The Raiser's Edge™

Queue for Task Scheduling Guide

Contents

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:

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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Queue for Task Scheduling Introduction

Procedures

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 Favorites** 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.
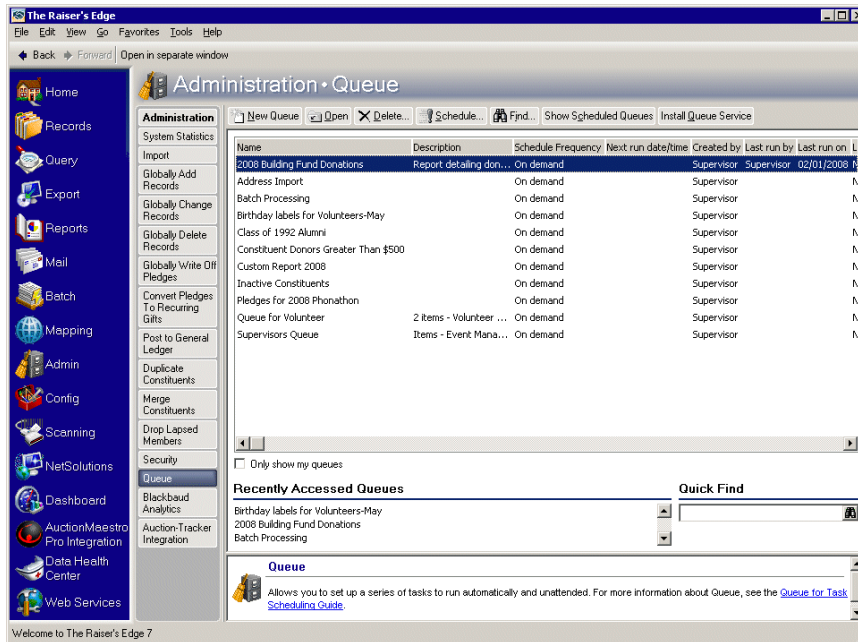
▶ **Accessing the Queue page**

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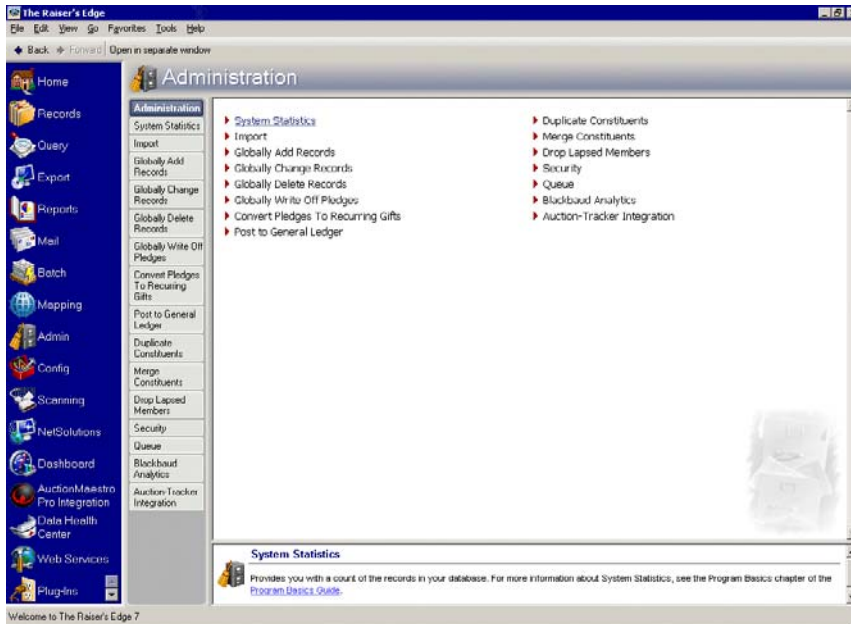
2. Click **Queue**. The Queue page appears.

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

The 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.
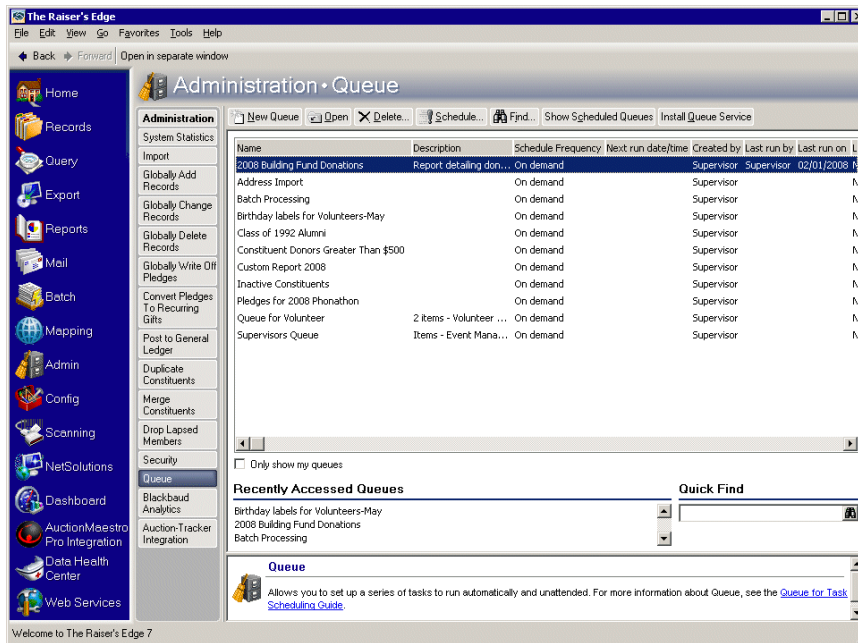
▶ **Opening an existing queue**

