# The Raiser's Edge<sup>™</sup>

Queue for Task Scheduling Guide

#### 020112

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# What Is In This Guide?

In the *Queue for Task Scheduling Guide*, you learn how to use the optional module *Queue for Task Scheduling* to set up a series of tasks to run automatically and unattended. You can set up and run queues when you have large amounts of data to export, print, commit, import, or send as email. Because you create queues to work with large amounts of data, you can schedule the queue to run during a break in the day or when all your volunteers and employees have left for the day. With the optional module *Queue for Task Scheduling*, you can include the following modules: *Batch, Export, Mail, Query, Reports,* and *Admin*.

In addition, you can create a recurring queue to run at a set interval, such as daily, hourly, or monthly.

You can also learn about the following:

- "Basic Queue Procedures" on page 17
- "Queue Reports" on page 39
- "Creating a Queue for Admin" on page 42
- "Creating a Queue for Batch" on page 60
- "Creating a Queue for Export" on page 76
- "Creating a Queue for Mail" on page 94
- "Creating a Queue for Query" on page 114
- "Creating a Queue for Reports" on page 130
- "Recurring Queues" on page 147

# How Do I Use These Guides?

*The Raiser's Edge* user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select Help, The Raiser's Edge Help Topics from the shell menu bar or press F1 on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

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**Note**: When you purchase modules from Blackbaud, such as *Queue for Task Scheduling* or *Event Management*, you are given a code. You must enter this code to "unlock" or activate the module. For more information, see the *Program Basics Guide*.

With the *Queue for Task Scheduling* module, you can set up a series of tasks to run automatically and unattended. You can set up and run queues when you have large amounts of data to export, print, commit, import, or send as email. Because you create queues to work with large amounts of data, you can schedule the queue to run during a break in the day or when all your volunteers and employees have left for the day. For example, you can set up a queue to print receipts. This time consuming task can be run at night after all your volunteers and employees have gone home. For your convenience, you can create the queue and schedule a specific date and time to run it.

To create a queue, you need to specify the type of module, category, and subcategory to include. You can include multiple modules in one queue. For example, you can set up a queue to run reports and also export information at the same time. This is useful when you have a variety of tasks to accomplish at once.

Not only can you create multiple tasks at once, you can also send the results of tasks you run in the queue as email. For example, the Director of Development wants to know how many constituents exist in the database with no valid address. You can set up a queue to query the database for this information and send the list of names directly to your Director of Development as email.

You can also assign tasks you are running in the queue to separate printers. For example, you want to print labels for invitations to your annual fundraiser. You also want to print a monthly financial report. You can accomplish both tasks by setting up one queue and assigning each task to separate printers. This is helpful if you want to print multiple tasks at the same time. To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues. For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

With the *Queue for Task Scheduling* module, you can organize the order of the items in a queue by using the **Up** and **Down** buttons on the Queue screen. You can also view a list of recently accessed queues and properties for all queues. Properties include statistical information for each queue, such as when the queue was last run. In addition, you can use the **Add to F**avorite**s** option to add queues to a list of records you often use.

With the *Queue for Task Scheduling* module, you can include the following modules: *Batch, Export, Mail, Query, Reports,* and *Admin*. This book explains each module you can include in a queue and the different procedures you can run.

You can schedule a recurring queue to run at a set interval, such as daily, weekly, or monthly. To set up recurring queue information, use the Processing, and Miscellaneous tabs on the Queue screen.

For more information about recurring queues, see "Recurring Queues" on page 147.

# **Frequently Used Terms**

This section defines words and phrases you need to know as you work with the *Queue for Task Scheduling* module. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

- **Category.** A category is a breakdown within the module of the queue you are creating. It helps to specify the type of task you are creating. For example, to set up a queue to run your quarterly financial report. On the Add Items to New Queue screen, in the **Module** field, you select the Reports module. In the **Category** field, select Financial to specify that the task you are working with is for Financial reports.
- **Frequency.** You can set a frequency for a recurring queue. Frequency designates how often to run the recurring queue. Frequency is the key part to setting up a recurring queue because by selecting a frequency for your queue, you know your queue runs automatically and unattended at your specified interval. For example, running a monthly report for your organization's Board of Directors. Your Board meets each month, and you are responsible for supplying a monthly gift report. By setting up a recurring queue to run with a frequency of Monthly, you know that your recurring queue runs automatically and supplies you the information you need monthly. You can set a recurring queue to run on demand, hourly, daily, weekly, monthly, and semi-monthly.

- **Module.** A module is the type of task the queue will run. You must begin setting up your queue by selecting a module. The module you select determines which list of categories appear in the **Category** field on the Add Items to New Queue screen. For example, you set up a new queue to print your weekly receipts. On the Add Items to New Queue screen, in the **Module** field, select Mail. In the **Category** field, you select Receipts to designate that this new task specifically pertains to receipts in *Mail*.
- **Queue.** A queue is a series of tasks that can be run automatically and unattended. You can designate the type of queue to run by selecting specific criteria on the Add Items to New Queue screen. For example, to create a report queue to run at night after all your volunteers have left or gone home for the day. You would specify the type of report to run, the report function to run, and designate a time for the report to run at night. You can set up all criteria for creating a queue on the Add Items to New Queue screen.
- **Queue item.** A queue item is a specific task in a queue. A queue item appears as a row on the Queue screen and consists of the module, category, and description for the task. Because you can include multiple tasks in one queue, multiple queue items can exist on the Queue screen. Queue items are set up in rows on the left side of the Queue screen and can be opened and removed directly from the Queue screen. You can also position the queue items in any order by using the **Up** and **Down** buttons on the Queue screen.
- **Queue service.** Queue Service is a utility required to run scheduled queues. You can install Queue Service. It enables a queue to run on a computer without a user being logged in; however, the computer must be turned on for the queue to run. All computers with Queue Service installed routinely check the database for queues scheduled to run at the current time.
- **Recurring queue.** You can create and run recurring queues. A recurring queue is a queue set to run at a specified interval. For example, to run a membership report to specify information about all dropped and lapsed members. To run this report each Sunday night so the printed report is ready when you arrive at your organization Monday morning you can create a recurring queue to run a membership report each week, and you can specify what time of day the queue will run.
- **Scheduled queue.** You can schedule a recurring or nonrecurring queue. A scheduled queue sits on the Queue Schedule screen until it is ready for processing. For example, you create a queue to export constituent information each week. You schedule the queue to run with a weekly frequency. Each week, the scheduled queue sits on the Queue Schedule screen until it is ready for processing. You can schedule a queue from the Queue page or from within the queue.
- Subcategory. A subcategory specifies a further breakdown within the category of a queue. These subcategories provide the specific information needed to successfully run the queue. For example, you create a new report queue to run an Action Summary Report. On the Add Items to New Queue screen, select Reports in the Module field, Action Reports in the Category field, and Action Summary Report in the Subcategory field. When you select Action Summary Report in the Subcategory field, you specify the type of action report to run.

# Navigating in Queue

From the **Queue** link in *Administration*, you can create new queues or open existing queues to run unattended at designated times.

#### • Accessing the Queue page

1. Click Admin on the Raiser's Edge bar. The Administration page appears.

Home	Admi	nistration	
Pecords Ouery Counts C	Administration System Statistics Inpact Eliabely Add Record Eliabely Change Records Eliabely Unite Off Pindges Construction Eliabely Unite Off Pindges Construction Eliabely Construction Diglicate Construction Diglicate Construction Blackhows Security Queue Blackhows Anayloci	Orstern Statistics     Import     Globally Add Records     Globally Compresented     Globally Compresented     Globally Compresented     Globally Compresented     Compresented Set To Records     Post to General Ledger	<ul> <li>Duplicate Constituents</li> <li>Marga Constituents</li> <li>Drop Lapsed Members</li> <li>Suruity</li> <li>Queue</li> <li>Buckboud Analytice</li> <li>Auction-Tracker Integration</li> </ul>
Center		System Statistics	
Plug-Ins			abase. For more information about System Statistics, see the Program Basics chapter of the

2. Click **Queue**. The Queue page appears.

From the Queue page, you can designate queues to run at a scheduled time or on an as-needed basis.

The Raiser's Edge	vorites Tools Help					_ 🗆 ×
◆ Back ◆ Forward Op						
Home		inistration • Queue	_			
Records	Administration	New Queue Dpen 🗙 Delete	Schedule	Find Show Scheduled Queues Ins	tall Queue Service	
	System Statistics	Name	Description	Schedule Frequency Next run date/	ime Created by Last run by Last i	run on L
lang 💫 Query	Import	2008 Building Fund Donations	Report detailing don		Supervisor Supervisor 02/0:	
	Globally Add Records	Address Import		On demand	Supervisor	A A A A A A A A A A A A A A A A A A A
Export 🛃		Batch Processing		On demand	Supervisor	N
	Globally Change Records	Birthday labels for Volunteers-May		On demand	Supervisor	N
Reports	Globally Delete	Class of 1992 Alumni		On demand	Supervisor	N
	Records	Constituent Donors Greater Than \$500		On demand	Supervisor	N
Mail	Globally Write Off	Custom Report 2008		On demand	Supervisor	л
-	Pledges	Inactive Constituents		On demand	Supervisor	л
Batch	Convert Pledges To Recurring	Pledges for 2008 Phonathon		On demand	Supervisor	М
	Gifts	Queue for Volunteer	2 items - Volunteer	On demand	Supervisor	М
Mapping	Post to General	Supervisors Queue	Items - Event Mana	On demand	Supervisor	л
10	Ledger					
Admin	Duplicate Constituents					
(No. )						
We Config	Merge Constituents					
Scanning	Drop Lapsed					
Scanning	Members	•				
NetSolutions	Security	Only show my queues				
Serve contaions	Queue					
R Dashboard	Blackbaud	Recently Accessed Queues			Quick Find	
Cop.	Analytics	Birthday labels for Volunteers-May		<u> </u>		商
AuctionMaestro	Auction-Tracker	2008 Building Fund Donations Batch Processing		-		
Pro Integration	Integration	Daten Processing		<u> </u>		
Data Health Center		Queue				-
Web Services		Allows you to set up a series of t	asks to run automatica	ly and unattended. For more informati	on about Queue, see the <u>Queue fo</u>	o <u>r Task</u>
Welcome to The Raiser's Ed	ae 7	10				_

The grid on the Queue page displays all the queues in your database. The Queue page also contains a list of recently accessed queues. You can open any queue in this list by clicking the queue or by highlighting the queue, and clicking **Open** on the action bar. To quickly find a queue, enter the name of the queue in the **Quick Find** field and click the binoculars to display a list of queues matching your entry.

Use the **Schedule** button to access the Schedule Queue screen where you can schedule a date and time for the queue to run or run the queue now. For information about scheduling nonrecurring queues, see the Scheduling a Queue procedure in each chapter of this guide. You also use the same **Schedule** button to schedule recurring queues. For more information about scheduling a recurring queue, see "Scheduling a Recurring Queue" on page 157.

The **Show Scheduled Queues** button displays scheduled recurring and nonrecurring queues. For more information about showing scheduled queues, see "Showing scheduled queues" on page 165.

To install or uninstall Queue Service, use the **Install Queue Service** or **Uninstall Queue Service** button on the Queue page. You must have Queue Service installed on at least one computer on your network or on your standalone computer to successfully run scheduled queues. For more information about installing queue service, see "Installing Queue Service" on page 148.

# Accessing a Queue

From the Queue page, you can open any queue in your database. To open a queue, you must have appropriate security rights. For more information about security, see "Security" on page 13. Also, if you do not mark the **Other users may modify this queue** checkbox on the Save Queue As screen for the queue, you cannot modify the queue unless you originally created the queue or have appropriate security rights.

#### Opening an existing queue

**Note**: The **Queue** link on the Administration page appears only if you use the *Queue for Task Scheduling* module.



1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

- The Raiser's Edge

   Eile Edit View Go Favorites Tools Help
   - 🗆 × Administration • Queue Ba Home 🖄 New Queue 🔄 Open 🗙 Delete... 📑 Schedule... 🏙 Find... Show Scheduled Queues Install Queue Service Administration Becord System Statistics Name Description Schedule Frequency Next run date/time Created by Last run by Last run on L Import 💽 Query Report detailing don... On demand 2008 Building Fund Donations вΝ Supervisor Supe Globally Add Records Address Import On demand Superviso 🐖 Export Batch Processing On demand Supervisor Globally Change Records Birthday labels for Volunteers-May On demand Supervisor Report Class of 1992 Alumni On demand Supervisor Globally Delete Records Constituent Donors Greater Than \$500 On demand Supervisor 🔮 Mail Globally Write Off Pledges Custom Report 2008 On demand Supervisor On demand Supervisor Inactive Constituents Batch Convert Pledges To Recurring Pledges for 2008 Phonathon On demand Supervisor Queue for Volunteer 2 items - Volunteer ... On demand Supervisor Mapping Post to General Ledger Supervisors Queue Items - Event Mana... On demand Supervisor Admin Duplicate Constituents Config Merge Constituents Drop Lapsed Members Scanning 🖉 • P NetSolutions Security Contraction of the show my queues Queue **Recently Accessed Queues** Quick Find 🚯 Dashboard Blackbaud Analytics Birthday labels for Volunteers-May 2008 Building Fund Donations Batch Processing • 鶞 AuctionMaestr Auction-Tracker Integration ta Health Queue Allows you to set up a series of tasks to run automatically and un Scheduling Califie Neb Service -Welcome to The Raiser's Edge 7
- 2. Click Queue. The Queue page appears.

Tip: You can press F8 on your keyboard to move between the left and right sides of the Queue screen.

3. In the grid, select a queue and click **Open** on the action bar. The Queue screen appears.

🔮 2005 Buildi	ng Fund Donations				_ 🗆 ×
<u>File E</u> dit F <u>a</u> v	orites <u>T</u> ools <u>H</u> elp				
🔁 Save and C	lose 🕶 🔚 📑 😭	🎒 🛕 🗹 📍			
Queue Proces	ssing <u>M</u> iscellaneous				
참 🗚 Item	🔁 Open 🗙 <u>R</u> emov	re 🛧 ∐p 🗣 Down	Detail Report		
Module	Category	Description		Fund Detail Report	
Reports	Campaigns, Funds,	Detail Report	Action	Print	
			Data Format		
			Include Header		
			File Name		
				Output Query	
			Query Type	Fund	
			Query Name	Detail Report	
			Query Description		
			Others May Everute?		
1					
This queue will ru	in on demand.				

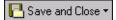
4. Make any necessary changes to the queue and click **Save and Close** on the toolbar. You return to the Queue page.

# Queue Toolbar

**Note**: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

#### 8 CHAPTER

The Queue screen toolbar contains buttons that represent common commands for a queue. You can use these buttons as alternatives to menu commands to save time during data entry.



Save and close the queue (Save and New can be accessed from the down arrow beside Save and Close. Use Save and New to save the queue, close the saved queue, and open a new queue.)



Save the queue



Schedule the queue to run



View queue properties

9

Print the Queue Profile report for a queue.



Preview the Queue Profile report for a queue.



Validate the queue



Access help from online help files, user guides, online support, or the Blackbaud Web site

# **User Options**

User options are preferences you set that affect how **The Raiser's Edge** looks and runs on the workstation you are using. User options are login-specific, which means if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Several user options are specific to the *Queue for Task Scheduling* module. For example, you can select to automatically save a queue when closing, create a control report, and set export defaults. For more information about User Options, see the *Program Basics Guide*.

#### Defining general user options

- 1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.
- 2. Select the Administration tab.

3. From the tree view on the left side of the Options screen, under **Queue**, select **General**. General queue user options appear on the right side of the screen.

Options		×
Administration Color	tions to set personal preferences for global change, import, and	
Import	Automatically save queue on close	
Queue General	Default module: Reports	
Export defaults	Default category: Alumni Reports 🔹	
	Default subcategory: Alumni Class List	
	Create control report	
	Control report format: Detail	
	Action: Print	
	Printer: HP DeskJet 722C	
	Copies: 3	
Reset to System Defaults	OK Cancel	Apply

- To automatically save the information entered in a queue when you close the queue, mark the **Automatically save queue on close** checkbox.
- In the **Default module** field, select a module to default in the **Module** field on the Add Items to New Queue screen. The modules available are *Admin*, *Batch*, *Export*, *Query*, *Reports*, or *Mail*.
- Selecting defaults is useful when you enter the same type of information more than once. For example, if you have multiple *Mail* tasks to run, you can select Mail as the default module in the **Default module** field.
- In the **Default category** field, select a category to default in the **Category** field on the Add Items to New Queue screen. Categories are used to further specify the type of module you are working with.
- Selecting defaults is useful when you enter the same type of information more than once. For example, if you have more than one group of letters to print for *Mail*, you can select Letters as the default category in the **Default category** field.
- In the **Default subcategory** field, select a subcategory to default in the **Subcategory** field on the Add Items to New Queue screen. The subcategory specifies a further breakdown within the category of the queue.
- Selecting defaults is useful when you enter the same type of information more than once. For example, if you are going to print multiple types of labels, you can select Labels as the default subcategory in the **Default subcategory** field.
- To create a control report for your queue, mark the **Create control report** checkbox. A control report lists the queue name, description, and all the tasks run in the queue, and appears after you run the queue.
- In the **Control report format** field, select the format for your control reports. You can either select to create a detail or summary control report.
- A detail control report lists all the options, checkboxes, and other specific properties selected for items in the queue. A summary report lists several properties for items in the queue, but does not include all information about items in the queue.

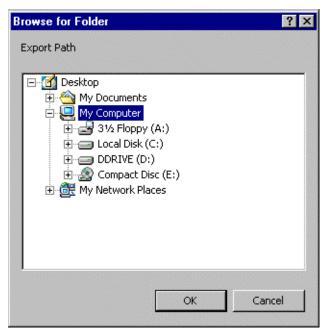
**Note**: On the Options screen, when you select to send the control report as email, the **Subject** and **cc** fields do not appear. When the control report is sent, "Queue Control Report" defaults into the subject line of the email.

- In the **Action** field, select whether to export, print, or send the control report as email. Once the queue runs, the control report either exports, prints, or is sent as email.
- Depending on your selection in the **Action** field, additional fields appear for you to specify the action further. For example, if you select Print in the **Action** field, you can choose a designated printer and the number of copies to print.
- 4. Click **Apply** to save your changes, or click **OK** to save your changes and close the Options screen.
- > Defining export default user options
  - 1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.
  - 2. Select the Administration tab.
  - 3. From the tree view on the left side of the Options screen, under **Queue**, select **Export defaults**. Export defaults user options appear on the right side of the screen.

Options	×
Administration Col	<u>Records Query Export Reports Mail Batch</u> or <u>Printing File Locations</u> Membership <u>S</u> canning ptions to set personal preferences for global change, import, and
Import Queue General	Export defaults for:  Query and Export Reports and Mail Format: Excel 5-7 (XLS) Destination: D:\Files Separator: , (*.CHR format only)
	Delimiter: " (*.CHR format only)
Reset to System Defaults	OK Cancel Apply

- 4. Mark the **Query and Export** option to define defaults for the *Query* and *Export* modules.
- In the **Format** field, select the default format for *Query* and *Export* queues when they are exported. For example, you can select to have your queue export in a Text format or a Microsoft *Excel* format.

• In the **Destination** field, select the location where the *Query* or *Export* queue to be exported. To browse to a file location, click the ellipsis to the right of the field. The Browse for Folder screen appears.



Select the file location and click **OK**. You return to the Options screen.

After you export the queue, you can find the exported file by locating the folder you specified on the Browse for Folder screen.

- In the **Separator** field, enter the character to use to separate the data in an export. For example, you can use a comma as the character for separating fields in an export.
- In the **Delimiter** field, enter the character to use to separate the data in an export. For example, you can use quotation marks as the character for separating strings of information in a field.
- If you select a comma as separator and quotation marks as delimiter, and export records with **Name** and **Age** selected as output, your results appear formatted as:
  - "Mark D. Adamson", "46"
  - "Allison E. Andrews", "41"
  - "Dustin S. Andrews", "47"

5. Select the **Reports and Mail** option to define defaults for the *Reports* and *Mail* modules. Additional fields appear on the right specific to the *Reports* and *Mail* modules.

Options	×
<u>G</u> eneral <u>H</u> ome <u>Administration</u> <u>Co</u>	Records       Query       Export       Reports       Mail       Batch         glor       Printing       Eile Locations       Membership Scanning         options to set personal preferences for global change, import, and         Export defaults for:       O Query and Export       Image: Reports and Mail         Format:       Excel 5-7 (XLS)       Image: Reports and Mail         Destination:       D:\Files       Image: Report only)         Delimiter:       (*.CHR format only)         Delimiter:       (*.CHR format only)         Lines per page:       Image: Report only         Use the same number formats selected in report         Use the date number formats selected in report
Reset to System Defaults	OK Cancel Apply

- In the **Format** field, select the default format for exporting *Report* and *Mail* queues. For example, you can select to have your queue export in a Text format or a Microsoft *Excel* format.
- In the **Destination** field, select the location where the *Report* or *Mail* queue will be exported. To browse to a file location, click the ellipsis to the right of the field. The Browse for Folder screen appears.

Browse for Folder	? ×
Export Path	
Desktop     My Documents     My Computer     My Computer     Jord 31/2 Floppy (A:)     Dccal Disk (C:)     DDRIVE (D:)     DDRIVE (D:)     Ompact Disc (E:)     My Network Places	
OK Can	:el

Select the file location and click **OK**. You return to the Options screen.

After you export the queue, you can find the exported file by locating the folder you specified on the Browse for Folder screen.

- In the **Separator** field, enter the character to use to separate the data in a report. For example, you can use a comma as the character for separating data in a report.
- In the **Delimiter** field, enter the character to use to separate the data in a report. For example, you can use quotation marks as the character for separating strings of information in a field.
- In the **Lines per page** field, select the number of lines to appear for each page in the report by clicking the up and down arrows.
- To use the same number formatting you selected for the report, mark the Use the same number formats selected in report checkbox.
- When you mark this checkbox, the report uses the same number formats set up for the report. If you unmark this checkbox, the report uses number formats specified in your *Windows* control panel settings.
- To use the same date formatting you selected for the report, mark the Use the date number formats selected in report checkbox.
- When you mark this checkbox, the report uses the same date formats set up for the report. If you unmark this checkbox, the report uses date formats specified in your *Windows* control panel settings.
- 6. Click Apply to save your changes or click OK to save your changes and close the Options screen.

# Security

Security options give you the ability to ensure the consistency and confidentiality of your data by limiting access to records and functions to only the users who need it. For example, by limiting access for executing or modifying queues, you can control who can run, change, or delete queues for your organization.

Each queue has its own security options. When a user runs a queue, security options are based on the user who runs the queue, not the user who creates the queue. For more information about setting up security options for a queue, see the Security chapter of the *Configuration & Security Guide*.

# **Overview of Queue Information**

With the *Queue for Task Scheduling* module, you can create queues to run automatically and unattended. For example, you can set up queues to run reports, to export information, or print mailing information. To create a queue, you need to specify the type of module, category, and subcategory for each item to be included in the queue. You can also include multiple modules in one queue.

For example, you set up a queue to run reports and to export information at the same time. Once you set up the queue, you can specify when and what time to run the queue. For example, you may want to run queues at night after all of your volunteers have gone home or left for the day, or during a lunch break.

For every queue you create, you can view the properties of the queue, add the queue to your list of favorites, and view recently accessed queues. You can also create queues from existing queues and change the order of the items in a queue using the **Up** and **Down** buttons on the Queue screen. In addition, not only can you export, print, or run the information in a queue, you can also send the results of the queue as email.

#### 14 CHAPTER

When you create a new queue, the Add Items to New Queue screen appears, asking you to select specific criteria.

💱 Add Items to New Queue	×
Filters Enter the module, category, and subcategory to filter the items that a	can be added to the queue.
Module: Mail	
Category: Labels	
Subcategory:	
Yew Item 🍙 Open 🖳 Select All 🔀 Deselect All 🛛 🛛	se these options for all selected items.
Select Description Basic Mailing	Action: Print  Restore to Defaults
Labels for Birthday Card	Printer: HP DeskJet 720C
	Copi <u>e</u> s: 1
C Only show my mailings	1
OK Cancel Total number of items in the queue: 0	Add to queue
Trotal number of items in the queue. 0	

In the **Module** field, you can select a specific module such as Mail or Export. In the **Category** field, you can select a category for the corresponding module and in the **Subcategory** field, you can select a subcategory to further define the category. When you save the queue item, you can name the queue and give the queue a description.

For example, when you save an Action report, you can specify that the Action reports are major donor actions. From the Add Items to New Queue screen, you can also add new queue items, open existing items, and specify an action for your queue item. For example, you can specify a queue item to export, print, send as email, commit, or create a word merge. Depending on the action you choose, you can select an export format, name, and even a printer path. Depending on what queue items you mark to include, several additional checkboxes appear on the Add Items to New Queue screen to help process the queue item.

Once you select the items to include in the queue, click **Add to queue**. The items are then added to the queue. Click **OK** to move to the Queue screen.

Once your queue is set up, you can save the queue to your database. You can easily open the queue, and add or edit information at any time before you run the queue. All saved queues appear in the grid on the Queue page. To open a saved queue, select the queue in the grid and click **Open** on the action bar. The Queue screen appears.

💱 Birthday labels for Volunteers-May		_ 🗆 🗵
Eile Edit Favorites Tools Help		
🔁 Save and Close 🗸 🔚 📑 😭 🚔 💽 🤉 🦿		
Queue Processing Miscellaneous		
揝 Add Item 🔁 Open 🗙 Remove 👍 Up 🐥 Down	Labels for Birthday Card	
Module Category Description		Labels
Mail Labels Labels for Birthday	Action	Print
	Data Format	
	Include Header	
		Output Query
	Query Type	
	Query Name	Labels for Birthday Card10
	Query Description	Labels for Birthday Card
	Others May Execute?	
	Continue processing if minimum are not met	n Postal Discount requirements
This queue will run on demand.		

From the Queue screen, you can add new items to the queue, open or remove items in the queue, and use the **Up** and **Down** buttons to change the position of each item in the queue grid.

When you select an item in the queue grid, you can view the criteria for that item on the right side of the screen. Depending on the type of module you select in the queue, a variety of fields appear on the right. The fields and checkboxes that appear on the right are the properties you selected when setting up the queue item. You can change these properties from the right side of the Queue screen or by opening the queue item. To open a queue item, select the queue item in the grid and click **Open** on the action bar.

In addition to the settings you specify on the Queue tab, depending on your needs, you may also need to specify data for the **Run as** and **Run on** fields on the Processing tab. These fields are also used for recurring queues. The remaining fields on the Processing tab and Miscellaneous tab are also used for recurring queues.

For detailed information about the Processing and Miscellaneous tabs and how they work for non-recurring and recurring queues, see "Recurring Queues" on page 147.

# **Queue Modules**

With the *Queue for Task Scheduling* module, the *Batch, Export, Mail, Query, Reports,* and *Admin* modules are available. A module is the type of task the queue will run. You must begin setting up your queue by selecting a module for the first task in the queue. After you select the type of task to run, you can select additional information, such as a category and subcategory, to specify the types of tasks to run within the module.

## Admin

With the *Queue for Task Scheduling* module, you can set up and run queues for *Admin*. For example, your organization receives information each quarter listing prospective donors that may be interested in donating to your organization. You create a queue to import the list of names into your database. When you create the new queue, select the *Admin* module and select Import as the category. Once you select the *Admin* module, you can select the prospective donor import file and specify a date and time to import the file into your database.

For detailed information and procedures explaining how to set up and run queues for *Admin*, see the chapter "Admin" on page 41.

# Batch

With the *Queue for Task Scheduling* module, you can set up and run queues for *Batch*. For example, your organization held an Open House last week where you collected numerous information cards of prospective constituents. You created a constituent batch including the names, addresses, and phone numbers of the prospective donors. You want to create a queue to commit this large constituent batch to the database. When you create the new queue, select the *Batch* module. Once you select the *Batch* module, you can select the Open House constituent batch and specify a date and time to commit the batch to your database.

For detailed information and procedures explaining how to set up and run queues for *Batch*, see the Batch chapter in this guide.

# Export

**Warning**: The *Queue for Task Scheduling* module does not recognize queues for *Query* or *Export* that are associated with a VBA macro.

With the *Queue for Task Scheduling* module, you can set up and run queues for *Export*. For example, to export all constituent names in your database into a text file so this information can be used in your next Board meeting. When you set up the queue, you can select the *Export* module and specify that constituent information be exported into a text format.

For detailed information and procedures explaining how to set up and run queues for *Export*, see the Export chapter in this guide.

## Mail

With the *Queue for Task Scheduling* module, you can set up and run queues for *Mail*. For example, your organization is having its Annual Alumni Ball, and you will be sending out invitations to all alumni from your organization. You can set up a queue to print address labels for your invitations to the ball. Because you have many labels to print, you can set the queue to run at night after all your employees and volunteers have left for the day.

For detailed information and procedures explaining how to set up and run queues for *Mail*, see the Mail chapter in this guide.

# Query

With the *Queue for Task Scheduling* module, you can set up and run queues for *Query*. For example, you want to run several queries at once; one to find the names of all prospective donors for the year, and another for all previous donors over the last five years. In addition, you want to run a report specifying the donations your organization has received during the year. Because several modules can be included in one queue, you can set up the queue and designate a date and time for the queue to complete the specified tasks.

For detailed information and procedures explaining how to set up and run queues for *Query*, see the Query chapter in this guide.

# Reports

With the *Queue for Task Scheduling* module, you can set up queues for *Reports*. For example, you want to print an Alumni Class List for your organization. You know this task is very time consuming due to the large amount of alumni currently in your database. You can set up the queue to print the Alumni Class List at a time when most or all of your employees and volunteers are not working in the database.

For detailed information and procedures explaining how to set up and run queues for *Reports*, see the Reports chapter in this guide.

# **Basic Queue Procedures**

This section contains basic procedures for the Queue screen, including validating, exporting, printing, and deleting a queue. Procedures such as creating and scheduling a queue are discussed in each chapter. For more information about those procedures, see the chapter that corresponds to the specific module.

Not all menu options are discussed in this section because the menu bar is very similar throughout *The Raiser's Edge*. For more information about menu options, see the *Program Basics Guide*.

### Validating a Queue

When you validate a queue, *The Raiser's Edge* examines all information entered in the queue to determine whether any data entry errors exist. For example, when you validate a queue, the program checks to see that all output file names are valid, that duplicate file names are not used, and that input queries can be found. Other examples of validation include ensuring the printers for all printer output can be found and ensuring that every selected report contains all necessary information.

When the program validates the queue, a Queue Validation Complete screen appears, displaying the results of the validation process. Exceptions are created for any problem found in the queue. If exceptions are found, you can click the **Preview Report** button to preview the exception report created for the queue. To validate a queue, select **Tools**, **Validate** from the menu bar of the Queue screen.

#### Validating a queue

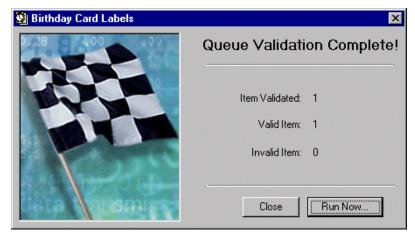
1. From a Queue screen, select **Tools**, **Validate** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

Save and C	/orites <u>T</u> ools <u>H</u> elp Nose <b>→ <u>√</u> <u>V</u>alidate</b>		∞ ?		
ieue   <u>P</u> roce	essing Queue	Options			
<u>A</u> dd Item	🔄 📴 🛄 User Op	otions	<b>♦</b> <u>D</u> own	Labels for Birthday Ca	rd
Module	Category	D	escription		Labels
ail	Labels	Labels f	for Birthday	Action	Print
				Data Format	
				Include Header	
				•	
					Output Query
				Query Type	Constituent
				Query Name	Labels for Birthday Card10
				Query Description	Labels for Birthday Card
				Others May Evecute?	
				are not met	iinimum Postal Discount requirements
	un on demand.				

A status bar appears, showing the progress of the validation.

ating Que	eue, pleas	se wait	

2. When the program finishes validating the batch, a Queue Validation Complete screen appears, displaying the results.



The Queue Validation Complete screen displays the number of items validated in the queue, and the number of valid and invalid items in the queue.

- 3. If invalid items exist, the **Preview Report** button appears on the Queue Validation Complete screen. Click **Preview Report** to preview the validation report for the queue.
- 4. If all items validated successfully, the **Run Now** button appears on the Queue Validation Complete screen. Click **Run Now** to access the Run Queue screen.

On the Run Queue screen, you can select to schedule a date and time to run the queue or run the queue now.

5. To return to the Queue screen, click **Close**.

## **Viewing Queue Properties**

You can easily view properties for a queue. The Queue Properties screen gives you detailed information about a queue such as the date created, by whom the queue was created, when the queue was last changed, and if other users can execute the queue. To access the Queue Properties screen, select **File**, **Properties** from the menu bar of the Queue screen.

