Friends Asking Friends 2.94

New Features Guide

8/10/2012 Friends Asking Friends 2.94 Friends Asking Friends US

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This guide provides an overview of new features and enhancements for the Blackbaud Friends Asking Friends changes available in the 2.94 release. For information about how to install or update to this version, see the *Infinity Platform and Upgrade Guide*.

Friends Asking Friends Event Management

The following event management enhancements are available. For more information, see the Friends Asking Friends Event Management chapter of the *Friends Asking Friends Guide*.

Update Incentive Benefits

The Friends Asking Friends Incentive Level Updates business process now calculates Friends Asking Friends incentive level benefits. Previously, new benefits were calculated from **Update benefits** on the Registrants tab of the Events page.

Friends Asking Friends Global Changes

The following new global changes are available. The global change functionality is available for Friends Asking Friends events from the **Update multiple events** link in *Events*, or from the Global Changes page in *Administration*. For more information, see the Friends Asking Friends Event Templates chapter of the *Friends Asking Friends Guide*.

Add, Change, or Delete Event Incentive Level

Incentive levels are elements within your event's benefit structure that motivate participants to reach event goals. For example, you can offer a sweatshirt to participants who raise $100 to $500 and a gym membership to those who raise $501 to $1000. If you need to add, change, or delete an incentive level for a template event that is copied, you can now update the template and then use the global change functionality to update all the copied events at once.

Friends Asking Friends Event Campaigns

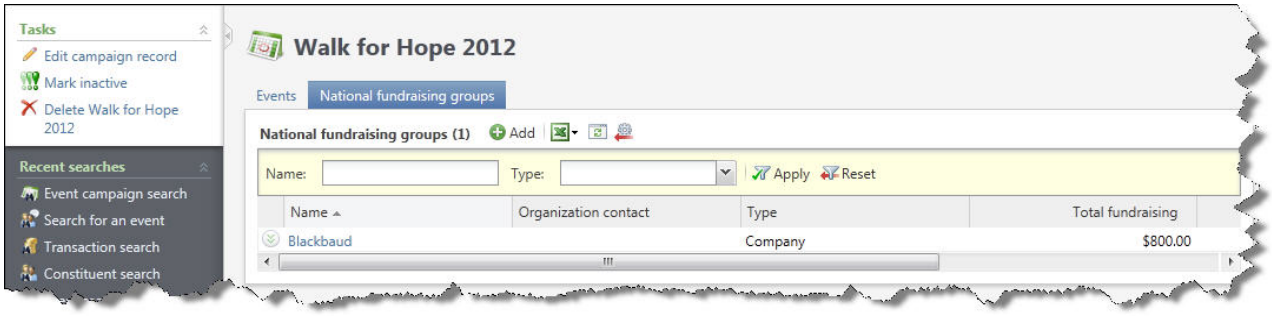
Previously,groups of related events were known as event programs. Now, they are referred to as event campaigns and include additional features. Create and search for event campaigns from the Friends Asking Friends section in *Events*.

Note: Event campaigns are available for accounts in which National Events is enabled.

When you create an event campaign, you can now:

- Copy configuration settings from an existing campaign so you do not have to manually enter settings and re-create national fundraising groups.
- Enter a previous Friends Asking Friends event campaign to use as a comparison for the current event campaign in reports.

In addition to the Events tab that was previously available, campaign records now include a National fundraising groups tab where you can manage the national organizations that participate in multiple events.



If you no longer need a campaign, you can delete the record and remove its associations with national fundraising groups and local events.

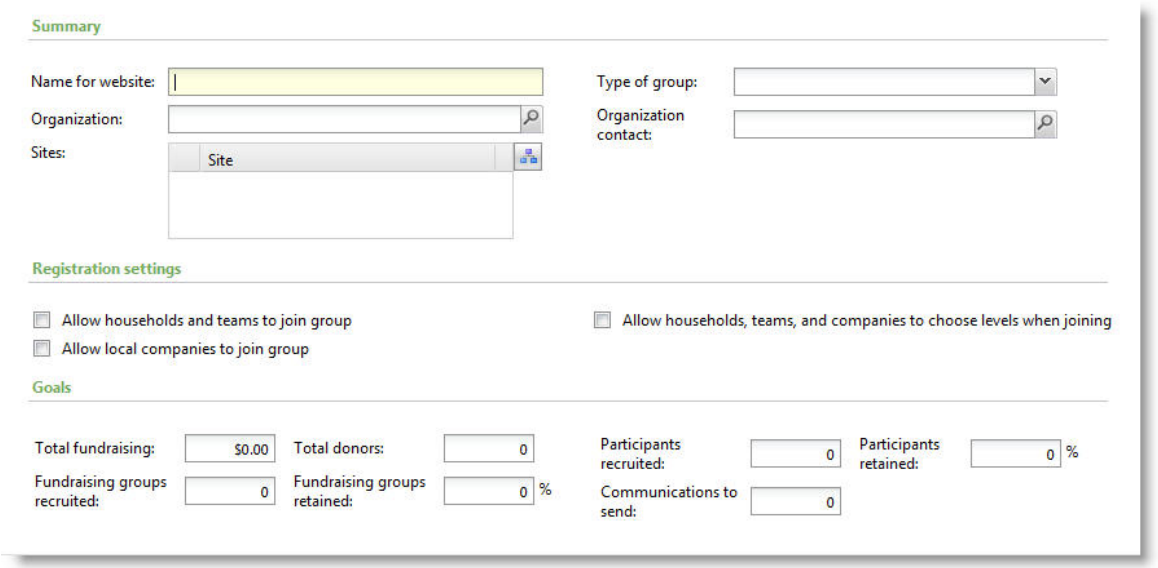
For information about evet campaigns, see the Friends Asking Friends Event Campaigns chapter of the *Friends Asking Friends Guide*.