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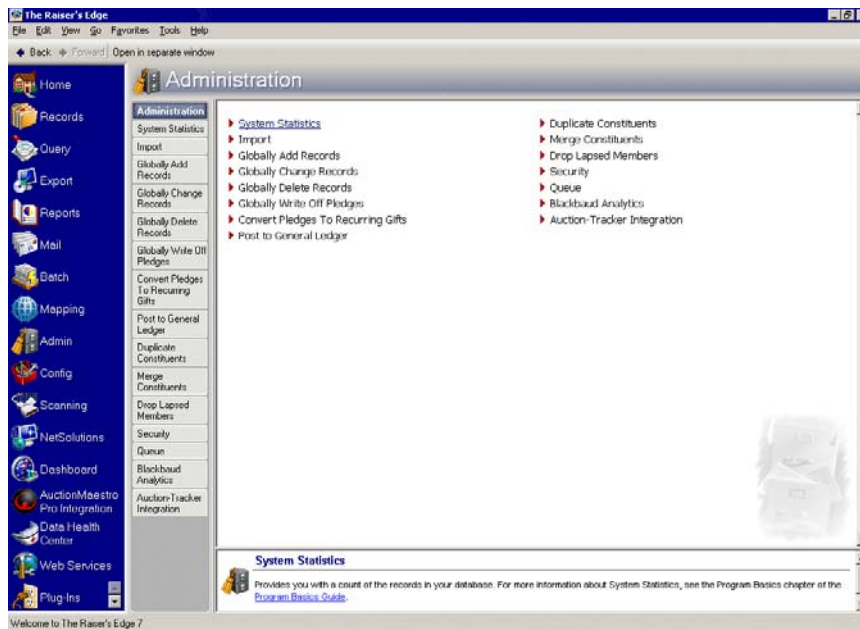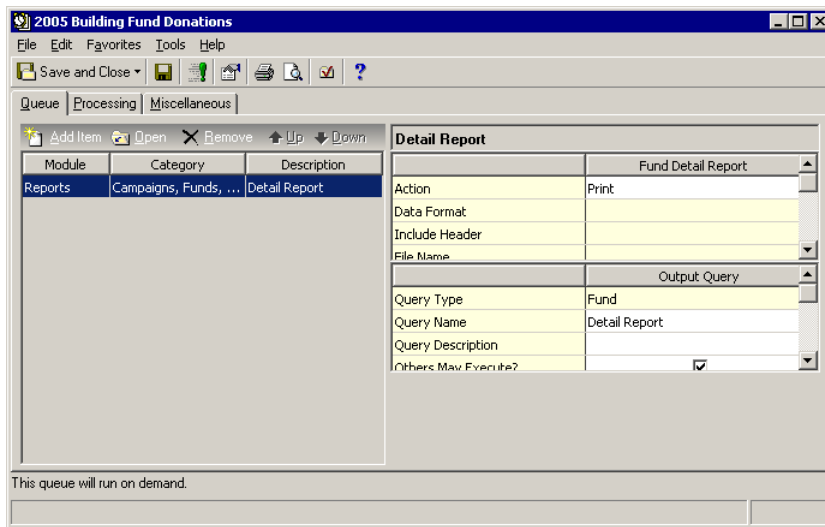
2. Click **Queue**. The Queue page appears.

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.

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*.

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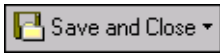
Save and close the queue (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the queue, close the saved queue, and open a new queue.)

Save the queue

Schedule the queue to run

View queue properties

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.
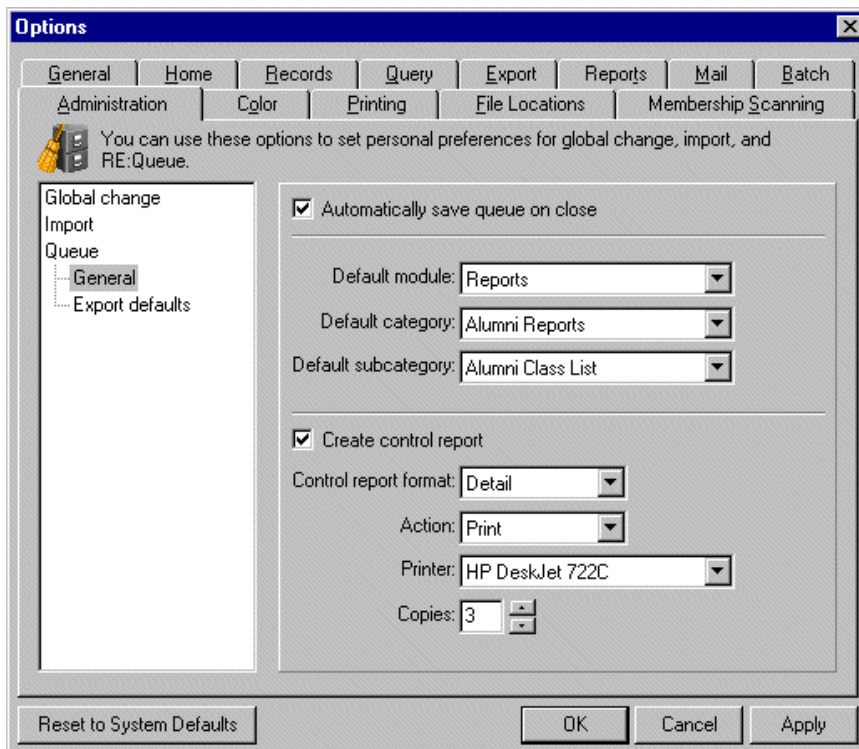

- To automatically save the information entered in a queue when you close the queue, mark the **Automatically save queue on close** checkbox.

- 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.
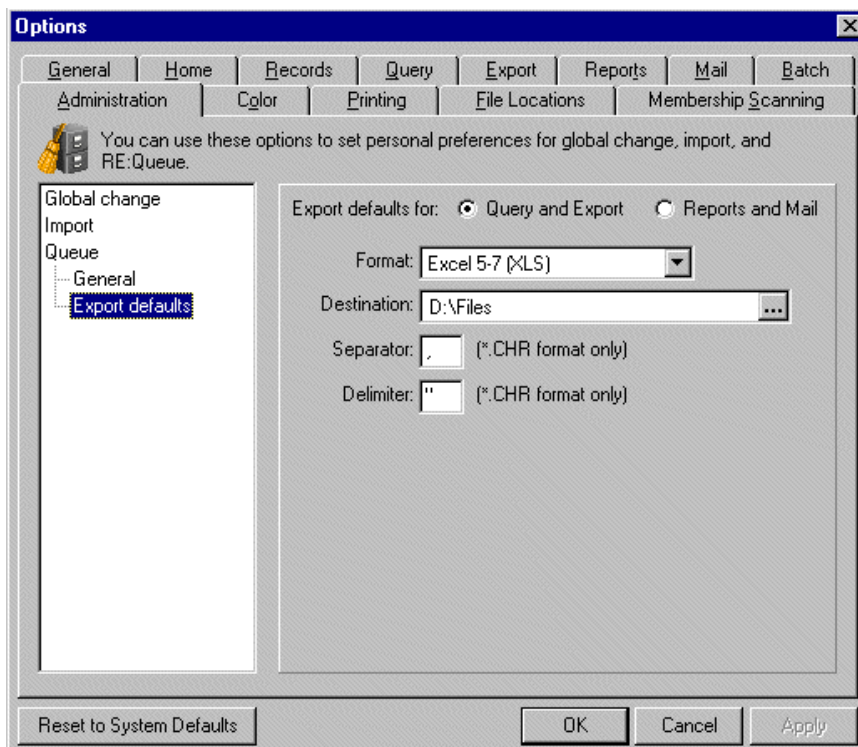
4. Mark the **Query and Export** option to define defaults for the *Query* and *Export* modules.