#### Viewing queue properties

1. From a Queue screen, select **File**, **Properties** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

Birthday labels f				_ 🗆
<u>ile E</u> dit F <u>a</u> vorites	<u>T</u> ools <u>H</u> elp	0		
New <u>N</u> ew	Ctrl+N	🗗 🎒 🙆 🗹 📍		
open	Ctrl+O	5]		
🗙 Delete		A Han B Dawn		
l caus	Ctrl+5	iove 🛧 ∐p 🗣 Down	Labels for Birthday Care	
<u>S</u> ave	Ctri+S	Description		Labels
Save <u>A</u> s		Labels for Birthday	Action	Print –
Save and Ne <u>w</u>	Ctrl+W		Data Format	
🕘 Save and Close	Ctrl+L		Include Header	
Schedule Queue				
_				Output Query
Proper <u>t</u> ies			Query Type	Constituent -
Print Setup			Query Name	Labels for Birthday Card10
			Query Description	Labels for Birthday Card
₫ Pre⊻iew			Others May Execute?	
👙 Print	Ctrl+P		J	
🚡 Export			Continue processing if mill are not met	nimum Postal Discount requirements
📓 Send as <u>M</u> ail			ard not mot	
Recently Accesse	d Queues 🔸			
<u>⊼</u> ⊆lose				

The Queue Properties screen appears.

ueue Properties	×				
Birthday labels for Volunteers-May					
Property	Value				
Created on	02/01/2008				
Created by	Supervisor				
Last modified on	02/10/2008				
Last modified by	Supervisor				
Last run on					
Last run by					
Last run completed successfully	No				
Duration of the last run					
Other users can execute this Queue	Yes				
Other users can modify this Queue	Yes				
	Close				

You can view the specific properties for the queue, such as when the queue was created and who the last person was to modify the queue.

2. When you finish viewing the Queue Properties screen, click **Close**. You return to the Queue screen.

## **Viewing Recently Accessed Queues**

At any time, you can select to view queues you have recently accessed. This is helpful when you are creating new queues and need to base a queue on a specific queue you recently used or for quickly locating a recently accessed queue, without having to query your database. To view recently accessed queues, select **File**, **Recently Accessed Queues** from the menu bar of the Queue screen.

#### Viewing recently accessed queues

1. From a Queue screen, select **File**, **Recently Accessed Queues** from the menu bar. A submenu appears, listing the most recently accessed queues. For more information about opening a queue, see "Accessing a Queue" on page 6.

🛂 Birthday labels f	or Voluntee	rs-May			
<u>File</u> <u>E</u> dit F <u>a</u> vorites	<u>T</u> ools <u>H</u> elp	)			
1 New	Ctrl+N	🕈 🖨 🔕 🗹 📍			
🔁 Open	Ctrl+O	el .			
🗙 <u>D</u> elete		tove 🛧 Up 🗣 Down	Labels for Bir		
Save	Ctrl+5	Description	Labels for Bir	thday Lard	Labels
Save <u>A</u> s		Labels for Birthday	Action		Print
🎦 Save and Ne <u>w</u>	Ctrl+W		Data Format		
🔁 Save and Close	Ctrl+L		Include Header		
📲 Schedule Queue					
					Output Query
Properties			Query Type		Constituent
Print Setup			Query Name		Labels for Birthday Card10
Q Preview			Query Description	on	Labels for Birthday Card
Brint	Ctrl+P		Others May Exe	cute?	
Export	Cuttr		Continue pro	cessing if minimum	Postal Discount requirements
Send as <u>M</u> ail			are not met		
Recently Accesses	d Queues 🔸	<u>1</u> . 2008 Building Fund Do	onations	1	
		2. Birthday labels for Vol	unteers-May		
		<ol> <li>Batch Processing</li> <li>Pledges for 2008 Phot</li> </ol>	nathon		
		1. Houges for 2000 Phot	1001011		

2. Select the recently accessed queue to open. The Queue screen appears.

😟 2005 Building Fund Donations		
<u>File Edit Favorites Tools H</u> elp		
🎦 Save and Close 🗸 🔚 📑 🚰 🗟 🗹 📍		
Queue Processing Miscellaneous		
🎦 Add Item 巀 Open 🗙 Remove 🛧 Up 🜩 Down	Detail Report	
Module Category Description		Fund Detail Report 🔺
Reports Campaigns, Funds, Detail Report	Action	Print
	Data Format	
	Include Header	
	File Name	
		Output Query 🔺
	Query Type	Fund
	Query Name	Detail Report
	Query Description	
	Others May Everute?	
This queue will run on demand.		

3. When you finish viewing or editing the queue, click **Save and Close** on the toolbar. You return to the Queue screen.

## **Queue Options**

From the Queue Options screen, you can add specific information about the queue to be used when querying your database for the queue. For example, you can enter a name for the queue and a description. You can also specify if other users can run or modify the queue. To add queue options, select **Tools**, **Queue Options** from the menu bar of the Queue screen. Once you add queue options for a queue, you can always edit the queue options you specify for a queue. For example, if you incorrectly named the queue or need to add to the description, you can always access the Queue Options screen from an open queue to make any necessary changes.

#### Adding queue options

1. From a Queue screen, select **Tools**, **Queue Options** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

New Queue File Edit Favorites	Tools Help			
Save and Close -	⊻alidate	☑ ?		
Queue Processing	Queue Optio	ns		
楂 Add Item 🗟 🛛	User Options	•••• Down	2008 Gift Detail Report	
Module	Category	Description		Detail Report 🔺
Reports Financ	ial Reports 2	2008 Gift Detail Report	Action	Print
			Data Format	
			Include Header	
			File Name	<u> </u>
				Output Query 🔺
			Query Type	Gift
			Query Type Query Name	
				Gift 2008 Gift Detail Report
			Query Name	Gift
			Query Name Query Description	Gift 2008 Gift Detail Report
			Query Name Query Description	Gift 2008 Gift Detail Report
			Query Name Query Description	Gift 2008 Gift Detail Report
			Query Name Query Description	Gift 2008 Gift Detail Report
This queue will run on d	emand.		Query Name Query Description	Gift 2008 Gift Detail Report

The Queue Options screen appears.

🔮 Queue Op	tions	×
Queue <u>n</u> ame:	2008 Gifts	
<u>D</u> escription:	Report detailing gifts given in 2008	< F
Other users	may <u>r</u> un this queue	
C Other users	may <u>m</u> odify this queue	
Input query:	A	
	OK Cancel	

- 2. In the **Queue name** field enter a name, such as "2008 Gifts". You should be able to query your database based on this name. This name may already default into the **Queue name** field, depending on whether or not you saved the queue.
- 3. In the **Description** box, enter a description such as "Report detailing gifts given in 2008". You can enter a description to help give the queue more specific information.
- 4. Mark the **Other users may run this queue** checkbox. Marking this checkbox specifies that users other than yourself can run this particular queue.
- 5. Mark the **Other users may modify this queue** checkbox. Marking this checkbox specifies that users other than yourself can modify this particular queue.
- 6. In the **Input query** field, you can search for an existing query to use as the input query for the queue.

When you select a query in the **Input query** field, you specify that the queue use the properties of the input query. For example, you created a query listing the board members of your organization. You want to create a queue to print a report of constituents who donated to your organization this year and want to list only board members who contributed. You can create the queue and select the Board Members query in the **Input query** field on the Queue Options screen. Whenever you include an input query for a queue, the query you select takes precedence over any query on a parameter form.

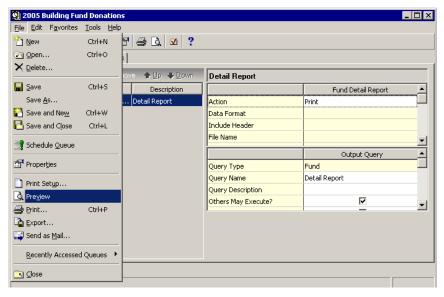
7. When you finish adding options for the queue, click **OK**. You return to the Queue screen.

### **Previewing a Queue Profile**

At any time, you can select to preview a profile for the queue with which you are working. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

#### Previewing a queue profile

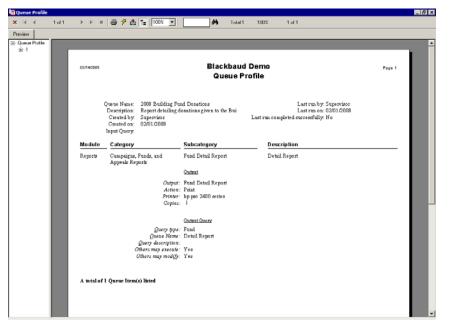
1. From a Queue screen, select **File**, **Preview** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.



A status bar appears, showing the progress for preparing the queue profile.

🔚 Queue Profile	_ 🗆 ×
Preparing report 'Queue Profile'	
Cancel	

The Queue Profile appears



2. To close the Queue Profile, click the "X" at the top left of the screen. You return to the Queue screen.

### **Exporting a Queue**

When working with queues, you can export a queue profile. You can also export the queue data entry grid to Microsoft *Excel* or to another application. When you select to export the data entry grid, all data entered in the queue is exported to your selected application. Exporting queue information lets you work with it in a different format or print it to store for later use.

#### Exporting a queue profile

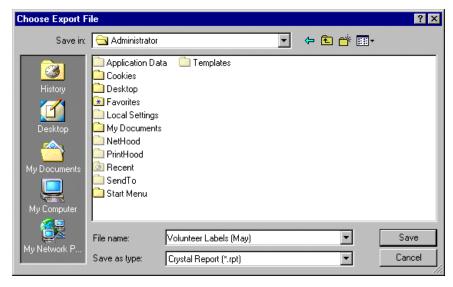
1. From a Queue screen, select **File**, **Export** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

<u>File E</u> dit F <u>a</u> vorites		1			
New <u>N</u> ew	Ctrl+N	P 🔿 🔕 🗹 ?			
🔄 Open	Ctrl+O	1			
🗙 <u>D</u> elete		nove ♠Up ♣Down	Labels for Birthday Card	1	
🚽 <u>S</u> ave	Ctrl+5	Description		Labels	
		Labels for Birthday	Action	Print	
🎦 Save and Ne <u>w</u>	Ctrl+W		Data Format		
🔁 Save and Close	Ctrl+L		Include Header		
Schedule Queue			File Name		۲ ۲
Properties				Output Query	<u> </u>
			Query Type	Constituent	
🗋 Print Setyp			Query Name	Labels for Birthday Card10	
Q Preview			Query Description	Labels for Birthday Card	
🗃 Print	Ctrl+P		Others May Execute?		
Export			Others May Modify?	<b>V</b>	-
Send as <u>M</u> ail			Continue processing if mir are not met	nimum Postal Discount requirements	
Recently Accesse	d Queues 🔸				

The Export screen appears.

Export		×
Format:		ОК
Crystal Reports (RPT)	-	
Destination:	_	Cancel
Disk file	-	
	<u> </u>	

- 2. In the **Format** field, select the type of format in which to export the queue. Some examples of formatting are Crystal Reports (RPT), *Excel*, or Rich Text Format.
- 3. In the **Destination** field, select the location to store the exported queue. For example, you can select to save the exported queue to a disc or store it in another application.
- 4. Click **OK**. The Choose Export File screen appears.



5. Select the location where to store the exported queue and click **Save**. The queue exports and saves to the location you specify.

#### • Exporting the data grid to another application

1. From a Queue screen, select **Edit**, **Export Grid** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

🔮 Birthday la	bels for Volunteers-	May		_ 🗆 X				
Eile Edit Fav	Eile Edit Favorites Iools Help							
🔁 : 🔓 Export Grid 👔 🕋 🔿 💽 🗹 💡								
🌇 🛱 Eind	. Ctrl+F K <u>R</u> emo	ve 🛧 Up 🐥 Down	Labels for Birthday Car	d				
Module	Category	Description		Labels 🔺				
Mail	Labels	Labels for Birthday	Action	Print				
			Data Format					
			Include Header					
			File Name					
				<u>•</u>				
				Output Query 🔺				
			Query Type	Constituent				
			Query Name	Labels for Birthday Card10				
			Query Description	Labels for Birthday Card				
			Others May Execute?					
			Others May Modify?					
			Continue processing if mi are not met	nimum Postal Discount requirements				
This queue will ru	ın on demand.							

The Export screen appears so you can choose the file type and file name for the export file.

Export	×
Export file type: 🌇 Comma-Separated Values	•
Export <u>fi</u> le name: D:\export.CSV	
Include <u>h</u> eader	
Export Now Cancel	

- 2. In the **Export file type** field, select the format for the export file. For more information about the available export formats, see the *Query & Export Guide*.
- 3. In the **Export file name** field, enter the name and location to save the export file. Click the ellipsis to browse for a location to store the file.
- 4. If the first row of the export file should contain the column headings listed on the Data Entry screen, mark the **Include header** checkbox.

Note: You can click Cancel on the Exporting File screen to stop the export and return to the Queue screen.

5. To begin exporting the Data Entry grid, click **Export Now**. The Exporting File screen appears, displaying a progress indicator. In the lower left corner of this screen, the path and file name of the export file appear.

When the Exporting File screen closes, the export is complete. You can open the export file using an application compatible with the **Export file type** you selected.

#### Exporting the data grid to Microsoft Excel

1. From a Queue screen, select **Edit**, **Export to Excel** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

Eile Edit Fav	rt to <u>Excel</u> ineous	a 🛛 🛛 🖇	Labels for Birthday Card			
Module	Category	Description		Labels 🔺		
Mail	Labels	Labels for Birthday	Action	Print		
			Data Format			
			Include Header			
			File Name	▼ ▶		
				Output Query		
			Query Type	Constituent		
			Query Name	Labels for Birthday Card10		
			Query Description	Labels for Birthday Card		
			Others May Execute?			
			Others May Modify?			
Continue processing if minimum Postal Discount requirements are not met						
This queue will n	un on demand.					

Note: You can click Cancel on the Exporting File screen to stop the export and return to the Queue screen.

The Exporting File screen appears, displaying a progress indicator. In the lower left corner of this screen, the path and file name of the export file appear.

Microsoft *Excel* automatically opens and displays the information exported from the queue.

		<mark>cel - BB1_5</mark> iew <u>I</u> nsert F	<u>o</u> rmat <u>T</u> ools	<u>D</u> ata <u>W</u> in	dow <u>H</u> elp A	\cro <u>b</u> at					_ 0
D	🖻 🖬 🔒	) 🖨 🖪 🕯	🕸 🐰 ኛ	<b>E</b> 🝼	ю + ся +	🍓 Σ 🎵	÷ 21 🛍	🕐 糞 MS	Sans Serif	• 10	- B =
Z	<b>7</b>										
	K23	-	=								
	А	В	C	D	E	F	G	Н		J	K
1	Module	Category	Description	ı							
2	Reports	Financial I	Report for	1998-1999	donors						
3											
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2. To save any changes to the export file, select File, Save from the Microsoft Excel menu bar.

### Sending a Queue Profile as Email

Note: The Raiser's Edge is compliant only with MAPI email software, such as Microsoft Outlook.

With the *Queue for Task Scheduling* module, you can send information included in a queue as email. For example, you and a co-worker are working to clean up your organization's database. One of your tasks is to update all constituent records that do not have a valid address. You can create a queue listing all constituent records in your database with invalid addresses and send the constituent names to your co-worker as email. When sending data as email, you can select the type of format for the information you are sending, select the recipients of the email, and check the names and addresses of the recipients. As a reminder, sending queue information as email and working with options in *Mail* are separate. For more information about *Mail*, see the *Mail Guide*.

You can also send the profile for a queue as an email. To send a queue profile as email, select **File**, **Send as Mail** from the menu bar of a Queue screen.

#### • Sending the queue profile as email

**Note**: In User Options, when you select to send the control report as email, the **Subject** and **cc** fields do not appear. When the control report is sent, "Queue Control Report" defaults into the subject line of the email. For more information about User Options, see "User Options" on page 8.

1. From a Queue screen, select **File**, **Send as Mail** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

🛿 Birthday labels f	or Voluntee	ers-May		
<u>File E</u> dit F <u>a</u> vorites	<u>T</u> ools <u>H</u> el	P		
🖄 <u>N</u> ew	Ctrl+N	🕈 🎒 🙆 🗹 📍		
open	Ctrl+O			
🗙 Delete				
		. iove 🛧 ∐p 🗣 Down	Labels for Birthday Ca	rd
<b>_</b> <u>S</u> ave	Ctrl+S	Description		Labels
Save <u>A</u> s		Labels for Birthday	Action	Print
👌 Save and Ne <u>w</u>	Ctrl+W		Data Format	
Save and Close	Ctrl+L		Include Header	
•		-	File Name	
💡 Schedule Queue				<u>•</u>
Properties				Output Query
		-	Query Type	Constituent
Print Setup			Query Name	Labels for Birthday Card10
👌 Preview			Query Description	Labels for Birthday Card
Print	Ctrl+P		Others May Execute?	
Export			Others May Modify?	
Send as Mail			Continue processing if r are not met	ninimum Postal Discount requirements
		-		
<u>R</u> ecently Accesse	d Queues 🔸			
S ⊆lose				

The Export screen appears.

Export	×
Format:	ОК
Text Text	Cancel
Microsoft Mail (MAPI)	

2. In the **Format** field, select the type of format in which to export the queue. Some examples of formatting are Crystal Reports (RPT), Text, or Rich Text Format.

3. In the Destination field, select "Microsoft Mail (MAPI)".

MAPI is the application used to send mail from a queue and is an acronym for Messaging Application Program Interface. This program interface allows you to send email from within a *Windows* application, such as Microsoft *Word*, and include the open document as an attachment.

4. Click **OK**. The Send Mail screen appears.



- 5. Enter the information on the Send Mail screen as shown in the previous picture. The queue information you are sending is automatically attached to the email in the format you specified. You do not see the information in the body of the email, but once you send the email, the information from the queue is sent.
- 6. On the Send Mail screen, click **Send**.

#### Saving a Queue

**Tip**: You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, press **CTRL** + **S** on your keyboard to save a queue or **CTRL** + **O** to open a queue.

At any time, you can save a queue to your database. When you save a queue to your database, any export file name that you enter is validated against other export file names. If duplicate file names exist, a message appears asking whether to change the current file name.

#### Saving a queue

You can save any changes you make and keep the queue open to continue working.

1. From a Queue screen, select **File**, **Save** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

🗿 Birthday labels fo	or Voluntee	rs-May		_	
<u>File</u> <u>E</u> dit F <u>a</u> vorites	<u>T</u> ools <u>H</u> el	).			
🎦 New	Ctrl+N	🕈 🔿 🔕 🗹 📍			
🔄 Open	Ctrl+O				
🗙 <u>D</u> elete					
Save	Ctrl+S	nove 🛧 ∐p 🗣 Down	Labels for Birthday Ca	1	
	Curi+5	Description		Labels	_ <b>_</b> _
Save <u>A</u> s		Labels for Birthday	Action	Print	
🎦 Save and Ne <u>w</u>	Ctrl+W		Data Format		
🄁 Save and Close	Ctrl+L		Include Header		
			File Name		_
Schedule Queue				<u> </u>	
Properties				Output Query	
			Query Type	Constituent	
📄 Print Setyp			Query Name	Labels for Birthday Card10	
A Preview			Query Description	Labels for Birthday Card	
🚑 Print	Ctrl+P		Others May Execute?		
Export			Others May Modify?	<b>V</b>	-
Send as Mail			Continue processing if n are not met	ninimum Postal Discount requirements	
			are not met		
Recently Accessed	d Queues 🔸				
 Close					

**Note**: You can also save a queue by selecting **File**, **Save As** from the menu bar of a Queue screen. The Save Queue As screen appears so you can enter a new name for the queue. For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

When saving a queue, any export file name that you enter is validated against other queue export file names saved in your database. If duplicate export file names exist, a message appears, asking you to replace the existing export file.

Export file name 🛛 🕅					
⚠	D:\BB1_1.xls already exists. Do you want to replace it?				
	Yes No				

2. To replace the existing file, click **Yes**. You return to the Queue screen. To return to the Queue screen and rename the file, click **No**.

3. From the Queue screen, select File, Save again. The Save Queue As screen appears.

일 Save Queue As	×
Queue name: Birthday Labels for Volunteers-May	
Description: monthly labels for volunteer birthday of	cards
Other users may run this queue	
Other users may modify this queue	
OK Cancel	

- 4. In the **Queue name** field, enter a name for the queue.
- 5. In the **Description** box, enter a description for the queue.
- 6. Mark the **Other users may run this queue** checkbox. Marking this checkbox specifies that users other than yourself can run this particular queue.
- 7. Mark the **Other users may modify this queue** checkbox. Marking this checkbox specifies that users other than yourself can modify this particular queue.
- 8. Click Save. You return to the Queue screen.

## Creating a New Queue from an Existing Queue

When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. For example, last week, you ran a queue exporting the names of all constituents who graduated from your organization in 1989 with a degree in History. This week, you want to export the names of constituents who graduated in 1990 with a degree in History. You can open the queue you ran last week, make any necessary parameter changes, and save the queue under a new name. The only exception to this is in the *Batch* module. When you are creating a queue to commit a batch, only one set of parameters exists for the batch. It is important to remember that when you include a constituent or gift batch in a queue, parameters set for the batch exist until you open the batch and change them. An existing batch cannot be edited from within a queue. You must edit batches within the *Batch* module of *The Raiser's Edge*. For more information about editing batches, see the *Batch Guide*.

#### • Creating a new queue from an existing queue

You can open any queue, change any necessary settings, and save the queue under a new name.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

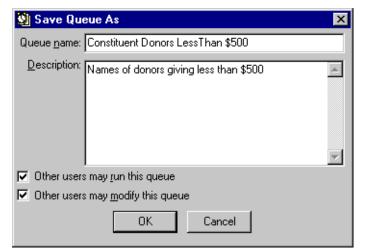
- The Raiser's Edge Eile Edit View Go Favorites Iools Help \_ 🗆 🗵 ◆ Back ◆ Forward Open in separate window Administration • Queue Home Administration Pecords 🍋 System Statistics 
   Name
   Description
   Schedule Frequency Next run date/time Created by Last run by Last run on

   2005 Building Fund Donations
   Report detailing don... On demand
   Supervisor
   Supervisor
   Supervisor
   Supervisor
   Supervisor
   Supervisor
   Supervisor
   Supervisor
   Supervisor
   Import Query Globally Add Records 👰 Export Batch Processing On demand Supervisor Globally Change Records Birthday labels for Volunteers-May On demand Supervisor 💽 Reports Class of 1992 Alumni Constituent Donors Greater Than \$500 On demand On demand Supervisor Supervisor Globally Delete Records Mail Globally Write Off Pledges Custom Report 2005 Inactive Constituents On demand Supervisor Supervisor On demand Batch Convert Pledges To Recurring Gifts Pledges for 2005 Phonathon On demand Supervisor Queue for Volunteer 2 items - Volunteer ... On demand Supervisor (Mapping Post to General Ledger Supervisors Queue Items - Event Mana... On demand Supervisor Admin Duplicate Constituents 💕 Config Merge Constituents Scanning Drop Lapsed Members • F P NetSolutions Security Only show my queues Queue Quick Find **Recently Accessed Queues** 🚯 Dashboard Blackbaud Analytics Constituent Donors Greater Than \$500 Birthday labels for Volunteers-May 2005 Building Fund Donations 亂 AuctionMaestr Pro Integration Auction-Tracker Integration ata Health I, Queue ٠ Allows you to set up a series of tasks to run automatically and unattended. For more information about Gueue, see the <u>Queue for</u> <u>Task Scheduling Cukle</u>. 🔞 Web Services -Welcome to The Raiser's Edge 7
- 2. Click Queue. The Queue page appears.

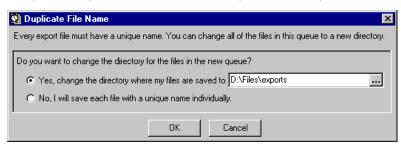
- 3. In the grid, select the queue to open.
- 4. Click **Open** on the action bar at the top of the page. The Queue screen appears.

🔮 Constituen	t Donors Greater Th	ian \$500					
<u>File Edit Fa</u> vorites <u>T</u> ools <u>H</u> elp							
🔁 Save and Close - 🔚 🟥 🚰 🚔 🔃 🗹 💡							
Queue Processing Miscellaneous							
楂 Add Item	🔁 Open 🗙 <u>R</u> emo	ve 🛧 Up 🐥 Down	Donations Given This Ye	ar			
Module	Category	Description		Constituent Giving History			
Reports	Financial Reports	Donations Given Thi	Action	Print			
			Data Format				
			Include Header				
			File Name				
			Document Name	<u> </u>			
				Output Query 🔺			
			Query Type	Gift			
			Query Name	Donations Given This Year1			
			Query Description	Donations Given This Year			
			Others May Execute?				
			Others May Modify?	V			
I							
This queue will ru	in on demand.						

5. To create a new queue from this open queue, select **File**, **Save As** from the menu bar. The Save Queue As screen appears.



- 6. In the **Queue name** field, enter a new name for the queue.
- 7. In the **Description** box, enter a new description for the queue.
- 8. To allow users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 9. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 10. Click **OK**.
- 11. If duplicate export names exist for the queue, the Duplicate File Name screen appears.



When you create a new queue from an existing queue that contains export file names and paths, you must change the directory for the export file names and paths in the new queue.

12. To change the directory for the new export queue, mark the **Yes, change the directory where my files are saved to** option and enter a new file location. You can also click the ellipsis to browse for a new file location.

If you would rather save each file individually, you can mark the **No, I will save each file with a unique name individually** option.

13. Click **OK**. You return to the Queue screen.

14. Click **Save** on the toolbar. The Save File screen may appear asking you to further specify file names and locations.

划 Save File	×
The file 'D:\Files\exports\Constituent Donors Greater than \$500.XLS' has the Constituent 'Donors Greater than \$500' and is already in use in 'Constituent #500'	
What do you want to do?	
Save this file as D:\Files\exports\Constituent Donors Less than \$5	i00.XLS
C Save this file to D:\Files\exports\	
C <u>O</u> verwrite the existing file when the queue is run	
Apply Apply to Ali	Cancel

- 15. To select a different file name to save in the default directory, mark the **Save this file as** option and enter a new name for the file. You can also click the ellipsis to browse for a new file name.
- 16. To select a different file location, mark the **Save this file to** option and enter a new file location. You can also click the ellipsis to browse to a new file location.
- 17. To leave the default file location as is and save over the existing queue in your database when the queue is run, mark the **Overwrite the existing file when the queue is run** option.

When you mark the **Overwrite the existing file when the queue is run** option, the **Apply to All** button is enabled. To apply the new options you specified on the Save File screen to any other duplicate export file names found in the database, click **Apply to All**.

- 18. Click Apply. You return to the Queue screen.
- 19. Make any other necessary changes and click Save and Close on the toolbar.

### Creating a Queue Using a Query as the Input

When you create a queue using a query as the input, you search for an existing query to use as the input query for the queue. For example, you created a query listing the board members of your organization. You want to create a queue to print the names of constituents who donated to your organization this year, and want to list only board members who contributed. You can create the queue, and select the Board Members query as the input query for a queue, the query you select takes precedence over any query on a parameter form.

- Creating a queue using a query as the input
  - 1. On the Raiser's Edge bar, click Admin. The Administration page appears.

2. Click **Queue**. The Queue page appears.

Back 🔶 Forward Op	en in separate windo	w				
Home	👍 Admi	inistration • Queue	_		_	_
Pecords	Administration	🖄 New Queue 🔄 Open 🗙 Delete	Schedule	Find Show Scheduled Queues Inst	all <u>Q</u> ueue Service	
	System Statistics	Name	e 1.1	Schedule Frequency Next run date/ti		
Query	Import		Description			
	Globally Add Records	2005 Building Fund Donations Address Import	Report detailing don	. On demand On demand	Supervisor Supervisor Supervisor	02/01/200
Se Export	Globally Change	Batch Processing		On demand	Supervisor	
	Records	Birthday labels for Volunteers-May		On demand	Supervisor	
Seports	Globally Delete	Class of 1992 Alumni		On demand	Supervisor	
Sur.	Records	Constituent Donors Greater Than \$500		On demand	Supervisor	
Mail	Globally Write Off	Custom Report 2005		On demand	Supervisor	
Sa	Pledges	Inactive Constituents		On demand	Supervisor	
Batch	Convert Pledges To Recurring	Pledges for 2005 Phonathon		On demand	Supervisor	
Ph	Gifts	Queue for Volunteer	2 items - Volunteer	On demand	Supervisor	
Mapping	Post to General Ledger	Supervisors Queue	Items - Event Mana	On demand	Supervisor	
Admin	Duplicate Constituents					
Config	Merge Constituents					
Scanning	Drop Lapsed Members					
NetSolutions	Security Queue	Only show my queues				
Dashboard	Blackbaud	Recently Accessed Queues			Quick Find	
<b>X</b>	Analytics	Constituent Donors Greater Than \$500 Birthday labels for Volunteers-May		<b>▲</b> [		
AuctionMaestro Pro Integration	Auction-Tracker Integration	2005 Building Fund Donations		<b>*</b>		
Data Health Center		Queue				
Web Services		Allows you to set up a series of Task Scheduling Guide.	tasks to run automatica	lly and unattended. For more informatic	n about Queue, see the Que	ue for

- 3. In the grid, select the queue to open.
- 4. Click **Open** on the action bar at the top of the page. The Queue screen appears.

9	Constituen	t Donors Greater Th	an \$500				
E	Eile Edit Favorites Iools Help						
Ę	🔁 Save and Close 🗸 🔛 📑 🔯 🗟 🖸 😤						
[	Queue Proce	ssing Miscellaneous					
	🎦 Add Item	🔄 Open 🗙 <u>R</u> emov	re <b>≜∐p </b> ♦ <u>D</u> own	Donations Given This Yea	ar		
l	Module	Category	Description		Constituent Giving History		
	Reports	Financial Reports	Donations Given Thi	Action	Print		
				Data Format			
				Include Header			
				File Name			
				Document Name	<u> </u>		
					Output Query 🔺		
				Query Type	Gift		
				Query Name	Donations Given This Year1		
				Query Description	Donations Given This Year		
				Others May Execute?			
				Others May Modify?			
T۲	iis queue will ru	in on demand.					

5. From the menu bar, select **Tools**, **Queue Options**. The Queue Options screen appears.

💁 Queue Options	×
Queue name: Constituent Donors Greater Than \$500	
Description: Names of donors giving more than \$500	*
	7
Other users may run this queue	
Other users may modify this queue	
Input query: Volunteers	,
OK Cancel	

6. In the **Input query** field, click the binoculars to search for a query. When you select a query in the **Input query** field, you specify that the queue use the properties of the input query. For this example, you can use the Volunteers query as the input query for this queue. The Volunteers query lists all volunteers in your database.

The Open Query screen appears.

d: Queries	🖨 Open
	Cancel
	<b>b</b> Edit
	Options
nd Queries that meet these <u>c</u> riteria:	
Query type: 🔀 relevant types> 💌 Created On:	💏 Eind Now
Query format: Created by:	Ne <u>w</u> Searc
Query name: Volunteers	Q
Description:	
Show merged queries only	Expand <u>R</u> esu

7. In the **Queue name** field, enter "Volunteers" to search for the Volunteers query.

8. Click Find Now. The Volunteers query appears in the grid.

🚧 Open Query					×
Find: Queries	<u> </u>				
Query Name	Query Description	Туре	Format	Cre	🔄 <u>O</u> pen
Volunteers		Constituent	Dynamic	Superviso	Cancel
					🏷 <u>E</u> dit
Find Queries that meet t	hese criteria:			Þ	Options
Query type: <all r<="" td=""><td>elevant types&gt;</td><td>Created On:</td><td></td><td></td><td>🐴 Eind Now</td></all>	elevant types>	Created On:			🐴 Eind Now
Query format:		Created by:			Ne <u>w</u> Search
Query name: Volur	nteers 💌				<b>Q</b>
Description:	<b>X</b>				
Show merged queri	es only 🗖 <u>E</u> xa	ct match only			Expand <u>R</u> esults
1 record found.					

- 9. Click **Open**. You return to the Queue Options screen. The Volunteers query now appears in the **Input query** field.
- 10. Click **OK**. You return to the Queue screen.
- 11. Make any other necessary changes and click Save and Close on the toolbar.

### **Printing a Queue**

**Note**: You can change your default printer for a queue by selecting **File**, **Print Setup** from the menu bar of the Queue screen. For more information, see the *Program Basics Guide*.

You can use the following procedure to print the Queue Profile for your queue. A Queue Profile is useful to see specific information you are adding or have added to a queue before you run the queue.

#### Printing a queue

1. From a Queue screen, select **File**, **Print** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

jile <u>E</u> dit F <u>a</u> vorites	<u>T</u> ools <u>H</u> e	1		
<u>N</u> ew	Ctrl+N	🎦 🎒 🙆 🗹 📍		
Open	Ctrl+O			
K <u>D</u> elete		_ tove ★ Up ↓ Down	Labels for Birthday Car	d
<u>S</u> ave	Ctrl+S	Description		Labels
Save <u>A</u> s		Labels for Birthday	Action	Print
Save and Ne <u>w</u>	Ctrl+W		Data Format	
Save and Close	Ctrl+L		Include Header	
		-	File Name	
Schedule Queue		_		
Proper <u>t</u> ies				Output Query
Print Setup		-	Query Type	Constituent
) Preview			Query Name	Labels for Birthday Card10
	Ctrl+P		Query Description	Labels for Birthday Card
print	Cun+P		Others May Execute?	
Export			Others May Modify?	
Send as <u>M</u> ail	d Queues 🕨	-	Continue processing if m	inimum Postal Discount requirements
<u>⊾</u> ⊆lose				
is queue will run on a				

**Tip**: You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, press **CTRL** + **P** on your keyboard to print a queue.