Friends Asking Friends National Fundraising Groups

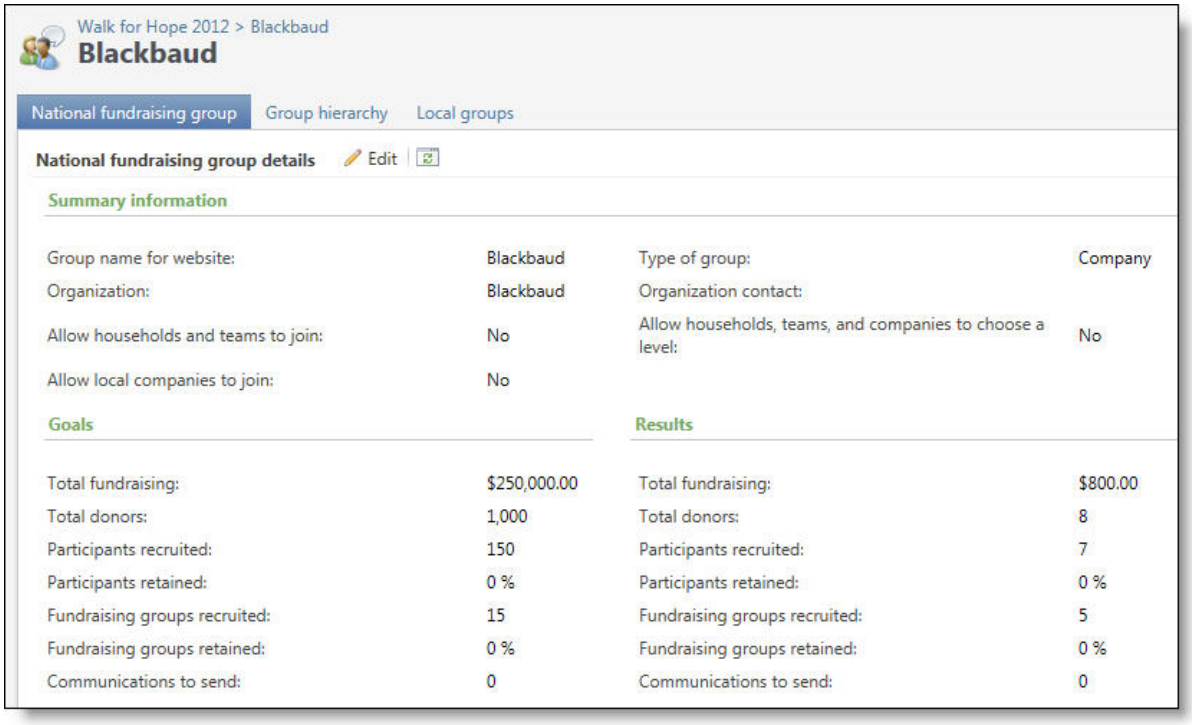
A national fundraising group is an organization that participates in multiple events to raise money and awareness for your cause. To track an organization's progress across multiple events, you can now create a national fundraising group from an event campaign. For information about national fundraising groups, see the Friends Asking Friends Event Campaigns chapter of the *Friends Asking Friends Guide*.

Note: National fundraising groups are available for accounts in which National Events is enabled.

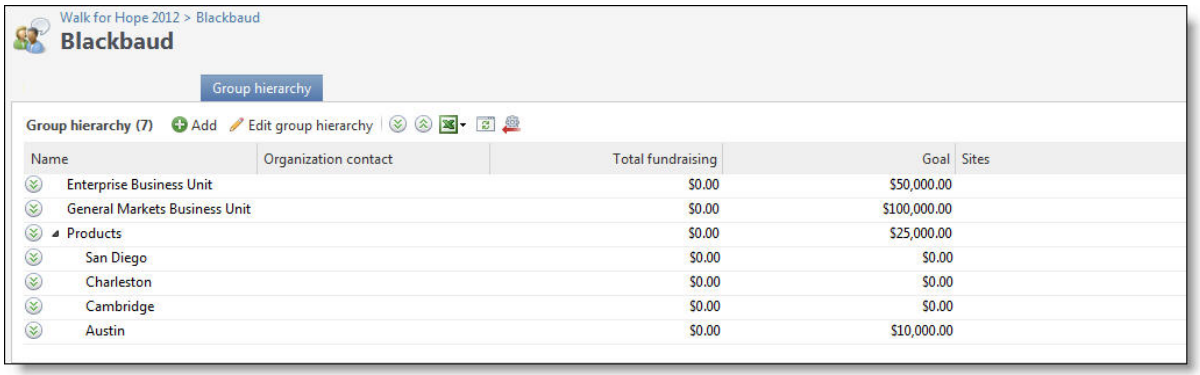
To create a national fundraising group, click **Add** from the National fundraising group tab on the event campaign record. From the screen, you specify registration settings, goals, and information to display on the event campaign website.



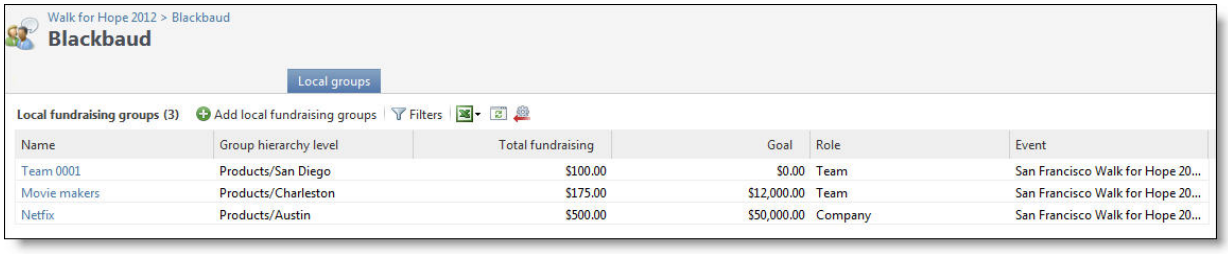
After you create the record, the national fundraising group appears. On the National fundraising group tab, you can edit the group record information.