- 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.
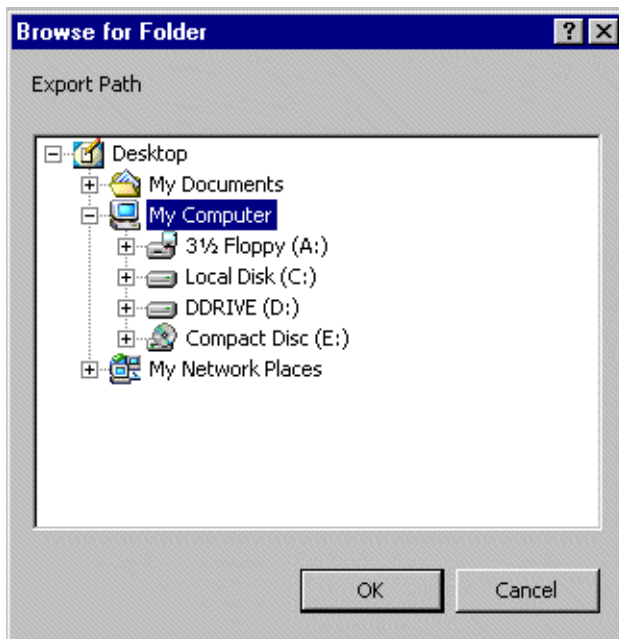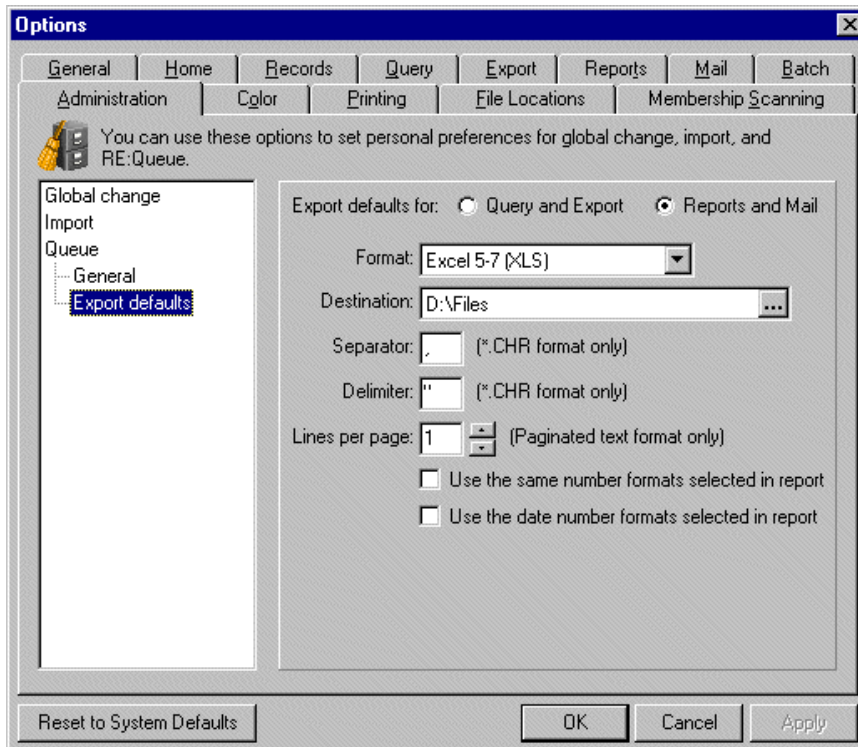

Select the file location and click **OK**. You return to the Options screen.
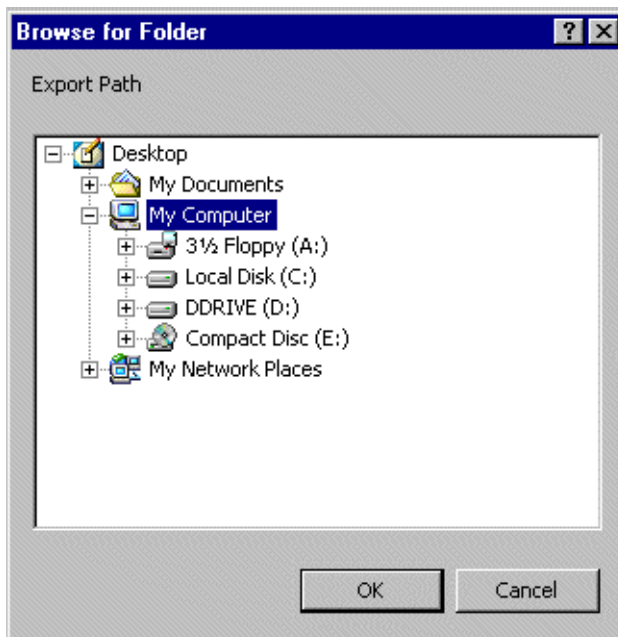
After you export the queue, you can find the exported file by locating the folder you specified on the Browse for Folder screen.

- 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.

- 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.

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.