2. The Queue Profile for the queue prints to your default printer.

### **Deleting a Queue**

On occasion, you may want to delete a queue from your database. For example, you created two very similar queues and only update and run one of the two most often. Once you are sure you do not need the second queue, you can select to delete the queue from your database. You can delete a queue from the Queue page or from the Queue screen.

#### • Deleting an existing queue from the Queue page

**Warning**: Before you delete a queue, or any other record in *The Raiser's Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click Queue. The Queue page appears.

Back      Forward Op					
A pack in Forward ob	en in separate windo	N			
et Home	付 Adm	inistration · Queue	_		
Pecords 8	Administration	New Queue 🔄 Open 🗙 Delete	. 🧊 <u>S</u> chedule 🛱	Find Show Scheduled Queues In	stall <u>Q</u> ueue Service
- Records	System Statistics				
Query	Import	Name	Description		time Created by Last run by Last run o
Export	Globally Add Records	2005 Building Fund Donations Address Import	Report detailing don	On demand	Supervisor Supervisor 02/01/20 Supervisor
S CXpon	Globally Change	Batch Processing		On demand	Supervisor
Reports	Records	Birthday labels for Volunteers-May		On demand	Supervisor
	Globally Delete	Class of 1992 Alumni		On demand	Supervisor
Mail	Records	Constituent Donors Greater Than \$500		On demand	Supervisor
and the second s	Globally Write Off Pledges	Custom Report 2005		On demand	Supervisor
Batch	Convert Pledges	Inactive Constituents		On demand	Supervisor
	To Recurring	Pledges for 2005 Phonathon		On demand	Supervisor
Mapping	Gifts	Queue for Volunteer	2 items - Volunteer		Supervisor
()) ())	Post to General Ledger	Supervisors Queue	Items - Event Mana	On demand	Supervisor
Admin	Duplicate Constituents				
Config	Merge Constituents				
Scanning	Drop Lapsed Members				
RetSolutions	Security Queue	Only show my queues			
🚯 Dashboard	Blackbaud Analytics	Recently Accessed Queues Constituent Donors Greater Than \$500		101	Quick Find
AuctionMaestro	Auction-Tracker	Birthday labels for Volunteers-May		<u> </u>	
Pro Integration	Integration	2005 Building Fund Donations		-	
Data Health		Queue			
Web Services		Allows you to set up a series of Task Scheduling Guide.	tasks to run automatica	lly and unattended. For more informat	ion about Queue, see the <u>Queue for</u>

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

3. Select the queue to delete and click **Delete** on the action bar at the top of the page. A message appears, asking if you are sure you want to delete the queue.

The Rais	er's Edge		$\times$
?	Are you sure you	u want to delete this que	ue?
	Yes	No	

If you do not have security rights to delete a queue, the **Other users may modify this queue** checkbox has not been marked, or if you did not originally create the queue, you receive the message "User not authorized to delete this queue."

4. Click **Yes**. The queue is permanently removed from the database. You return to the Queue page.

### > Deleting a queue item from the Queue screen

**Note**: You can delete a queue item from the action bar of the Queue screen. To do this, select the queue item to delete in the grid and click **Remove** on the action bar.

1. From a Queue screen, select **File**, **Delete** from the menu bar. For more information about opening a queue, see "Accessing a Queue" on page 6.

<u>File E</u> dit F <u>a</u> vorites	<u>T</u> ools <u>H</u> el	P		
🎦 <u>N</u> ew	Ctrl+N	🕈 🖨 🙆 🗹 ?		
🔄 Open	Ctrl+O	1		
X <u>D</u> elete		nove 🛧 Up 🖶 Down	Labels for Birthday Car	
🚽 Save	Ctrl+S	Description		Labels
Save <u>A</u> s		Labels for Birthday	Action	Print
🎦 Save and Ne <u>w</u>	Ctrl+W		Data Format	
🔁 Save and Close	Ctrl+L		Include Header	
			File Name	
Schedule Queue				
🚰 Properties				Output Query
Print Setup			Query Type	Constituent
Q Pre <u>v</u> iew			Query Name	Labels for Birthday Card10
🚔 Print	Ctrl+P		Query Description	Labels for Birthday Card
	Cultr		Others May Execute?	
Èxport			Others May Modify?	
Eccently Accesse	d Queues 🕨		Continue processing if m are not met	inimum Postal Discount requirements
his queue will run on	demand.			

A message appears asking if you are sure you want to delete the queue.

The Rais	er's Edge 🛛 🔀
?	Are you sure you want to delete this queue?
	Yes No

2. To permanently delete the queue, click Yes. To return to the Queue screen, click No.

# **Queue Reports**

With the *Queue for Task Scheduling* module, several reports are available to help you track the different queues entered in your database, to record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. The next chapters explain each report and how the report is useful to the specific module with which you are working. If you use the *Queue for Task Scheduling* module, the following reports are available for each module:

- Validation Report
- Control Report
- Queue Profile
- •



# Admin

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With the *Queue for Task Scheduling* module, several modules are available for you to include when creating and running queues. With the *Admin* module, you can import data into your database, validate data, create import files, and update existing records by importing updated information into your database. By identifying the type of import to bring in and defining your import parameter file, you can easily import the information you need. With the *Queue for Task Scheduling* module, you can set up and run multiple imports in one queue. In addition, you can also run multiple modules in one queue. For example, you want to commit a gift batch of new pledges. You also want to import action information into your database. Not only can you include both the *Batch* module and the *Admin* module in one queue, you can set the queue to run at any time that is convenient for you.

# Working with Queues for Admin

When working with queues for *Admin*, one category is available. A category is a breakdown within the *Admin* module of the queue and helps to specify the type of task you are creating. The available category for the *Admin* module is Import. Once you select the Import category for *Admin*, you can further specify the category by selecting a subcategory. A subcategory specifies a breakdown within the category of a task. Subcategories provide the specific information needed to successfully run the task. For more information about the Import category and the available subcategories, see the *Import Guide*.

Once you select Import and specify a subcategory, select the appropriate checkboxes and options to include in the queue. Then, specify a date and time to run the queue. For more information about running a queue, see "Scheduling a Queue for Admin" on page 52.

## Creating a Queue for Admin

**Note:** *The Raiser's Edge* sample database includes several sample import files. These files may prove useful as guides when you create import files. You can access the sample files for *Import* by clicking the ellipsis in the **What file do you wish to import?** frame on the new import screen. The Select Import File screen appears, where you can map to the sample import files stored in RE7/Help folders. In the **Files of type** field, select "All Files".

With the *Queue for Task Scheduling* module, you can create a new queue, create a queue from an existing queue, or create a queue using a query as the input.

When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. For example, you ran a queue last month importing names of prospective donors to your organization. This month, you want to import new names of prospective donors. You can set up the queue and specify the queue to run at the most convenient time for you. This can be during your lunch break or at night after your volunteers and employees have left for the day. You can open the queue you ran last month, make any necessary parameter changes, and save the queue under a new name. You can now use the settings from the previous queue to run your new queue.

When working with import files, you need to specify settings, or "parameters", for the import file you include in a queue. Each import file has its own set of parameters. When you work with a particular import file many times, remember that parameters set for the import file exist until you open the import file and change them. For example, the first time you create a campaign import, you specify parameters for it and run the queue. Next month, when you run the queue again, the same parameters exist. You can change the parameters for an import file, but remember, only one set of parameters exists for each import file.

For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

When you create a queue using a query as the input, the input query can either apply to the queue task you are creating, or it can apply to the entire queue. First, when creating an import queue item, on the import parameter form, you can select **Create import file** and then choose a query of constituents to include. This query only applies to the current queue task you are creating. You can only base an import file on a query if you select **Create import file**. If you select other options such as **Import new records**, or **Update existing records**, the ability to base the import file on a query is disabled on the import parameter form. For example, you are creating a new import file to include in a queue. You only want to include certain constituents in the import file. You can use an input query for the import you are creating, to specify only certain constituents be included in the process.

You can also create a queue using a query as the input from the Queue Options screen for a queue. From the Queue Options screen, use the **Input query** field to search for a query to use as the input for the queue. This query applies to the entire queue. The **Input query** field is always enabled because other queue items may exist in the queue that can be affected by the query you select. Even though the **Input query** field is always enabled, it does not mean that it will apply to the import task you are including in the queue. The input query type is consistent with the import file type that you are creating. In general, whenever you include an input query for a queue, the query you select takes precedence over any query on a parameter form. For more information about importing and the different options available, see the *Import Guide*.

From the **Queue** link of the Administration page, you can create new queues for *Admin* or open existing queues to run unattended at designated times. To access the Queue page, click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Queue**. The Queue page appears. From the Queue page, you can create and work with queues for *Admin*.

#### • Creating a new queue

**Scenario:** Earlier this month, you created an import file listing specific constituent names and addresses in your database. You sent the import file to an outside research company to update the addresses for the specific constituents listed in the file. You just received the updated file and need to import the updated addresses into your database. Because the list contains many updated addresses, you need to create a queue to import the information.

**Note**: One parameter form exists for each import file. You can change the parameters for an import from within a queue.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.

2. Click Queue. The Queue page appears.

The Raiser's Edge File Edit View Go Fav	vorites Tools Help					_ 🗆 X
◆ Back ◆ Forward Op	en in separate windo	WV				
Home	Adm 🚯	inistration • Queue	_		_	
Records	Administration	New Queue 🔄 Open 🗙 Delete	Schedule	Find Show Scheduled Queues In:	stall <u>Q</u> ueue Service	
	System Statistics	Name	Description	Schedule Frequency Next run date/	time Created by Last run by Last	trun on L
Query	Globally Add	2008 Building Fund Donations	Report detailing don		Supervisor Supervisor 02/0	01/2008 N
👰 Export	Records	Address Import		On demand	Supervisor	N
🚱 Exbou	Globally Change	Batch Processing		On demand	Supervisor	N
Reports	Records	Birthday labels for Volunteers-May Class of 1992 Alumni		On demand On demand	Supervisor Supervisor	N N
	Globally Delete Records	Constituent Donors Greater Than \$500		On demand	Supervisor	Ň
Mail	Globally Write Off	Custom Report 2008		On demand	Supervisor	N
	Pledges	Inactive Constituents		On demand	Supervisor	N
Batch	Convert Pledges To Recurring	Pledges for 2008 Phonathon		On demand	Supervisor	N
	Gifts	Queue for Volunteer	2 items - Volunteer		Supervisor	N
Webping	Post to General Ledger	Supervisors Queue	Items - Event Mana	On demand	Supervisor	N
Admin	Duplicate					
	Constituents					
W Config	Merge Constituents					
Scanning	Drop Lapsed Members					
email	Security					
NetSolutions	Queue	C Only show my queues				
R Dashboard	Blackbaud	Recently Accessed Queues			Quick Find	
	Analytics	Birthday labels for Volunteers-May		×		亂
AuctionMaestro Pro Integration	Auction-Tracker Integration	2008 Building Fund Donations Batch Processing		-	-	
Data Health		Queue				-
Web Services		Allows you to set up a series of Scheduling Guide.	tasks to run automatica	ly and unattended. For more informati	on about Queue, see the <u>Queue 1</u>	for Task
Welcome to The Raiser's Ed	lge 7	r				

3. On the action bar, click **New Queue**. The Add Items to New Queue screen appears. For more information about accessing the queue page, see "Accessing a Queue" on page 6.

Filters	to New Queue	s that can be added to the queue.
<u>M</u> odule: C <u>a</u> tegory:	Admin 💌	] ] ]
New Item	© <u>D</u> pen IV <u>S</u> elect All IS <u>D</u> eselect All Description	Use these options for all selected items.         Action       Run Import         For the control reports use:         Action       Print         Printer       Generic PostScript Printer         Copies:       1
Only show r		Cancel Add to queue

- 4. In the **Module** field, select "Admin" to run a queue for the Admin module.
- 5. In the **Category** field, select "Import" to import information.
- 6. In the **Subcategory** field, select "Constituent Address". You are importing updated addresses for the constituents in your database.
- 7. When imports exist on the Add Items to New Queue screen, the **Only show my imports** checkbox is enabled at the bottom of the screen. To display only imports that you have saved, mark the **Only show my imports** checkbox.

8. On the action bar, click **New Item** to add a new administration task. The Import-Constituent Address screen appears.

Import - Constituent Address			×
File Edit Favorites Tools He	alb		
🖬 🗙 📑 🍜 🔓 🗛 :	º ? ·		
1: General 2: File Layout 3: Fi	elds 🛛 👍: Summary 🕽		
What do you want to do?			
<ul> <li>Import new records</li> </ul>	Options		
<ul> <li>Update existing records</li> </ul>	🔽 Validate data only		
	Create new table entries		
C Create import filey	Import records not found as new records		
What file do you wish to in	nport?		
Import file: D:\updatedaddres:	ses.imp		
	em to identify existing constituents? —		
Use the Import ID			
O Use the Constituent ID			
C Use the Social Security Nu	umber		
What is the format of this i	mport file?		,
Delimited - Characters sep.	arate the fields		
C Fixed width - Fields and red	cords have a set length Rec. length:	No. of fields	
< <u>B</u> ack <u>N</u> ext > C	ancel	<u>S</u> ave	Import No <u>w</u>

- 9. On the General tab, in the **What do you want to do?** frame, select **Update existing records** to specify that you want to import a file that will update address information on your constituent records.
- 10. In the **Options** frame, mark the **Create new table entries** checkbox. When you mark this checkbox, new table entries are created for those found in the import file that do not already exist in **The Raiser's Edge**. However, because new table entries are created, misspellings and incorrect formatting may occur. For example, title entries may appear in several different forms: MR., Mr, Mr. It is important to be aware that this may occur.
- 11. In the **Options** frame, mark the **Import records not found as new records** checkbox. When you mark this checkbox, the program identifies any updated record that does not match an existing record in your database, and treats it as a new record. A new record is created for the data.

If you mark the **Import records not found as new records** checkbox, make sure your import file includes all fields required to import new records. For information about fields required for new imports, see the Import Table chapter of the *Import Guide*.

**Note**: An import file must be formatted in accordance with the parameter settings you select in *Import*. Import files must be formatted as \*.txt, \*.csv, or \*.prn files.

12. In the **What file do you wish to import?** frame, in the **Import file** field, enter the name of the import file to import. This is the name of the file that contains the updated address information to import. To search for the file name, click the ellipsis. The Select Import File screen appears.

Select Import Fil	e				? ×
Look in:	DDRIVE (D:)		•	+ 🗈 💣 🛙	<b>H</b> •
History Desktop My Documents My Documents	<ul> <li>Files</li> <li>Frame book doo</li> <li>FTP</li> <li>1386</li> <li>ICVERIFY</li> <li>ICVWIN20</li> <li>ICVWIN201_Ins</li> <li>IXgen</li> <li>IxgenforFrank</li> <li>Paint Shop Pro</li> <li>Program Files</li> </ul>	updatedaddress	es.imp		
	File name:	updatedaddresses.imp		•	Open
My Network P	Files of type:	Import Files (*.imp)		•	Cancel

Select the name of the file to import and click **Open**. You return to the Import screen.

Note: To update a record, you must have a unique ID to reference the record.

- 13. In the **How do you want the system to identify existing constituents?** frame, mark the **Use the import ID** checkbox. The import ID is a program-generated number assigned to your records. *The Raiser's Edge* uses the import ID to identify existing records.
- 14. In the **What is the format of this import file?** frame, mark **Delimited Characters separate the fields**. When you select this option, a character, such as a comma, is used to separate the fields in the import file. Whatever you select as the format for the import file must be the same format you selected when you created the import file.

15. Click Next. The File Layout tab appears.

mport - Constituent	Address			×
File Edit Favorites	Tools Help			
🖬 🗙 📑 🗁	🚡 🙆 😁 구 -			
1: General 2: File La	yout 3: Fields 4: S	ummary		
Field Separators and	Fext Qualifiers			
Comma	Text qualifier: Qua	otation 💌		
C Tab C Semicolon C Space		is. Any field sepa		l between two text qualifiers n two text qualifiers will not
O Other	This allows you to that is part of the o			character and a character
Import Field Names				
Field names are	on the first line of the i	mport file		
C Import file does r	not contain field name:	S		
C Field names are	in a separate file			
Sample Import Format				
AddrImpID	AddrLines	AddrCity	ConsID	ImportID
00001-027-0000184	248 Twin Lane/nB	Birmingham	1	00001-079-000018
00001-027-0000382 1481 Mountain Cr Birmingham 1 00001-079-000018				
	77 (°-14 1	C. 16 Channa	<b>.</b>	00001-030-000010
< <u>B</u> ack <u>N</u> ext	> Cancel			Save Import Now

The parameters on the File Layout tab must exactly match the parameters you specified when you created the import file to be sent to the outside research company.

- 16. In the **Field Separators and Text Qualifiers frame**, select **Comma** to use a comma as the delimiter to separate the fields in the import file.
- 17. In the **Text qualifier** field, you can define the beginning and end points of your field.

For example, to include the **Address block** field in your import file using quotation marks as your text qualifier and commas as your separator, it would appear as "AddrBlock". The text qualifier also allows the program to distinguish between actual punctuation in a string of text and the field separator. For example, if you select the comma as your separator and then try to import the following address — 100 Main Street, Apt. 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field — "100 Main Street, Apt. 23F" — the program knows all text contained between the text qualifier is part of the same field.

18. In the **Import Field Names frame**, select **Field names are on the first line of the import file**. When you select this option, the first line of the import file is the header line or row, which contains the import name of the fields included in the file.

19. Click Next. The Fields tab appears.

i X 🔄 🥏 🔓 🗛 😭	? -		
1: General 2: File Layout 3: Fields Indicate where each 'Field to Import' sh		iser's Edge Field from the list :	of 'Available
Fields' Available Fields	Import Fields	sol a Lugo Hold nom the list.	
Show: <all fields=""></all>	Field to Import	Raiser's Edge Field	Extension
⊡-Address ▲	AddrImpID	Address Import ID (A	
Address Import ID	AddrLines	Address Lines (AddrLi	
	AddrCity	City (AddrCity)	
City	ConsID	Constituent ID (ConsID)	
Constituent ID	ImportID	Constituent Import ID	
-Constituent SSN	SSNum	Constituent SSN (SSN	
Country	AddrCountry	Country (AddrCountry)	
Date from	AddrCounty	County (AddrCounty)	
Date to DPC	AddrState	State (AddrState)	
-Info source	AddrZIP	ZIP (AddrZIP)	
LOT NZ City Click here for detailed field information	.		
Find Select ->	<- Remove	Update Fields C	Clear Fields

**Note**: The import values contained in your import file must be arranged in the same order you arrange the field names on the Fields tab.

20. From the Fields tab, you map the fields in the import file to the appropriate location in *The Raiser's Edge*. The program attempts to automatically match all your **Fields to Import** entries with the fields in *The Raiser's Edge*. If the program does not recognize a field name, you must manually map to the field. All available fields appear in the box to the left of the grid. For more information, see the *Import Guide*.

21. Click Next. The Summary tab appears.

Import - Constituent Address		X
File Edit Favorites Tools Help		
🖬 🗙 📑 🖨 🏠 🛤 🖀 📍 ? •		
1: General 2: File Layout 3: Fields 4: Summary		
Import Options		
Create exception file of records not updated/imported D:\exception.imp		
Create an output query of the records imported		
Create an output query of the records updated		
Create control report		
Import Summary Information		
Type: Constituent Address File Name: updatedaddresses.imp		<b>^</b>
New constituent addresses will be imported Existing constituent addresses will have their information updated		
Field names are on the first line of the import file Fields are separated by Comma		
The text qualifier is a <quotation></quotation>		
These fields will be imported and/or updated: Address Import ID (AddrImpID)		
Address Lines (AddrLines) City (AddrCity)		
Constituent ID (ConsID)		-
< <u>B</u> ack <u>M</u> ext> Cancel	<u>S</u> ave	Import No <u>w</u>

22. In the **Import Options** frame, you can choose to create an exception of files not updated or imported, an output query of the records imported or updated, or a control report. For this example, mark all checkboxes. Later, when you add the queue item to the queue, on the Queue screen, you can specify a name and description for the output query.

When you mark the **Create control report** checkbox, a control report is created after the import runs that lists criteria fields and criteria operators selected for the import. The report also shows the import name and the location of the saved import. You can select to print or preview the control report.

23. Click **Save** on the toolbar. The Save Import As screen appears.

Save Impo	rt As	×
<u>N</u> ame:	Updated Addresses	Save
Description:	updated address from 2008 file.	Cancel
	Other users may run this import	
	Other users may modify this import	

- 24. In the Name field, enter "Updated Addresses".
- 25. In the Description box, enter "Updated addresses from 2008 file".
- 26. To allow users other than you to run the report, mark the **Other users may run this import** checkbox.
- 27. To allow users other than you to modify the report, mark the **Other users may modify this import** checkbox
- 28. To save the parameters for the new queue item and close the Save Import As screen, click **Save**. You return to the Import-Constituent Address screen.

- 29. To close the Import-Constituent Address screen, click the "X" at the top right corner of the screen. You return to the Add Item to New Queue screen.
- 30. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "Updated Addresses" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

🛂 Add Items to New Queue	×
Filters         Enter the module, category, and subcategory to filter the items         Module:       Admin         Category:       Import         Subcategory:       Constituent Address	that can be added to the queue.
New Item Coper, Select All Coselect All Select Description Updated Addresses	Use these options for all selected items. Action: Run Import Restore to Defaults For the control reports use: Action: Print Print Print Copies: 1
Only show my imports     OK Ca     Total number of items in the queue: 0	incel Add to queue

- 31. In the **Use these options for all selected items** frame, "Run Import" defaults in the **Action** field. You are going to run the import file.
- 32. Under **For the control report use**, in the **Action** field, specify the action for the control report. You can either export, print, or send the control report as email.
- 33. In the **Printer** field, specify the printer to print the control report.
- 34. To add the new queue item to the queue, click **Add to queue**.

35. Click **OK**. The New Queue screen appears.

New Queue File Edit Far	e vorites <u>T</u> ools <u>H</u> elp			
🔁 Save and C	Close 🔹 🔚 📑 📰	🔿 📐 🗹 📍		
Queue Proce	essing <u>M</u> iscellaneous			
🏝 🛆 d Item	🔄 Open 🗙 Remo	ve 🛧 Up 🐥 Down	Updated Addresses	
Module	Category	Description		Import
Admin	Import	Updated Addresses	Action	Run Import
			Data Format	
			Include Header	
			File Name	
			Document Name	<b>_</b>
				Output Query
			Query Type	Constituent
			Query Name	Updated Addresses2
			Query Description	Updated Addresses
			Others May Execute?	
			Others May Modify?	
This queue will n	un on demand.			

**Note**: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the right side of the screen, such as the action and data format for the queue item. Earlier, if you selected to create an output query, you can now specify a name and description for the output query in the **Output Query** column.

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab. For more information, see "Processing Tab" on page 154.

36. To save the new queue, click **Save**. The Save Queue As screen appears.

🔮 Save Qu	eue As	×
Queue <u>n</u> ame:	Address Import	
<u>D</u> escription:	Updated addresses, 2008	
✓ Other user:	s may <u>r</u> un this queue	1
C Other user:	s may <u>m</u> odify this queue	
	Save Cancel	

**Note**: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

- 37. In the Queue name field, enter "Address Import".
- 38. In the Description box, enter "Updated addresses, 2008".
- 39. To allow users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 40. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 41. Click Save. You return to the New Queue screen.
- 42. To save and close the queue, click **Save and Close** on the toolbar. You return to the Queue page.

You can now run the queue. For more information about running a queue, see "Scheduling a Queue for Admin" on page 52.

### Scheduling a Queue for Admin

**Warning**: If you are using **The Raiser's Edge** on a network, make sure all other users have exited the program before running any imports.

Once you create a queue, you can either select to save and run the queue immediately, or you can select another date and time to run the queue.

When the queue is recurring, you can schedule the queue to run at a set frequency. For more information about scheduling recurring queues, see "Scheduling a Recurring Queue" on page 157.

To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues. For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

**Note**: From *The Raiser's Edge* shell, you can also run a queue by selecting **File**, **Schedule Selected Queue** from the menu bar. From the Queue screen, you can run a queue by clicking **Open** in the toolbar or by selecting **File**, **Schedule Queue** from the menu bar.

#### Scheduling a queue

**Scenario:** You recently received a file from an outside research company that contains address updates for constituents in your database. Because many addresses need importing, you created a queue to import the address updates. Open the queue and select to run the queue at 8:00 tonight, after your volunteers and employees have left for the day. Before you run the queue, you must properly set up and save the queue. This scenario uses the queue created in "Creating a new queue" on page 43.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click **Queue**. The Queue page appears.

Back 🔶 Forward Op	en in separate windo	N			
Home	/ Admi	inistration • Queue	_		_
a Records	Administration	New Queue Dpen 🗙 Delete.	Schedule	Find Show Scheduled Queues Instal	I <u>Q</u> ueue Service
	System Statistics	Name	Description	Schedule Frequency Next run date/tim	e Created by Last run by Last run
Query	Import	2008 Building Fund Donations	Report detailing don		Supervisor Supervisor 02/01/2
	Globally Add Becords	Address Import	report documy dom.	On demand	Supervisor Supervisor Supervisor
Export 🚽		Batch Processing		On demand	Supervisor
	Globally Change Records	Birthday labels for Volunteers-May		On demand	Supervisor
Reports	Globally Delete	Class of 1992 Alumni		On demand	Supervisor
	Records	Constituent Donors Greater Than \$500		On demand	Supervisor
💕 Mail	Globally Write Off	Custom Report 2008		On demand	Supervisor
~	Pledges	Inactive Constituents		On demand	Supervisor
Batch	Convert Pledges	Pledges for 2008 Phonathon		On demand	Supervisor
n.	To Recurring Gifts	Oueue for Volunteer	2 items - Volunteer	On demand	Supervisor
Mapping	Post to General	Supervisors Queue	Items - Event Mana	On demand	Supervisor
	Ledger				
Admin	Duplicate				
12	Constituents				
Config	Merge				
	Constituents				
Scanning	Drop Lapsed Members	। न			
<b>A</b>	Security				
NetSolutions	Oueue	Only show my queues			
<u>a</u>	Blackbaud	Recently Accessed Queues		Q	uick Find
Dashboard	Analytics	Address Import			
AuctionMaestro	Auction-Tracker	Birthday labels for Volunteers-May			
Pro Integration	Integration	Constituent Donors Greater Than \$500		-	
Data Health		0			
ਓ Center		Queue			
Web Services		Allows you to set up a series of	tasks to rup automatica	ily and unattended. For more information	about Queue, see the Queue for

- 3. In the grid, select "Address Import".
- 4. Click **Schedule** on the action bar at the top of the page.

Warning: For a queue to run successfully, the database must be running.

Once you select to run the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears informing you that the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

Schedule Addres	s Import 🛛 🗙
	Enter the date and time to begin processing the queue and press 'Schedule Queue' or press 'Run Queue Now' to run the queue now.
18 4	Current date: 05/12/2008 Current time: 9:47:55 AM
7 6 8	Queue start date: 05/12/2008 📷 Queue start time: 8:00 PM 😤
U	Run As: Supervisor 💌 Run On:
-9	Begin processing with: Address Import
	Schedule Queue Cancel Run Queue Now

If the validate process is successful, the Schedule screen appears.

Note: On the Schedule screen, you can click **Run Queue Now** to run the queue now.

- 5. In the **Queue start date** field, enter today's date to run the queue tonight.
- 6. In the **Queue start time** field, enter "8:00 PM" to run the queue at 8:00 tonight.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

- In the Run As field, select the user to run the queue. Security rights are considered based on the user's security settings. A scheduled queue can run only when the user selected in the Run As field is not logged into *The Raiser's Edge*.
- 8. In the **Run On** field, enter a specific computer on which to run the queue. This field is useful when you have more than one queue server.
- 9. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item to process first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field will not run. For this example, only one queue item exists in the queue.

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

10. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

# Queue Reports for Admin

With the *Queue for Task Scheduling* module, several reports are available for *Admin* to help you track the different queues entered in your database, record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. A validation report, a queue profile, and a control report are available for the *Admin* module.

# Validation Report

You can validate a queue by selecting **Tools**, **Validate** from the menu bar of the Queue screen. The Queue Validation Complete screen appears, specifying how many items successfully validated or failed. You can view the validation report for items that failed to validate by clicking **Preview Report** on the Queue Validation Complete screen. A validation report appears only if errors are found during the queue validation process. When the validation report appears, you can view the queue name; description; input query; module; subcategory; and category for each invalid item in the queue. The report also gives an explanation for the invalid queue item.

For more information about validating a queue, see "Validating a Queue" on page 17.

🔮 Validation Q	Jeue Report					_ B ×
×	1 of 1	)   = 🚭 🗲 🕭	100% 🔻 🚺 🥼	Total:1 100%	1 of 1	
Preview						
						2
			Disa			
	2/12/2008			daud Demo alidation Report		
	Des	e Name: Address Import cription: Updated addresses,	2008			
	Report R	un Date: 2/12/2008				
	EXCEP	TIONS:				
	Module	Category	Subcategory	Description	Reason	
	Admin	Import	Constituent Address	Updated Addresses	Import file not found: updatedaddresses.imp	
	Total excep	tions listed: 1				
						-

# Queue Profile

You can select to preview a profile for the queue you are working with at any time. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

ueue Profile ]- 1						
	6/12/2008		Blackbaud Queue Pi			Page 1
	Descript Created	ame: Address Import ion: Undated addresses, 2008 by: Supervisor ion: 6/12/2008 ery:	Last run	Last run by: Last run on: completed successfully:	12/12/2008	
	Module	Category	Subcategory	Descriptio	n	
	Admin	Import	Constituent Address	Updated Add	iresses	
			Output			
		Output: Action:				
		Action:	HP DeskJet 722C			
		Ouery type:	Output Query Constituent			
			Updated Addresses Updated Addresses			
		Others may execute:	Yes			
		Others may modify:	Yes			

# **Control Report**

When you mark the **Create control report** checkbox on the Options screen in User Options, a control report appears after a queue finishes processing. Depending on your settings in User Options, the control report either exports, prints, or is sent as email. There are two types of control reports — Summary and Detail. When you mark the **Create control report** checkbox in User Options, you need to select which type of report to create. For more information about setting up user options, see "User Options" on page 8.

### Summary

The summary report includes the queue name, description, input query, start date and time, and end date and time for the queue. The summary report also lists the type of module, category, subcategory, and description for each queue item entered in the queue. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

🕒 Queue Contra								_ 8 :
Preview	1 of 1 🗼 🕨	# # # 100%	• <u>M</u>	Total:2 10	0% 20	of 2		
							1	
	01/02/2008		Blackba Queue Con	ud Demo itrol Repo	rt			
	Description: Input query: Start date/time: End date/time: Elapsed time:	Address Incport Undated addresses, 2008 01.02/2008 / 12.00.00 PM 01.02/2008 / 12.35.00 PM 00.35:00 All completed.						
	Category	Subcategory	Description	Start Time	End Time	Elapsed Time	Status	
	Import	Constituent Address	Updated Addresses	12:00:00PM	12:35:00PM	00:35:00	Completed.	
							_	

### Detail

The detail report includes the queue name, description, input query, start date and time, and end date and time for the queue. The detail report also lists the type of module, category, subcategory, description, and each option you selected for the queue. These options can include checkboxes you selected, which printer you specified for the queue output, or the names of people receiving the queue output as email. You can select to either create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

01/02/2008			aud Demo ontrol Repo	rt		
Description: Input query: Start date/time: End date/time: Elapsed time: Status:	All completed.				Elapsed	
Category	Subcategory	Description	Start Time	End Time	Time	Status
mport	Constituent Address	Updated Addresses	12:00:00PM	12:21:00PM	00:21:00	Completed.
	Action: Output: Action:	HP DeskJet 722C				
	Output auery type: Output query name: Query description: Others may execute: Others may modify:	Updated Addresses Updated Addresses Yes				



# Batch

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#### Procedures

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Scheduling a queue	 	 	 

With the *Queue for Task Scheduling* module, several modules are available for you to include when creating and running queues. With *Batch*, you can commit constituent, gift, and time sheet batches included in the queue, and run multiple batches in one queue. In addition, you can also run multiple modules in one queue. For example, you want to commit two gift batches that you created yesterday. You also want to print address labels for your mailing this month. Not only can you include both the *Batch* module and the *Mail* module in one queue, you can set the queue to run at any time that is convenient for you.

# Working with Queues for Batch

When working with queues for *Batch*, three categories are available. A category is a breakdown within the *Batch* module of the queue and helps to specify the type of task you are creating. The available categories for the *Batch* module are Constituent, Gift, and Time Sheet. No subcategories exist within the *Batch* module. For more information about the available categories for *Batch*, see the *Batch Guide*.

Once you select the specific category for *Batch*, select the appropriate checkboxes and options to include in the queue. Then, specify a date and time to run the queue.

For more information about running a queue, see "Scheduling a Queue for Batch" on page 67.

### Creating a Queue for Batch

**Warning**: An existing batch cannot be edited from within a queue. You must edit batches within the *Batch* module of *The Raiser's Edge*. For more information about editing batches, see the *Batch Guide*.