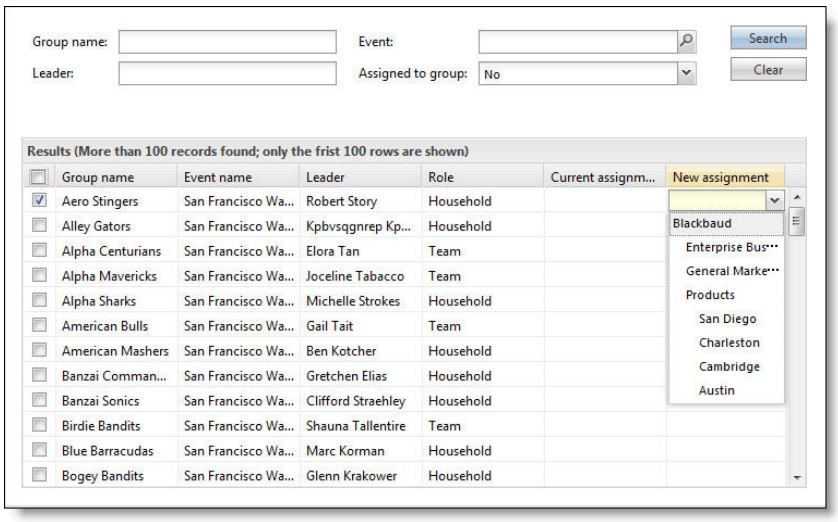
On the Group hierarchy tab, you manage the levels local fundraising groups use to register under a national fundraising group. Group hierarchies allow national fundraising groups to specify levels that are unique to their organizational structure. When a national fundraising group uses a hierarchy, participants in local events can associate their fundraising groups with the national group at any level within the hierarchy. For example, a team in the San Diego office of a national fundraising group can join under the organization's human resources department in the west coast division.



On the Local Groups tab, you manage fundraising groups associated with the national fundraising group. You can assign groups to different levels in the national fundraising group hierarchy or associate other fundraising groups from the event campaign with the national fundraising group.Typically, you add local fundraising groups to national groups when participants register their groups with campaign events, but do not associate their local groups with national groups.

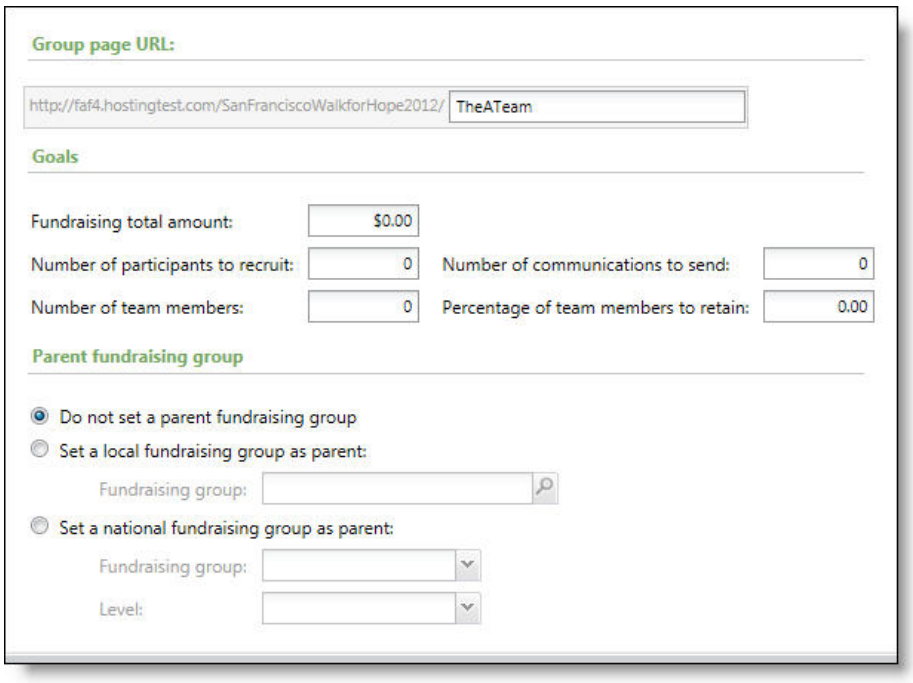


To assign fundraising groups to the national fundraising group, or to assign a group to a different level in the national fundraising group hierarchy, click **Add local fundraising groups** on the Local groups tab of the national fundraising group record. The Assign event companies and groups to national company screen appears.



From the screen, you can search for groups and view fundraising groups that are already assigned to the national group, or do not have a current national group assignment. You can view the group names, events the groups are assigned to, group leader names, group fundraising roles,and current hierarchy level assignments. To assign a group to a level in the national fundraising group hierarchy or change a current group level assignment, select the group row and make the selection in the **New assignment** column.

You can also assign a local group to a national fundraising group from the group record. New parent fundraising group fields which allow you to assign the group to a parent group in the local event or from a national fundraising group are now available when you edit the group.



National Fundraising Group Records

When you add a national fundraising group to an event campaign, the program creates a constituent group page and a national fundraising group page. The constituent group aggregates national fundraising group performance across events, and the national fundraising group page contains the group summary details, website information, hierarchy levels, and local fundraising groups associated with it from the event campaign.

For information about constituent group pages, see the *Constituents Guide*.

You can access national fundraising group pages from event campaigns or constituent group pages. To view a national fundraising group page from an event campaign, click the name of the group in the grid under **National fundraising groups** from the National fundraising groups tab. To view a national fundraising group page from a constituent group page, select the National fundraising group constituency view under **View as** and click the group name under **Event campaigns**.

To access constituent group pages, click **Go to constituent** under **Tasks** on the national fundraising group page or use the constituent search from *Constituents*.

When you delete the constituent group, the program removes the constituent group and national fundraising group. The program also removes the group and its associated hierarchy levels from event campaigns.

Access constituent groups from national fundraising groups, or from the constituent search in *Constituents*.

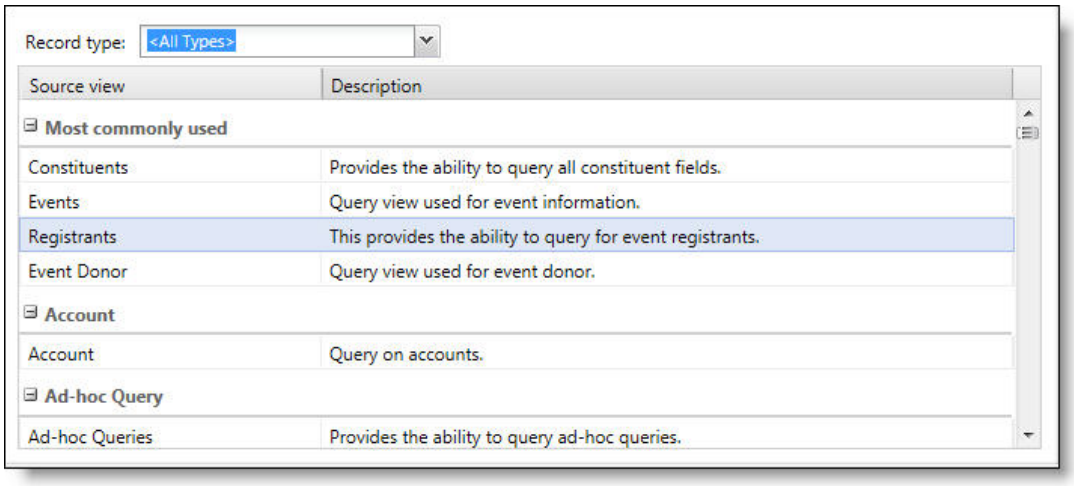
Note: To keep a national fundraising group but remove it from an event campaign,click **Remove from campaign** on the national fundraising group record.

