What You Should Know About Queries and Reports

In MyBernard, queries and reports give you the tools to group records based on specific criteria and generate reports to analyze your organization's success. With queries, you can use the output to create dashboards for your home page, charts for visual impact, and answer questions about the database.

Reports use graphics and summarized data to provide a window into performance, effectiveness, efficiency, and other information that you need to analyze.

Using Query Functions

Query functions allow you to look at several conditions when executing a Contacts query type or performing an appeal pull. They can include results from one or multiple queries and be reused with new queries.

The following table identifies the different query functions available in MyBernard and includes a description of each function.

Query Function	Description
Current Date	Compare the current date to a fixed date you select. You can use this function to control the use of acknowledgment letters before or after a certain date.
New Names with Recency Frequency and MRC	Allows you to insert a date range, minimum and maximum gift count, and minimum and

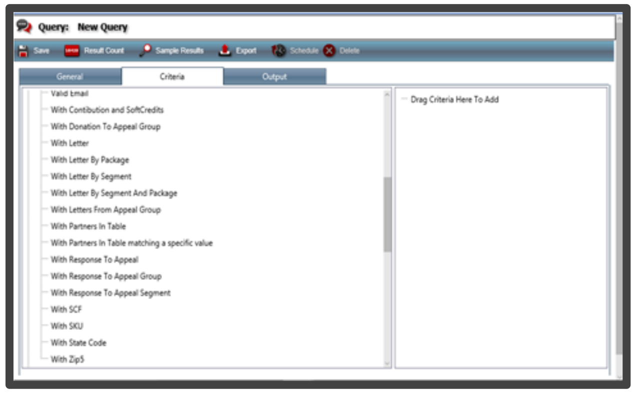
Query Function	Description
	maximum last gift amount within one parameter to access certain donors.
Number of Years Given	Identify how many individual years within a date range that a specific donor has given.
Valid Email	Checks the primary email address and verifies that the address is valid.
With Contribution and Soft Credits	Summarizes dollars based on the date range and you can test on 'Contained In' as validation that the dollar range comparisons were met.
With Donation to Appeal Group	Enter the group type and option to see who donated to appeals in that grouping. You can then select contained in or not contained in for your comparison.
With Donors to Appeal Group	Enter a date range, fund code, appeal group, appeal group option, minimum and maximum gift count as well as gift total range.
With Letter	Enter an appeal ID to see if a donor was mailed a specific solicitation.
With Letter By Package	Enter an appeal ID and package ID to see if a donor was mailed a specific solicitation letter.
With Letter By Segment	Enter an appeal ID and appeal segment-ID to determine if a donor was mailed a specific solicitation letter.
With Letter By Segment and Package	Entering an appeal ID, appeal segment ID, and package ID to determine if a donor was mailed a specific solicitation letter. This is important for users that allow multiple package ID's to be assigned to the same unique appeal segment ID.
With Letters From Appeal Group	Select a specific appeal grouping type and option to identify donors who received any solicitations to an appeal grouping such as Christmas programs or fiscal year.
With New Names	Select the first response date, fund list, minimum and maximum gift count, and minimum and maximum gift total to identify specific types of new names.
With New Names From Appeal	Enter the information to identify specific types of new names who responded to a list of specific appeal codes separated by a comma.

Query Function	Description
With New Names From Appeal Groups	Enter the information to identify specific types of new names who responded to a list of appeal grouping options separated by a comma.
With Recency Frequency and MRC	Enter the information to display donors in an MRC format.
With Response to Appeal	Identify donors who donated to a specific appeal.
With Response to Appeal Group	Identify donors who donated to a specific appeal group.
With Response to an Appeal Segment	Identify donors who donated to a specific appeal segment ID.
With SCF	Identify specific postal sectional center facilities.
With State Code	Identify specific states without the need to create separate OR statements.
With Zip5	Identify specific zip codes without the need to create separate OR statements.