With the *Queue for Task Scheduling* module, you can create a new queue or create a queue from an existing queue to commit to the database. The *Batch* module is a little different than all other modules available in *Queue for Task Scheduling*. With other modules, you can create new items to add to a queue, such as a new task to print labels or a new query. While working in a batch queue, you cannot create a new constituent, gift, or time sheet batch. Constituent, gift, and time sheet batches must already exist. Once you create a batch, you can then create a new queue and include the batch in the queue.

You can also specify settings, or "parameters", for batches you include in the queue. Each batch has its own set of parameters. When you work with a particular batch many times, remember that parameters set for the batch exist until you open the batch and change them. For example, the first time you commit a recurring batch, you mark the **Create a new batch of exceptions** checkbox on the Commit Gift Batch screen, and run the queue. Next month, when you run the queue again, the **Create a new batch of exceptions** checkbox is still set as a parameter. You can change the parameters for a batch, but remember, only one set of parameters exists for each batch.

With the *Batch* module, you can create a queue to commit a batch with numerous gifts, or set a specific time for a recurring batch to commit to the database. You can also create new queues from existing queues. When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. By doing this, you are basing the new queue on the settings of the existing queue. For example, last month you ran a queue committing a gift batch that contained gifts donated during your February Appeal. This month, you want to create a queue to do exactly the same thing, but this time, you want to commit the batch for your March Appeal. You can open the queue you ran last month, select your March Appeal batch, and save the queue under a new name.

For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

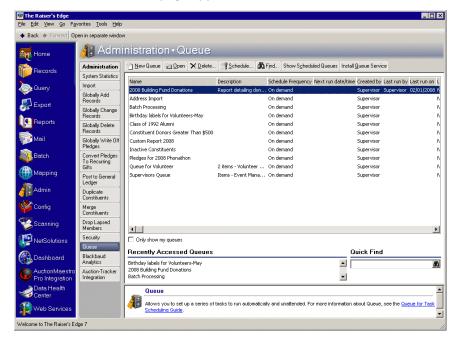
From the **Queue** link of *Administration*, you can create new queues for *Batch* or open existing queues to run unattended at designated times. To access the Queue page, click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Queue**. The Queue page appears. From the Queue page, you can create and work with queues for *Batch*.

**Warning**: You cannot create a new constituent or gift batch from within a queue. You must create batches within the *Batch* module of *The Raiser's Edge*. For more information about creating batches, see the *Batch Guide*.

• Creating a new queue

**Scenario:** Your organization just finished receiving pledges for its Annual Phonathon. You created a gift batch containing the numerous gifts pledged during your fundraiser last week. Now, you are ready to commit these pledges to the database. Because the gift batch is large, you need to use a queue to commit the gift batch to the database at the end of the business day. Name the queue "Pledges for 2008 Phonathon".

- 1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
- 2. Click **Queue**. The Queue page appears.



**Note**: Nonrecurring gift batches that have been previously committed will not appear in the list of gift batches available for selection in a queue. For more information about creating gift batches, see the *Batch Guide*.

3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the Queue page, see "Accessing a Queue" on page 6.

Filters         Enter the module, category, and subcategory to filter the items that can be added to the queue.         Module:       Batch         Category:       Item items         Subcategory:       Item items         Select       Description         25 - 10 gifts of \$100 - 10/03/2008       Action: Commit         25       26         27       Control reports use:         27       Only show my batches	🥸 Add Items to New Queue	×
Select       Description         25 - 10 gifts of \$100 - 10/03/2008       Action: Commit        Restore to Defaults         26       27         27       Print           39 - 2008 Phonathon       Print           Printer:       HP DeskJet 722C         Copigs:       1	Enter the module, category, and subcategory to filter the items to Module: Batch	that can be added to the queue.
Only show my batches	Select         Description           25 - 10 gifts of \$100 - 10/03/2008         26           27         27	Action: Commit  Restore to Defaults For the control reports use: Action: Print Print Printe: HP DeskJet 722C
Cancel Add to queue		ncel Add to queue

- 4. In the **Module** field, select "Batch" to commit a batch to the database.
- 5. In the **Category** field, select "Gift" to select your gift batch to commit to the database.
- 6. When batches exist on the Add Items to New Queue screen, the **Only show my batches** checkbox is enabled at the bottom of the screen. To display only batches that you saved, mark the **Only show my batches** checkbox.
- 7. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "2008 Phonathon".
- 8. Click **Open**. The Commit Gift Batch screen appears, and you can specify settings for the batch.

Commit Gift Batch			×		
1: General 2: Payments					
Step 1: Enter general Validate batch before c Create gift query of com	ommitting mitted gifts				
<ul> <li>Create a new batch of exceptions</li> <li>Create control report Summary          <ul> <li>Preview</li> <li>Print</li> </ul> </li> <li>Delete batch after committing</li> <li>Automatically apply gifts to pledges and recurring gifts</li> <li>Only apply gifts to pledges and recurring gifts with the same fund(s)</li> </ul>					
	Batch S	tatistics			
Running number of gifts:	31	Number of matching gifts:			
Running amount:	\$ 5,020.00	Matching gift amount:	\$210.00		
Created on:	08/03/2008 9:49:24 AM	Times committed:	0		
Last changed on:	Last changed on: 08/03/2008 11:09:46 Last committed on:				
Created by:	Supervisor				
< <u>B</u> ack <u>N</u> ext >	Cancel		Save and Close		

9. To create a query of all gifts you entered in this batch, mark the **Create gift query of committed gifts** checkbox. Later, when you add the queue item to the queue, the Queue screen appears. Options appear on the right side of the Queue screen where you can specify the name and description for the query. We strongly recommend that you mark this checkbox because you can later use this query to send a letter or other mailings to the constituents for whom you added gifts in this batch.

**Warning**: When you mark the **Create gift query of committed gifts** checkbox, the program includes only the gifts committed to the database. Any gifts not committed to the database due to exceptions are not included in the query.

- 10. To create a new batch containing all gifts not committed to the database, mark the **Create a new batch of exceptions** checkbox.
- 11. To create a control report after you commit the batch to the database, mark the **Create control report** checkbox. Mark this to select whether to create a Detail or Summary report in the adjacent field. For more information about a detail or summary control report, see "Control Report" on page 71.
- 12. To delete the batch file after committing the batch to the database, mark the **Delete batch after committing** checkbox. Even though the program deletes the batch file, the batch number is never reused. You may want to mark this checkbox to reduce the size of your database.

**Note**: Gifts can be automatically applied to a recurring gift if the recurring gift is active, the pay method is cash, and the next transaction does not have the status of pending. A recurring gift transaction has the status of pending when the previous transaction has not yet been committed.

13. To have the program automatically apply a gift to a pledge or recurring gift when a constituent has an outstanding pledge or recurring gift, mark the **Automatically apply gifts to pledges and recurring gifts** checkbox. For more information about automatically generating gifts in a batch, see the *Electronic Funds Transfer (EFT) Guide*.

When you mark this checkbox, the program determines whether each constituent who gave an eligible gift has any outstanding pledges or recurring gifts. If no outstanding pledges or recurring gifts exist for the constituent, the gift is committed to the database as you entered it. When a constituent has outstanding pledges or recurring gifts, the program applies the gift to the oldest outstanding pledge or recurring gift matching the fund listed in the batch. If you split the gift entered in the batch over several funds, the program selects the pledge or recurring gift with the same funds. When an exact match does not exist, the program selects a pledge or recurring gift with at least one common fund listed on the constituent's record. Each gift is automatically applied to only one pledge or recurring gift.

14. Click Next. The Payments tab appears.

Commit Gift Batch			×	
1: General 2: Payments				
Step 2: Indicate how to process payments         If a payment overpays a pledge:         ○ Create gift with remainder       ○ Create an exception (do not commit the payment)         If a payment is applied to a gift that is linked to a membership:         ☑ Apply the payment to the same membership				
	Batch S	itatistics		
Running number of gifts:	31	Number of matching gifts:	4	
Running amount:	\$ 5,020.00	Matching gift amount:	\$210.00	
Created on:	08/03/2008 9:49:24 AM	Times committed:	0	
Last changed on:	08/03/2008 11:09:46	Last committed on:		
Created by:	Supervisor			
< <u>B</u> ack <u>N</u> ext>	Cancel		Save and Close	

15. When you apply a gift to a pledge or recurring gift that is greater than the amount of the pledge or recurring gift transaction, select **Create gift with remainder** to have the program create a separate cash gift, or select **Create an exception (do not commit the payment)** to create an exception and not commit the gift.

**Note**: When working with recurring gift batches, the Recurring Batch tab appears on the Commit Gift Batch screen. You can specify the gift date, post date, and batch number on this tab. For more information about the Recurring Batch tab, see the *Batch Guide* and the *Gift Records Guide*.

16. When a payment is applied to a gift linked to a membership, to apply the payment to the membership, mark the **Apply the payment to the same membership** checkbox.

Filters Enter the modu	ule, category, and subcategory to filter the items	s that can be added to the queue.
<u>M</u> odule: C <u>a</u> tegory: Su <u>b</u> category:	Batch	
Select 25		Use these options for all selected items.         Action:       Commit         For the control reports use:         Action:       Prinit         Prinit:       HP DeskJet 722C         Copigs:       1
Only sho <u>w</u> m	-	ancel Add to queue

17. Click Save and Close. You return to the Add Items to New Queue screen.

18. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "2008 Phonathon" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

- 19. In the **Use these options for all selected items** frame, in the **Action** field, select "Commit" to commit the gift batch to the database.
- 20. Under For the control and exception reports use, in the Action field, select "Print".
- 21. In the **Printer** field, specify the printer to print the report.

Additional options appear on the right side of the screen depending on the action you choose. For example, you can select an export format, name, or a printer path.

22. To add the new queue item to the queue, click **Add to queue**.

23. Click OK. The New Queue screen appears.

	orites <u>T</u> ools <u>H</u> elp						<u>- 0 ×</u>		
C Save and Close 🗸 🔛 🚔 🖾 🗹 📍									
Queue Proces	ssing Miscellaneous								
🎦 Add Item	🔁 Open 🛛 🗙 Remov	45 - 2008 Phonathon							
Module	Category	Description		Batch		Exception Report 📃 📥			
Batch	Gift	45 - 2008 Phonathon	Action	Commit		Print			
			Data Format						
			Include Header						
			File Name				<u> </u>		
					Output Query				
			F		Gift				
			Query Name		45 - 2008 Phonathon1				
			Query Description		45 - 2008 Phonathon				
			Others May Execute?						
			Contrary March March 6.12						
 This queue will ru	n on demand								

**Note**: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear on the right of the New Queue screen. You can change the information on the right side of the screen such as the action and data format for the queue item.

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab. For more information, see "Processing Tab" on page 154.

24. Click Save. The Save Queue As screen appears.

🛂 Save Queue As 🛛 🛛 🗙						
Queue <u>n</u> ame:	Pledges for 2008 Phonathon					
<u>D</u> escription:	gift batch for 2008 pledges	4				
_	, s may <u>r</u> un this queue s may <u>m</u> odify this queue					
	Save Cancel					

25. In the Queue name field, enter "Pledges for 2008 Phonathon".

**Note**: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

- 26. In the Description box, enter "gift batch for 2008 pledges".
- 27. To allow users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 28. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 29. Click **Save**. You return to the New Queue screen.
- Click Save and Close on the toolbar to save and close the queue. You return to the Queue page.
   You can now run the queue. For more information about running a queue, see "Scheduling a Queue for Batch" on page 67.

### Scheduling a Queue for Batch

Note: From *The Raiser's Edge* shell, you can also run a queue by selecting **File**, **Schedule Selected Queue** from the menu bar. From the Queue screen, you can run a queue by clicking **Open** in the toolbar or by selecting **File**, **Schedule Queue** from the menu bar.

Once you create a queue, you can either select to save and run the queue immediately, or you can select another date and time to run the queue.

When the queue is recurring, you can schedule the queue to run at a set frequency.

For more information about scheduling recurring queues, see "Scheduling a Recurring Queue" on page 157.

To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues.

For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

#### Scheduling a queue

**Scenario:** You created the queue "Pledges for 2008 Phonathon", containing a gift batch of pledged gifts. Now, you are ready to commit this gift batch to the database by running the queue. Because the gifts are numerous, you need to set the queue to commit at the end of the business day. Before you run the queue, you must properly set up and save the queue. This scenario uses the queue created in "Creating a new queue" on page 61.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.

2. Click Queue. The Queue page appears.

∃le <u>E</u> dit ⊻iew <u>G</u> o F <u>a</u> v						
<ul> <li>Back          Forward Op     </li> </ul>	en in separate windo	w				
et Home	👍 Admi	inistration • Queue				_
Pecords	Administration	🖄 New Queue 🔄 Open 🗙 Delete	Schedule 🛱 Find.	Show Scheduled Queues Ins	tall Queue Service	
	System Statistics					
Querv	Import	Name		edule Frequency Next run date/t		
Export	Globally Add Records	2008 Building Fund Donations Address Import		demand	Supervisor Supervisor Supervisor	02/01/2005
Se Expon	Globally Change	Batch Processing		demand	Supervisor	
Reports	Records	Birthday labels for Volunteers-May		demand	Supervisor	
	Globally Delete Records	Class of 1992 Alumni Constituent Donors Greater Than \$500		demand demand	Supervisor Supervisor	
Mail	Globally Write Off	Custom Report 2008	On	demand	Supervisor	
~	Pledges	Inactive Constituents		demand	Supervisor	
Batch	Convert Pledges	Pledges for 2008 Phonathon		demand	Supervisor	
	To Recurring Gifts	Queue for Volunteer	2 items - Volunteer On	demand	Supervisor	
Mapping	Post to General Ledger	Supervisors Queue	Items - Event Mana On	demand	Supervisor	
Admin	Duplicate Constituents					
Config	Merge Constituents					
Scanning	Drop Lapsed Members					
PNetSolutions	Security					D
	Queue	Only show my queues				
Dashboard	Blackbaud Analytics	Recently Accessed Queues			Quick Find	
AuctionMaestro Pro Integration	Auction-Tracker Integration	Batch Processing				8
Data Health Center		Address Import Birthday labels for Volunteers-May				
Web Services		Queue				
		Allows you to set up a series of Task Scheduling Guide.	tasks to run automatically an	d unattended. For more informati	on about Queue, see the Que	eue for

- 3. In the grid, select "Pledges for 2008 Phonathon".
- 4. Click **Schedule** on the action bar at the top of the page.

Warning: For a queue to run successfully, the database must be running.

Once you select to run the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears informing you that the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

Cancel

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

•

Run Queue Now

Schedule Pledges	s for 2008 Phonathon	×
11 12 -	Enter the date and time to begin processing the or press 'Run Queue Now' to run the queue now	
18 19	Current date: 02/12/2008	Current time: 9:53:29 AM
7 28	Queue start date: 02/12/2008 📰	Queue start time: 6:30 PM 🐳
U	Run As: Supervisor	Run On:

Begin processing with: Pledges for 2008 Phonathon

If the validate process is successful, the Schedule screen appears.

Note: On the Run Queue screen, you can click Run Queue Now to run the queue now.

Schedule Queue

- 5. In the Queue start date field, enter today's date to run the queue tonight.
- 6. In the **Queue start time** field, enter "6:30 PM" to run the queue at 6:30 tonight.

- In the Run As field, select the user to run the queue. Security rights are considered based on the user's security settings. A scheduled queue can run only when the user selected in the Run As field is not logged into *The Raiser's Edge*.
- 8. In the **Run On** field, enter a specific computer on which to run the queue. This field is useful when you have more than one queue server.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

9. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item is processed first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field will not run. For this example, only one queue item exists in the queue.

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

10. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

# Queue Reports for Batch

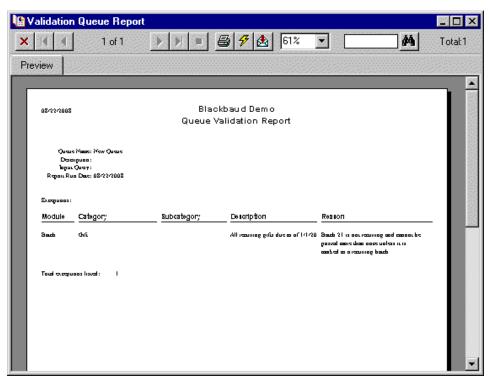
With the *Queue for Task Scheduling* module, several reports are available for *Batch* to help you track the different queues entered in your database, record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. A validation report, a queue profile, and a control report are available for the *Batch* module.

## Validation Report

You can validate a queue by selecting **Tools**, **Validate** from the menu bar of the Queue screen. The Queue Validation Complete screen appears, specifying how many items successfully validated or failed. You can view the validation report for items that failed to validate by clicking **Preview Report** on the Queue Validation Complete screen. A validation report appears only if errors are found during the queue validation process. When the validation report appears, you can view the queue name; description; input query; module; and category for each invalid item in the queue. The report also gives an explanation for the invalid queue item.

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For more information about validating a queue, see "Validating a Queue" on page 17.



## **Queue Profile**

You can select to preview a profile for the queue you are working with at any time. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

😫 Queue Profile	e							<u> </u>
<b>X</b>	1 of 1	<b>b b</b>	- 🖶 🗲	🛓 📜   100% 💌	M	Total:2 11	00% 2 of 2	
Preview			Cancel readin	g records				
- Queue Profile								
<b>!</b> ±⊡								
		6/10/2008			Blackba	ud Dem	D	
					Queue	Profile		
			Queue Name:	Recurring Gifts			Last run	
			Description: Created by:	Supervisor		Last ru	Last run n completed successfi	
			Created on:	6/10/2008				
			Input Query:					
		Module	Category		Subcategory		Description	
		Batch	Gift				28 - Recurring - 10 g:	ifts of \$100
					Output			
				Output:				
				Action:	Commit			
				Outnut	Exception Report			
				Action:	Print			
				Printer: Copies:	hp psc 2400 series			
				Copies.	1			
	1 1200							•

# **Control Report**

When you mark the **Create control report** checkbox on the Options screen in User Options, a control report appears after a queue finishes processing. Depending on your settings in User Options, the control report either exports, prints, or is sent as email. There are two types of control reports — Summary and Detail. When you mark the **Create control report** checkbox in User Options, you need to select which type of report to create. For more information about setting up user options, see "User Options" on page 8.

## Summary

The summary report includes the queue name, description, input query, start date and time, and end date and time for the queue. The summary report also lists the type of module, category, and description for each queue item entered in the queue. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

01/02/2008		Blackbau	d Demo			
011022000		Queue Cont		rt		
Description: Input query: Start date/time: End date/time: Elapsed time:	10:25:40 AM	/02/2008				
Category	Subcategory	Description	Start Time	End Time	Elapsed Time	Status
Gift		21 - All recurring gifts due as	10:25:40AM	10:26:44AM	00:01:04	Completed.

#### Detail

The detail report includes the queue name, description, input query, start date and time, and end date and time for the queue. The detail report also lists the type of module, category, description, and each option you selected for the queue. These options can include checkboxes you selected, which printer you specified for the queue output, or the names of people receiving the queue output as email. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

X     1 of 1     Image: Second	<b>^</b>
Preview	<b>^</b>
	<b>^</b>
10022000 Blackbaud Demo	
Queue Control Report	
Que no anno: Orisi fono apos fenore Description: 28 - Each for 2100/2008. 10 Ingra yany: Sharda shafina: 10/243.5 AM Engla shafina: 10/243.5 AM Engred man: 11/seconds	
Elapsed Category Subcategory Description Start Time End Time Time Status	
Giff 28-Earh.fs:10.02.2008.10 10:11:15AM 10:11.25AM 00:90:11 Comph.md.	
Output: Exch. Activa: Commit	
Output Exception.Report Action: Reint	
Printar: Waymat no WESDOC-8000 Copies: 1	
	-



# Export

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#### Procedures

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Warning: Word Integration appears only if Word 2000, Word 2003, or Word XP is installed on your computer.

With the *Queue for Task Scheduling* module, several modules are available for you to include when creating and running queues. With *Export*, you can export information in a variety of formats. Examples of available data formats include comma-separated values, *Excel*, Text, and HTML. You can also specify an export to have simple or conditional word merge data formats. On the New Queue screen for an export task, in the **Data Format** field, you can select "Blackbaud Simple Word Merge" or "Blackbaud Conditional Word Merge". When you specify a word merge format for exports, you can use a wizard on the parameter form for an export to set up and organize your word merge. The wizard takes you through the necessary steps to complete the merge set up. For more information about simple and conditional word merges in *The Raiser's Edge*, see *The Raiser's Edge & Microsoft Office Integration Guide*.

You can set up and run multiple exports in one queue. In addition, you can also run multiple modules in one queue. For example, you want to query the database for constituents who donated to your organization so far this year. You also want to export this list of constituents into an *Excel* spreadsheet for your records. Not only can you include both the *Query* module and the *Export* module in one queue, you can set the queue to run at any time that is convenient for you.

# Working with Queues for Export

**Warning:** The *Queue for Task Scheduling* module does not recognize saved exports that are associated with a VBA macro.

When working with queues for *Export*, several categories are available. A category is a breakdown within the *Export* module of the queue and helps to specify the type of task you are creating. The available categories for the *Export* module are Action, Appeal, Campaign, Constituent, Event, Fund, Gift, Individual Relationships, Job, Membership, and Participant. No subcategories exist within the *Export* module. For more information about the available categories for *Export*, see the *Query & Export Guide*.

Once you select the specific category for *Export*, select the appropriate checkboxes and options to include in the queue. Then, specify a date and time to run the queue.

For more information about running a queue, see "Scheduling a Queue for Export" on page 86.

# Creating a Queue for Export

With the *Queue for Task Scheduling* module, you can create a new queue, create a queue from an existing queue, or create a queue using a query as the input.

When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. For example, last week, you ran a queue exporting the names of all constituents that graduated from your organization in 1989 with a degree in History. This week, you want to export the names of constituents that graduated in 1990 with a degree in History. You can open the queue you ran last week, make any necessary changes, and save the queue under a new name. You can now use the settings from the previous queue to run your new queue.

For more information about saving a queue, see "Creating a New Queue from an Existing Queue" on page 30.

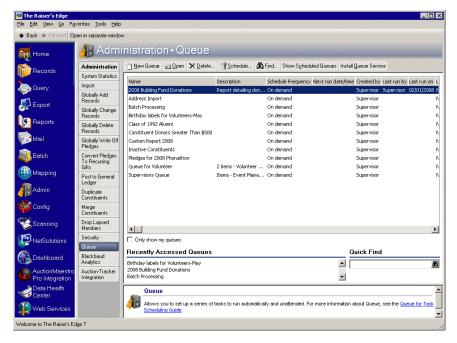
When you create a queue using a query as the input, you search for an existing query to use as the input query for the queue. For example, you created a query listing the board members of your organization. You want to create a queue to print the names of constituents who donated to your organization this year, and want to list only board members who contributed. You can create the queue, and select the Board Members query as the input query for a queue, the query you select takes precedence over any query on a parameter form.

From the **Queue** link of *Administration*, you can create new queues for *Export* or open existing queues to run unattended at designated times. To access the Queue page, click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Queue**. The Queue page appears. From the Queue page, you can create and work with queues for *Export*.

Creating a new queue

**Scenario:** You are currently organizing this year's Annual Campaign. You want to create a list of constituents who donated a one-time gift of over \$500 to your organization last year. You want to use this information for solicitation purposes. Set up a queue to export the first and last names of constituents who donated a one-time gift of more than \$500 to your organization last year. Name this queue "Constituent Donors Greater than \$500".

- 1. On the Raiser's Edge bar, click Admin. The Administration page appears.
- 2. Click Queue. The Queue page appears.



3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the Queue page, see "Accessing a Queue" on page 6.

Filters Enter the n <u>M</u> odu	Ins to New Queue	that can be added to the queue.
New Ite	m in Open is Select All in Description Address/Phone List Export CRYS6_7 DIRECTORY GDET_CONST Notepad Information PLGSTATEMENT	Use these options for all selected items.          Action:       Export       Eestore to Defaults         For the control and exception reports use:       Action:       Export         Action:       Export       Image: Control and exception reports use:         Data format:       Image: Control and exception reports use:       Image: Control and exception reports use:         Export       Image: Control and exception reports use:       Image: Control and exception reports use:         Image: Control and exception:       Image: Control and exception reports use:       Image: Control and exception reports use:         Image: Control and exception:       Image: Control and exception reports use:       Image: Control and exception reports use:         Image: Control and exception:       Image: Control and exception reports use:       Image: Control and exception reports use:         Image: Control and exception:       Image: Control and exception reports use:       Image: Control and exception reports use:         Image: Control and exception:       Image: Control and exception reports use:       Image: Control and exception reports use:         Image: Control and exception:       Image: Contreptin
	w my exports	nce Add to queue

- 4. In the **Module** field, select "Export" to export information.
- 5. In the **Category** field, select "Constituent" to export constituents who donated over a certain amount in gifts.

No subcategories exist within the *Export* module.

6. When exports exist on the Add Items to New Queue screen, the **Only show my exports** checkbox is enabled at the bottom of the screen. To display only exports that you saved, mark the **Only show my exports** checkbox.

7. To add a new task for the queue, click **New Item**. The New Constituent Export screen appears.

E New Constituent Export	
File Edit View Favorites Tools Help	
🧧 Save and Close 🔒 🗙 ≩ 💁 😭 📍	-
1:General 2:Output	,
Include All Records	
"Head of Household" Processing © Export only constituents marked "Head of Household" © Export first constituent found © Export both constituents separately	Include these Constituents Inactive constituents Deceased constituents Constituents with no valid address
	Export Now

**Note**: If you choose to include **All Records**, every constituent record in the database is included in the processing.

- 8. From the General tab, click Include.
- 9. Choose **Selected Records**. You only want to include records for those who gave more than \$500 to your organization. The Open Query screen appears.

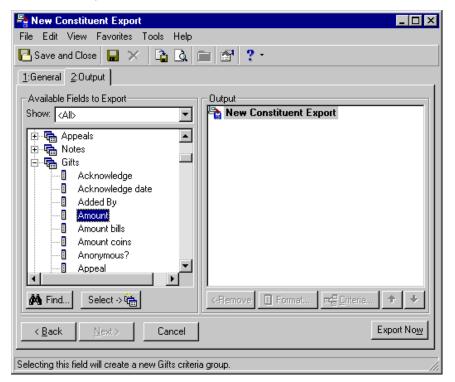
G Open Query			2
Fi <u>n</u> d: Queries	<u>-</u>		
Query Name	Query Description	Туре	🔄 <u>O</u> pen
Donors for 'This Month'	Donors who have given 'this month' sorted t	oy Date Constituent	Cancel
Donors More Than \$500		Constituent	
			الله الله الله الله الله الله الله ا
			Y Add New
			Options
		•	J
Find Queries that meet these <u>c</u> r	lteria:		
Query type: <	types>  Created On:		M Eind Now
Query format:	Created by:	<u> </u>	Ne <u>w</u> Search
Query name: Donors More	• Than \$500 💌		Q .
Description:			
Show merged queries only	Exact match only		Expand <u>R</u> esult

10. In the **Query name** field, enter "Donors More Than \$500". This is an existing query that lists the names of constituents who donated more than \$500 to your organization.

- 11. Click **Find Now**. The Donors More Than \$500 query appears in the grid. Click **Open** to select the query. You return to the New Constituent Export screen.
- 12. Select options in the **Head of Household Processing** frame according to the records to be exported. For this example, select **Export both constituents separately**.
- 13. In the **Include these Constituents** frame, mark the **Inactive constituents** and the **Constituents with no valid address** checkboxes to include these constituents. Unmark the **Deceased constituents** checkbox.
- 14. Mark the **Create control report** checkbox to keep a record of the information you export. Mark **Preview**. If exceptions are found, you can preview the control report on the screen. You can also select to print the report from the control report preview screen.

You can use control reports to double-check that information in a queue is correct, for reporting purposes, or for any other needs specific to your organization.

15. Select the Output tab.



- 16. In the **Show** field, select "<All>". You can select a specific group of fields or select "<All>" to see a complete list of Available Field categories.
- 17. To reveal criteria fields under each group, in the **Available Fields to Export** box, click the plus sign to the left of the group name. To reveal the **Amount** field, click the Gifts group.

18. Select the **Amount** field and click **Select**. The Gifts Criteria screen appears so you can select gift criteria for the records you export.

Gifts Criteria	×
1: General 2: Filters 3: Gift Types	
For each Constituent, enter the number of Gifts Include Gifts with these Dates Date to use: Gift date Date: Last calendar yr	
Include Gifts for these Amounts Start amount: \$500.00	Soft Credit Gitts To         O Donor         O Soft credit recipients         Use distribution on gift         O Both
<ul> <li>Order Gifts By Date</li> <li>Ascending</li> <li>Descending</li> </ul>	Credit Matching Gifts To O Donor O MG Company O Both
ОК	Cancel

19. On the General tab, in the **For each Constituent, enter the number of Gifts to export** field, enter "2". This is the number of gifts to export for each constituent.

When exporting in a flat file format such as Microsoft *Excel* or Microsoft *Word*, you must enter a number in this checkbox. You are specifying to the program how many columns to list for each item in the export. If you select an export format that is not flat, such as *Crystal Reports* or Microsoft *Access*, you do not need to mark this checkbox, because the items export as separate records.

- 20. In the **Include Gifts with these Dates** frame, in the **Date to use** field, select "Gift date" to export gifts based on the gift date.
- 21. In the **Include Gifts with these Dates** frame, in the **Date** field, select "Last calendar yr" to export gifts donated during the last calendar year.
- 22. In the **Include Gifts for these Amounts** frame, in the **Start amount** field, enter the amount \$500 to export individual gifts of over \$500 donated to your organization last year.
- 23. Mark the **Order Gifts by Date** checkbox and mark the **Ascending** option to have the gifts appear in ascending order.

24. Select the Filters tab.

ifts Criteria		2
<u>1</u> : General <u>2</u> : Filte	ers <u>3</u> : Gift Types	
By using the	grid below, the gifts ma	y be filtered on the items shown in the Selected Filters column.
Filters	Include	Selected Filters
Campaigns	All	<all campaigns=""></all>
Funds	All	<all funds=""></all>
Appeals	All	<all appeals=""></all>
Query	All	<all criteria="" gifts="" meet="" that=""></all>
		OK Cancel

- 25. You can include or exclude records by selecting the filters to include in the **Campaigns**, **Funds**, **Appeals**, and **Query** fields. For this example, you do not need to select anything on the Filters tab to include all campaigns, funds, appeals, and queries.
- 26. Select the Gift Types tab.

Gifts Criteria	×
1: General 2: Filters 3: Gift Types	
Gift Types: All Cash All Pledge All Stock All Gifts In Kind All Write Offs Write Off MG Write Off All Other	Include these Gift Types: Cash Pay-Cash MG Pay-Cash Pledge MG Pledge Stock/Property Stock/Property V
Exclude zero amount gifts     Use sale date for sold stock/property     Use sale amount for sold stock/property     Subtract broker fee from sold stock/propert,     Use gift balance instead of gift amount     Calculate gift balance based on date range	-
ОК	Cancel

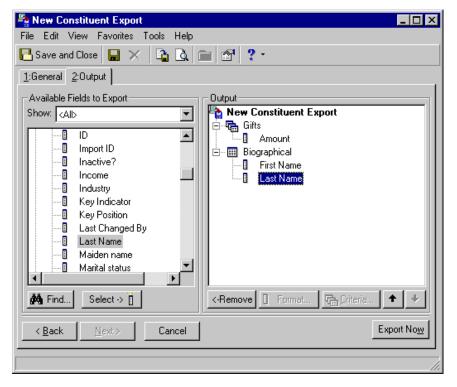
27. In the **Gift Types** box, you can select gift types to include when exporting. For this example, you do not need to mark anything. All gift types default into the **Include these Gift types** box, except the gift types Write Off and MG Write Off.

On the Gift Types tab, you can also select to exclude zero amount gifts, and base gift balances based on campaigns, funds, or appeals. For this example, you do not need to select anything.

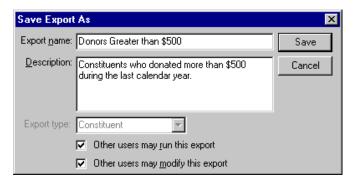
28. Click OK. You return to the New Constituent Export screen. The Amount field appears in the Output box.

Rew Constituent Export	
File Edit View Favorites Tools Help	
🔁 Save and Close  🔛 🔀 🔯	i
1:General 2:Output	
Available Fields to Export	Output
Show: <all></all>	New Constituent Export
	⊟- <b>F</b> a Gifts I [] Amount
A Find Select -> 🚫	<-Remove Format
< <u>B</u> ack <u>N</u> ext> Cancel	Export No <u>w</u>

- 29. In the **Available Fields to Export** box, to reveal the **First Name** and Last Name fields, click the Biographical group.
- 30. Select the First Name field and click Select. Select the Last Name field and click Select. The selected fields appear in the Output box. The first and last names of the constituents will appear next to each gift when the export is complete.