Analysis

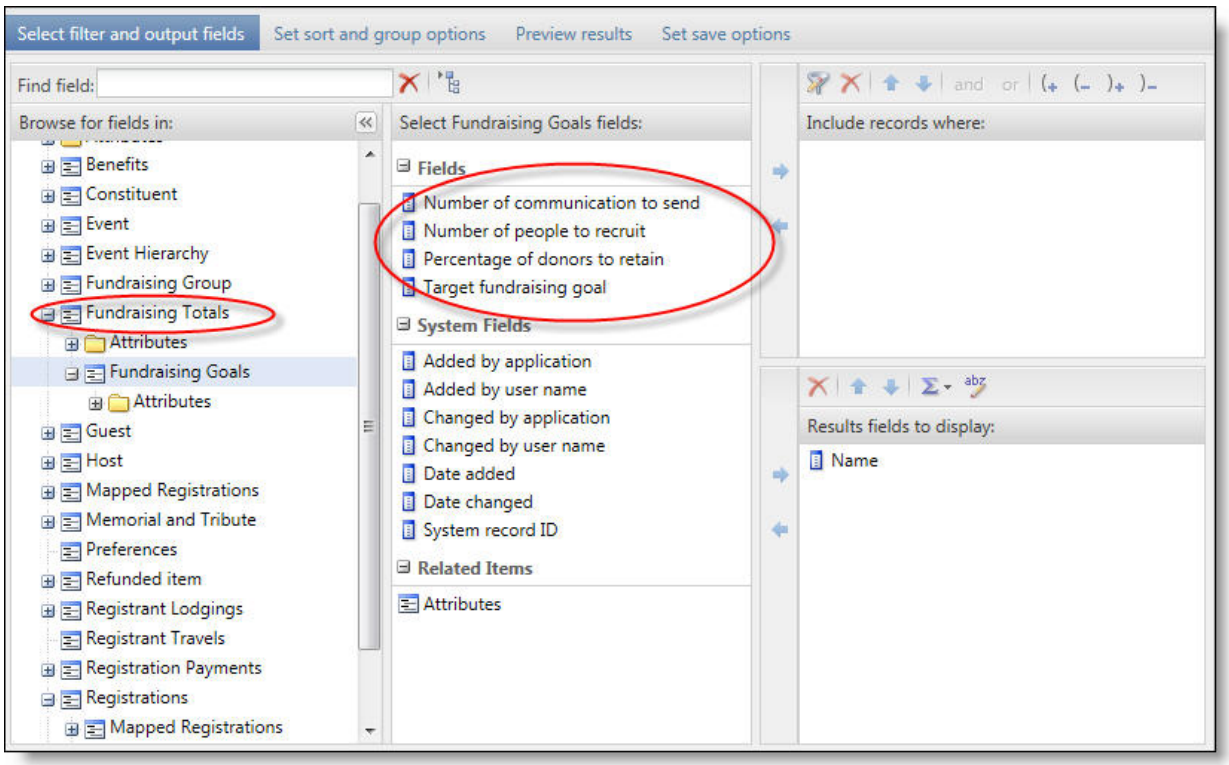
The following Friends Asking Friends query enhancement is available in *Analysis.* For information about queries, see the *Query and Export Guide.*

Personal Goals Fields in Query

Personal goals fields are now available from the registrant source view when you create queries from the Query page.



The Number of communications to send, Number of people to recruit, Percentage of donors to retain, and Target fundraising goal fields appear in the Fundraising Goals folder under Fundraising Totals.



Friends Asking Friends Event Website

The following event website enhancements are available.

Participant and Group Page Friendly URLs

Now when participants and group leaders register for the event, the registration form auto-populates the registrant or group name after the event's friendly URL. Previously, the program generated a long link with special characters.

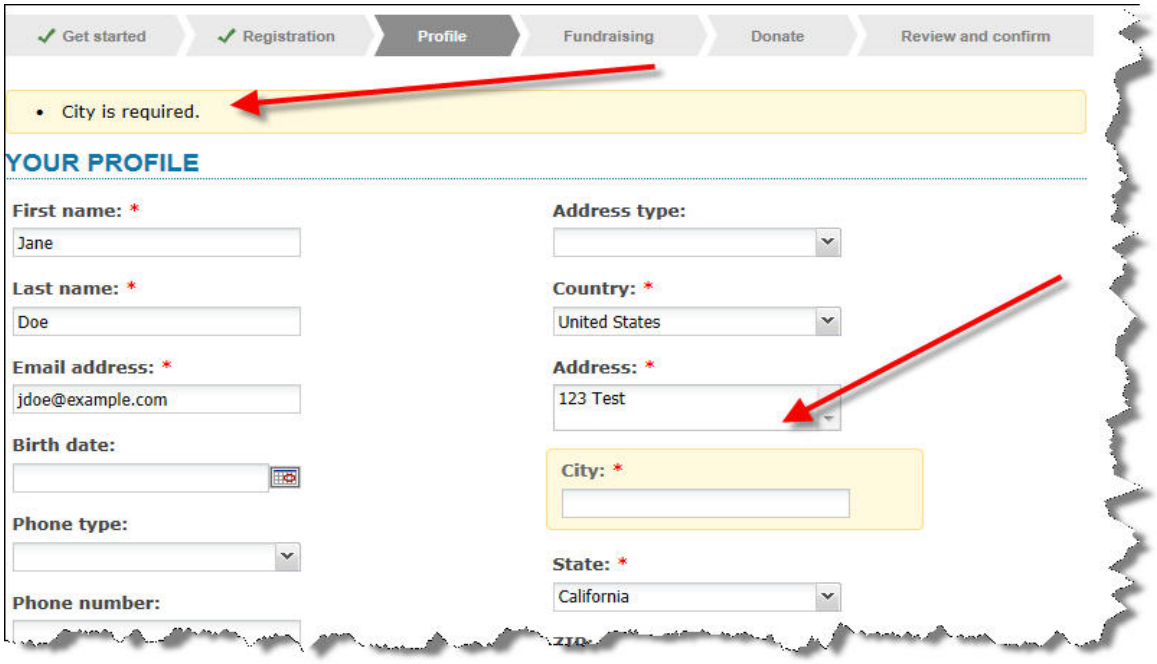
Friends Asking Friends Forms Enhancements