Contact Query

To use query functions for a contact query, follow these steps:

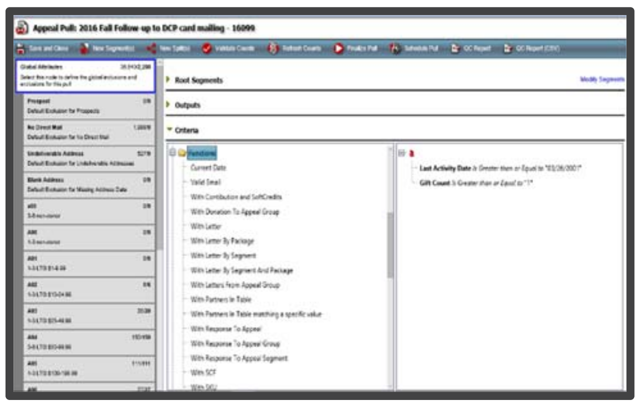
1. Locate and open or create a new query.
2. For a new query, select **Contacts** in the **Query** field.
3. Select the **Criteria** tab.
4. Expand the **Functions** option and then drag and drop the functions to the pane on the right.



Appeal Pulls

To use query functions in appeal pulls, follow these steps:

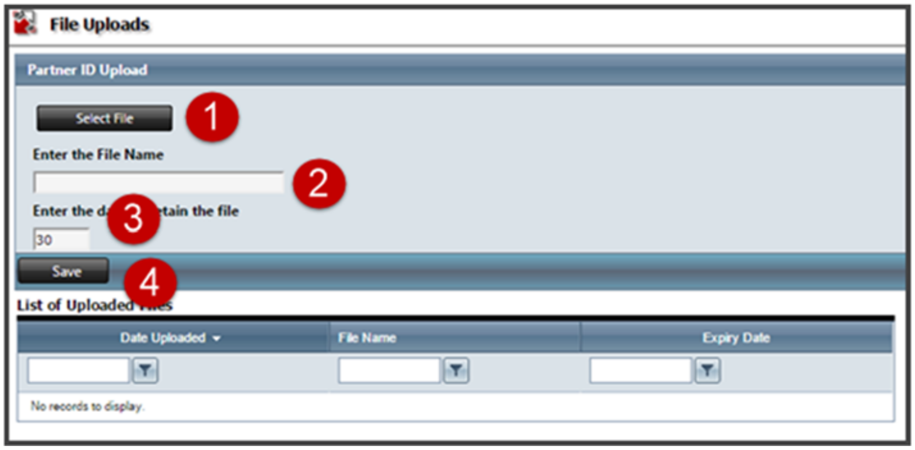
1. Locate and open or create a new appeal.
2. Select the **Pulls** tab.
3. Click **Edit Current** Pull.
4. Expand the **Criteria** panel.
5. Expand the **Functions** option and then drag and drop the functions to the pane on the right.



Uploading Files For a Specific Mailing

There may be times when you want to temporarily upload a file in MyBernard after it has been manipulated in Excel for a specific mailing using the With Partner in File query function. The partner ID field is required in your file and it must be in CSV format.

To upload a file click **Queries** on the Navigation menu, select **File Uploads** and then follow these steps:



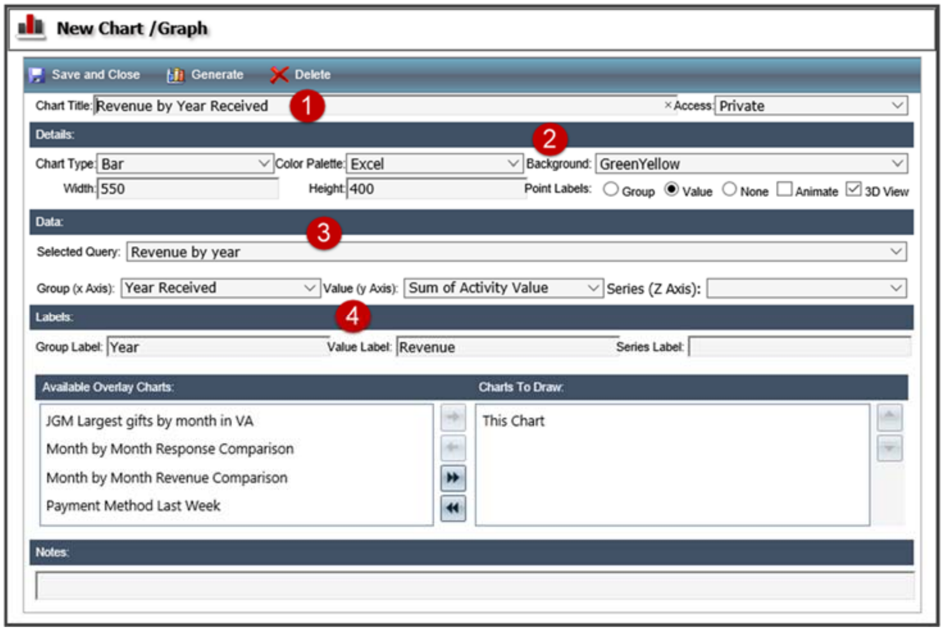
1. Click **Select File** to search for and select the CSV file to upload.
2. Enter a name for the new file.
3. Enter the number of days to keep the file.
4. Click **Save**.