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


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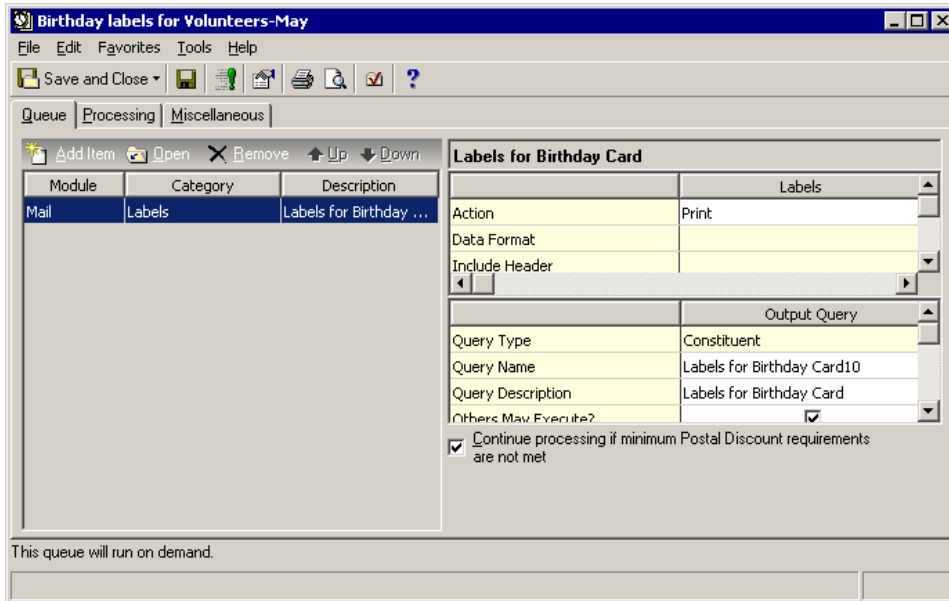
From the Queue screen, you can add new items to the queue, open or remove items in the queue, and use the **Up** and **Down** buttons to change the position of each item in the queue grid.

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.
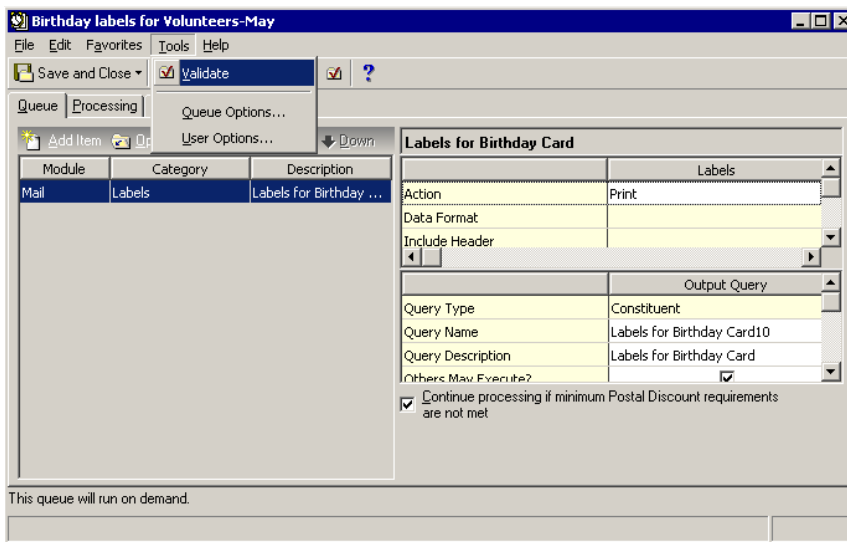
A status bar appears, showing the progress of the validation.
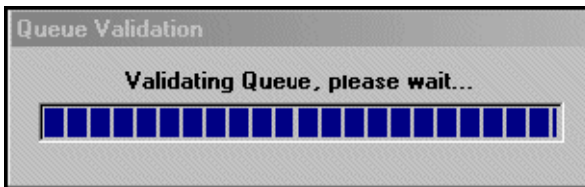
2. When the program finishes validating the batch, a Queue Validation Complete screen appears, displaying the results.
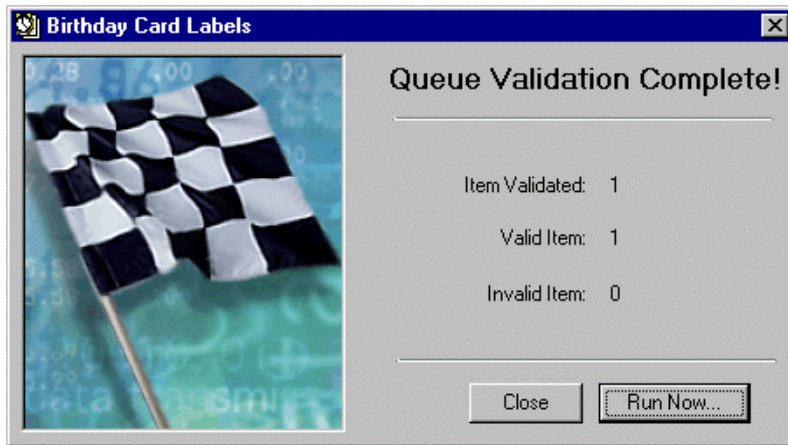
The Queue Validation Complete screen displays the number of items validated in the queue, and the number of valid and invalid items in the queue.

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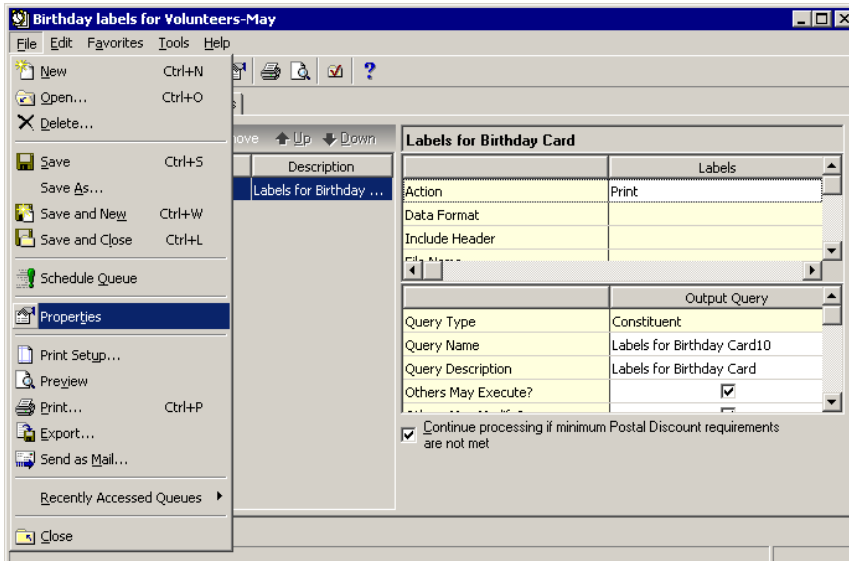
The Queue Properties screen appears.
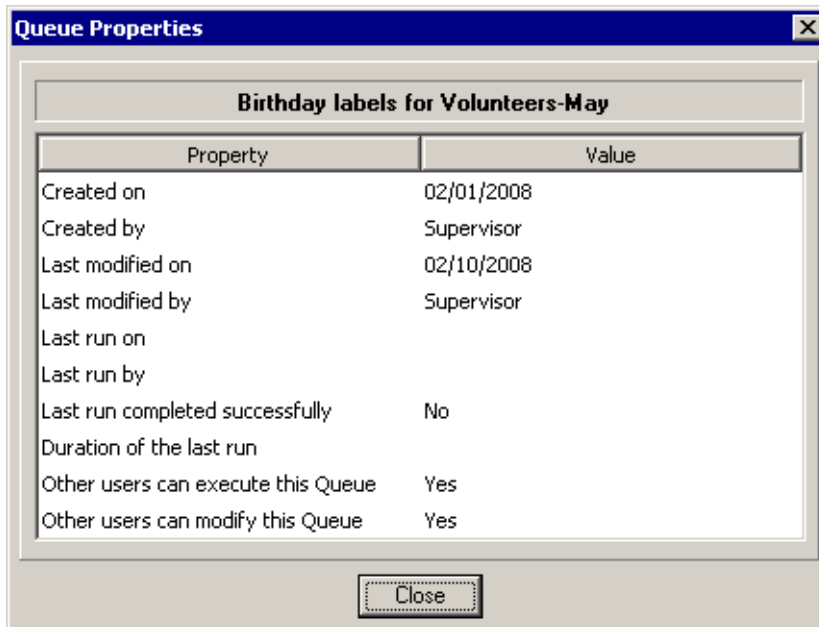
You can view the specific properties for the queue, such as when the queue was created and who the last person was to modify the queue.