Friends Asking Friends forms now include default style sheet changes that make them easier for website users to complete. The changes are backwards compatible, so they appear for existing forms.

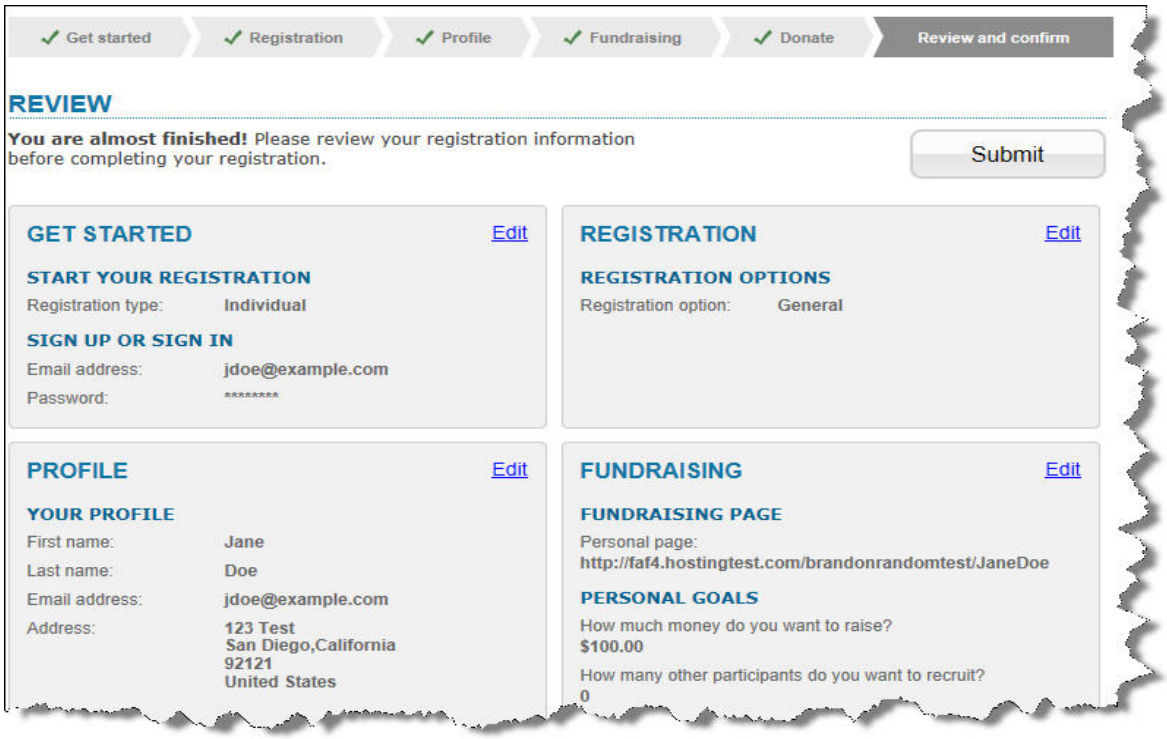
The forms changes include:

- An updated progress indicator. Now checkboxes appear for each step users complete. The checkboxes allow users to switch between steps without losing their changes.

- Updated validation messages. When users omit required fields, the corresponding error messages now appear at the top of the page and the missing fields are highlighted in the form.

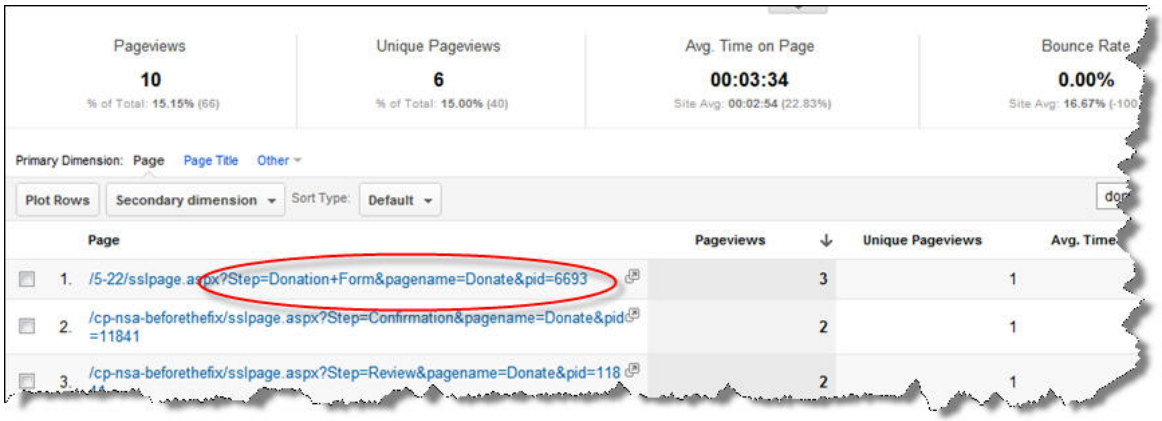


- An updated review page. Form details now appear in a two column format.

