



TELOSA
SOFTWARE

Premier Special Topics Cheat Sheet

Reports & Extractions

REPORTS

- There are System Reports and there are Custom Reports
- System Reports are canned reports created by Telosa
- Custom Reports are reports that you can build yourself
- Among System Reports, there are Biographical, Gifts & Pledges, & Statistical reports
- If you have the Guest, Grant or Volunteer modules, there are reports for those as well
- System Reports can be saved in multiple formats
- The formats are Word, Excel, PDF, HTML or RTF
- Any of the above formats can be selected from the Report screen *before* running the report or from the Print Preview toolbar *after* running the report
- One format that can only be selected from the Print Preview toolbar is Image
- Image allows you to save the report as a JPG, GIF or other image format
- Custom Reports can also be saved in one of the above formats, but must be done so from the Print Preview toolbar when the report comes up
- Some Statistical Reports can be drilled down
- The reports that can be drilled down are:
 - Action Statistics
 - Campaign Report
 - Count Only
 - Event/Reason Report
 - Gift Fund Report
 - Mailing Analysis Report
 - One Period All
 - One Period Received and Due
 - Three Month/YTD Statistics
- The Credit Card Reconciliation Report is for clients using IATS to process their Credit Cards from Exceed!

- The Pledge Balances report gives you a snapshot of all pledges with current balances due
- Any report can be saved as a Favorite report, whereby the program remembers the settings for the report, as well as the extraction criteria
- Favorite Reports can be modified, deleted or added to another System Users Favorite Reports list from the Organize Favorites option under the Favorites menu

EXTRACTIONS

- No matter what you are doing – a report, a mailing, setting a filter, archiving – the Extraction engine will always look the same and always give you the same choices
- The 3 choices are Extract by Range, Extract by Query and Saved Query
- Exceed uses Structured Query Language (SQL) to build your extraction, which just means it uses language in a structured manner to do the extraction (query)
- Extract by Range allows you to pick and choose almost any field in Exceed for extraction
- Extract by Range builds the SQL in the background using the items you have chosen for extraction
- Extract by Query allows you to not only pick and choose almost any field, it also requires that you build the SQL around the items you have chosen
- Saved Query allows you to save any extraction criteria you build in the extraction engine – be it by Range or by Query
- Extraction criteria can be saved on the last screen (Step 4) of the Extraction engine
- Extraction criteria can be viewed or modified on the last screen (Step 4) of the Extraction engine
- Extracting on any code field – except Affiliations – allows you to only Include or Exclude; there is an exception with the Volunteer module
- When extracting on any code field – except Affiliations - Include is an “or” and Exclude is a “not”
- Extracting on Affiliation codes allows you to Include, Exclude or Require
- For Affiliations, Include is an “and/or,” Exclude is a “not,” and Require is an “and”
- After establishing an Extraction you can change it by clicking on the Extract a Group box and selecting from Edit, Clear, Uncheck and Cancel.