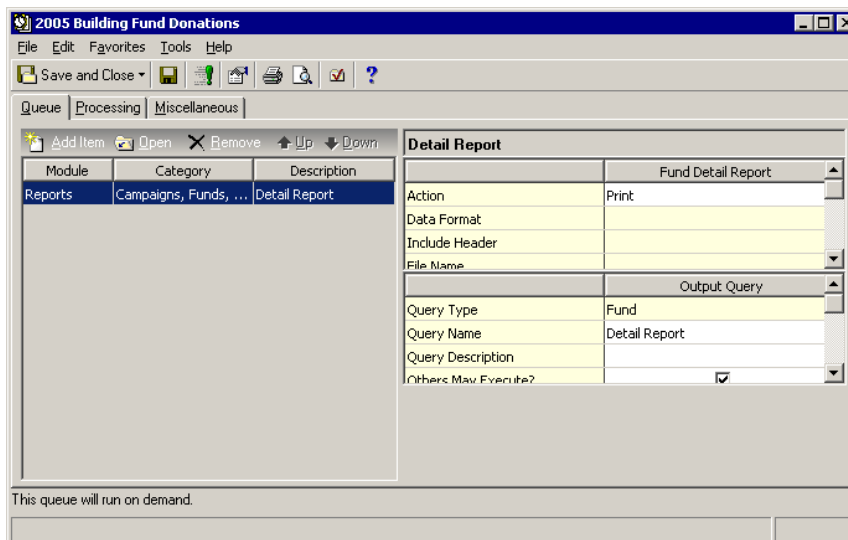2. When you finish viewing the Queue Properties screen, click **Close**. You return to the Queue screen.

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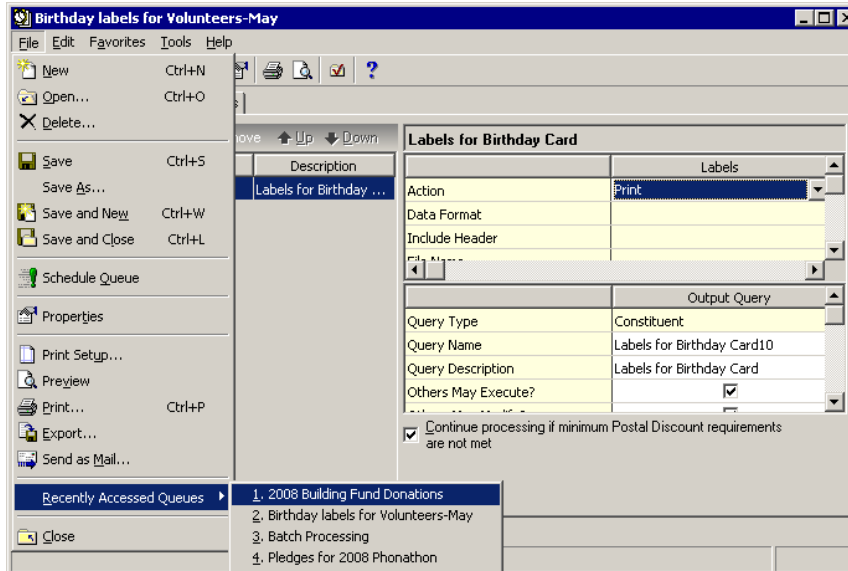
2. Select the recently accessed queue to open. The Queue screen appears.

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.
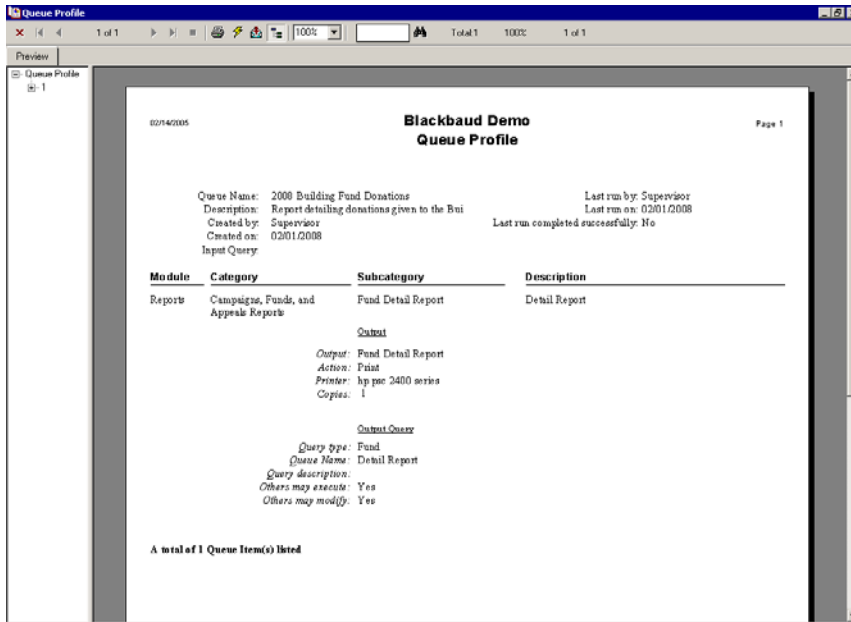
‣ **Adding queue options**