31. Click Save. The Save Export As screen appears.



- 32. In the Export name field, enter "Donors Greater than \$500".
- 33. In the Description box, enter "Constituents who donated more than \$500 during the last calendar year."
- 34. To allow other users to run the export, mark the Other users may run this export checkbox.
- 35. To allow other users to modify the export, mark the **Other users may modify this export** checkbox.
- 36. To close the Save Export As screen, click **Save**. You return to the New Constituent Export screen.
- 37. Click the "X" at the top corner of the New Constituent Export screen. You return to the Add Items to New Queue screen.

划 Add Items to New Queue	×
Filters	
Enter the module, category, and subcategory to filter the items	that can be added to the queue.
Module: Export	
Category: Constituent	
Su <u>b</u> category:	
🎦 New Item 🍙 Open 🛛 🖳 Select All 🛛 🛣 Deselect All	Use these options for all selected items.
Select         Description           Address/Phone List Export         CRY56_7           DIRECTORY         Donors Greater than \$500           GDET_CONST         Notepad Information           PLGSTATEMENT         PLGSTATEMENT	Action: Export Eestore to Defaults For the control and exception reports use: Action: Export Data format: Excel 7.0 (XLS) Export path: D:\Files Include greater
Only show my exports	ncel Add to queue
Total number of items in the queue: 0	

 On the Add Items to New Queue screen, in the Select column, mark the checkbox next to "Donors Greater than \$500" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

- In the Use these options for all selected items frame, in the Action field, select "Export" to export the list
  of donors.
- 40. Under For the control and exception reports use, in the Action field, select "Export".

Additional options appear on the right side of the screen depending on the action you choose. For example, you can select an export format, name, or a printer path.

**Note**: You can set up defaults for the **Format** and **Destination** fields in User Options. For more information about setting up queue user options, see "User Options" on page 8.

- 41. In the **Data format** field, select "Excel 7.0 (XLS)" to export the information into an *Excel* spreadsheet.
- 42. In the **Export path** field, select the file location to store the exported information. You can either type in a path name or click the ellipsis to the right of the field to browse for a file location.
- 43. To add the new queue item to the queue, click **Add to queue**.
- 44. Click **OK**. The New Queue screen appears.

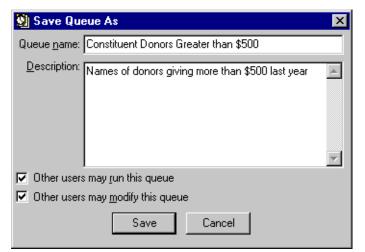
😟 New Queue							
<u>File E</u> dit F <u>a</u> vorites <u>T</u> ools <u>H</u> elp							
🔁 Save and Close 🗸 🔛 🚔 🛃 🥵 🐼 📍							
Queue Processing Miscellaneous							
참 Add Item 巀 Open 🗙 Remove 🛧 Up 🜩 Down	Donors Greate	r Than \$500					
Module Category Description		Export	Control Report 🔺				
Export Constituent Donors Greater Tha	Action	Export	Export				
	Data Format	Excel 5-7 (XLS)					
	Include Header						
	File Name	Donors Greater Than \$500.XLS					
		,					
			<b>^</b>				
	Query Type						
	Query Name						
	Query Description						
	Others May Exec						
	Others May Modi	fv?					
<u> </u>							
This queue will run on demand.							

**Note**: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the right side of the screen such as the action and data format for the queue item.

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab. For more information, see "Processing Tab" on page 154.

45. Click Save. The Save Queue As screen appears.



- 46. In the Queue name field, enter "Constituent Donors Greater than \$500".
- 47. In the **Description** box, enter "Names of donors giving more than \$500 last year".
- 48. To allow users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 49. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.

**Note**: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

- 50. Click Save. You return to the New Queue screen.
- 51. Click **Save and Close** on the toolbar to save and close the queue. You return to the Queue page.
  - You can now run the queue. For more information about running a queue, see "Scheduling a Queue for Export" on page 86.

## Scheduling a Queue for Export

Once you create a queue, you can either select to save and run the queue immediately, or you can select another date and time to run the queue.

When the queue is recurring, you can schedule the queue to run at a set frequency. For more information about scheduling recurring queues, see "Scheduling a Recurring Queue" on page 157.

To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues.

For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

**Note**: From *The Raiser's Edge* shell, you can also run a queue by selecting **File**, **Schedule Selected Queue** from the menu bar. From the Queue screen, you can run a queue by clicking **Open** in the toolbar or by selecting **File**, **Schedule Queue** from the menu bar.

Scheduling a queue

**Scenario:** You created the queue "Constituent Donors Greater than \$500" to export names of constituents who donated more than \$500 to your organization last year. You want to set this queue to run at 10:00 tonight after all your employees have left for the day. Before you run the queue, you must properly set up and save the queue. This scenario uses the queue set up in "Creating a new queue" on page 77.

- 1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
- 2. Click Queue. The Queue page appears.

Back I Forward Op	and the second sec	* inistration • Queue				
Records	Administration System Statistics	New Queue Deen X Delete.	. 🧊 Schedule 🛱			
Query	Import	Name	Description	Schedule Frequency Next run date/t		
Export	Globally Add Records	2008 Building Fund Donations Address Import	Report detailing don	On demand	Supervisor Supervisor 02 Supervisor	/01/200
	Globally Change Records	Batch Processing Birthday labels for Volunteers-May		On demand On demand	Supervisor Supervisor	
Neports	Globally Delete Records	Class of 1992 Alumni Constituent Donors Greater Than \$500		On demand On demand	Supervisor Supervisor	
Mail	Globally Write Off Pledges	Custom Report 2008 Inactive Constituents		On demand On demand	Supervisor Supervisor	
Batch	Convert Pledges To Recurring Gifts	Pledges for 2008 Phonathon Oueue for Volunteer	2 items - Volunteer	On demand	Supervisor Supervisor	
Mapping	Post to General Ledger	Supervisors Queue	Items - Event Mana		Supervisor	
Admin	Duplicate					
Config	Merge Constituents					
Scanning	Drop Lapsed Members					•
NetSolutions	Security Queue	Only show my queues				_
Dashboard	Blackbaud Analytics	Recently Accessed Queues Constituent Donors Greater Than \$500			Quick Find	
AuctionMaestro Pro Integration	Auction-Tracker Integration	Eatch Processing Address Import		▲   ▼		<u>a</u>
Data Health Center		Allows you to set up a series of				_

- 3. In the grid, select "Constituent Donors Greater than \$500".
- 4. Click **Schedule** on the action bar at the top of the page.

Warning: For a queue to run successfully, the database must be running.

Once you select to run the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears informing you that the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

If the validate process is successful, the Schedule screen appears.

🕺 Schedule Constit	uent Donors Greater Than \$500	X
11 12	Enter the date and time to begin processing the queue and press 'Schedule Queue' or press 'Run Queue Now' to run the queue now.	
18 4	Current date: 02/12/2008 Current time: 10:20:56 AM	
7 6 7	Queue start date: 02/12/2008 📰 Queue start time: 10:00 PM 🗧	
U	Run As: Supervisor 💌 Run On:	
-9	Begin processing with: Donors Greater than \$500	•
	Schedule Queue Cancel Run Queue N	ow

**Note:** On the Schedule screen, you can click **Run Queue Now** to run the queue now.

- 5. In the Queue start date field, enter today's date to run the queue tonight.
- 6. In the **Queue start time** field, enter "10:00 PM" to run the queue at 10:00 p.m.
- In the Run As field, select the user to run the queue. Security rights are considered based on the user's security settings. A scheduled queue can run only when the user selected in the Run As field is not logged into *The Raiser's Edge*.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

- 8. In the **Run On** field, enter a specific computer on which to run the queue. This field is useful when you have more than one queue server.
- 9. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item to process first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field will not run. For this example, only one queue item exists in the queue.

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

10. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

# Queue Reports for Export

With the *Queue for Task Scheduling* module, several reports are available for *Export* to help you track the different queues entered in your database, record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. A validation report, a queue profile, and a control report are available for the *Export* module.

## Validation Report

You can validate a queue by selecting **Tools**, **Validate** from the menu bar of the Queue screen. The Queue Validation Complete screen appears, specifying how many items successfully validated or failed. You can view the validation report for items that failed to validate by clicking **Preview Report** on the Queue Validation Complete screen. A validation report appears only if errors are found during the queue validation process. When the validation report appears, you can view the queue name, description, input query, module, and category for each invalid item in the queue. The report also gives an explanation for the invalid queue item.

1/02/2008		kbaud Demo Validation Report	
Queue Name: New Oueue Description: Input Query: Report Run Date: 01/02/2008 Exceptions:			
Module <u>Category</u>	Subcategory	Description	Reason
Export Constituent		DIRECTORY	Required field missing: Export format
Export Constituent		DIRECTORY	Required field missing: Export filename
xport Constituent		DIRECTORY	Required Field Missing: File format
			Problem. The error is from the Export module. The export format you selected in Queue to run the seved Export file requires more fields. To fix the problem, change the export format in the saved Export file on appropriate export format you selected in queue.

For more information about validating a queue, see "Validating a Queue" on page 17.

# Queue Profile

You can select to preview a profile for the queue you are working with at any time. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

ue Profile Export, Don					
	01/02/2008		Blackbau Queue I		Page 1
	Descript Created	ame: Constituent Donors Greater tha tion: Names of donors giving more th low: Supervisor Lon: 01.02/2008 ery:	an \$500 last yea:	Last run by: Supervisor Last run on: 01,02/2008 n completed successfully: Yes	
	Module	Category	Subcategory	Description	
	Export	Constituent		Donors Greater than \$500	
		Export As:	Export Blackbaud Report Writer Da D:Files\exports\Constituent	tabase (MDB) Donors Greater than \$500 XLS	
		Action: Export As:	Control Report Export Excel 3.0 (XLS) D:\Files\exports\Donors Gree No	ater than \$300 XLS	

# **Control Report**

When you mark the **Create control report** checkbox on the Options screen in User Options, a control report appears after a queue finishes processing. Depending on your settings in User Options, the control report either exports, prints, or is sent as email. There are two types of control reports — Summary and Detail. When you mark the **Create control report** checkbox in User Options, you need to select which type of report to create. For more information about setting up user options, see "User Options" on page 8.

### Summary

The summary report includes the queue name, description, input query, start date and time, and end date and time for the queue. The summary report also lists the type of module, category, and description for each queue item entered in the queue. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

01/02/2008	Blackbau Queue Cont		rt		
Queue name: Address/Phone L Description: Input query: Stat date/time: 10/47:37 AM End date/time: 10/47:37 AM Elapsed time: 10 seconds Status: All completed.	ist			Elapsed	
Category Subcateg	ory Description	Start Time	End Time	Time	Status
Constituent Export	Address/Phone List Export	10:47:37AM	10:47:47AM	00:00:10	Completed

## Detail

The detail report includes the queue name, description, input query, start date and time, and end date and time for the queue. The detail report also lists the type of module, category, description, and each option you selected for the queue. These options can include checkboxes you selected, which printer you specified for the queue output, or the names of people receiving the queue output as email. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

01/02/2008		Blackbau	d Domo			
J2/2008		Queue Cont		t		
	nstituent Donors Greater th mes of donors giving more t					
Input query:		nan 5000 iast yea.				
Start date/time: 2:1 End date/time: 2:1						
Elapsed time: 48 Status: All						
Jidius, All					Elapsed	
tegory	Subcategory	Description	Start Time	End Time	Time	Status
istituent		Donors Greater than \$500	2:15:17PM	2:16:05PM	00:00:48	Completed.
	Output:					
		Export Blackbaud Report Writer Da	(MDB)			
		D:\Files\exports\Constituent		than \$500.XLS		
		Control Report				
	Action:	Export Excel 3.0 (XLS)				
		D: Files/exports/Donors Gre	ater than \$500.X	LS		



# Mail

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#### Procedures

Creating a new queue	 	
Scheduling a queue	 	

Warning: Word Integration appears only if Word 2000, Word 2003, or Word XP is installed on your computer.

With the *Queue for Task Scheduling* module, several modules are available for you to include when creating and running queues. With *Mail*, you can print, export, send information included in a mailing as email, and create simple and conditional word merges. When you create simple and conditional word merges, you can use a wizard on the mail parameter form to help you set up and organize the word merge to create. With simple and conditional word merges, the **Word Processing Documents/Letters** field on the File Locations tab in User Options is used as the default path. On the New Queue screen, the **Document name** and **Folder** fields are enabled. You can fill in these fields to specify the name and location of your word merge file that you are creating. In addition, the Word Merge action option appears on the Add Items to New Queue form for certain mail tasks. When you select "Word Merge" in the **Action** field, you are specifying that you want to create a word merge for the mail task with which you are working. You must use the word merges are donor acknowledgement letters, follow-up letters, and quick letters. For detailed information about setting up simple and conditional word merges, see *The Raiser's Edge & Microsoft Office Integration Guide*.

You can set up and run multiple mailing options in one queue. In addition, you can also run multiple modules in one queue. For example, you want to query the database for events with other donations. You also want to print address labels for your mailing this quarter. Not only can you include both the *Query* module and the *Mail* module in one queue, you can set the queue to run any time that is convenient for you.

# Working with Queues for Mail

When working with queues for *Mail*, several categories are available. A category is a breakdown within the *Mail* module of the queue and helps to specify the type of task you are creating. The available categories for the *Mail* module are Appeal Cards; Cards; Donor Acknowledgement Letters; Envelopes; Follow-up Letters; Honor/Memorial Acknowledgement Letters; Label Truncation Report; Labels; Membership Card Truncation Report; Membership Cards; Name Tags; Phonathon Forms; Place Cards; Quick Letters; Receipt Report; Receipts; Reminder Report; Reminders; Renewal Notices; and Volunteer Follow-up Letters. Once you select a category for *Mail*, you can further specify the category by selecting a subcategory. A subcategory specifies a breakdown within the category of a task. Subcategories help provide the specific information needed to successfully run the task. For more information about the available categories and subcategories for *Mail*, see the *Mail Guide*.

Once you select the specific category and subcategory for *Mail*, you can select the appropriate checkboxes and options to include in the queue. You can then specify a date and time to run the queue.

For more information about running a queue, see "Scheduling a Queue for Mail" on page 106.

## Creating a Queue for Mail

With the *Queue for Task Scheduling* module, you can create a new queue, create a queue from an existing queue, or create a queue using a query as the input.

When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. For example, you ran a queue last month printing name tags for volunteers attending your organization's Annual Ball. This month, you want to print name tags for volunteers helping with your Annual Food Drive. You can open the queue you ran last month, change any parameters, and save the queue under a new name. You can now use the settings from the previous queue to run your new queue.

For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

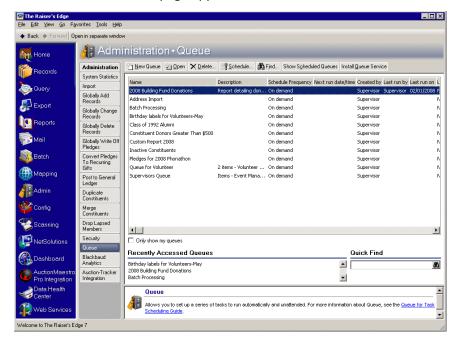
When you create a queue using a query as the input, you search for an existing query to use as the input query for the queue. For example, you created a query listing donors who gave less than \$50 to your organization in April. You want to create a queue to print cards listing donors who gave to your organization in April, and want to include only donors who contributed \$50 or less. You can create the queue, and select the donor list query as the input query. Whenever you include an input query for a queue, the query you select takes precedence over any query on a parameter form.

From the **Queue** link of *Administration*, you can create new queues for *Mail* or open existing queues to run unattended at designated times. To access the Queue page, click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Queue**. The Queue page appears. From the Queue page, you can create and work with queues for *Mail*.

Creating a new queue

**Scenario:** Once a month, you send birthday cards to the hardworking volunteers who donate their time and energy to your organization. Because you will be printing many labels, you need to set the queue to run at night after all your volunteers have left for the day. Set up a new queue and designate the queue to print address labels for all volunteers in your database who have a birthday in the month of May.

- 1. On the Raiser's Edge bar, click Admin. The Administration page appears.
- 2. Click **Queue**. The Queue page appears.



3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the Queue page, see "Accessing a Queue" on page 6.

🥸 Add Items to New Queue	×
Filters Enter the module, category, and subcategory to filter the items Module: Mail Cgtegory: Labels Subcategory:	that can be added to the queue.
New Item a Open Select All Description Basic Mailing Labels for Birthday Card	Use these options for all selected items. Action: Print Bestore to Defaults Printer: HP DeskJet 720C Copies: 1
Only show my mailings     OK Ca     Total number of items in the queue: 0	ncel Add to queue

- 4. In the **Module** field, select "Mail" because you are working with a mailing task.
- 5. In the **Category** field, select "Labels" because you are going to print labels.
- 6. When mailings exist on the Add Items to New Queue screen, the **Only show my mailings** checkbox is enabled at the bottom of the screen. To display only mailings that you saved, mark the **Only show my mailings** checkbox.
- 7. Click New Item to add a new mail task. The New Labels screen appears.

ew Labels						
le Edit Favo	rites Help					
1 4 5 6	à 📪 😑 🗧					
<u>7</u> : <u>1</u> : General	Segment   2: Fields to Include	<u>8</u> : Po <u>3</u> : Filters	ostal <u>4</u> : Attributes	   <u>5</u> : Ind	<u>9</u> : Format I. Address <u>6</u> : Or	g. Address
Create for: 💿	Constituents 🔿 Rela	ationships	C Honor	/Memorials	C Participan	ts
Include	folunteer Birthdays in Ma	ay				
Form type:	Туре	Size	Across	Down	Descriptio	m
	Avery® 5161	1 x 4	2	10	Laser Address	
Form font: Ti	mes New Roman 💌	Start	printing in Ro Colur			
C Mail only to C Mail to first	ehold Processing constituents marked 'Head o constituent found constituents separately	f Household'	Decea:	e constituer sed constitu	nts	
🔽 Create outp	ut query					
< <u>B</u> ack	Next > Cancel			<u>P</u> rin	t Previe <u>w</u>	<u>L</u> ayout

- 8. On the General tab, in the **Create for** field, select **Constituents** to print labels for constituents in your database.
- 9. Click **Include** and choose **Selected Records** to print labels for volunteers in your database who have a birthday in May. The Open Query screen appears.

Open Query			
d: Queries 💌			
			🚔 Open
			Cancel
			<u>ک</u> <u>E</u> dit
			* Add Nev
			Op <u>t</u> ions
d Queries that meet these <u>c</u> riteria:			
Query type: <all relevant="" types=""></all>	Created On:		💏 Eind Nov
Query format:	Created by:	•	Ne <u>w</u> Sean
Query name: Volunteers with Birthdays	•		Q
Description:			•
Show merged queries only	Exact match only		Expand <u>R</u> es

- 10. In the **Query name** field, enter "Volunteers with Birthdays in May". This is an existing query that lists the names of volunteers in your database with a May birthday.
- 11. Click **Find Now**. The Volunteers with Birthdays in May query appears in the grid. Click **Open** to select the Volunteers query. You return to the New Labels screen.
- 12. In the **Form type** field, select the label type you are using. In the **Form font** and **Font size** fields, select the formatting for the text on the labels. For more information about mail tasks, see the *Mail Guide*.
- 13. Select options in the **Head of Household Processing** and **Include these Constituents** frames according to the records that should receive labels.
- 14. To create a static query of the records for which you print labels, mark the **Create output query** checkbox.

Later, when you add the queue item to the queue, the Queue screen appears. Options appear on the right side of the Queue screen where you can specify the name and description for the query.

Note: Use labels large enough to fit all information you choose on the Fields to Include tab.

15. Click Next. The Fields to Include tab appears.

lew Labels		
ile Edit Favorites Help		
🔒 🗟 🖨 🗳 🚔 💼 📍 🛀		
<u>7</u> : Segment <u>1</u> : General <u>2</u> : Fields to Include	8: Postal         9: Form           3: Filters         4: Attributes         5: Ind. Address         6	at Org. Address
Select optional fields you wish to print b	by moving them to the right-hand box.	
Available Fields:	Fields to Print:	
Address Fields	Constituent Information.Addressee	Options
Address Barcode  Address Barcode  CART  Country  Contry  Phone number  Constituent Information  Additional Addressee  Bith date  Class of	Address Fields.Address Block	1
The address to print is defined on the In	ndividual/Organization Address tabs. If a phone number is	4
chosen the selected phone type for that	at address will be printed.	
< <u>B</u> ack <u>N</u> ext > Cancel	Print Preview	Layout

**Note**: To see if a field has options available, select the field. If the **Options** button is disabled, the field does not have options. If the **Options** button is enabled, click it to access and select the available options for the particular field.

- 16. In the **Available Fields** box, select **Addressee** and click the single right arrow to move the **Addressee** field into the **Fields to Print** box to print the name of the constituent on the label.
- 17. In the **Available Fields** box, select **Address Block** and click the single right arrow to move the **Address Block** field into the **Fields to Print** box to print the constituent's address on the label.

**Note**: You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **ALT + 3** on your keyboard to select the Filters tab.

18. Click **Next**. The Filters tab appears.

	ľ			1 0	<b>-</b> .
<u>7</u> : Segment 1: General 2: Fiel	and a second second second second	3: Filters	: Postal 4: Attributes	<u>9</u> : 5: Ind. Address	Format 6: Org. Address
By using the grid t	below, this mailing m	nay be filtere	d on the items sho	wn in the Selected Filt	ers column.
Filters	Filter Option	ו ו		Selected Filters	
ates Last Changed	Include All	< <mark>All D</mark> a	ates Last Changed	>	
olicit Codes	Include All	<all so<="" th=""><th>olicit Codes&gt;</th><th></th><th></th></all>	olicit Codes>		

- 19. On the Filters tab, you can select the filters to use to choose records for which to print labels. For this example, you do not need to select any filters because you want to search the database for all volunteer records. For more information about selecting filters for labels, see the *Mail Guide*.
- 20. Click Next. The Attributes tab appears.

[:General ] □ Include or	Segment <u>2</u> : Fields to Ir Exclude Record	holude   <u>3</u> : F ds With these Att	<u>8</u> : Postal Filters <u>4</u> : Attrib rributes	utes <u>5</u> : In	<u>9</u> : F d. Address	Format <u>6</u> : Org. Addre
Filter	Record Typ	Catego	pry Desc	ription		Short Desc
🗖 Add. Upda	ite or Delete the	se Attributes for	each Record			
Action	Туре	Category	Description	Short	Date	Comment
and the second se						
<u>.</u>						

21. On the Attributes tab, enter any attributes to filter the records for which labels print. Also, enter any attributes to add, update, or delete on the records for which labels print. For this example, leave the Attributes tab blank.

22. Click Next. The Ind. Address tab appears.

lew Labels	×
File Edit Favorites Help	
🖬 🖪 🖨 📬 📪 <b>?</b> -	
7: Segment         8: F           1: General         2: Fields to Include         3: Filters	Postal <u>9</u> : Format <u>4</u> : Attributes <u>5</u> : Ind. Address <u>8</u> : Org. Address
Complete the steps below to determine which address wi	ill print. Click here to learn about address processing.
Consider addresses with seasonal dates as of Step 2: Specify, in the order of importance, the addresses Addresses: First address found Primary business Spouse primary business	
Step 3: You may check for special requirements by first co Address Attributes   <no address="" attributes="" spe<="" td=""><th></th></no>	
Step 4: Specify what happens if no address is found: Prin	nt with no address
· · · · · ·	
< <u>B</u> ack <u>N</u> ext> Cancel	Print Previe <u>w</u> Layout

**Note:** *The Raiser's Edge* only checks the address types listed in the **Address to Use** box. If the program should check all address types during address processing, move all available address types from the **Addresses box** to the **Addresses to use** box.

23. On the Ind. Address tab, use the steps outlined on the tab to select an address type for each individual constituent for whom you are printing a label. For more information about the Ind. Address tab for mailings, see the *Mail Guide*.

24. Click **Next**. The Org. Address tab appears.

w Labels		
e Edit Favorites Help		
l 🗟 🖨 🔓 🚍 📒 ? · 👘		
<u>7</u> : Segment     1       1: General <u>2</u> : Fields to Include	<u>8</u> : Postal <u>3</u> : Filters <u>4</u> : Attributes	9: Format           5: Ind. Address
Complete the steps below to determine t	which address will print. <u>Click here</u>	to learn about address processing.
<ul> <li>tep 1: Indicate if this mailing should go to</li> <li>Mail to contacts</li> <li>Mail</li> </ul>	o the contacts for the organization o il only to the organization	or to the organization itself.
Step 2: Specify the contact types to cons		itact types or address attributes.
Contact Information	<all contact="" types=""></all>	
Contact Address Attributes	<no address="" attributes="" contact="" sp<="" td=""><td>ecified&gt;</td></no>	ecified>
	act is found: Print the Organization r	

25. On the Org. Address tab, use the steps outlined on the tab to select the contact for whom you are printing a label. For more information about the Org. Address tab for mailings, see the *Mail Guide*.

**Note**: The Postal tab is available if you use the optional module *Postal Discounts*. For more information about *Postal Discounts* see the *Mail Guide*. If you are using *Postal Discounts* for Postal Discounting, and the label type you choose on the General tab cannot fit an address barcode and endorsement line, the Postal tab is disabled.

26. Select the Format tab. The Format tab appears. The right side of the screen changes as you highlight selections in the list on the left.

<u>1</u> :General <u>2</u> :Fields <u>7</u> :Segment	to Include <u>3</u> : Filters <u>4</u> : Attributes <u>8</u> : Postal	5: Ind. Address <u>6</u> : Org. Addres <u>9</u> : Format
Dutput options Sort Truncation reports	<ul> <li>Omit punctuation from mailing</li> <li>Print address in ALL CAPS</li> <li>Skip 1 lines before printing the firs</li> <li>Include 1 spaces before each line</li> <li>Include total number of labels</li> </ul>	

27. From the list, select **Output options** to enter formatting preferences for the information printing on the labels. For example, you can omit punctuation from the mailing or print the addresses on your labels in all capital letters.

**Note:** Sort is available in the list on the Format tab only if you do not sort the mailing by running postal discounts on the Postal tab.

28. From the list, select **Sort** to choose a specific order to print the labels.

Ne <del>w</del> Labels			×
File Edit Favorites Help			
🖬 🗟 🖨 🔓 🖼 ? *			
1: General 2: Fields to Include 3: Filters	4: Attributes	<u>5</u> : Ind. Address	<u>6</u> : Org. Address
<u>7</u> : Segment	<u>8</u> : Postal	<u>9</u> :	Format
Output options     Sort     Truncation reports	Select the fields by w fields, you can sort w the order by which to	ithin groups. You ca	
Do not sort mailing			
Sort by the following	g fields		
Available Fields		Sort Fields	
Alphabetical ZIP Code	> <		
		Asc Desc	÷ +
< <u>B</u> ack <u>M</u> ext > Cancel	[	Print Prev	rie <u>w L</u> ayout

29. From the list, select **Truncation reports** to choose settings for printing a truncation report.

You can print truncation reports to determine the records whose information does not fit on the label as you designed it to print. The report displays truncation information on a variety of different font sizes so you can determine the options best for the mailing. For more information about truncation reports, see the *Mail Guide*.

New Labels	×
File Edit Favorites Help	
🖬 🗟 🖨 🗳 🚍	? -
<u>1</u> : General <u>2</u> : Fields to <u>7</u> : Segment	Include <u>3</u> ; Filters <u>4</u> ; Attributes <u>5</u> ; Ind. Address <u>6</u> ; Org. Address <u>8</u> ; Postal <u>9</u> ; Format
Output options Sort Truncation reports	<ul> <li>Print Truncation Reports before label run</li> <li>Check for horizontal truncations</li> <li>Check for vertical truncations</li> <li>If truncations are found using font Times New Roman at size 10</li> <li>Create exception query</li> <li>Exclude record from this label run</li> </ul>
< Back Next >	Cancel

30. Click Save on the toolbar. The Save Mailing As screen appears.

Save Mailing	As	×
Mailing <u>n</u> ame:	Birthday labels for volunteers (May)	Save
<u>D</u> escription:	Labels for volunteer birthday cards with a birthday in May	Cancel
	<ul> <li>Other users may run this Mailing</li> <li>Other users may modify this Mailing</li> </ul>	

- 31. In the Mailing name field, enter "Birthday labels for volunteers (May)".
- 32. In the Description box, enter "Labels for volunteer birthday cards with a birthday in May".
- 33. To allow users other than you to run the mailing, mark the Other users may run this Mailing checkbox.
- 34. To allow users other than you to modify the mailing, mark the **Other users may modify this Mailing** checkbox
- 35. To save the new queue item and close the Save Mailing As screen, click **Save**. You return to the New Labels screen.

36. Click the "X" at the top corner of the New Labels screen. You return to the Add Item to New Queue screen.

🔇 Add Items to New Queue	×
Enter the module, category, and subcategory to filter the items	that can be added to the queue.
Module: Mail	
Category: Labels	
Subcategory:	
New Item 🔄 Open 💷 Select All 🔏 Deselect All	Use these options for all selected items.
Select Description	Action: Print  Restore to Defaults
Basic Mailing Labels for Birthday Card	
Birthday labels for volunteers (May)	Printer: HP DeskJet 720C
	Copi <u>e</u> s: 1
Conly show my mailings	
OKCa	ncelAdd to queue
Total number of items in the queue: 0	

37. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "Birthday labels for volunteers (May)" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

**Note**: If you select "Send as Mail" in the **Action** field, additional fields such as **Mail to** and **cc** appear for you to specify the recipients of the email. With your cursor in these fields, you can press **F7** on your keyboard for your email address book.

38. In the **Use these options for all selected items** frame, in the **Action** field, select "Print" to print the labels for the volunteers.

Additional options appear on the right side of the screen depending on the action you choose. For example, you can select an export format, name, or a printer path.

- 39. In the **Printer** field, specify the printer to print the labels.
- 40. To add the new queue item to the queue, click **Add to queue**.

**Note**: When creating eReceipts, you can specify to mark a gift as receipted and/or acknowledged. These options appear on the right side of the Queue screen. To work with eReceipts and recurring queues, the user account must have access to the email server. For more information about eReceipts, see the eReceipts chapter of the *Mail Guide*.

41. Click **OK**. The New Queue screen appears.

ueue Proce	essing ( <u>M</u> iscellaneous)			
Add Item	🔄 Open 🗙 Remo	ve 🛧 Up 🐥 Down	Birthday labels for volu	nteers (May)
Module	Category	Description		Labels
Mail	Labels	Birthday labels for v	Action	Print
			Data Format	
			Include Header	
			File Name	
				Output Query
			Query Type	Constituent
			Query Name	Birthday labels for volunteers (May)1
			Query Description	Birthday labels for volunteers (May)
			Others May Execute?	
			Others May Modify?	
			Continue processing if m are not met	nimum Postal Discount requirements

**Note**: The **Continue processing if minimum Postal Discount requirements are not met** checkbox defaults to marked if valid postal information exists on the Postal tab.

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the right side of the screen such as the action and data format for the queue item.

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab. For more information, see "Processing Tab" on page 154.

**Note**: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

- 42. To continue printing labels, even if the minimum Postal Discount requirements are not met, mark the **Continue processing if minimum Postal Discount requirements are not met** checkbox. This checkbox only appears if you use the optional module *Postal Discounts*.
- 43. To save the new queue, click **Save** on the toolbar. The Save Queue As screen appears.

🔮 Save Qu	eue As	×
Queue <u>n</u> ame:	Birthday labels for Volunteers-May	
Description:		
🔽 Other users	, s may <u>r</u> un this queue	
🔽 Other users	s may <u>m</u> odify this queue	
	Cancel	

- 44. In the Queue name field, enter "Birthday Labels for Volunteers-May".
- 45. To allow other users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 46. To allow other users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 47. Click Save. You return to the New Queue screen.

**Note**: When you save a queue to your database, any export file name that has been entered is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

48. Click Save and Close on the toolbar to save and close the queue. You return to the Queue page.

You can now run the queue. For more information about running a queue, see "Scheduling a Queue for Mail" on page 106.

### Scheduling a Queue for Mail

Once you create a queue, you can either select to save and run the queue immediately, or you can select another date and time to run the queue.

When the queue is recurring, you can schedule the queue to run at a set frequency. For more information about scheduling recurring queues, see "Scheduling a Recurring Queue" on page 157.

To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues.

For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

**Note**: From *The Raiser's Edge* shell, you can also run a queue by selecting **File**, **Schedule Selected Queue** from the menu bar. From the Queue screen, you can run a queue by clicking **Open** in the toolbar or by selecting **File**, **Schedule Queue** from the menu bar.

Scheduling a queue

**Scenario:** You created a queue to print birthday card labels for all volunteers in your database with a birthday in May. You want to set this queue to run at 8:00 tonight after all your volunteers have left for the day. Before you run the queue, you must properly set up and save the queue. This scenario uses the queue set up in "Creating a new queue" on page 95.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.