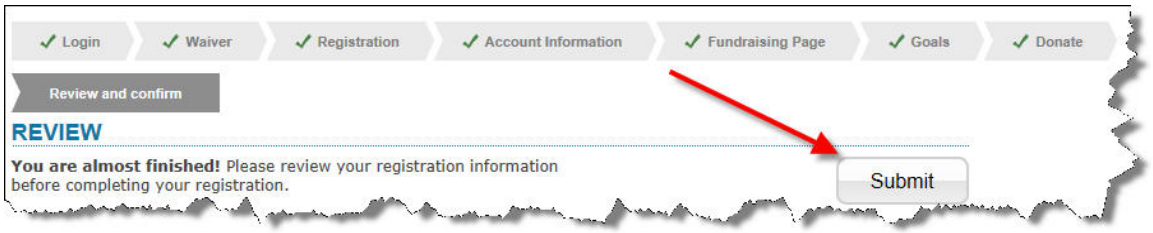


- The ability to return to the review page. Users can return to any step in the form from the review page to edit their information and then return to the review page.

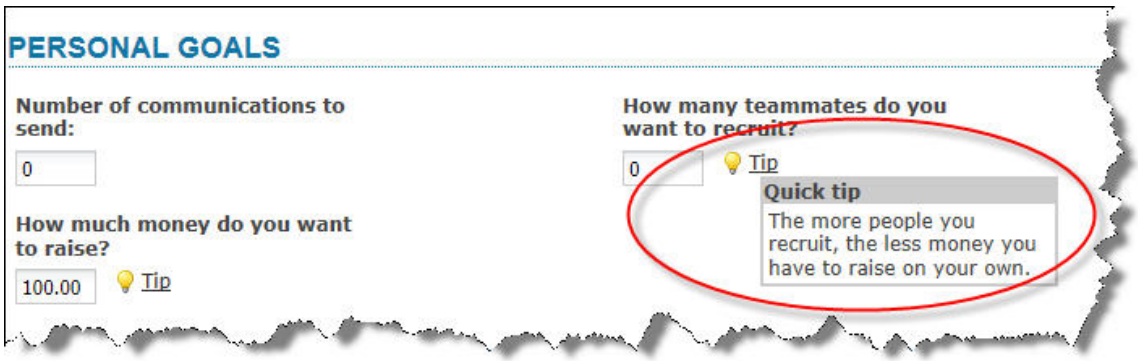
- Tracking URLs for form steps. The URLs allow you to identify the steps users complete when you use tracking tools such as Google Analytics.



- A button to submit the form at the top of the review page. Previously, the submit button appeared at the bottom of the page where users could not easily find it.



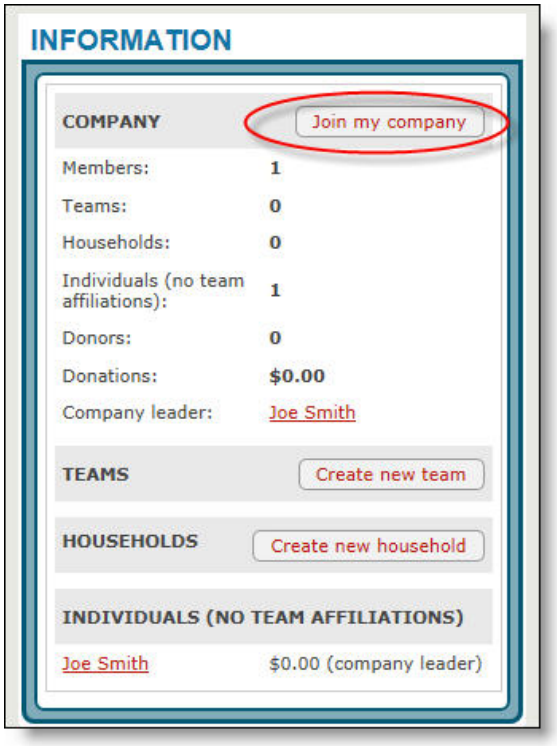
- Help text for goal fields. The new text appears after users highlight light bulb icons and explains the purpose of each field.



Group Fundraising Page Enhancements

Links to registration pages where website users can join fundraising groups are now more prominent on group fundraising pages. Buttons to join companies and teams now appear at the top of group fundraising pages, and

in rows above group details within the information widget.



Also, the program now validates whether teams and companies have reached capacity when website users attempt to join them from group fundraising pages.

Login Enhancement

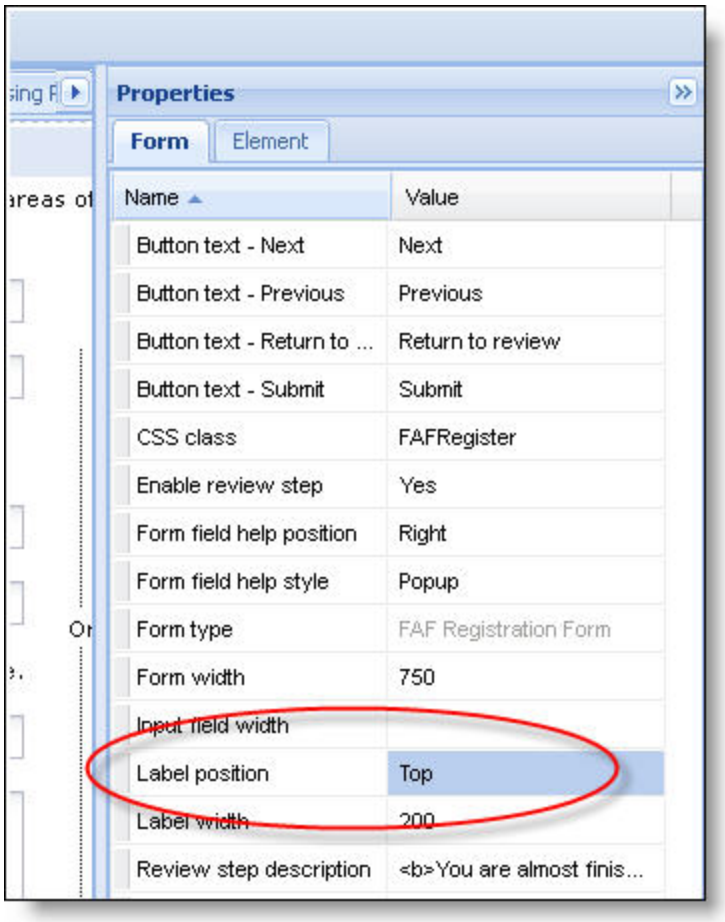
Now when a user clicks **Forgot your user name or password** on the login screen, an email is sent to the user's email address that includes the user name and a link to reset the password. When the user clicks the link, a screen appears to enter a new password and confirm it. By default, the link expires after the user clicks it or after 24 hours.

