Honor Roll Report

<div style="background-color:#c00; color:white; font-weight:bold;">WHEN TO USE THE HONOR ROLL REPORT</div>

The Honor Roll report provides an output of donors and their honor roll name, along with additional fields. The report includes list refinement options like giving type—cash or new commitments— unit/department/fund, time frame, among other parameters.

Use this report when you need to…

- Create a honor roll or donor wall list
- Only need look up ID, standard name, honor roll formatted name, and giving total

RELATED REPORTS AND LIMITATIONS:
- The report includes similar parameters to Communication Planner – Donors to Unit/Dept/Fund, but the similarities end there. This report—which is not intended for communications, only for honor rolls and donor walls—excludes contact information and includes deceased.

<div style="background-color:#c00; color:white; font-weight:bold;">WHAT IS INCLUDED IN THE HONOR ROLL REPORT</div>

The report provides a list of donors who qualify for honor rolls or donor walls. The user can create such a list by choosing a giving time frame and selecting funds based on unit or department or particular fund groups. The Giving Type parameter allows the user to define giving as either cash (i.e. payments – outright gifts, payments on pledges) or new commitments (outright cash gifts, new pledges, planned gift initiations).

Along with standard first name, last name and Lookup ID, the report provides the custom honor roll name format and total giving (a calculation based on the Giving Type parameter choice).

Deceased constituents are included; and a deceased flag field exists to distinguish those.

<div style="background-color:#c00; color:white; font-weight:bold;">HOW TO GENERATE THE HONOR ROLL REPORT</div>

1. Log in to ABE CRM.
2. On the navigation bar, click **WFAA Reports**.
3. Click the **Honor Roll** link.
4. Select a value for **DonorsTo**.
5. Select a value for **Fund Group** (if applicable).
6. Select a value for **Donors to Unit**
7. Select a value for **Donors to Department**
8. Select a value for **Fund**
9. Select a value for **Start Date**
10. Select a value for **End Date**

11. Select a value for **Giving Type**
12. Select a value for **Exclude Tribute Gifts**
13. Select a value for **Exclude Matching Gifts**
14. Select a value for **Spouse Link**
15. Select a value for **List this School/College Alum First When Spouse-linked**
16. Select a value for **Include Spouse Even If They Do Not Qualify**
17. Select a value for **Excel-ready**
18. Click **View Report**.

The **DonorsTo** parameter allows the user to include funds based on either **Unit/Department/Fund** criteria or **Fund Group**. Note that choosing Fund Group renders **Donors to Unit** and **Donors to Department** "Not Applicable"; likewise, choosing **Unit/ Department /Fund** renders **Fund Group** "Not Applicable."

The **Giving Type** parameter enables the user to define giving in one of two ways: 1) cash (i.e. outright gift payments, payments on pledges); or 2) new commitments (i.e. outright gifts, new pledges, planned gift initiations).

REPORT GLOSSARY

Report Section	Element	Description
Main	Constituent Lookup ID	A unique ID assigned to the donor.
Main	Last Name	The donor's last name, or the name of an organization.
Main	First Name	
Main	Deceased Flag	
Main	Spouse Lookup ID	A unique ID assigned to the donor's spouse.
Main	Spouse Last Name	
Main	Spouse First Name	
Main	Spouse Deceased Flag	
Main	Honor Roll Name	Adam T. Smith and Mary D. Smith David J. Ricardo
Main	Cash Giving / New Commitment Giving	Total giving for time period, based on either payments or new commitment gift