Once the file is uploaded you can use it for the **With Partner in File** query function as criteria in a new query.

Creating Charts

Before you can create a chart, you must have a query for the data to use in the chart. An example of criteria for your query is an activity date greater than or equal to 1/1/2013. Select year received, member count, activity count, and sum of activity value as you output fields and sort by the year received field.

To create a new chart click **Charts** on the Navigation menu, click **New Chart**, and then follow these steps:



1. Enter a name for your chart.
2. Choose the details such as chart type, color pallete to use, and background color for the chart.
3. Select the query to use and then choose the criteria for the **Group, Value,** and **Series** fields.
4. Enter labels for the **Group, Value,** and **Series** fields.
5. Click **Generate**.
    a. Make changes to the **Details, Data,** or **Labels** fields and preview the results until you achieve the look you want.
6. Click **Save and Close**.

Monitoring High Impact Reports

MyBernard includes many different reports you can generate to analyze information in your database. The table below identifies the high impact reports you should monitor on a regular basis and includes a description of each report in order of importance.

Query Function	Description
Campaign Performance Analysis (C1006)	Provides appeal performance information for appeals mailed during the date range you define with the appeal grouping you select. **Reports module > Campaign Analysis folder**
Giving Lifecycle (P1014)	Categorizes donors in groups of donors/non-donors and runs a detailed analysis of gifts as well as revenue for each group. Generate this report no less than Quarterly to determine if programs are on target to Budget expectations. **Reports module > Partner folder > Administrative folder**
State of the Database (MG1001)	Summarizes giving metrics for three previous years to date. You should generate this report on a monthly basis to verify that programs are functioning as expected. **Reports module > Management folder**
Fund Revenue By Description (V1007)	Displays month to date and year to date responses and income for the past three fiscal years. Month to date displays at the top and year to date displays below that at the bottom of the report. **Reports module > Income/Expense folder**
Revenue By Appeal (A1006)	Details the performance of active appeals during a specific date range. This report should be run monthly as part of your end-of-month procedures. **Reports module > Appeal folder > Revenue folder**
Core Stats (MA1010)	Analyzes five years of data including donations, retention, and upgrade/downgrade metrics for each lifecycle group. **Reports module > Advanced Management folder**
Appeal Recap (A1013)	Displays summary details for a specific appeal and includes information such as the Overall Summary, Monthly Giving Summary, and Package Cost Detail. **Reports module > Appeal folder > Revenue folder**
Revenue by Appeal Group (A1040)	Displays details in a table and graphical format based on the revenue, number mailed, and gift counts for the selected appeal grouping. **Reports module > Appeal folder > Revenue folder**
Appeal Performance Analysis (A1015)	Provides a summary total of all appeals mailed within the date range you choose. Previous and current fiscal

Query Function	Description
	year (or calendar year) are the most common date ranges. **Reports module > Appeal folder > Appeal Performance folder**
Appeal Performance Analysis by Segment (A1014)	Provides metrics associated with the performance of a set of defined appeals. Sub-Totals are provided for each appeal presented and Grand Totals are printed for all appeals printed. **Reports module > Appeal folder > Appeal Performance folder**
Appeal Performance Analysis by Package (A1061)	Provides an appeal performance analysis by package for the appeals you select. **Reports module > Appeal folder > Appeal Performance folder**
Appeal Performance Analysis by Segment with Segment Groups (A1030)	Provides appeal performance statistics by segment using the appeal segment groupings. **Reports module > Appeal folder > Appeal Performance folder**