Form Label Position Settings

The **Label position** form property now displays labels in the position you specify when you design forms. Previously, form and element labels appeared in the top position, regardless of the **Label position** property setting.

Tip: We recommend you review your forms and update the settings as necessary to ensure the labels appear properly.

By default, Friends Asking Friends forms now use the top setting for form and element label positions.



Friends Asking Friends Reports and Lists

The following reports and lists enhancements are available. For more information, see the Friends Asking Friends Reports and Lists chapter of the *Friends Asking Friends Guide*.

Friends Asking Friends Event Lists

With this release, we replaced several Friends Asking Friends reports with new Friends Asking Friends lists. Lists are similar to reports but with more functionality.

Just like reports, lists enable you to track, manage, and evaluate the effectiveness of your event website, as well as fundraisers' performance. With lists, you can view a group of records that share selected criteria. When you first access a list page, all its applicable records appear. To create a custom list, use the filters to determine which records to include and information to view.

- To filter the data in a column, select the filter icon.

  Based on the data in the column you filter, you enter your criteria. For example, for a date-based column, you can enter date criteria, such as all donations after 11/1/2012. For name-based columns, you can enter the name for which you want to filter, such as all registrants with the last name Williams.
- To find specific records, use the **Search** to enter the criteria. However, the program uses your criteria to only search through the first 500 records that display for the list. To narrow down the results before you use the search, we recommend you use the column filters first.
- To select which columns to show, on the action bar, click **Columns**. A screen appears for you to select which columns to show and hide. Use the **Search** field to quickly find a column by name.
- To revert back to the grid defaults, you can reset the grid .

  Note: By default, data for lists refreshes every 24 hours from the Data Mart.
- To sort the grid data by a specific column, click the column header. An arrow appears next to the column header for you to choose ascending or descending.
- Also, if you select and hold the column header, you can drag and drop columns to the left and right to reorganize the grid.

  Tip: After you make desired list changes, we recommend you save your list for future access. You can save as many lists as you need to segment and review data.

After you create a list, you can download its information or save the list for future reference.

- You can download a list as a comma-separated values (*.CSV) file or a Microsoft *Excel* (*.XLSX) spreadsheet. For example, you can download a *.CSV file to provide a mail house for a mailing, or export an *Excel* spreadsheet for use outside of the program. To download a list, click **Export section** and then **Download to CSV** or **Download to XLSX**. Your browser then downloads the export file, which you can save locally or open in *Excel*.
- To save a list, click **Save list** on the action bar. On the Save list screen, enter a name and description to help identify the list and then click **Save**.
- To open a saved list, click **Open list** on the action bar. On the Open a list screen, click the name of the list. To narrow the lists that appear, search for the list to open by its name.

You can access the new lists from the event record in Friends Asking Friends. The following are the lists and the reports they replaced:

- Registrants List replaced the Participant List Report.
- Lapsed Registrants List replaced the Lapsed Participant Report
- Groups List replaced the Fundraising Groups Report
- Lapsed Groups List replaced the Lapsed Fundraising Groups Report
- Donations List replaced the Donor Detail Report

Friends Asking Friends Data Warehouse

For this release, we added a data warehouse for the new event lists. The following is information about the data warehouse and what it means for Friends Asking Friends. For more information, see the Friends Asking Friends Event Setup chapter of the *Friends Asking Friends Guide*.

Friends Asking Friends Data Warehouse

Friends Asking Friends uses a data warehouse and ETL processes for several event lists.

Tip: ETL (Extract, Transform, and Load) is a data warehousing process in which data is gathered from various locations (extracted), processed (transformed), and placed in a data warehouse (loaded).

A data warehouse contains business information organized and stored in such a way that queries and reports can be run quickly with less impact on a transactional database.

Note: The terms 'data mart' and 'data warehouse' are sometimes used interchangeably. But generally, 'data warehouse' indicates a large repository of business information at an organization and 'data mart' indicates a smaller or specialized repository that accommodates a department or division of an organization. A data warehouse feeds a data mart, from which queries and reports are created.

The data warehouse for your Friends Asking Friends data, is maintained separately from your day-to-day transactional database system. As such, the database for a data warehouse is periodically updated with data from the transactional database. Updates occur when traffic to the transactional database is low, such as during non-working hours. This separation ensures that queries and reports run on the data warehouse do not affect the operation of the transactional database.

Data warehouses are also structured differently than transactional databases. While transactional databases are designed to perform well for a variety of functions such as small queries and updating records, data warehouses are designed to perform well for reports and queries that involve a large number of records.

For smaller organizations, the data warehouse will be installed and run on the same hardware as your OLTP (Online Transaction Processing) database. For larger organizations, the data warehouse can be installed and run on a separate server. However, as a hosted organization, you will not notice whether your OLTP and data warehouse is on the same server.

How does the use of data warehouse and ETL processes affect Friends Asking Friends?

- Friends Asking Friends has a nightly process to run ETL for all lists except the Donations List.
- Friends Asking Friends has a nightly business process to update the cache table for the Donations List.

  Note: Because your event lists are updated nightly from the data warehouse, when you update data in Friends Asking Friends, your lists do not update in real time.
- All attribute types for revenue, constituent, and registration, if the attribute category was made available in lists, is automatically added to the data warehouse by a nightly business process.

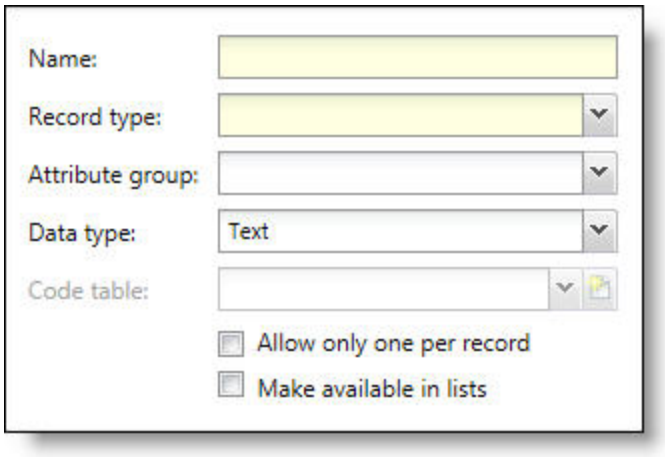
  Tip: We recommend you monitor your attribute usage and remove attributes no longer in use. The more attributes you have, the longer the nightly business process and ETL.
- When you access your event lists in Friends Asking Friends, in the upper right corner of the list, you can see the last time your data refreshed from the data warehouse.