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.
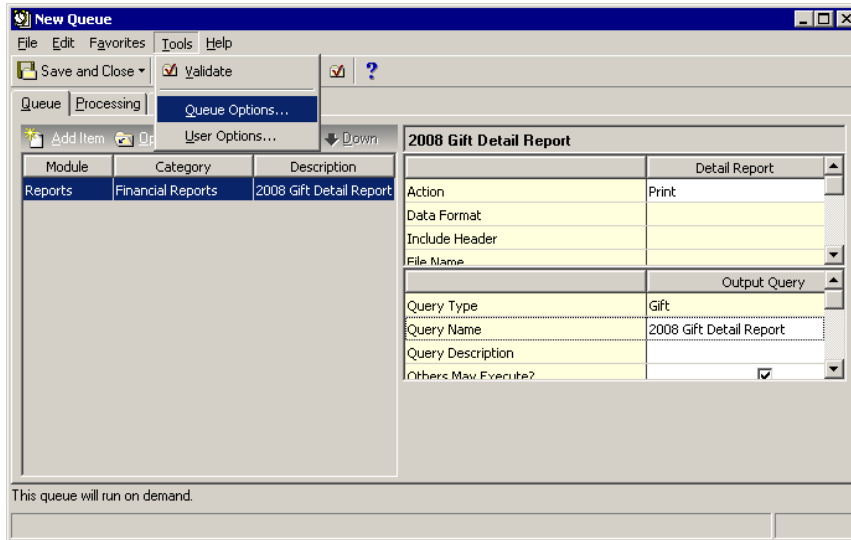
The Queue Options screen appears.
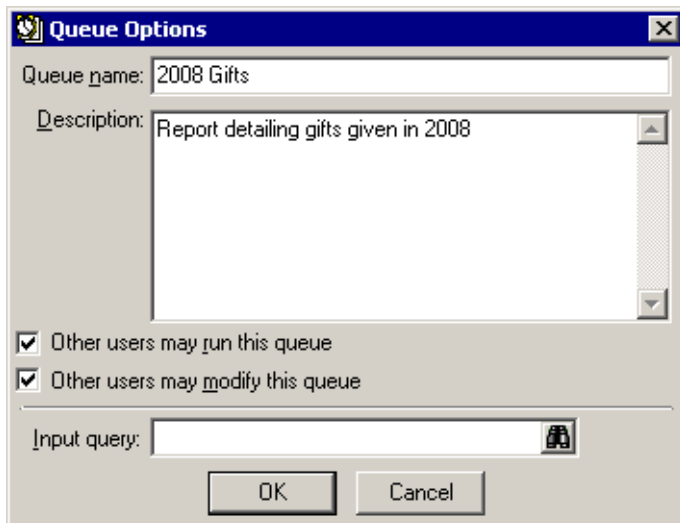
2. In the **Queue name** field enter a name, such as "2008 Gifts". You should be able to query your database based on this name. This name may already default into the **Queue name** field, depending on whether or not you saved the queue.

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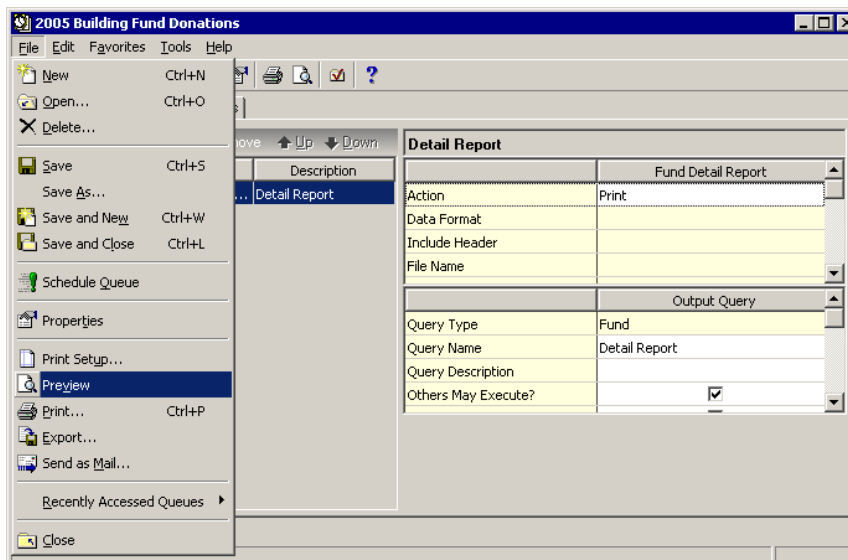
A status bar appears, showing the progress for preparing the queue profile.
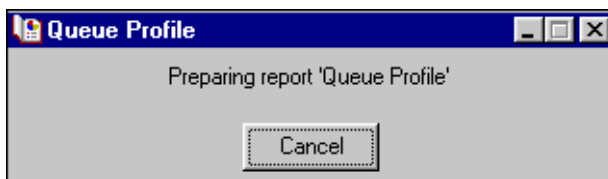
The Queue Profile appears

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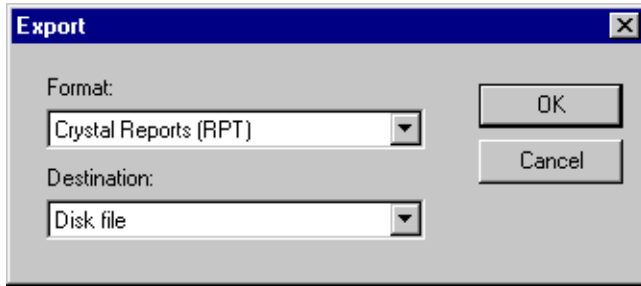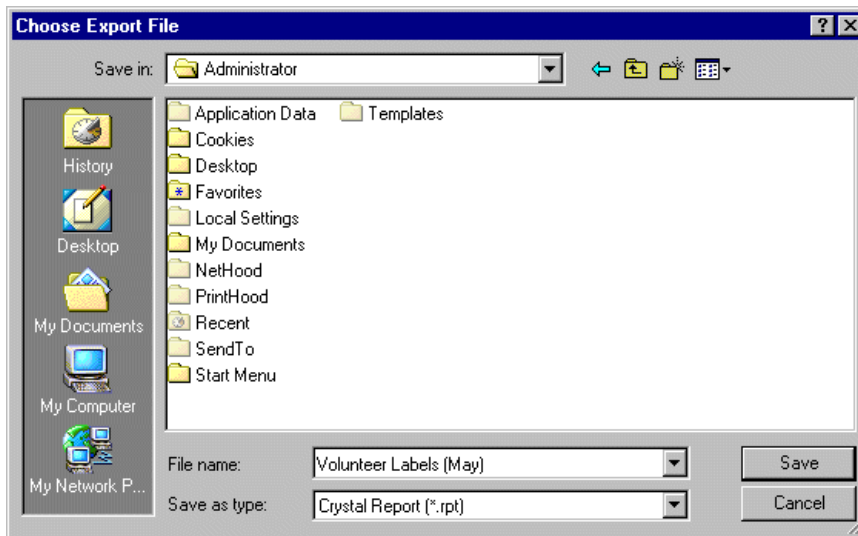
Exporting a Queue

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.