2. Click **Queue**. The Queue page appears.

Back  Forward 0					
Back i Porward U	pen in separate windo	~			
Home	付 Admi	inistration • Queue	_		
ecords	Administration	🖄 New Queue 🔄 Open 🗙 Delete	Schedule	Find Show Scheduled Queues Ins	itall <u>Q</u> ueue Service
- Records	System Statistics			la in a la interna	
⊇ Querv	Import	Name	Description		time Created by Last run by Last run o
,	Globally Add	2008 Building Fund Donations	Report detailing don		Supervisor Supervisor 02/01/200
💋 Export	Records	Address Import		On demand	Supervisor
	Globally Change	Batch Processing		On demand	Supervisor
Reports	Records	Birthday labels for Volunteers-May		On demand	Supervisor
	Globally Delete Becords	Class of 1992 Alumni		On demand	Supervisor
Mail	Globally Write Off	Constituent Donors Greater Than \$500		On demand	Supervisor
	Pledges	Custom Report 2008 Inactive Constituents		On demand On demand	Supervisor
Batch	Convert Pledges	Pledges for 2008 Phonathon		On demand On demand	Supervisor
<b>1</b>	To Recurring	Oueue for Volunteer			Supervisor
Mapping	Gifts	Supervisors Oueue	2 items - Volunteer Items - Event Mana		Supervisor
	Post to General Ledger	Supervisors Queue	Items - Event mana	Officiality	Supervisor
Admin	Duplicate				
18	Constituents				
Config	Merge				
	Constituents				
Scanning	Drop Lapsed				
5	Members				
NetSolutions	Security	Only show my queues			
	Queue	Recently Accessed Queues			Quick Find
🔒 Dashboard	Blackbaud Analytics	· · · · · · · · · · · · · · · · · · ·			
Auction Maestro		Constituent Donors Greater Than \$500 Batch Processing		<b></b>	
Pro Integration	Auction-Tracker Integration	Address Import		•	
Data Health					
Center		Queue			
		Allows you to set up a series of		ally and unattended. For more informati	

- 3. In the grid, select "Birthday Labels for Volunteers-May".
- 4. Click **Schedule** on the action bar at the top of the page.

Warning: For a queue to run successfully, the database must be running.

Once you select to run the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears informing you that the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

If the validate process is successful, the Schedule screen appears.

🗐 Schedule Birthda	ay labels for Volunteers-May	×
	Enter the date and time to begin processing the queue and pr or press 'Run Queue Now' to run the queue now.	ess 'Schedule Queue'
18 4 19	Current date: 02/12/2008 Current	time: 10:27:42 AM
7 6	Queue start date: 02/12/2008 📰 Queue start	time: 8:00 PM 🔹
U	Run As: Supervisor 💌 Run Or	с
-9	Begin processing with: Birthday labels for volunteers (May)	<b>_</b>
	Schedule Queue Cancel	Run Queue No <u>w</u>

Note: On the Schedule Queue screen, you can click **Run Queue Now** to run the queue now.

- 5. In the **Queue start date** field, enter today's date to run the queue tonight.
- 6. In the **Queue start time** field, enter "8:00 PM" to run the queue at 8:00 tonight after all your volunteers have left for the day.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

- In the Run As field, select the user to run the queue. Security rights are considered based on the user's security settings. A scheduled queue can run only when the user selected in the Run As field is not logged into *The Raiser's Edge*.
- 8. In the **Run On** field, enter a specific computer on which to run the queue. This field is useful when you have more than one queue server.

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

9. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item to process first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field will not run. For this example, only one queue item exists in the queue.

10. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

# Queue Reports for Mail

With the *Queue for Task Scheduling* module, several reports are available for *Mail* to help you track the different queues entered in your database, record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. A validation report, a queue profile, and a control report are available for the *Mail* module.

## Validation Report

You can validate a queue by selecting **Tools**, **Validate** from the menu bar of the Queue screen. The Queue Validation Complete screen appears, specifying how many items successfully validated or failed. You can view the validation report for items that failed to validate by clicking **Preview Report** on the Queue Validation Complete screen. A validation report appears only if errors are found during the queue validation process. When the validation report appears, you can view the queue name; description; input query; module; subcategory; and category for each invalid item in the queue. The report also gives an explanation for the invalid queue item.

09/05/2008			ud Demo ation Report	
Desc Input Report Ri	e Name: New Queue ription: Query: m Date: 09/05/2008			
Exceptions: Module	Category	Subcategory	Description	Reason
Mail	Letters	Labels, Cards, and Envelopes	Donor cards	Required field missing: Printer path
ail	Letters	Labels, Cards, and Envelopes	Donor cards	Printer not found
tal except	ions listed: 2			

For more information about validating a queue, see "Validating a Queue" on page 17.

## Queue Profile

You can select to preview a profile for the queue you are working with at any time. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

🕒 Queue Profile					_ & ×
× 🕅 ◀ 1 of 1		🖶 🗲 🛃 🔚 100% 💌	<b>M</b> Total:1 10	00% 1 of 1	
Preview					
Queue Profile					×
Mail, Birthda					
	04/09/2008		Blackbaud Der	no	Page 1
			Queue Profile	e	
	Queue Na Descript	ame: Birthday labels for Volunteers-N	/lav	Last run by: Last run on:	
	Created	by: Supervisor	Last run comple		
	Created Input Qu	l on: 04/09/2008 ery:			
	-		<b></b>		
	Module	Category	Subcategory	Description	
	Mail	Labels, Cards, and Envelopes	Labels	Birthday labels for volunteers (May)	
		Output: Action:			
		Printer:	HP DeskJet 722C		
		Copies: Include header:	1 No		
		Mark the gifts as receipted:			
		Query type: Oueue Name:	Birthday labels for volunteers (May)		
		Query description:	Birthday labels for volunteers (May)		
		Others may execute: Others may modify:			
		,,			
<b>₹</b>					-

## **Control Report**

When you mark the **Create control report** checkbox on the Options screen in User Options, a control report appears after a queue finishes processing. Depending on your settings in User Options, the control report either exports, prints, or is sent as email. There are two types of control reports — Summary and Detail. When you mark the **Create control report** checkbox in User Options, you need to select which type of report to create. For more information about setting up user options, see "User Options" on page 8.

#### Summary

The summary report includes the queue name, description, input query, start date and time, and end date and time for the queue. The summary report also lists the type of module, category, subcategory, and description for each queue item entered in the queue. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

ue Contro	l Report							_
	1 of 1 🗼 🕨	A 100%	- <u>M</u>	Total:1 10	0% 1 o	f1		
(								
	01/02/2008		Blackbau	d Demo				
			Queue Cont	rol Repo	rt			
	Queue name: Description:	Donor Acknowledgement Lett	ers					
	Input query:	10 50 50 13 5						
	Start date/time: End date/time:							
	Elapsed time:							
	Status:	All completed.				Elapsed		
	Category	Subcategory	Description	Start Time	End Time	Time	Status	
	Letters	Donor Acknowledgemen	Donor Acknowledgement Le	10:53:50AM	10:54:02AM	00:00:12	Completed.	
							•	

#### Detail

The detail report includes the queue name, description, input query, start date and time, and end date and time for the queue. The detail report also lists the type of module, category, subcategory, description, and each option you selected for the queue. These options can include checkboxes you selected, which printer you specified for the queue output, or the names of people receiving the queue output as email. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

01/02/2008		Blackbau				
		Queue Cont	rol Repo	t		
Description: Input query: Start date/time: End date/time: Elapsed time:	3:21:04 PM	Mav				
Category	Subcategory	Description	Start Time	End Time	Elapsed Time	Status
Labels, Cards, and H	inve Labels	Birthday labels for volunteer	3:21:04PM	3:21:36PM	00:00:32	Completed.
	Output: Action: Printer: Copies:	Print HP DeskJet 722C				

# Query

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#### Procedures

Creating a new queue	 	 •••	 	 •••	 	 •••	 	•••	 	 	 	 	 	 •••	 	 11	5
Scheduling a queue	 	 •••	 	 •••	 	 •••	 	• • •	 	 	 	 	 	 •••	 	 12	2

With the *Queue for Task Scheduling* module, several modules are available for you to include when creating and running queues. With *Query*, you can export information in a variety of ways. Examples of available formats include comma-separated values, *Excel*, Text, and HTML. You can set up and run multiple queries in one queue. In addition, you can also run multiple modules in one queue. For example, you want to query the database for funds with no ending date. You also want to run a quarterly financial report. Not only can you include both the *Query* module and the *Reports* module in one queue, you can set the queue to run at any time that is convenient for you.

## Working with Queues for Query

**Warning**: The optional module *Queue for Task Scheduling* does not recognize saved queries that are associated with a VBA macro.

When working with queues for *Query*, several categories are available. A category is a breakdown within the *Query* module of the queue and helps to specify the type of task you are creating. The available categories for the *Query* module are Action, Appeal, Campaign, Constituent, Event, Fund, Gift, Individual, Job, Membership, Organization, Participant, and Relationship. Once you select a category for *Query*, you can further specify the category by selecting a subcategory. A subcategory specifies a breakdown within the category of a task. Subcategories provide the specific information needed to successfully run the task. For more information about the available categories and subcategories for *Query*, see the *Query* & *Export Guide*.

Once you select the specific category and subcategory for *Query*, select the appropriate checkboxes and options to include in the queue. Then, specify a date and time to run the queue.

For more information about running a queue, see "Scheduling a Queue for Query" on page 122.

### Creating a Queue for Query

With the *Queue for Task Scheduling* module, you can create a new queue or create a queue from an existing queue.

When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. For example, you ran a queue last month querying the database for constituents who donated \$500 or more to your organization last year. This month, you want to query the names of constituents who donated less than \$500 last year. You know the list is lengthy, so you set up the queue and specify the queue to run at the most convenient time for you. This can be during your lunch break or at night after your volunteers and employees have left for the day. Open the queue you ran last month, make any necessary changes, and save the queue under a new name. You can now use the settings from the previous queue to run your new queue.

For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

From the **Queue** link of *Administration*, you can create new queues for *Query* or open existing queues to run unattended at designated times. To access the Queue page, click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Queue**. The Queue page appears. From the Queue page, you can create and work with queues for *Query*.

#### Creating a new queue

**Scenario:** You are cleaning up your database and need to create a list of all inactive constituents currently in the database. Because you have many inactive constituents in the database, you need to create a new queue to list this information. Sort this list in ascending alphabetical order, including the constituent's name and constituent ID. Export this list into an *Excel* spreadsheet so that you can print the list for your records.

- 1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
- 2. Click **Queue**. The Queue page appears.

🚳 The Raiser's Edge						_ 🗆 🗙
Eile Edit View Go Fav						
+ Back + Forward Op	en in separate window	v				
et Home	👍 Admi	nistration • Queue	_			
The Records	Administration	🖄 New Queue 🔄 Open 🗙 Delete	Schedule	Find Show Scheduled Queues In	nstall <u>Q</u> ueue Service	
	System Statistics	Name	Description	Schedule Frequency Next run date	(time Created by Last run by L	ast run on 1
lang Query	Import	2008 Building Fund Donations	Report detailing don		Supervisor Supervisor 0	
	Globally Add Becords	Address Import		On demand	Supervisor	N
Export 🖉		Batch Processing		On demand	Supervisor	Ň
	Globally Change Records	Birthday labels for Volunteers-May		On demand	Supervisor	N
Reports	Globally Delete	Class of 1992 Alumni		On demand	Supervisor	N
	Records	Constituent Donors Greater Than \$500		On demand	Supervisor	N
Mail 💕	Globally Write Off	Custom Report 2008		On demand	Supervisor	N
	Pledges	Inactive Constituents		On demand	Supervisor	N
Batch	Convert Pledges To Recurring	Pledges for 2008 Phonathon		On demand	Supervisor	N
A.	Gifts	Queue for Volunteer	2 items - Volunteer	On demand	Supervisor	N
Mapping	Post to General	Supervisors Queue	Items - Event Mana	On demand	Supervisor	N
12	Ledger					
Admin	Duplicate Constituents					
🍄 Config	Merge Constituents					
	Drop Lapsed					
Scanning	Members					F
NetSolutions	Security	Only show my queues				
Serve a contrions	Queue					
Cashboard	Blackbaud	Recently Accessed Queues			Quick Find	
	Analytics	Birthday labels for Volunteers-May 2008 Building Fund Donations		-		截
AuctionMaestro Pro Integration	Auction-Tracker Integration	Batch Processing		-		
Data Health		Queue				-
Center						
Web Services		Allows you to set up a series of Scheduling Guide.	tasks to run automatica	lly and unattended. For more informa	tion about Queue, see the <u>Queu</u>	e for Task
Welcome to The Raiser's Edg	ge 7	,				1.

3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the queue page, see "Accessing a Queue" on page 6.

Filters Enter the r	module, category, and subcategory to filter the item	is that can be added to the queue.
Mod	ule: Query	
Cateo	ory: Constituent	
Subcateg	ory: Dynamic	
🄄 <u>N</u> ew Ite	em 😑 Open, 🖳 <u>S</u> elect All 🔝 <u>D</u> eselect All	Use these options for all selected items.
Select	Description	
	Blank Primary Addressee	Action: Export Restore to Defaults
	Board Members	Data format:
	Development Committee (Const Attribute)	
	Donors for 'This Month'	Export path:
	Inactive Records	
	Invalid Address/Blank Preferred Address	Include header
	Largest Gift +\$5,000	
	Major Donor Prospect	
	Members (active and dropped)	
	Previous Donors	
	Prospects	
	Tribute Records	
Only sho	o <u>w</u> my queries	
	OK. C	Cancel Add to queue

- 4. In the **Module** field, select "Query" because you are querying the database.
- 5. In the **Category** field, select "Constituent" because you are querying the database for a list of inactive constituents.
- 6. In the **Subcategory** field, select "Dynamic". A dynamic query is always updated. You may want to run this same query again several months from now. By selecting dynamic, the query pulls the most recent and up-to-date information from your database.
- 7. When queries exist on the Add Items to New Queue screen, the **Only show my queries** checkbox is enabled at the bottom of the screen. To display only queries that you saved, mark the **Only show my queries** checkbox.

8. Click New Item to add a new task for the queue. The New Constituent Query screen appears.

New Constituent Query - The Raiser's Edge	
le Edit View Format Records Favorites Tools Help	
] 📑 🔓 🗃 🖨 🖨 📍 ? ·	
[:Criteria ] 2:Output   3:Sort   4:Results ]	
The filters entered here will determine the records that are output.	
Include inactive constituents  Include deceased constituents  Include cons	stituents with no valid address
Available Fields	
Show: <all></all>	
- Fiscal Year Starts	
Gender	
ID	
Import ID Inactive?	
Industry	
- Key Indicator	
Hind Select-> <-Remove Change ( )	And Or 🛧 🔸
Real Nets Const	D Ni
< Back. Next > Cancel	<u>B</u> un Now

Tip: You can use the Find button to easily locate a field in the Available Fields box.

- 9. On the Criteria tab, in the **Show** field, select "<All>". You can select a specific group of fields or select "<All>" to see a complete list of Available Field categories.
- 10. To reveal criteria fields under each group, in the **Available Fields** box, click the plus sign to the left of the group name. To reveal the **Inactive?** field, click the Constituent Information group.

**Tip**: You can also select a filter and access the Edit Field Criteria screen by highlighting the field and dragging it into the **Filters** box, or by double-clicking on the field.

11. Select Inactive? and click Select. The Edit Field Criteria screen appears.

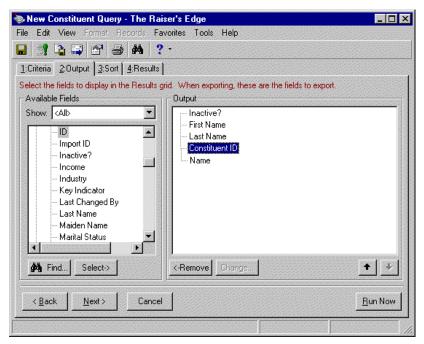
Edit Field Criteria	×
Inactive?	
Operator: equals	
OK Cancel	

- 12. In the **Operator** field, select "equals". For more information about criteria fields, see the *Query & Export Guide*.
- 13. In the Value field, select "Yes".
- 14. Click **OK**. The criteria field with the criteria operator appears in the **Filters** box.
- 15. Select the Output tab.

💩 New Constituent Query - The Raise	r's Edge	
File Edit View Format Records Favor	ites Tools Help	
🖬 📑 🔓 💣 🖨 📍 ? ·		
1:Criteria 2:Output 3:Sort 4:Results		
Select the fields to display in the Results grid.	When exporting, these are the fields to export.	
Available Fields	Output	
Show: <all></all>	Inactive?	
Find Select->	<-Remove Change	++
< <u>B</u> ack <u>N</u> ext > Cancel		<u>B</u> un Now

- 16. In the **Show** field, select "<All>". You can select a specific group of fields or select "<All>" to see a complete list of Available Field categories.
- 17. To reveal criteria fields under each group, in the **Available Fields** box, click the plus sign to the left of the group name. To reveal the **First Name** field, click the Constituent Information group.
- 18. Select the First Name field and click Select. The First Name field appears in the Filters box.

19. Select the Last Name field and click **Select**. Do the same for the **Constituent ID** and **Name** to select the **Name** field in case there are inactive organizations that exist in your database. The Last Name, **Constituent ID**, and **Name** fields appear in the **Filters** box.



20. Select the Sort tab.

📚 New Constituent Query - The Rais	ser's Edge	
File Edit View Format Records Fav	vorites Tools Help	
🖬 📑 🔓 🗃 🚔 🐴 📍	•	
1:Criteria 2:Output 3:Sort 4:Results		
The records returned by the query will be s	orted by the fields selected here.	
Available Fields	Sort By	
Show: <all></all>	Name (Asc)	
Inactive?     Income     Industry     Key Indicator     Last Changed By     Last Name     Maiden Name     Marital Status     Matching Gift Factor		
Find Select->	<-Remove Change	Asc Desc +
< <u>B</u> ack <u>N</u> ext > Cancel		<u>B</u> un Now

- 21. To reveal criteria fields under each group, in the **Available Fields** box, click the plus sign to the left of the group name. To reveal the **Name** field, click the Constituent Information group.
- 22. Select **Name** and click **Select**. The selected sort field appears in the **Sort By** box with (Asc) as its default alphabetical sorting order.

23. Click Save on the toolbar. The Save Query As screen appears.

Save Query As	×
Query name: Inactive Constituents	Save
Description: Inactive constituents in the database	Cancel
Query format: Dynamic	
✓ Other users may execute this query	
Other users may modify this query	

- 24. In the Query name field, enter "Inactive Constituents".
- 25. In the Description box, enter "Inactive constituents in the database".
- 26. In the Query format field, select "Dynamic".
- 27. To allow other users to run the query, mark the Other users may execute this query checkbox.
- 28. To allow other users to modify the query, mark the **Other users may modify this query** checkbox.
- 29. To save the new queue item and close the Save Query As screen, click **Save**. You return to the New Constituent Query screen.
- 30. To close the New Constituent Query screen, click the "X" at the top corner of the screen. You return to the Add Items to New Queue screen for the queue.

Filters		
Enter the	module, category, and subcategory to filter the items	s that can be added to the queue.
Mod	dule: Query	
Lateg	gory: Constituent	
Subcateg	gory: Dynamic 💌	
hew It	em 巀 Open 💷 Select All 🔏 Deselect All	Use these options for all selected items.
Select	Description	
	Donor Giving Summary for 'This Week'	Action: Export <u>Restore to Defaults</u>
	Donor Giving Summary for 'This Year'	Data format: Excel 5-7 (XLS)
	Pledge Balance Greater than Zero	
	Fund ID = <ask></ask>	Export path: C:\Files
	Non-contributors	
	Current Membership Category = <ask></ask>	🗖 Include <u>h</u> eader
	Lapsed Members	
	Dropped Members with Dropped Date = <ask< td=""><td></td></ask<>	
	Alumni with Class Of = <ask></ask>	
	Total Amount Given for Active Tributes	
	Constituents with Defined Target Amounts	
	Inactive Constituents	
	· · · · · · · · · · · · · · · · · · ·	
•	١	
Only sh	o <u>w</u> my queries	
	OK Ca	ancel Add to queue

31. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "Inactive Constituents" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

32. In the **Use these options for all selected items** frame, in the **Action** field, select "Export" to export the inactive constituents list.

Additional options appear on the right side of the screen depending on the action you choose. For example, you can select an export format, name, or a printer path.

- 33. In the **Data format** field, select "Excel 5-7 (XLS)" to export the information into an *Excel* spreadsheet.
- 34. In the **Export path** field, select the file location to store the exported information. You can either type in a path name or click the ellipsis to the right of the field to browse for a file location.
- 35. To add the new queue item to the queue, click Add to queue.
- 36. Click **OK**. The New Queue screen appears.

0	New Queue	<u> </u>			
E	ile <u>E</u> dit F <u>a</u> v	vorites <u>T</u> ools <u>H</u> elp			
E	🖪 Save and C	Close 🕶 🔚 📑 🖅	🔿 🔕 🗹 📍		
6	Queue Proce	essing   <u>M</u> iscellaneous			
	🐴 Add Item	🔄 Open 🗙 <u>R</u> emo	ve 🛧 Up 🐥 Down	Inactive Constituer	nts
Γ	Module	Category	Description		Query
	Query	Constituent	Inactive Constituents	Action	Export
				Data Format	Excel 5-7 (XLS)
				Include Header	
				File Name	Inactive Constituents.XLS
				Document Name	
				Query Type	
				Query Name Query Description	
				Others May Execute?	
				Others May Execute:	
Th	is queue will ru	un on demand.			

**Note**: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the right side of the screen such as the action and data format for the queue item.

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab. For more information, see "Processing Tab" on page 154.

37. To save the new queue, click **Save**. The Save Queue As screen appears.

💟 Save Queue As	×
Queue name: Inactive Constituents	
Description:	4
<ul> <li>Other users may run this queue</li> <li>Other users may modify this queue</li> <li>Save</li> <li>Cancel</li> </ul>	

38. In the Queue name field, enter "Inactive Constituents".

- 39. To allow users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 40. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 41. Click Save. You return to the New Queue screen.

**Note**: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

42. Click **Save and Close** on the toolbar to save and close the queue. You return to the Queue page.

You can now run the queue. For more information about running a queue, see "Scheduling a Queue for Query" on page 122.

### Scheduling a Queue for Query

Once you create a queue, you can either select to save and run the queue immediately, or you can select another date and time to run the queue.

When the queue is recurring, you can schedule the queue to run at a set frequency. For more information about scheduling recurring queues, see "Scheduling a Recurring Queue" on page 157.

To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues.

For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

Scheduling a queue

*Scenario:* You created the queue "Inactive Constituents" that lists all inactive constituents in your database. You want to set this queue to run at 12:00 p.m. tomorrow afternoon during your lunch break. Before you run the queue, you must properly set up and save the queue. This scenario uses the queue set up in "Creating a new queue" on page 115.

**Note**: From *The Raiser's Edge* shell, you can also run a queue by selecting **File**, **Schedule Selected Queue** from the menu bar. From the Queue screen, you can run a queue by clicking **Open** in the toolbar or by selecting **File**, **Schedule Queue** from the menu bar.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.

2. Click **Queue**. The Queue page appears.

Home Records Ouery Export Reports Mail	Administration System Statistics Import Globally Add Records Globally Delete	nistration • Queue	Description Report detailing don	Schedule Frequency Next run date/tir		
Query	System Statistics Import Globally Add Records Globally Change Records	Name 2008 Building Fund Donations Address Import	Description	Schedule Frequency Next run date/tir		
Query	Import Globaly Add Records Globaly Change Records	2008 Building Fund Donations Address Import			ne Created by Last run by	
Export Reports	Globally Add Records Globally Change Records	2008 Building Fund Donations Address Import			ne Created by Last run by	
Peports	Records Globally Change Records	Address Import	Report detaiing don			
Peports	Globally Change Records			On demand	Supervisor Supervisor Supervisor	02/01/200
<b>-</b>	Records			On demand	Supervisor	
		Birthday labels for Volunteers-May		On demand	Supervisor	
Mail		Class of 1992 Alumni		On demand	Supervisor	
🚰 Mail	Becords	Class of 1992 Autility Constituent Donors Greater Than \$500		On demand	Supervisor	
	Globally Write Off	Cursuluent Donors Greater man \$500 Custom Report 2008		On demand	Supervisor	
	Pledges	Inactive Constituents		On demand	Supervisor	
Batch	Convert Pledges	Pledges for 2008 Phonathon		On demand	Supervisor	
<u>*</u>	To Recurring	Oueue for Volunteer	2 items - Volunteer		Supervisor	
Mapping	Gifts	Supervisors Queue	Items - Event Mana		Supervisor	
	Post to General Ledger	Supervisors Queue	Items - Event mana	. On demand	Supervisor	
Admin	Duplicate					
19	Constituents					
Config	Merge					
	Constituents					
Scanning	Drop Lapsed					
	Members					
NetSolutions	Security	Only show my queues				
	Queue			~		
Dashboard	Blackbaud	Recently Accessed Queues			Juick Find	
<b>1</b>	Analytics	Constituent Donors Greater Than \$500				l
AuctionMaestro	Auction-Tracker	Batch Processing Address Import				
Pro Integration	Integration	Address Import		•		
Data Health		Queue				
Center		Allows you to set up a series of		ally and unattended. For more information		

- 3. In the grid, select "Inactive Constituents".
- 4. Click **Schedule** on the action bar at the top of the page.

Warning: For a queue to run successfully, the database must be running.

Once you select to run the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears informing you that the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

Schedule Inactiv	e Constituents
11 12 -	Enter the date and time to begin processing the queue and press 'Schedule Queue' or press 'Run Queue Now' to run the queue now.
18 19	Current date: 02/02/2008 Current time: 10:48:33 AM
7 5 0	Queue start date: 02/03/2008 📰 Queue start time: 12:00 PM 🗧
U	Run As: Supervisor 💌 Run On:
-9	Begin processing with: Inactive Constituents
	Schedule Queue Cancel Run Queue Nog

If the validate process is successful, the Schedule screen appears.

Note: On the Schedule Queue screen, you can click **Run Queue Now** to run the queue now.

- 5. In the Queue start date field, enter tomorrow's date to run the queue tomorrow during your lunch break.
- 6. In the **Queue start time** field, enter "12:00 PM" to run the queue at 12:00 p.m. during your lunch break.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

- In the Run As field, select the user to run the queue. Security rights are considered based on the user's security settings. A scheduled queue can run only when the user selected in the Run As field is not logged into *The Raiser's Edge*.
- 8. In the **Run On** field, enter a specific computer on which to run the queue. This field is useful when you have more than one queue server.
- 9. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item to process first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field will not run. For this example, only one queue item exists in the queue.

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

10. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

## Queue Reports for Query

With the *Queue for Task Scheduling* module, several reports are available for *Query* to help you track the different queues entered in your database, record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. A validation report, a queue profile, and a control report are available for the *Query* module.

## Validation Report

You can validate a queue by selecting **Tools**, **Validate** from the menu bar of the Queue screen. The Queue Validation Complete screen appears, specifying how many items successfully validated or failed. You can view the validation report for items that failed to validate by clicking **Preview Report** on the Queue Validation Complete screen. A validation report appears only if errors are found during the queue validation process. When the validation report appears, you can view the queue name; description; input query; module; subcategory; and category for each invalid item in the queue. The report also gives an explanation for the invalid queue item.

01/02/2008			∶kbaud Demo √alidation Report	
Desc Input	e Name: New Oueue xiption: Query: m Date: 01/02/2008			
Module	Category	Subcategory	Description	Reason
Query	Campaign	Dynamic	Campaigns/average gift over \$1,000	Required field missing: Export format
Query	Campaign	Dynamic	Campaigns/average gift over \$1,000	Required field missing: Export filename
Total except	tions listed: 2			

For more information about validating a queue, see "Validating a Queue" on page 17.

## Queue Profile

You can select to preview a profile for the queue you are working with at any time. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

ofile /, Inac					
	01/02/2008		Blackbaı Queue		Page 1
	_ Descript Created	lby: Supervisor lon: 01/02/2008	Last 1	Last run by: Supervisor Last run on: 01/02/2008 un completed successfully: Yes	
	Module	Category	Subcategory	Description	
	Query	Constituent	Dynamic	Inactive Constituents	
			Export Excel 8.0 (XLS) D:FilesUnactive Constituer	ts 2001 XLS	

## **Control Report**

When you mark the **Create control report** checkbox on the Options screen in User Options, a control report appears after a queue finishes processing. Depending on your settings in User Options, the control report either exports, prints, or is sent as email. There are two types of control reports — Summary and Detail. When you mark the **Create control report** checkbox in User Options, you need to select which type of report to create. For more information about setting up user options, see "User Options" on page 8.

#### Summary

The summary report includes the queue name, description, input query, start date and time, and end date and time for the queue. The summary report also lists the type of module, category, subcategory, and description for each queue item entered in the queue. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

🞦 Queue Contro								<u> </u>
× III I	1 of 1 🗼 🕅 🔳	9 🔗 🔗 🚺 100	× <u> </u>	Total:1 10	0% 1 o	f1		
Preview								
[								
	01/02/2008			oaud Demo				
			Queue C	ontrol Repo	nt			
	Queue name: B Description:	oard Members						
	Input query: Start date/time: 10	):56:38 AM						
	End date/time: 10 Elapsed time: 6	0:56:38 AM						
		ll completed.						
	Category	Subcategory	Description	Start Time	End Time	Elapsed Time	Status	
	Constituent Query	Dynamic	Board Members	10:56:38AM	10:56:44AM	00:00:06	Completed.	

#### Detail

The detail report includes the queue name, description, input query, start date and time, and end date and time for the queue. The detail report also lists the type of module, category, subcategory, description, and each option you selected for the queue. These options can include checkboxes you selected, which printer you specified for the queue output, or the names of people receiving the queue output as email. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

01/02/2008		Blackbau Queue Cont		t		
Description Input query Start date/time End date/time Elapsed time	:: 4:05:27 PM :: 4:05:27 PM					
Category	Subcategory	Description	Start Time	End Time	Elapsed Time	Status
Constituent	Dynamic	Inactive Constituents 2008	4:05:27PM	4:05:30PM	00:00:03	Completed.
			ts XLS			



# Reports

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Queue Profile	
Control Report	
Summary	
Detail	145

#### Procedures

Creating a new queue	 	 	 	•••	 	•••	 •••	 	 •••	 	 	•••	 	 	. 13	1
Scheduling a queue	 	 	 	•••	 	•••	 •••	 	 •••	 	 		 	 	. 13	Э

With the *Queue for Task Scheduling* module, several modules are available for you to include when creating and running queues. With *Reports*, you can print, export, or send information included in a report as email. You can set up and run multiple reports in one queue. In addition, you can also run multiple modules in one queue. For example, you want to print address labels for your fundraising newsletter. You also want to run a report specifying the new donors who are currently giving to the Building Fund. Not only can you include both the *Mail* module and the *Reports* module in one queue, you can set the queue to run at any time that is convenient for you.

# Working with Queues for Reports

When working with queues for *Reports*, several categories are available. A category is a breakdown within the *Reports* module of the queue and helps to specify the type of task you are creating. The available categories for the *Reports* module are Action; Analytical; Campaigns, Funds and Appeals; Custom; Demographic and Statistical; Event Management; Financial; Membership; Pledge and Recurring Gift; Profiles, Lists, and Directories; Prospect Research; Tribute; and Volunteer. Once you select a category for *Reports*, you can further specify the category by selecting a subcategory. A subcategory specifies a breakdown within the category of a task. Subcategories provide the specific information needed to successfully run the task. For more information about the available categories and subcategories for *Reports*, see the available report guides.

Once you select the specific category and subcategory for *Reports*, select the appropriate checkboxes and options to include in the queue. Then, specify a date and time to run the queue. For more information about running a queue, see "Scheduling a Queue for Reports" on page 139.

## Creating a Queue for Reports

With the *Queue for Task Scheduling* module, you can create a new queue, create a queue from an existing queue, or create a queue using a query as the input.

When you create a new queue from an existing queue, you are basically opening an existing queue and saving the queue under a different file name. For example, you ran a queue last month creating a report of honor/memorial constituents with the tribute type "In Honor Of". This month, you want to create a report of honor/memorial constituents with the tribute type "In Special Recognition Of". You can set up the queue and specify the queue to run at the most convenient time for you. This can be during your lunch break or at night after your volunteers and employees have left for the day. You can open the queue you ran last month, make any necessary changes, and save the queue under a new name. You can now use the settings from the previous queue to run your new queue.

For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

When you create a queue using a query as the input, you are searching for an existing query to use as the input query for the queue. For example, you created a query listing the board members of your organization. You want to create a queue to print a report of constituents who donated to your organization this year, and want to list only board members who contributed. You can create the queue, and select the Board Members query as the input query. Whenever you include an input query for a queue, the query you select takes precedence over any query on a parameter form.

From the **Queue** link of *Administration*, you can create new queues for *Reports* or open existing queues to run unattended at designated times. To access the Queue page, click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Queue**. The Queue page appears. From the Queue page, you can create and work with queues for *Reports*.

#### • Creating a new queue

*Scenario:* Your educational organization is planning its Class Reunion for those who graduated from your organization in 1992. Your Development Director asks you to create a report listing these alumni. This report will help your group prepare for this event. Include the constituent names, addresses, phone numbers, major, and year graduated in the report.

- 1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
- 2. Click **Queue**. The Queue page appears.