Administration

The following enhancements are available in *Administration.*

New Attribute Category Field

A new **Make available in lists** field is available on the Add attribute category screen from the Attribute Categories page. The checkbox allows you to make categories available as options when you click **Columns** from list pages. For information about lists, see the Friends Asking Friends Reports and Lists chapter of the *Friends Asking Friends Guide*.



Note: Before new categories are available as columns, the program executes a nightly business process which adds the categories and attribute values to lists. For Friends Asking Friends lists and list reports that refresh data from the Data Mart, the program also executes a business process to refresh the data after the process to add the categories is complete.

Tip: We recommend you only select categories you need for lists. If you include a large number, the categories will slow list performance.

Friends Asking Friends Business Processes

Friends Asking Friends events use several business processes to automatically calculate data and perform system tasks. For example, the program uses a process to calculate the incentive level benefits registrants earn when they raise money, send communications, and recruit other participants. Friends Asking Friends events use business processes that are specific to Friends Asking Friends, and general system processes.

The following Friends Asking Friends processes are now available from the Business Process page and do not require configuration.

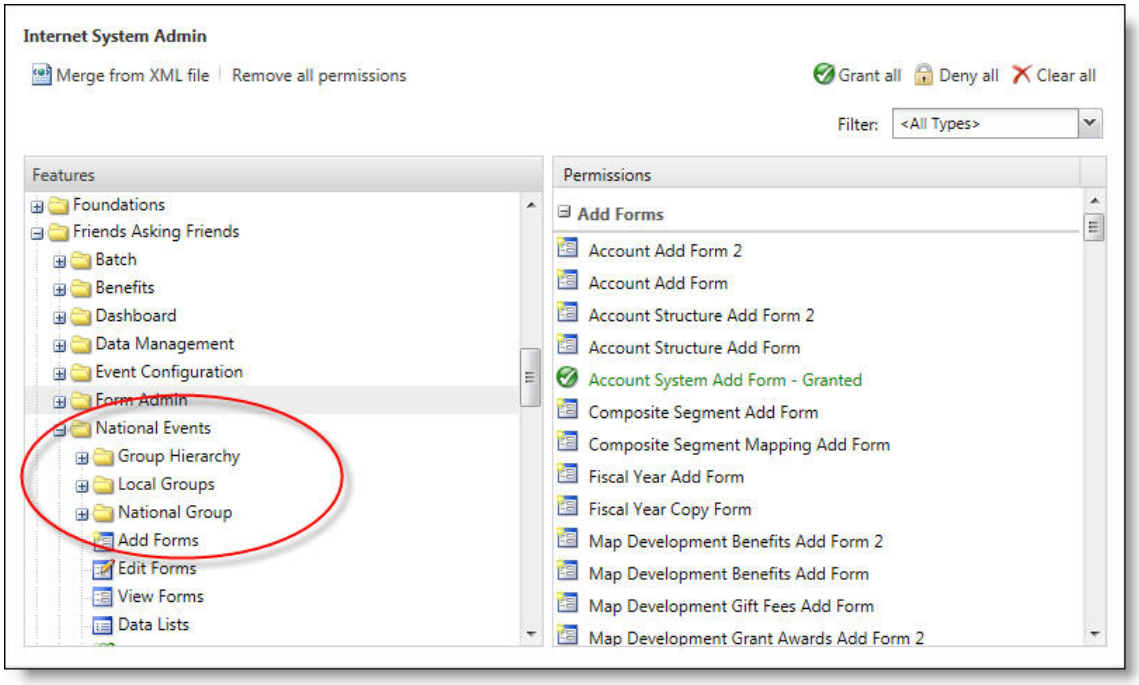
For information about business processes, see the *Queue Guide*. For information about Friends Asking Friends business processes, see the Friends Asking Friends Event Setup chapter of the *Friends Asking Friends Guide*.

Order	Name	Description	Frequency	Scheduled Time
1	Friends Asking	Calculates the number of groups,	5 min-	N/A

Order	Name	Description	Frequency	Scheduled Time
	Friends Fundraising Group Summary	group members, communications sent, gifts received, and donors for each group in a fundraising group hierarchy. It also calculates the total fundraising amount and the group and group member retention percentages. The program uses the values in participant headquarter pages, lists, and the Local groups tab of national fundraising group records.	utes	
2	Friends Asking Friends Incentive Level Updates	Updates the benefits registrants earn when they raise money, send communications, or recruit participants for the event.	24 hours	11:00 PM
3	Friends Asking Friends Totals and Aggregates for Datamart Business Process	Updates totals for calculations such as participant benefits.	24 hours	11:30 PM
Independent	Friends Asking Friends Donation Report Business Process	Collects donation related data from multiple database tables for the Donations list. The process creates a single table which improves performance for list generation.	24 hours	11:30 PM
Independent	Friends Asking Friends Email Process	Merges values into merge fields for email content and queues the messages for email processing.	10 minutes	N/A
Independent	Friends Asking Friends National Fundraising Group Summary	Calculates the number of groups, group members, communications sent, gifts received, and donors for a national fundraising group. It also calculates the total fundraising amount and the group and group member retention percentages. The program uses the values on the Group hierarchy and National fundraising group tabs of national fundraising group records.	13 minutes	N/A

National Events Feature Permissions

Feature permissions for Friends Asking Friends national event campaigns and national fundraising groups are now available from the Features tab on the System Roles page in *Administration*. For information about feature permissions and system roles, see the *Security Guide*.



Friends Asking Friends Code Tables

Depending on the products you use, these Friends Asking Friends code tables contain default values on the Code Tables page:

- Friends Asking Friends Market Type
- Friends Asking Friends Season Type
- National Fundraising Group Type

To edit a default value, select the code table name. The table entries page appears. Select the value to and change and click **Edit**. From the Edit table entry screen that appears, make the necessary updates.