The Export screen appears.

The Export dialog box shows:
Export
Format: Crystal Reports (RPT)
Destination: Disk file
with OK and Cancel buttons.
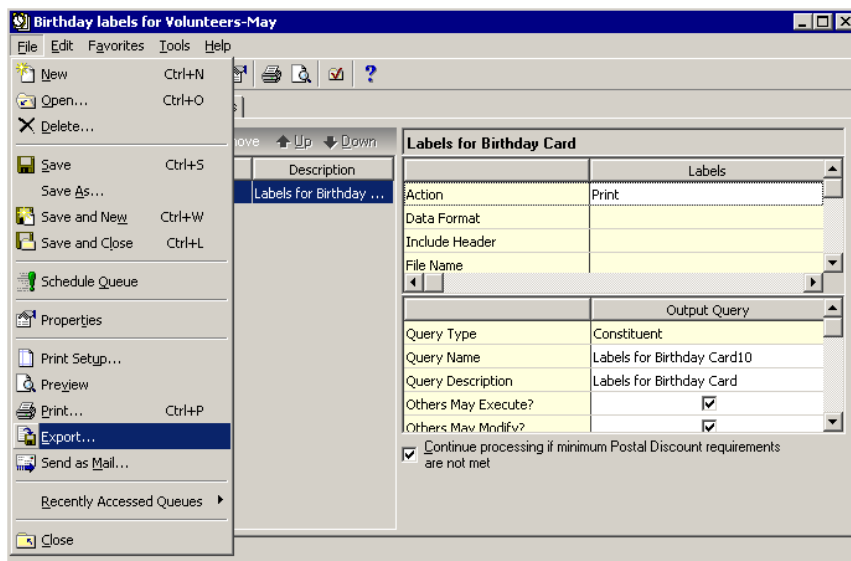
2. In the **Format** field, select the type of format in which to export the queue. Some examples of formatting are Crystal Reports (RPT), *Excel*, or Rich Text Format.

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.

The Choose Export File dialog box shows Save in: Administrator with a list of folders (Application Data, Cookies, Desktop, Favorites, Local Settings, My Documents, NetHood, PrintHood, Recent, SendTo, Start Menu, Templates). File name: Volunteer Labels (May). Save as type: Crystal Report (*.rpt).

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.
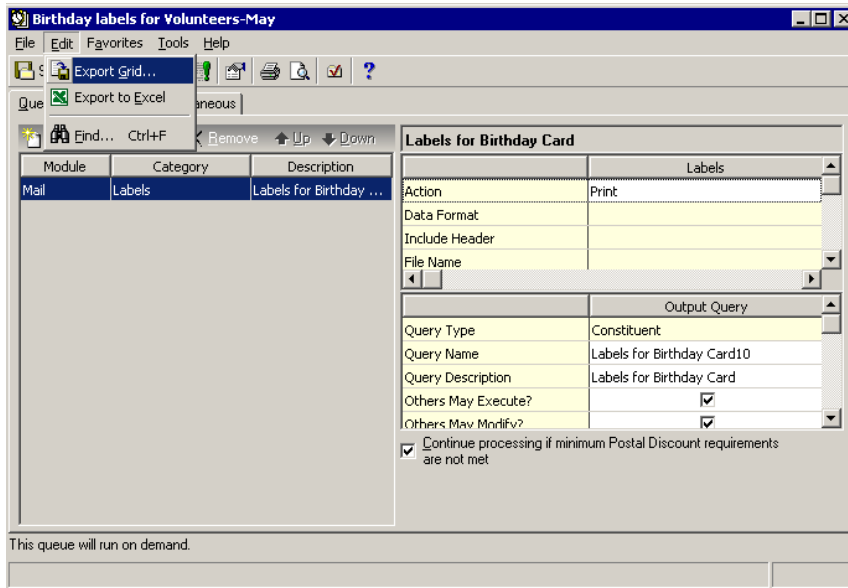
The Export screen appears so you can choose the file type and file name for the export file.
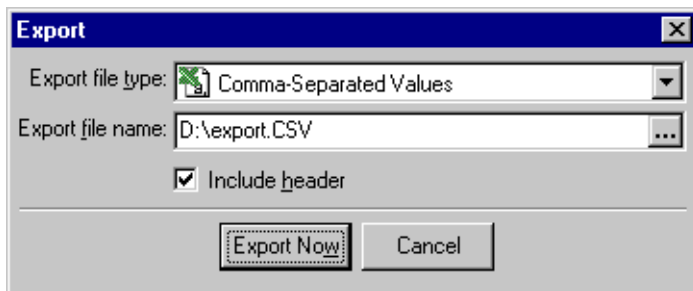
2. In the **Export file type** field, select the format for the export file. For more information about the available export formats, see the *Query & Export Guide*.

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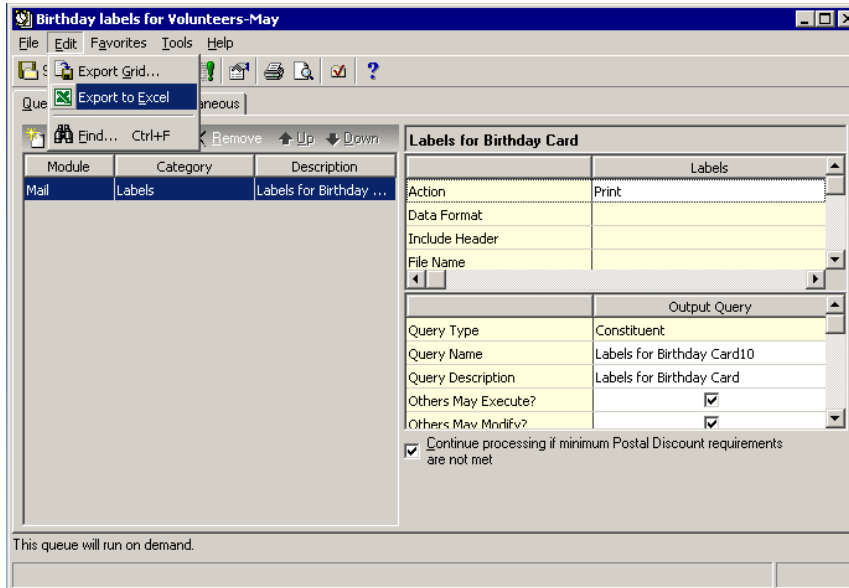
Note: You can click **Cancel** on the Exporting File screen to stop the export and return to the Queue screen.