🚳 The Raiser's Edge						- 🗆 🗡
Eile Edit View Go Fav	vorites <u>T</u> ools <u>H</u> elp					
♦ Back ♦ Forward Op	en in separate window	N				
	-					
🙀 Home	Admi	inistration · Queue				
The cords	Administration	New Queue Dpen X Delete	Schedule	Find Show Scheduled Queues Ins	tall Queue Service	
S	System Statistics	Name	Description	Schedule Frequency Next run date/t	ime Created by Last run by Last ru	in on L
Cuery 🖉	Import	2008 Building Fund Donations	Report detailing don	. On demand	Supervisor Supervisor 02/01/	2008 N
	Globally Add Records	Address Import		On demand	Supervisor	N
Export 🛃	Globally Change	Batch Processing		On demand	Supervisor	N
	Records	Birthday labels for Volunteers-May		On demand	Supervisor	N
Reports	Globally Delete	Class of 1992 Alumni		On demand	Supervisor	N
-	Records	Constituent Donors Greater Than \$500		On demand	Supervisor	N
Mail	Globally Write Off	Custom Report 2008		On demand	Supervisor	N
star	Pledges	Inactive Constituents		On demand	Supervisor	N
Batch	Convert Pledges To Recurring	Pledges for 2008 Phonathon		On demand	Supervisor	N
A	Gifts	Queue for Volunteer	2 items - Volunteer	On demand	Supervisor	N
Mapping	Post to General Ledger	Supervisors Queue	Items - Event Mana	On demand	Supervisor	N
Admin	Duplicate Constituents					
di 2						
W Config	Merge Constituents					
Scanning	Drop Lapsed Members					F
STALL OF L	Security	Only show my queues				
VetSolutions	Queue					
R Dashboard	Blackbaud	Recently Accessed Queues			Quick Find	
0	Analytics	Birthday labels for Volunteers-May		-		截
AuctionMaestro Pro Integration	Auction-Tracker Integration	2008 Building Fund Donations Batch Processing		-		
Data Health						
Center		Queue				
Web Services		Allows you to set up a series of Scheduling Guide.	tasks to run automatica	lly and unattended. For more informati	on about Queue, see the <u>Queue for</u>	Task
Welcome to The Raiser's Ed	ge 7					11.

3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the queue page, see "Accessing a Queue" on page 6.

🕺 Add Items to New Queue	X
Filters         Enter the module, category, and subcategory to filter the items to         Module:       Reports         Cgtegory:       Profiles, Lists, and Directories         Subcategory:       Alumni Class List	hat can be added to the queue.
New Item Coper, Select All Coesciption	Use these options for all selected items. Action: Print Print Print Copigs: 1
Only sho <u>w</u> my reports     OK Car     Total number of items in the queue: 0	icel Add to queue

- 4. In the **Module** field, select "Reports" to run a queue for Reports.
- 5. In the **Category** field, select "Profiles, Lists, and Directories" to run an alumni report.
- 6. In the **Subcategory** field, select "Alumni Class List". You are running a report listing your 1992 graduates.
- 7. When reports exist on the Add Items to New Queue screen, the **Only show my reports** checkbox is enabled at the bottom of the screen. To display only reports that you have saved, mark the **Only show my reports** checkbox.
- 8. Click New Item to add a new item for this Reports queue. The New Alumni Class List screen appears.

New Alumni Class List 🛛 🗙
File Edit Favorites Help
1: General 2: Filters 3: Attributes 4: Ind. Address 5: Format
Include) All records
Alumni information to use: Primary alumni information 💌
✓ Inactive constituents
Deceased constituents
Constituents with no valid addresses
Create output query
<u>Print</u> <u>Preview</u>

9. From the General tab, Click Include.

**Note**: If you choose to include **Selected Records**, a screen appears so you can include records in an established query or create a new constituent query. You are specifying that only specific records matching the criteria you set for running this reports are included.

10. Select All Records. A label appears to the right of the button, displaying your selection.

When you select **All Records**, you are specifying that all records in the database matching the criteria you set for running this Reports queue are included.

- 11. In the **Alumni information to use** field, select "Primary alumni information" to include only records with the **Primary alumni information** checkbox marked on the education record.
- 12. In the **Include these Constituents** frame, mark the **Inactive constituents** and the **Constituents with no** valid addresses checkboxes to include these constituents. Unmark the **Deceased constituents** checkbox.
- 13. Mark the Create output query checkbox.

Later, when you add the queue item to the queue, the Queue screen appears. Options appear on the right side of the Queue screen where you can specify the name and description for the query.

14. Click Next. The Filters tab appears.

ew Alumni Class L	_ist	
ile Edit Favorites	Help	
] 🖪 🖨 🔓 🕯	a ? -	
1: General 2: Filters	: 3: Attributes 4: 1	nd. Address   <u>5</u> : Format
	1- 1-	1- 1
🧼 By using the j	grid below, this repor	t may be filtered on the items shown in the Selected Filters column.
Filters	Include	Selected Filters
Academic Status	Include All	<all academic="" codes="" status=""></all>
Class Years	Include Selected	ee.
Alumni Codes	Include All	<all alumni="" codes=""></all>
Degrees	Include All	<all degrees=""></all>
Majors	Include All	<all majors=""></all>
Assigned Solicitors	Include All	<all assigned="" solicitors=""></all>
< Back Nex	kt > Cancel	<u>P</u> rint Previe <u>w</u> <u>L</u> ayout
		4

15. In the **Include** column, for the **Class Years** filter, choose "Selected" to include only those that graduated from your organization in 1992.

16. In the **Selected Filters** column, click in the field next to **Class Years**. Click the binoculars to browse for the year 1992 to include as a filter. The Selected Class Years screen appears.

Type entry or select one from the	list:			
		Include these entries		
Description	ID	Description	ID	OK
Class of 1991		Class of 1992		Cancel
Class of 1993				Cancer
Class of 1994				
Class of 1995		>		
Class of 1996				
Class of 1997				
Class of 1998	<			
Class of 1999				
Class of 2000	<b>_</b>			

- 17. In the Description column, select "Class of 1992".
- 18. Click the single right arrow to move "Class of 1992" from the box on the left into the **Include these entries** box on the right.
- 19. Click **OK**. You return to the Filters tab. The filter you selected now appears in the **Selected Filters** column.
- 20. Click Next. The Attributes tab appears.

w Alumni Class List			
Edit Favorites H	elp		
🖪 🖨 🔓 📑	= ? -		
		I. Address   <u>5</u> : Format	
Include Records w	vith these Attributes		
Record Type	Category	Description	Short Desc
Exclude Records v	with these Attributes		
Exclude Records (     Record Type	with these Attributes	Description	Short Desc
		T	Shart Desc
		T	Short Desc
		T	Short Desc
		T	Short Desc

21. On the Attributes tab, you can include or exclude records with specific attributes by marking the respective checkboxes and selecting the attributes to include in the **Record**, **Category**, **Description**, and **Short Desc** fields. For this example, you do not need to mark anything on the Attributes tab.

22. Click Next. The Ind. Address tab appears.

New Alumni Class List	×
File Edit Favorites Help	
🖬 🗟 🖨 🛱 📪 🔭	
1: General 2: Filters 3: Attributes 4: Ind. Address 5: Format	
Print two addresses on report • Settings for first address	C Settings for second address
What would you like to print: Address & phone	Phone type: Home
	The first valid address will be used. ses to use: ed address
Address Attributes	
Step 4: Specify what happens if no address is found. Print with no add	ress
<u> </u>	Previe <u>w</u> Layout

- 23. In the **What would you like to print** field, select "Address and phone" to print the address and phone number for the graduates that list in the report.
- 24. In the **Phone type** field, select "Home" to print the home phone number for the graduates.
- 25. In Step 1, unmark the **Consider addresses with seasonal dates as of** checkbox. You do not want to include addresses with seasonal dates.
- 26. In Step 2, select "Home" as the address to consider if the preferred address cannot be found.
- 27. Click **Next**. The Format tab appears. The right side of the screen changes as you highlight selections in the tree view on the left.

New Alumni Class List		×
File Edit Favorites Help		
🖬 🖪 🖨 🖬 🗖	<b>?</b> -	
1: General   2: Filters   3: Att Headings	ributes   <u>4</u> : Ind. Address <u>5</u> : Format   Heading Format Title: 1992 Alumni	
<ul> <li>Detail</li> <li>Sort/Break</li> <li>Page Footer</li> <li>Report Footer</li> <li>Miscellaneous</li> <li>Name formats</li> <li>Constituent</li> <li>Individual</li> <li>Color scheme</li> </ul>	Align: Center	neader Print Report Date in Heading Format: Short Date
<back nexts<="" td=""><td>Print report heading on each page</td><td>Print Preview Layout</td></back>	Print report heading on each page	Print Preview Layout

- 28. From the tree view, select Headings. In the Title field, enter "1992 Alumni".
- 29. In the Subtitle field, enter "List of 1992 graduates".
- 30. In the **Align** field, select "Center" to center the heading on the page.
- 31. To print the page number and report date in the heading, do not change the default **Print Page Number in Heading** and **Print Report Date in Heading** checkboxes.
- 32. To print the selected heading on every page, mark the Print report heading on each page checkbox.
- 33. From the tree view, select **Sort/Break**. Move Major from the **Available Fields** box to the **Sort Fields** box. The report groups alumni by their major.

ew Alumni Class List		I
ile Edit Favorites Help		
I 🖪 🖨 🖬 🖬	1 <b>?</b> -	
1: General   2: Filters   3: Al	ttributes 4: Ind. Address 5: Format	
1. douga   2. more   2. m		
📄 Headings	🗖 Sort by query order	
📄 Criteria	Available Fields Sort Fields	
📑 Detail 📑 Sort/Break	Class Of Asc Asc	
Page Footer	Minor >	
Report Footer	As	.c
Name formats	De	sc
E Constituent	Break Report by <sort 1="" field=""> Break Header: Text before value Text after value Sort Field 1</sort>	
	Sample: <sort 1="" field=""></sort>	
	Break Footer: Print count of <sort 1="" field=""> Print count as a % of to</sort>	otal
< <u>B</u> ack <u>N</u> ext>	Cancel <u>Print</u> Previe <u>w</u> Lay	out

34. From the tree view, select Miscellaneous. In the Report Orientation frame, mark the Portrait option.

New Alumni Class List		×
File Edit Favorites Help		
🖬 🗟 🍜 🗳 🖬 🖿	? -	
	butes 🛛 🛓: Ind. Address 🛛 <u>5</u> : Format 🗍	
Headings	Report Orientation	
📄 Criteria	Portrait	
📄 Detail	C Landscape	
📄 Sort/Break		
Page Footer		
Report Footer		
Name formats		
Individual		
Color scheme		
< <u>B</u> ack <u>N</u> ext>	Cancel	Print Previe <u>w</u> Layout

35. Click Save on the toolbar. The Save Report As screen appears.

Save Report a	As	×
Report <u>n</u> ame:	1992 Graduates	Save
<u>D</u> escription:	list of all 1992 alumni in the database	Cancel
	<ul> <li>Other users may run this Report</li> <li>Other users may modify this Report</li> </ul>	

- 36. In the Report name field, enter "1992 Graduates".
- 37. In the Description box, enter "list of all 1992 alumni in the database".
- 38. To allow users other than you to run the report, mark the Other users may run this Report checkbox.
- 39. To allow users other than you to modify the report, mark the **Other users may modify this Report** checkbox
- 40. To save the new queue item and close the Save Report As screen, click **Save**. You return to the New Alumni Class List screen.
- 41. To close the New Alumni Class List screen, click the "X" at the top corner of the screen. You return to the Add Item to New Queue screen.
- 42. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "1992 Graduates" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

🔕 Add Items to	New Queue	×
Filters Enter the module,	category, and subcategory to filter the item	s that can be added to the queue.
Module: Re	eports 💌	
	ofiles, Lists, and Directories	
Subcategory: Al	umni Class List 📃 💌	
🎦 <u>N</u> ew Item 🛛	<u>O</u> pen 🖳 <u>S</u> elect All 🔝 <u>D</u> eselect All	Use these options for all selected items.
Select Alumn	Description i Class List for Graduates by Class Year	Action: Print
	Graduates	Printer: HP DeskJet 722C
		Copi <u>e</u> s: 1
) 🔲 Only sho <u>w</u> my re		
<b>T</b>		ancel Add to queue
Total number of ite	ms in the queue: U	

**Note**: If you select "Send as Mail" in the **Action** field, additional fields such as **Mail to** and **cc** appear for you to specify the recipients of the email. With your cursor in these fields, you can press **F7** on your keyboard for your email address book.

43. In the **Use these options for all selected items** frame, in the **Action** field, select "Print" to print the list of graduates.

Additional options appear on the right side of the screen depending on the action you choose. For example, you can select an export format, name, or a printer path.

- 44. In the **Printer** field, specify the printer to print the report.
- 45. To add the new queue item to the queue, click **Add to queue**.
- 46. Click **OK**. The New Queue screen appears.

	New Queue     File Edit Favorites Iools Help			
	Contraction of the second			
Queue Proce	Queue Processing Miscellaneous			
🎦 Add Item	Add Item 🔄 Open 🗙 Bemove 🏠 Up 🔸 Down 1992 Graduates			
Module	Category	Description		Alumni Class List 📃
Reports	Profiles, Lists, and	1992 Graduates	Action	Print
			Data Format	
			Include Header	
			File Name	
				Output Query
			Query Type	Constituent
			Query Name	1992 Graduates1
			Query Description	1992 Graduates
			Others May Execute?	
			Contraction of the second	
This queue will run on demand.				

**Note**: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the right side of the screen such as the action and data format for the queue item.

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab. For more information, see "Processing Tab" on page 154.

47. To save the new queue, click **Save**. The Save Queue As screen appears.

划 Save Queue As	×
Queue name: Class of 1992 Alumni	
Description:	4
✓ Other users may run this queue	
Other users may modify this queue	
Save Cancel	

48. In the Queue name field, enter "Class of 1992 Alumni".

- 49. To allow users other than you to run the queue, mark the **Others users may run this queue** checkbox.
- 50. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 51. Click Save. You return to the New Queue screen.

**Note**: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

52. Click **Save and Close** on the toolbar to save and close the queue. You return to the Queue page.

You can now run the queue. For more information about running a queue, see "Scheduling a Queue for Reports" on page 139.

#### Scheduling a Queue for Reports

Once you create a queue, you can either select to save and run the queue immediately, or you can select another date and time to run the queue.

When the queue is recurring, you can schedule the queue to run at a set frequency. For more information about scheduling recurring queues, see "Scheduling a Recurring Queue" on page 157.

To successfully run a scheduled queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run scheduled queues.

For more information about installing Queue Service, see "Installing Queue Service" on page 148. You do not need to install queue service to run queues on demand.

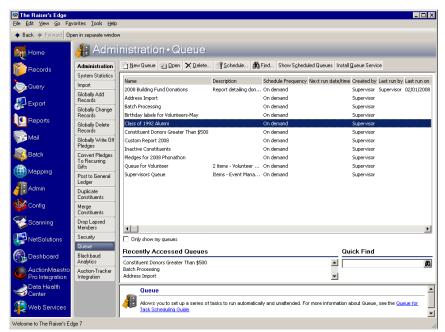
**Note**: From *The Raiser's Edge* shell, you can also run a queue by selecting **File**, **Schedule Selected Queue** from the menu bar. From the Queue screen, you can run a queue by clicking **Open** in the toolbar or by selecting **File**, **Schedule Queue** from the menu bar.

#### Scheduling a queue

*Scenario:* Your educational organization is planning its Class Reunion for those who graduated from your organization in 1992. You created a queue to list the constituent names, addresses, phone numbers, major, and year graduated in the report. Because the Class of 1992 was your largest graduating class yet, you know this report will take time to run. Because of this, you need to set the queue to run at 11:30 tonight after all your volunteers and employees have left for the day. Before you run the queue, you must properly set up and save the queue. This scenario uses the queue created in "Creating a new queue" on page 131.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.

2. Click Queue. The Queue page appears.



- 3. In the grid, select "Class of 1992 Alumni".
- 4. Click **Schedule** on the action bar at the top of the page.

Warning: For a queue to run successfully, the database must be running.

Once you select to run the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears informing you that the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

Schedule Class of	f 1992 Alumni	×
11 12 -	Enter the date and time to begin processing the queue and press 'Schedu or press 'Run Queue Now' to run the queue now.	ile Queue'
18 4	Current date: 02/12/2008 Current time: 10:53	:18 AM
7 6 9	Queue start date: 02/12/2008 📰 Queue start time: 11:3	0 PM ≑
U	Run As: Supervisor 💌 Run On:	
-9	Begin processing with: 1992 Graduates	•
	Schedule Queue Cancel Run	Queue No <u>w</u>

If the validate process is successful, the Schedule screen appears.

Note: On the Schedule Queue screen, you can click Run Queue Now to run the queue now.

- 5. In the Queue start date field, enter today's date to run the queue tonight.
- 6. In the **Queue start time** field, enter "11:30 PM". to run the queue at 11:30 tonight.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

- In the Run As field, select the user to run the queue. Security rights are considered based on the user's security settings. A scheduled queue can run only when the user selected in the Run As field is not logged into *The Raiser's Edge*.
- 8. In the **Run On** field, enter a specific computer on which to run the queue. This field is useful when you have more than one queue server.

**Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

9. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item to process first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field will not run. For this example, only one queue item exists in the queue.

10. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

# Queue Reports for Reports

With the *Queue for Task Scheduling* module, several reports are available for *Reports* to help you track the different queues entered in your database, record the settings selected when you run a queue, and correct the exceptions generated when you run a queue. A validation report, a queue profile, and a control report are available for the *Reports* module.

## Validation Report

You can validate a queue by selecting **Tools**, **Validate** from the menu bar of the Queue screen. The Queue Validation Complete screen appears, specifying how many items successfully validated or failed. You can view the validation report for items that failed to validate by clicking **Preview Report** on the Queue Validation Complete screen. A validation report appears only if errors are found during the queue validation process. When the validation report appears, you can view the queue name; description; input query; module; subcategory; and category for each invalid item in the queue. The report also gives an explanation for the invalid queue item.

For more information about validating a queue, see "Validating a Queue" on page 17.

🔮 Validation Que	ue Report					_ 8
× (4) 4	1 of 1 🕒	) = 🗃 🗲 🕭 1	00% 💌 🧖	Total:2 100% 2 o	f2	
Preview						
_						
	01/02/2008			oaud Demo lidation Report		
	Desci Input	Name: New Queue ription: Query: n Date: 01/02/2008				
	Exceptions:					
	Module	Category	Subcategory	Description	Reason	-
	Reports	Membership Reports	Comparative Membership	1998 - 2000 Summer Months Com	Required field missing: Export format	
	Reports	Membership Reports	Comparative Membership	1998 - 2000 Summer Months Com	Required field missing: Export filename	
	Total excepti	ions listed: 2				

## **Queue Profile**

You can select to preview a profile for the queue you are working with at any time. A queue profile is basically a summary of the options you set up for the queue. For example, on the Queue Profile screen you can view the name and description of the queue, as well as the properties of the tasks included in the queue. Once you preview the queue profile, you can select to print or export the information for the queue. To access a queue profile, select **File**, **Preview** from the menu bar of the Queue screen.

🕒 Queue Profile							_ 8 ×
× H A	1 of 1		😂 🗲 🛃 📜 100% 💌	<u> </u>	Total:1 100	% 1 of 1	
Preview							
🖃 Queue Profile							×
Reports, 19							
		01/02/2008		Black	kbaud Dem	0	Page 1
		0110220000			eue Profile	-	i age i
			me: Class of 1992 Alumni			Last run by:	
		Descripti	ion: by: Supervisor		Last run complete	Last run on:	
		Created	on: 01/02/2008		Last run complete	a successivaly.	
		Input Que	ery:				
		Module	Category	Subcategory		Description	
		Reports	Profiles, Lists, and Dire	Alumni Class List		1992 Graduates	
			Output:	Alumni Class List			
			Action:	Print			
			Printer: Copies:	HP DeskJet 722C			
			Include header:	No			
			Q	1992 Graduates			
			Query type: Queue Name:				
			Query description:	1992 Graduates			
			Others may execute: Others may modify:				
			onicio naty notary.	100			

## **Control Report**

When you mark the **Create control report** checkbox on the Options screen in User Options, a control report appears after a queue finishes processing. Depending on your settings in User Options, the control report either exports, prints, or is sent as email. There are two types of control reports — Summary and Detail. When you mark the **Create control report** checkbox in User Options, you need to select which type of report to create. For more information about setting up user options, see "User Options" on page 8.

#### Summary

The summary report includes the queue name, description, input query, start date and time, and end date and time for the queue. The summary report also lists the type of module, category, subcategory, and description for each queue item entered in the queue. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

🕒 Queue Control								_ 5 >
XIII	1 of 1 🕨 🔰 🔳	B 7 🖄 100%	· <u>M</u>	Total:1 10	0% 1 c	f1		
Preview								
	01/02/2008		Blackbau Queue Cont		rt			
	Queue name: Alu Description: Input query: Start date/lime: 10.5 End date/lime: 19.6 Elansed time: 19.6 Status: All	58:26 AM 58:26 AM reconds completed.				Elapsed		
	Category Profiles, Lists, and Dire	Subcategory Alumni Class List	Alumni Class List for Gradu		End Time		Completed.	
								Ţ

#### Detail

The detail report includes the queue name, description, input query, start date and time, and end date and time for the queue. The detail report also lists the type of module, category, subcategory, description, and each option you selected for the queue. These options can include checkboxes you selected, which printer you specified for the queue output, or the names of people receiving the queue output as email. You can select whether to create a summary control report or a detail control report for a queue in User Options. For more information about User Options, see "User Options" on page 8.

Queue name: C			trol Repo	t		
Description: Input query: Start date/time: 2: End date/time: 2: Elapsed time: 10 Status: A	33:09 PM					
Category	Subcategory	Description	Start Time	End Time	Elapsed Time	Status
Alumni Reports	Action:	Alumni Class List Print Generic PostScript Printer	2.33.09PM	2:33:25PM	00:00:16	Completed.



# **Recurring Queues**

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Scheduling a recurring queue	215
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Editing a scheduled queue	
Deleting a scheduled queue	

With *The Raiser's Edge*, you can create a recurring queue to run at a set interval, such as daily, weekly, or monthly. For example, you want to run a membership report specifying information about all dropped and lapsed members. You want to run this report each Sunday night so the printed report is ready when you arrive at your organization Monday morning. You can create a recurring queue to run a membership report each week, and you can specify what time of day you want the queue to run. You can also schedule nonrecurring queues to run at a later date and time.

To successfully run a recurring queue, at least one computer must be set up as a Queue Service computer. Queue Service is a utility in *The Raiser's Edge* that enables you to run recurring queues. For more information about Queue Service, see the following sections.

You must have Queue Service installed on at least one computer on your network or on your standalone computer to successfully run scheduled queues.

## Installing Queue Service

**Note**: Queue Service must be installed to schedule queues. This process regularly checks the database for queues scheduled to run at the current time.

To work with recurring queues, you need to install Queue Service. Queue Service is a utility required to run scheduled queues. It enables a queue to run on a computer without a user being logged in; however, the computer must be turned on for the queue to run. All computers with Queue Service installed routinely check the database for queues scheduled to run at the current time. A queue is processed by the first computer to find it at the scheduled start time. You cannot designate on which computer a scheduled queue is run if you have Queue Service installed on more than one computer and you have a queue set to run on all computers. When you set a queue to run on all computers (in the **Run on** field on the Processing tab of a queue), you are really telling the queue to run the queue on the next available Queue Service computer. You can also designate a queue to run on a specific computer.

When Queue Service is installed in a network environment, the server is automatically set up as the Queue Service computer. However, any computer can be installed with Queue Service and can be used to run recurring queues. When a Queue Service computer does find a queue that is ready to run, it changes the status of the queue so no other Queue Service computer can run the queue.

**Note**: If you are running your SQL Server in Windows Only authentication mode, you need to run Queue Service under a network account that has at least public role access to *The Raiser's Edge* database on the SQL Server. For more information about starting a service under a network account, see the SQL Server Help menu.

You can easily install and uninstall this utility by clicking Install Queue Service or Uninstall Queue Service on the action bar of the Queue page. If your organization runs *The Raiser's Edge* on a network, we recommend setting up a separate dedicated computer, not a user's computer, to operate as the Queue server. This ensures a user's workstation is not suddenly slowed because it is running another person's queue tasks. In addition, it promotes the integrity of your regular server.

Once you install the Queue Service, it is logged on with a Local System account. For printing and exporting requirements, we recommend you change the service from the default Local System account to a user account with full rights. When working with eReceipts and recurring queues, the user account must have access to the email server. For more information about eReceipts, see the *Mail Guide*.

In addition to installing Queue Service on the computer you want to run recurring queues, you must ensure that Microsoft *Internet Information Services* (IIS) and its subcomponent SMTP are installed. To ensure that this is installed properly on your computer, check with your system administrator or IT technician. This is needed only if the **Send a queue status notification** checkbox is marked on the Miscellaneous tab of a queue or if you choose to send email as a type of output.

#### Installing Queue Service

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click **Queue**. The Queue page appears.

<mark>ആ The Raiser's Edge</mark> _Eile _Edit _View _ <u>G</u> o	F <u>a</u> vorites <u>T</u> ools <u>H</u> i	elp			_ 8 ×
♦ Back ♦ Forward	Open in separate wind	dow			
🙀 Home	👍 Adm	inistration • Q	ueue		
Records	Administration	🔄 New Queue 🔄 Open	X Delete Schedule	. 🛱 Find Show Scheduled Q	ueues Install Queue 🕨
	System Statistics	Name	Description	Schedule Frequency	Next run date/time
🧼 Query	Import	Queue for Volunteer	2 items - Volunteer Follow		Hosteran adoptino
Export	Globally Add Records	Supervisors Queue	Items - Event Manageme		
	Globally Change Records				
Reports	Globally Delete Records				
Mail	Globally Write Off Pledges				
Batch	Convert Pledges To Recurring				
(Ampling)	Gifts				Þ
	Post to General Ledger	Conly show my queues			
Admin	Duplicate Constituents	Recently Accessed	l Queues	Quick Find	
Config	Merge Constituents	Queue for Volunteer			商
Scanning	Drop Lapsed Members	Queue			
	Security Queue			matically and unattended. For mor	e information about
Welcome to The Baiser's	Louisening	p			

3. On the action bar, click **Install Queue Service**. An installation screen appears, asking you if you are sure you want to install Queue Service.

The Rais	er's Edge 🛛 🕅						
?	The Raiser's Edge queue service is NOT currently installed on this computer.						
Ŷ	By installing the queue service, you are indicating that this computer can be used by you and other users on your network (if applicable) to process scheduled queues. If you are not sure this is something you want to do, please check with your system administrator before proceeding.						
	Do you want to install The Raiser's Edge queue service now?						
	Yes No						

**Note**: To uninstall Queue Service, on the action bar, click **Uninstall Queue Service**. Queue Service is automatically uninstalled from the computer from which you are working.

4. Click Yes. A message appears, indicating the status of the installation.

The Rais	er's Edge 🛛 🗙
٩	You have successfully installed The Raiser's Edge queue service on this computer.
	ОК

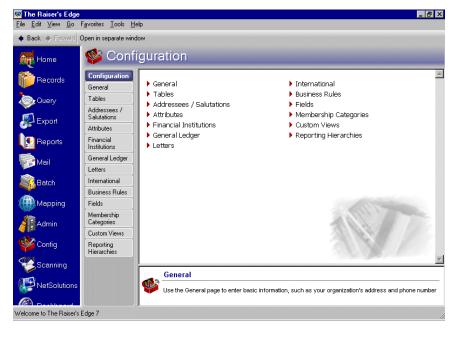
When the Queue Service installation is successful, you can begin running recurring queues. If you receive a message indicating the installation was unsuccessful, contact Customer Support.

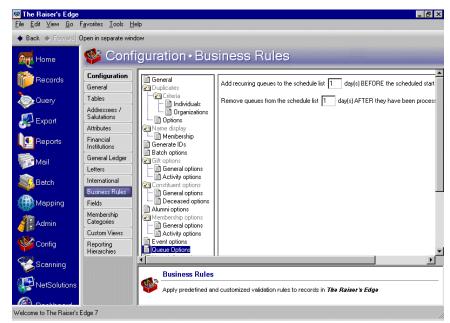
## **Business Rules for Recurring Queues**

Business rules affect all workstations using **The Raiser's Edge**. For Queue for Task Scheduling, you can set a business rule to add recurring queues to the schedule at a specified interval. You can also set an additional business rule to remove recurring queues from the schedule at a specified interval. When queues are added to the schedule, you can view them on the Queue Schedule screen. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

You can set business rules only if you established the appropriate security rights from the **Security** link of *Administration*. For more information about setting business rules, see the *Configuration & Security Guide*.

- > Defining Queue business rules
  - 1. On the Raiser's Edge bar, click Config. The Configuration page appears.





2. Click Business Rules. The Business Rules page appears.

- 3. From the tree view on the left, select Queue Options. The queue options appear on the right.
- 4. To add recurring queues to the Queue Schedule screen a specific number of days before the queue runs, enter a number in the Add recurring queues to the schedule list [] day(s) BEFORE the scheduled start date field.

For example, you want to add recurring queues to the Queue Schedule screen two days before the queue is scheduled to run. Enter "2" in the Add recurring queues to the schedule list [] day(s) BEFORE the scheduled start date field so that your queues appear on the Schedule screen two days before they run.

When you change the number of days entered for this business rule, the Queue Schedule screen is not automatically updated. For existing recurring queues to update on the Queue Schedule screen, you must either run or resave existing queues you created before you changed this business rule. For example, you created and scheduled a membership queue. The membership queue is now sitting on the Queue Schedule screen, waiting to run. You decide to change the number of days you initially entered for this business rule. Once you make the change, the membership queue is not affected on the Queue Schedule screen. You must either run or resave the queue for the business rule to update the queue.

5. To remove recurring queues from the Queue Schedule screen a specific number of days after the queue is processed, enter a number in the **Remove queues from the schedule list [] day(s) AFTER they have been processed** field.

For example, you want to remove recurring queues from the Queue Schedule screen one day after the queue has processed. Enter "1" in the **Remove queues from the schedule list [] day(s) AFTER they have been processed** field so that your queues are removed from the Schedule screen one day after they have processed.

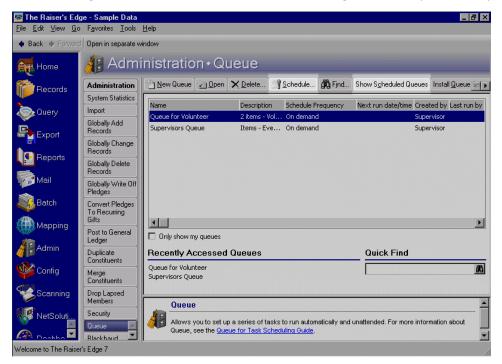
After you make changes to business rules, your changes are updated right away.

## Queue Buttons on Queue Page

Buttons appear on the Queue page to help you schedule recurring queues. On the Queue page action bar, you can schedule a recurring queue by clicking the **Schedule** button. For more information about scheduling a queue, see "Scheduling a Recurring Queue" on page 157.

**Tip**: You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, press **ALT** + **C** on your keyboard to access the Show Scheduled Queues screen or **ALT** + **S** to access the Schedule Queue screen.

You can also view queues scheduled to run by clicking the **Show Scheduled Queues** button. For more information about viewing the Queue Schedule screen, see "Showing scheduled queues" on page 165.



Before you begin processing recurring queues, from the Queue page, you must first click the **Install Queue Service** button. This installs Queue Service on your computer. It is important to remember that Queue Service must be installed before any recurring queues can be processed.

For more information about installing Queue Service, see "Installing Queue Service" on page 148.

For details about other options on the Queue page, see "Navigating in Queue" on page 4.

## Queue Tabs on Queue Screen

Tabs appear on the Queue screen to help you schedule recurring queues. These tabs help you set up preferences and choose options for your recurring queues. By establishing specific preferences, you can set up and run a recurring queue in the most efficient way to meet your needs.

🔮 Queue fo	or Volunteer				_ 🗆 ×
File Edit F	avorites Tools Help				
🔁 Save and	Close - 🔒 📑 😭	🎒 🗟 🗹 ?			
Queue Prod	cessing <u>M</u> iscellaneous				
Madd Iter	m 巀 Open 🗙 Re <u>m</u> o	ve 🛧 Up 🐥 Down	Volunteer Foll	ow-up Letters	
Module	Category	Description		Volunteer Follow-up Letters	Control Report 📥
Mail	Volunteer Follow-up	Volunteer Follow-up L.,	Action	Export	
Query	Constituent	Members (active and	Data Format	Excel 5-7 (XLS)	
			Include Header		<b>▼</b>
				1	
					^
			Query Type		
			Query Name		
			Query Descriptio		-
				ients as 'Letter sent'?	
				ICHILS OS LOUGI SCHL!	
		•			
This queue will	run on demand.				

#### **Queue Tab**

From the Queue tab of the Queue screen, you can add new items to the queue, open or remove items in the queue, and use the **Up** and **Down** buttons to change the position of each item in the queue grid. Changing the position also changes the order in which the queue items are processed.

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When you select an item in the queue grid, you can view the criteria for that item on the right side of the screen. Depending on the type of module you select in the queue, a variety of fields appear on the right. The fields and checkboxes that appear on the right are the properties you selected when setting up the queue item. You can change these properties from the right side of the Queue screen or by opening the queue item. To open a queue item, select the queue item in the grid, and click **Open** on the action bar.

🗿 Queue fo	r Volunteer				
File Edit Fa	avorites Tools Help				
🔁 Save and	Close - 🔒 📑 😭	'∰ <u>&amp;</u> ⊻ ?			
Queue Proc	cessing <u>M</u> iscellaneous				1
참 Add Item	n 🔁 <u>O</u> pen 🗙 Re <u>m</u> or	ve 🛧 Up 🕂 Down	Volunteer Fol	low-up Letters	
Module	Category	Description		Volunteer Follow-up Letters	Control Report 🔺
Mail	Volunteer Follow-up	Volunteer Follow-up L	Action	Export	
Query	Constituent	Members (active and	Data Format	Excel 5-7 (XLS)	
			Include Header		
				1	
			Query Type		<u>_</u>
			Query Name		
			Query Description	n	_
			Others May Eve	cute?	
			🦳 Mar <u>k</u> Assignn	nents as 'Letter sent'?	
		F			
This queue will	run on demand.				

In the bottom left corner of the screen, the frequency appears for the queue. At a glance, the frequency lets you know how often or seldom the queue is scheduled to run. Examples of frequencies are on demand, hourly, and monthly. You can change the frequency of a recurring queue on the Processing tab.

#### **Processing Tab**

From the Processing tab of the Queue screen, you can set the frequency for a recurring queue. The frequency determines how often or seldom a recurring queue runs. In addition to frequency, you can also select the user who runs the queue (for security purposes), as well as the computer to run the queue.

🖞 Queue for Volunteer	- 🗆 ×
File Edit Favorites Tools Help	
🔁 Save and Close 📲 📑 🚰 🚔 🙆 🔽 🗹 📍	
Queue Processing Miscellaneous	
Frequency: Weekly  Run as: Supervisor  Run on:	
Every 1 week(s), starting at 10:00:00 PM	
🔽 Sunday 🔲 Thursday	
🗖 Monday 🔲 Friday	
Tuesday Saturday	
Wednesday	
Queue schedule start date: 04/04/2008  End date:	
Next queue run date/time: 04/04/2008 10:00:00 PM	
✓ If an error occurs while running this queue, stop processing	
If all items are processed successfully, delete this queue	
This queue will run weekly.	

On the Processing tab, enter a start date and end date for running the queue in the **Queue schedule start date** and **End date** fields. Your choices in these fields default in the **Next queue run date/time** field. To stop the process if an error occurs while running the queue, mark the **If an error occurs while running this queue, stop processing** checkbox. To delete the queue upon successful processing, mark the **If all items are processed successfully, delete this queue** checkbox.

**Frequency.** Frequency determines how often or how seldom you run the recurring queue. Frequency is a key part to setting up a recurring queue because by selecting a frequency for your queue, you know your queue runs automatically and unattended at your specified interval. For example, you want to run a monthly report for your organization's Board of Directors. Your Board meets each month, and you are responsible for supplying a monthly gift report. By setting up a recurring queue to run with a frequency of Monthly, you know that your recurring queue runs automatically and supplies you the information you need monthly.

You can specify a recurring queue to run at five frequencies.

- **On demand** specifies the queue to run immediately at the time you specify on the Schedule Queue screen.
- Hourly specifies the queue to run at an hourly interval. In the Frequency field, when you select Hourly, the Every [] hour(s) from [] to [] fields are enabled. Here, you can designate the queue to run between 1 and 12 hours, as well as a start time, end time, start date, and end date. For example, you can select an Hourly frequency and set the queue to run every hour or every five hours, depending on your needs.
- Weekly specifies the queue to run at a weekly interval. In the Frequency field, when you select Weekly, the Every [] week(s) starting at [] field is enabled. Here, you can designate a weekly interval by selecting a Weekly frequency and specifying the queue to run in weekly intervals starting on any day of the week (Sunday Saturday). Perhaps you want the queue to run at a daily interval. To do this, select Weekly as the frequency and mark the checkboxes next to the days of the week to run the queue. At least one weekday checkbox must be marked for the queue to run.
- Monthly specifies the queue to run at a monthly interval. In the Frequency field, when you select Monthly, two additional fields appear. In the Every [] month(s) on day [] field, enter the monthly interval at which you want the queue to run. In addition, enter the date of each month the queue will run. For example, you want to run a recurring queue to commit a gift batch every month on the 28th day. To do this, select "Monthly" in the Frequency field, and enter "1" and "28" in the corresponding fields. If you do not want to specify a date of each month to run the queue, you can mark the Every [] month(s) on the [][] starting at [] option. Here, you can specify a particular day of the month such as the last Saturday of each month. For example, you want to run a recurring queue exporting constituent prospect information on the last Friday of each month. You can do this by selecting Monthly as your frequency and selecting Last and Friday in the corresponding checkboxes.
- Semi-monthly specifies the queue to run twice each month. In the Frequency field, when you select "Semi-monthly", additional fields appear. You can specify which two days of the month you want to run the recurring queue. In the Every [] month(s) on day [] fields, you can select to run the queue on the first or last day of the month or on a specific day. When you select "Specific day", enter a number in the corresponding field to designate a specific day to run the queue.
- **Run as.** In the **Run as** field, you can designate the queue to run as a specific user. A list of users with access to *The Raiser's Edge* appears in this field. Depending on the user you select in this field, *The Raiser's Edge* recognizes the security settings for that user and applies the settings when the queue is run. For example, your name is Maria, and you are currently logged onto the computer in use. The user who is currently logged into the computer in use defaults into the **Run as** field. Therefore, the user name "Maria" defaults in the **Run as** field. However, you can select another user in this field if you want *The Raiser's Edge* to run the queue based on another user's security rights. For more information about security settings, see the *Configuration & Security Guide*.

The **Run as** field is also used to specify a user to run nonrecurring, scheduled queues.

It is important to understand that a user can be logged in only once at any given time. When the queue is set up to run as a user who is already logged into *The Raiser's Edge* somewhere else, that particular user cannot log into *The Raiser's Edge* to run the queue. An error occurs and is recorded in the Windows Event log. To view the logged error, from the **Start** button on your computer, select **Control Panel**, **Administrative Tools**, **Event Viewer**. Look for items with a source of REQueue. Double-click on the error to see a description. **Run on.** In the **Run on** field, you can select the computer on which to run the queue. For example, in this field, you would enter the name that identifies your computer. Depending on how your computer is set up, these identifying names vary. You can use this field to specify a computer for non-recurring, scheduled queues as well.

If you have Queue Service installed on more than one computer and you have a queue set to run on all computers, you cannot designate on which computer a scheduled queue is run. When you set a queue to run on all computers in the **Run on** field on the Processing tab of a queue, you are really telling the queue to run the queue on the next available Queue Service computer.

Tip: In the Queue schedule start date and End date fields, press F3 on your keyboard for today's date and F7 for a calendar.

Queue schedule start date. When you select Hourly, Weekly, Monthly, or Semi-monthly in the Frequency field, the Queue schedule start date field is enabled. In this field, select the date for the recurring queue to begin running. For example, you want the queue to begin running on November 5, 2008. In the Queue schedule start date field, enter this date. The current system date defaults into this field. When you select to run the queue on demand, this field is disabled.

**Note**: When you select "On Demand" in the Frequency field, the **Queue schedule start date** field and **End date** field are disabled.

- **End date.** When you select Hourly, Weekly, Monthly, or Semi-monthly in the **Frequency** field, the **End date** field is enabled. In this field, select the date for the recurring queue to stop running. For example, you want the queue to stop running on November 5, 2009. In the **Queue schedule End date** field, enter this date.
- Next queue run date/time. The Next queue run date/time field is a disabled field that shows you the next date and time the recurring queue is scheduled to run. The date and time you enter in the Queue schedule start date and End date fields determines the date and time that appears in this field. You cannot edit the Next queue run date/time field.
- If an error occurs while running this queue, stop processing. To stop running the queue if an error occurs, mark the If an error occurs while running this queue, stop processing checkbox. When you mark this checkbox, if an error occurs, all queue processing stops. When this checkbox is unmarked, the program continues processing the next scheduled tasks in a queue.
- If all items are processed successfully, delete this queue. To delete a recurring queue once it has successfully processed, mark the If all items are processed successfully, delete this queue checkbox. This checkbox is only enabled when you select On demand in the Frequency field.

#### **Miscellaneous Tab**

From the Miscellaneous tab of the Queue screen, you can set up preferences to send an email notification when the recurring queue is processed.

💱 Queue for Volunteer	- 🗆 ×
File Edit Favorites Tools Help	
🔁 Save and Close 🔹 🔚 📑 🚔 🗟 🗹 📍	
Queue Processing Miscellaneous	
I⊄ Send a queue status notification	
Mail to: anne.smith@vamuseum.org	
Cc: brian.davis@vamuseum.org	

Send a queue status notification. To send a notification specifying the status of a queue upon processing, mark the Send a queue status notification checkbox. When you mark this checkbox, the Mail to and Cc fields are enabled so you can specify recipients of the email.

When you mark the **Send a queue status notification** checkbox, an email is sent when the queue finishes processing. Regardless of whether or not the queue runs successfully, a status notification is still sent. A queue notification is either successful or unsuccessful. When the queue is run by the Queue Service, the email is sent from the Queue Server. When the queue is run locally, the email is sent by the user of that local computer.

Mail to. In the Mail to field, specify the recipient of the email you are sending. You can type in the email address or click the binoculars to access your default email address book. The recipients you select appear in the Mail to field.

**Cc.** In the **Cc** field, specify the recipient of the email you are sending. You can type in the email address or click the binoculars to access your default email address book. The recipients you select appear in the **Cc** field.

In the bottom left corner of the screen, the frequency appears for the queue. For more information about setting the frequency, see "Processing Tab" on page 154.

# Scheduling a Recurring Queue

**Note**: Queue Service must be installed on a computer in your network to run scheduled queues, including recurring queues. This utility regularly checks the database for queues scheduled to run at the current time.

You can create and save queues to run recurring tasks on a specific schedule. For example, if you run a Membership Dues report at the end of every month, you can create and schedule a queue to run this report automatically on the last day of each month.

When running a scheduled queue, the program applies security rights of the person who originally added the queue. Even if a different person edits or runs the queue, the program uses the security rights of the person you specify in the **Run as** field on the Processing tab of the queue. Therefore, you may consider not allowing anyone else to run or modify a queue you create. If you do not allow others to run the queue, it can still run on a server computer since you are initiating the schedule. You must have security rights for each item you add to a queue. **The Raiser's Edge** processes scheduled queues based on the security rights of the original creator, even if someone else runs the queue.

**Warning**: You must have security rights for each item you add to a queue. The program processes scheduled queues based on the security rights of the original creator, even if someone else runs the queue.

Any security rights or restrictions you have to run mailings and reports, for example, or to view, edit, add, and delete information remain in effect when a queue is processed. For example, if you have rights to edit certain batches, you can run reports on only those batches. For more information, see the *Configuration & Security Guide*.

## Scheduling Checklist

To schedule a queue that runs smoothly and successfully, you must fulfill several requirements.

Queue Service must be installed on at least one computer in your network. We recommend installing Queue Service on a separate computer, not a user computer, to operate as the Queue server. You can easily install and uninstall this utility by clicking **Install Queue Service** or **Uninstall Queue Service** on the action bar of the Queue page.

**Warning**: You cannot designate the computer on which a scheduled queue is run if you are on a network, and Queue Service is installed on more than one computer. If specified queue actions are dependent on a specific computer, use **Run Queue Now**.

At least one computer with Queue Service installed must have the power turned on at the time the queue is scheduled.

The computer with Queue Service installed must have Microsoft Internet Information Services (IIS) and its subcomponent SMTP installed.

When queue actions include printing and you are on a network, you must designate an accessible printer. If the scheduled queue is processed on a computer without the designated local printer, the queue does not process successfully.

**Note:** If you must use a local printer and are not using a standalone computer, we recommend using the **Run Queue Now** function instead of scheduling the queue.

When queue actions include sending an email, be sure you enter the correct address. When you create the queue, the program validates addresses if the addresses are in your address book; Microsoft *Outlook* is running at the time you save the queue; and the cdo.dll is installed on your computer.

When you are sending an email outside your organization's internal mail system during a queue run, you must have port 25 open. This enables mail to travel beyond your organization's firewall. In lieu of opening port 25, you can send email to an internal address and set the email to be forwarded from there. If you are unsure about port 25 settings, contact your system administrator or IT technician.

**Warning**: The port 25 setting needs to be set up by a system administrator or an IT technician before you send mail while running scheduled queues.

When queue actions include exporting, the location in which you save the export file must be a shared file on your network. If you designate a location on a hard drive (for example, drive C), the export file is saved to the hard drive of the computer that ran the queue, and you may not be able to access it easily later.

To ensure all network locations are accessible, when exporting or printing, we recommend you change the service from the default Local System account to a user account with full rights.

#### • Creating a recurring queue

**Scenario:** You want to create a recurring queue to run an Expired Membership Report for your Board of Directors. You want this queue to run on the 10th day of each month. This example uses the "Monthly Expired Memberships" report in your sample database. For more information about creating a new queue for Reports, see "Creating a Queue for Reports" on page 130.

- 1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
- 2. Click **Queue**. The Queue page appears.

🚳 The Raiser's Edge						_ 🗆 🗙
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🔶 Back 🔶 Forward Op	en in separate window	w				
Mome Home	🔏 Admi	inistration • Queue			_	
Part Records	Administration	New Queue Dpen X Delete	Schedule	Find Show Scheduled Queues	Install <u>Q</u> ueue Service	
4	System Statistics	Name	Description	Schedule Frequency Next run dat	eltime Created by Last run by	Last run on L
Query	Import	2008 Building Fund Donations	Report detailing don		Supervisor Supervisor	
	Globally Add Becords	Address Import		On demand	Supervisor	N
😽 Export	Globally Change	Batch Processing		On demand	Supervisor	N
la.	Records	Birthday labels for Volunteers-May		On demand	Supervisor	N
Reports	Globally Delete	Class of 1992 Alumni		On demand	Supervisor	N
Mail	Records	Constituent Donors Greater Than \$500		On demand	Supervisor	N
Men .	Globally Write Off Pledges	Custom Report 2008		On demand	Supervisor	N
Ratch	Convert Pledges	Inactive Constituents		On demand	Supervisor	
	To Recurring Gifts	Pledges for 2008 Phonathon Oueue for Volunteer	2 items - Volunteer	On demand On demand	Supervisor Supervisor	
Mapping	Post to General	Supervisors Queue	Items - Event Mana		Supervisor	
· · · · ·	Ledger	Suber Allor & Galace	Letter Event Human	orradinaria	Jupor Visor	1
Admin	Duplicate Constituents					
	Merge Constituents					
Scanning	Drop Lapsed Members					F
WetSolutions	Security Queue	Only show my queues				
R Dashboard	Blackbaud	Recently Accessed Queues			Quick Find	
	Analytics	Birthday labels for Volunteers-May 2008 Building Fund Donations		-	▲	<i>8</i> 6
AuctionMaestro Pro Integration	Auction-Tracker Integration	Batch Processing			•	
Data Health		Queue				-
Web Services		Allows you to set up a series of Scheduling Guide.	asks to run automatica	ly and unattended. For more inform	ation about Queue, see the Qu	eue for Task
Welcome to The Raiser's Ed	lge 7					11.

**Tip**: You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, press **ALT** + **N** on your keyboard to create a new queue.

3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the Queue page, see "Accessing a Queue" on page 6.

🔄 Add Items	to New Queue				×
Filters Enter the mod	lule, category, and subcate	gory to filter the item:	s that car	be added to the queue.	
<u>M</u> odule:	Reports	•			
Category:	Membership Reports	<b>T</b>			
Subcategory:	Expired Membership Rep	ort 🔽			
* <u>N</u> ew Item	2 Open ■/ Select All	🔏 Deselect All	Uset	hese options for all s	elected items.
	Descripti emberships Expiring in 200 onthly Expired Membership	8		Acțion: Print Printer: hp psc 2400 se Copies: 1 -	■ <u>Restore to Defaults</u> eries ▼
Only show r	ny reports	ок   са	ancel	Add to queue	
Total number o	- of items in the queue: 0				

- 4. In the **Module** field, select "Reports" to run a queue for Reports.
- 5. In the **Category** field, select "Membership" to run a membership report.
- 6. In the **Subcategory** field, select "Expired Membership Report". You are running a report detailing expired memberships.
- 7. When reports exist on the Add Items to New Queue screen, the **Only show my reports** checkbox is enabled at the bottom of the screen. To display only reports you saved, mark the **Only show my reports** checkbox.
- 8. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "Monthly Expired Memberships" to add this queue item to the queue.

Once you select the queue item to add, several options are enabled on the right side of the Add Items to New Queue screen.

划 Add Items to New Queue	×
Filters	
Enter the module, category, and subcategory to filter the iter	ns that can be added to the queue.
Module: Reports	1
	3
Category: Membership Reports	<u>_</u>
Subcategory: Expired Membership Report	
🎦 New Item 🔄 Open 💷 Select All 🔏 Deselect All	Use these options for all selected items.
Select Description	Action: Print  Restore to Defaults
Memberships Expiring in 2008     Monthly Expired Memberships	
Monthly Expired Memberships	Printer: hp psc 2400 series
	Copies: 1
Only show my reports	
OK (	Cancel Add to queue
Total number of items in the queue: 0	

9. In the **Use these options for all selected items** frame, in the **Action** field, select "Print" to print the list of expired memberships.

Additional options appear on the right side of the screen depending on the action you choose. For example, you can select an export format, name, or a printer path.

- 10. In the **Printer** field, specify the printer to print the report.
- 11. To add the new queue item to the queue, click **Add to queue**.
- 12. Click **OK**. The New Queue screen appears.

🔮 New Q	ueue					_ 🗆 ×
File Edit	Favorites Tools He	łp				
🔁 Save a	nd Close • 🔒 📑	🖆 🎒 🔕 🙎 📍				
Queue P	rocessing [ <u>M</u> iscellaned	ous				
🎽 Add II	tem 🔁 <u>O</u> pen 🗙 <u>R</u>	emove 🛧 🖳 🗣 Down	Monthly Expire	ed M	emberships	
Module	Category	Description			Expired Membership Report	
Reports	Membership Reports	Monthly Expired Member	Action	Print	t	
			Data Format			
			Include Header			
			File Name			<u> </u>
					Output Query	<u> </u>
			Query Type		Membership	
			Query Name		Monthly Expired Memberships	
			Query Description	n	Monthly Expired Memberships	
			Others May Ever	ute?		-
1						
This queue v	vill run on demand.					

On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the right side of the screen such as the action and data format for the queue item.

At the bottom of the left side of the New Queue screen, you also see the frequency for the queue. The frequency defaults to **This queue will run on demand**. You can change the frequency on the Processing tab.

13. Select the Processing tab. The Processing tab appears.

🧐 New Queue	- 🗆 ×
File Edit Favorites Tools Help	
🔁 Save and Close - 🔛 📑 🗁 🗟 🗹 💡	
Queue Processing Miscellaneous	
Frequency: Monthly  Run as: Supervisor  Run on: (All Machines)	
☞ Every 1 month(s) on day 10	
C Every month(s) on the	
starting at 12:00:00 AM +	
Queue schedule start date: 10/10/2008	
Next queue run date/time: 10/10/2008 12:00:00 AM	
If an error occurs while running this queue, stop processing	
If all items are processed successfully, delete this queue	
This queue will run monthly.	

- 14. In the Frequency field, select "Monthly" to run the queue monthly.
- 15. In the Run as field, designate the queue to run as a specific user. For this example, select "Supervisor".
- 16. In the Run on field, enter the computer on which the queue will run. This field defaults to <All Machines>.

The default, <All Machines>, signifies that the next available computer installed with Queue Service run the queue. When a Queue Service computer does find a queue that is ready to run, it changes the status of the queue so no other Queue Service computer can run the queue.

- 17. In the **Every** [] **month(s) on day** [] field, enter "10" and "10" in each field, respectively to run the queue every month on day 10.
- 18. In the Queue schedule start date field, enter "10/10/2008".
- 19. In the End date field, enter "10/10/2009".
- 20. To stop the process if an error occurs, mark the **If an error occurs while running this queue, stop processing** checkbox. When you mark this checkbox, if an error occurs, all queue processing stops. When this checkbox is unmarked, the program continues processing the next scheduled tasks in a queue.

21. Select the Miscellaneous tab. The Miscellaneous tab appears.

🗿 New Qu	ieue		
File Edit	Favorites Tools Help		
🔁 Save an	d Close • 🔒 📑 🚰 🌛 🛝	⊻ ?	
Queue Pro	ocessing <u>M</u> iscellaneous		
🔽 Send	a queue status notification		
Mail to:	jane.smith@rgt.org	<b>#</b>	
Co:	scott.jones@rgt.org	<b>#</b>	
<b>T</b> 1 ·	90		
This queue w	ill run monthly.		

- 22. To send a queue status notification email, mark the **Send queue status notification** checkbox. The **Mail to** and **Cc** field are enabled.
- 23. Enter the email addresses in the corresponding fields.

When the queue is run by Queue Service, the status notification email is sent from the Queue Server. When the queue is run locally, the status notification email is sent by the user of that local computer.

24. To save the new queue, click **Save**. The Save Queue As screen appears.

🔮 Save Queue As	×
Queue name: Expired Membership Report for Board Members	
Description: Includes monthly reports of expired memberships.	
Other users may run this queue	
C Other users may modify this queue	
Save Cancel	

- 25. In the Queue name field, enter "Expired Membership Report for Board Members".
- 26. To allow users other than you to run the queue, mark the Others users may run this queue checkbox.
- 27. To allow users other than you to make changes to the queue, mark the **Other users may modify this queue** checkbox.
- 28. Click Save. You return to the New Queue screen.

**Note**: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears, asking if you want to change the current file name. For more information about saving a queue, see "Saving a queue" on page 29.

29. Click **Save and Close** on the toolbar to save and close the queue. You return to the Queue page.

#### Scheduling a recurring queue

**Scenario:** You want to schedule the recurring queue, Expired Membership Report for Board Members. You want to schedule the queue today. Before you schedule the queue, you must properly set up and save the queue. This scenario uses the queue created in "Creating a recurring queue" on page 159.

- 1. On the Raiser's Edge bar, click Admin. The Administration page appears.
- 2. Click **Queue**. The Queue page appears.

ile <u>E</u> dit <u>V</u> iew <u>G</u>	o F <u>a</u> vourites <u>T</u> ools	Help		
💠 Back 🔶 Forwar	d Open in separate w	indow		
et Home	👍 Admi	nistration • Queue		
Pecords	Import Standing Orders	New Queue Den X Delete	Schedule K Find Show Schedu	uled Queues Uninstall Queue
Query	Globally Add Records	Name 2008 Building Fund Donations 2008 E	ption Schedule Frequency Next ru Buildin On demand	n date/time Created by Las Supervisor
Export	Globally Change Records	Address Import	On demand	Supervisor
Reports	Globally Delete Records	Batch Processing Birthday labels for Volunteers-May Labels	On demand for Bi On demand	Supervisor Supervisor
	Globally Write Off Pledges	Class of 1992 Alumni Constituent Donors Greater Than Names	On demand of do On demand	Supervisor Supervisor
Mail	Convert Pledges To Recurring Gifts	Constituent Donors Less Than £500 Names End of Week Processes	of do On demand On demand	Supervisor Supervisor
🐝 Batch	Post to Nominal Ledger	Expired Membership Report for B Include Inactive Constituents	es mo Monthly 10/10/2 On demand	2008 12: Supervisor Supervisor
💮 Mapping	Duplicate Constituents	Only show my queues		F
Admin	Merge Constituents	Recently Accessed Queues	Quick F	ind
Config	Drop Lapsed Members	Expired Membership Report for Board Memb Class of 1992 Alumni	ers 🔺 🗈	9
Scanning	Security	Inactive Constituents		
🥵 NetSoluti	Queue Data Enrichme	Queue		
a 🔽	Services 🖵	Allows you to set up a series of tas	ks to run automatically and unattended. Fo	or more information about

- 3. In the grid, select "Expired Membership Report for Board Members".
- 4. Click **Schedule** on the action bar at the top of the page.

Once you select to schedule the queue, if you marked the **Create control report** checkbox on the Options screen, the queue is validated to ensure that the printer, file, or mail recipient can be located. If the printer, file, or mail recipient cannot be located, a message appears, informing you the information cannot be successfully located. To correct the information, click **Edit User Options** on the Options screen. For more information about setting user options, see "User Options" on page 8.

If any other item in the queue is not valid, the Queue Validation Complete screen appears. For more information about validating a queue, see "Validating a Queue" on page 17.

Warning: You must enter a date and time to run the queue that is either on or after the current date and time.

Schedule Expire	d Membership Report for Bo	ard Members		X
11 12 "	Enter the date and time to begi or press 'Run Queue Now' to ru			chedule Queue'
18 19	Current date: 10/10	ate: 10/10/2008 Current time: 3:45:11 PM		
	Queue start date: 10/1	0/2008 🔳	Queue start <u>t</u> ime:	12:00:00 AM 🚦
	Bun As: Sup	ervisor 💌	Run On:	
-9	Begin processing with: Mon	thly Expired Merr	nberships	•
	<u>S</u> ched	ule Queue 📔 C	Cancel	Run Queue No <u>w</u>

If the validate process is successful, the Schedule Queue screen appears.

5. In the **Queue start date** field, enter today's date to schedule the recurring queue today.

Remember that you set up the queue to run the membership report on the 28th day of each month. On the Schedule Queue screen, by entering today's date as the start date for the queue, you are simply scheduling the queue to begin processing today. However, since you specified the report in the queue to run every 28 days, this queue sits on the Queue Schedule screen until it is ready to be run on the 28th day of each month.

- 6. In the **Queue start time** field, enter "12:00 AM" to begin processing the queue at 12:00 AM.
- 7. In the **Run As** and **Run On** fields, information you entered in these fields on the Processing tab of the recurring queue defaults into these fields on the Schedule Queue screen.
- 8. In the **Begin processing with** field, if you have more than one queue item in a queue, you can select which queue item to process first by selecting a queue item in this field.

If more than one queue item exists in the queue and you select a queue item other than the first one in the list, queue items listed before the one you select in this field do not run. For this example, only one queue item exists in the queue.

Tip: In the Queue start date field, press F3 on your keyboard for today's date and F7 for a calendar.

9. To schedule the queue to run at the time you specified, click **Schedule Queue**. The Queue sits on the Queue Schedule screen until it is ready to run. For more information about viewing scheduled queues, see "Showing scheduled queues" on page 165.

If you change your mind and decide to run the queue now, you can click **Run Queue Now** to cancel the scheduling process and begin processing the queue immediately.

#### Showing scheduled queues

You can view the queues you have scheduled to run at any time. Depending on your business rule selections, you may or may not see all scheduled queues on the Queue Schedule screen. For more information about setting business rules for Queue, see "Business Rules for Recurring Queues" on page 150.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click Queue. The Queue page appears.

The Raiser's Edge File Edit View Go Fav	www.a.a. Taala Mala					_ 🗆 X
Back      Forward Op						
Back → Forward Up		inistration • Queue				
Records	Administration	New Queue Dpen X Delete.	Schedule	Find Show Scheduled Queues I	nstall <u>Q</u> ueue Service	
<u> </u>	System Statistics Import	Name	Description	Schedule Frequency Next run date	e/time Created by Last run by La	ast run on L
Query	Globally Add	2008 Building Fund Donations	Report detaiing don	. On demand On demand	Supervisor Supervisor 02	2/01/2008 N
i Export	Records Globally Change	Address Import Batch Processing		On demand	Supervisor Supervisor	N
Reports	Records Globally Delete	Birthday labels for Volunteers-May Class of 1992 Alumni		On demand On demand	Supervisor Supervisor	N
Mail	Records Globally Write Off	Constituent Donors Greater Than \$500 Custom Report 2008		On demand On demand	Supervisor Supervisor	N
Batch	Pledges Convert Pledges	Inactive Constituents Pledges for 2008 Phonathon		On demand On demand	Supervisor Supervisor	N
	To Recurring Gifts	Queue for Volunteer	2 items - Volunteer	On demand	Supervisor	N.
	Post to General Ledger	Supervisors Queue	Items - Event Mana	On demand	Supervisor	V
Admin	Duplicate Constituents					
We Config	Merge Constituents					
Scanning	Drop Lapsed Members					F
WetSolutions	Security Queue	Only show my queues				
Cashboard	Blackbaud Analytics	Recently Accessed Queues Birthday labels for Volunteers-May			Quick Find	
AuctionMaestro Pro Integration	Auction-Tracker Integration	2008 Building Fund Donations Batch Processing		-		<u>#</u> A
Data Health Center		Queue				<b>^</b>
Web Services		Allows you to set up a series of Scheduling Guide.	tasks to run automatica	lly and unattended. For more informa	ation about Queue, see the <u>Queue</u>	e for Task
Welcome to The Raiser's Ed	ge 7	P.				

3. On the action bar, click **Show Scheduled Queues**. The Queue Schedule screen appears. For more information about accessing a queue, see "Accessing a Queue" on page 6.

Queue Name	Description	Status	Scheduled Start Date/T
d Membership Report fo	or Includes monthly reports of exp	i Scheduled	10/10/2008 12:00:00 AM

From the Queue Schedule screen, you can view the name, description, and status of a queue. You can also view the scheduled start date/time, actual start date/time, actual end date/time, schedule, and computer name. Depending on your settings for the queue, the **Stop on Errors?** and **Delete on Completion?** checkboxes are marked.

4. To show only the queues you created, at the bottom of the Queue Schedule screen, mark the **Only show my queues** checkbox.

To update the Queue Schedule screen so that only your queues are showing, on the action bar, click **Refresh**.

5. To show only scheduled queues, mark the **Only show scheduled** checkbox.

To update the Queue Schedule screen so that only scheduled queues are showing, on the action bar, click **Refresh**.

6. To close the Queue Schedule screen, click **Close**. You return to the Queue page.

# Editing a Scheduled Queue

From the Queue Schedule screen, you can edit a scheduled queue. For example, you may need to change the frequency, start date, or end date for a scheduled queue. You can easily make your changes, save the queue, and return to the Queue Schedule screen. Scheduled queues appear on the Queue Schedule screen based on the business rules you set for recurring queues.

For more information about business rules for recurring queues, see "Business Rules for Recurring Queues" on page 150.

#### • Editing a scheduled queue

**Note**: You can also edit a scheduled queue item from the Queue tab of the Queue screen. To do this, from the Queue tab, double-click the queue item to edit.

1. From the Queue Schedule screen, double-click the queue to edit. For more information about opening a queue, see "Accessing a Queue" on page 6.



The Queue screen appears.

	avorites Tools Help						
🔁 Save and Close - 📓 📑 🗁 🚭 🔍 🗹 📍							
🎦 Add Item 🔕 Open 🗙 Bernove 🍙 🏨 🏵 Down 🛛 Volunteer Follow-up Letters							
Module	Category	Description		Volunteer Follow-up Letters	Control Report 🔺		
Mail	Volunteer Follow-up	Volunteer Follow-up	Action	Export	Print		
Query	Constituent	Members (active an	Data Format	Excel 5-7 (XLS)			
			Include Header				
			Query Name Query Descriptio				
			Others May Ever		-		
				nents as 'Letter sent'?			
his queue will I	run monthly.						

2. Once your changes are complete click **Save and Close** on the toolbar. You return to the Queue Schedule screen.

# **Deleting a Scheduled Queue**

From the Queue Schedule screen, you can delete a scheduled queue. Deleting the queue from the Queue Schedule screen does not delete the queue from your database. This action simply deletes the queue from the Queue Schedule screen and from the Queue Service. Scheduled queues appear on the Queue Schedule screen based on the business rules you set for recurring queues.

For more information about business rules for recurring queues, see "Business Rules for Recurring Queues" on page 150.

#### Deleting a scheduled queue

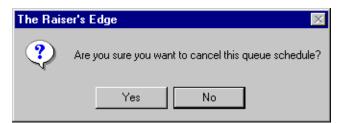
1. From the Queue Schedule screen, select the queue to delete. For more information about opening a queue, see "Accessing a Queue" on page 6.

V Queue Schedule										
🛜 🖸 pen 🗙 Remove 🔮 Refresh 🕺 🖄 🖸 lose										
Queue Name	Description	Status	Scheduled Start Date/.A	Actual Start Date/Time A						
Queue for Volunteer	2 items - Volunteer Follow-up	Scheduled	04/04/2008 12:00:00 AM							
•				Þ						
Only show my queues  Only show scheduled										

**Note**: You can delete a queue item from the action bar of the Queue screen. To do this, select the queue item to delete in the grid, and click **Remove** on the action bar. For more information about deleting queues, see "Deleting a queue item from the Queue screen" on page 38.

2. On the action bar, click **Remove**.

A message appears asking if you are sure you want to delete the queue.



3. To delete the queue from the Queue Schedule screen, click **Yes**. To return to the Queue Schedule screen, click **No**.

The **Remove** button is enabled only for queues with a status of Scheduled and when you mark the **Show only scheduled queues** checkbox. When you click **Remove**, the queue is removed from the Queue Schedule screen, and the status automatically changes from Scheduled to Cancelled.

Deleting the queue from the Queue Schedule screen does not delete the queue from your database. This action simply deletes the queue from the Queue Schedule screen and from the Queue Service.

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