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.
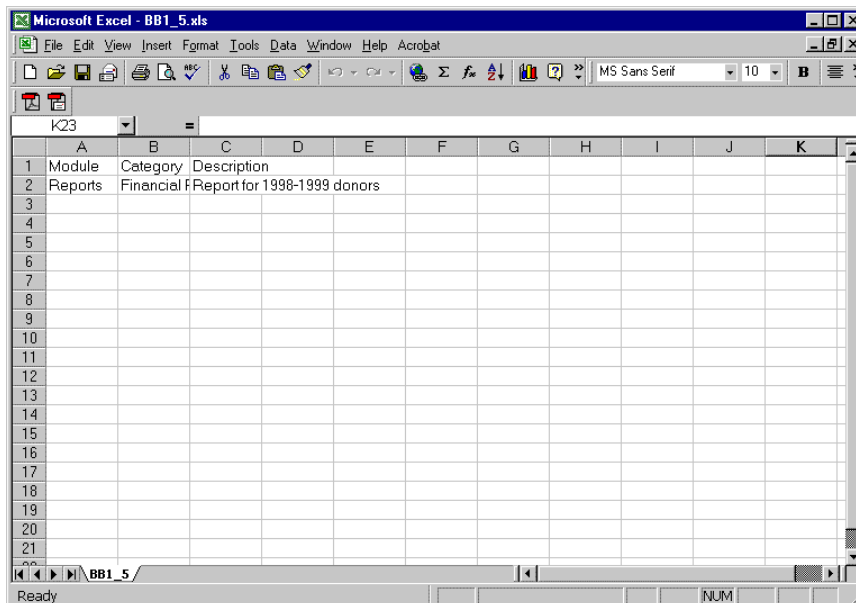
2. To save any changes to the export file, select **File**, **Save** from the Microsoft *Excel* menu bar.

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.
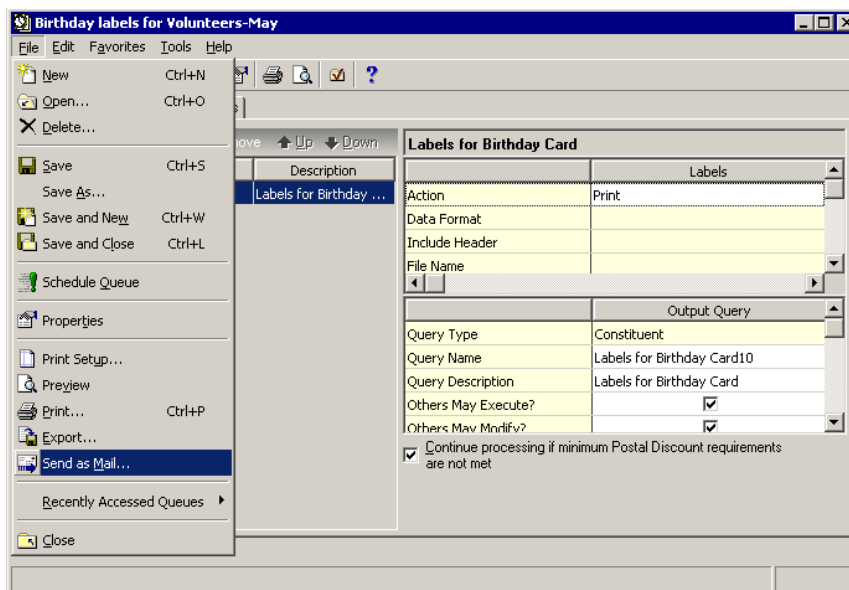

The Export screen appears.
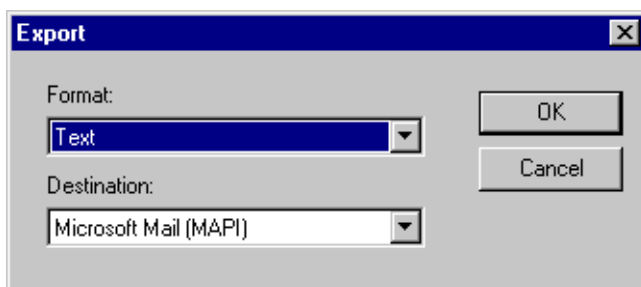
2. In the **Format** field, select the type of format in which to export the queue. Some examples of formatting are Crystal Reports (RPT), Text, or Rich Text Format.

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.
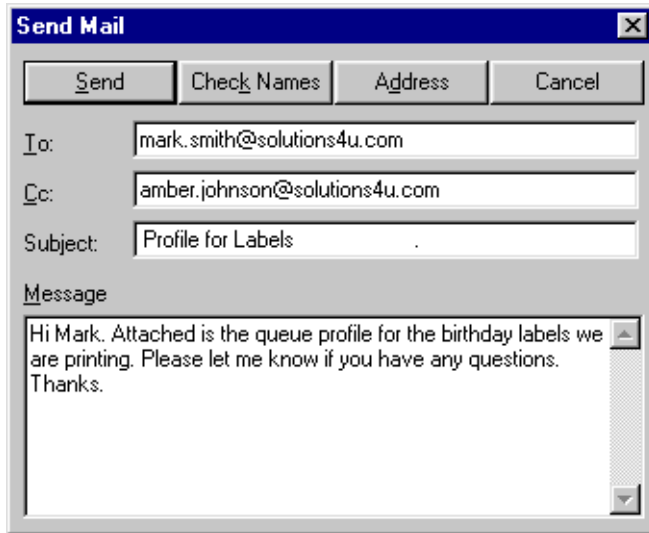
5. Enter the information on the Send Mail screen as shown in the previous picture. The queue information you are sending is automatically attached to the email in the format you specified. You do not see the information in the body of the email, but once you send the email, the information from the queue 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.
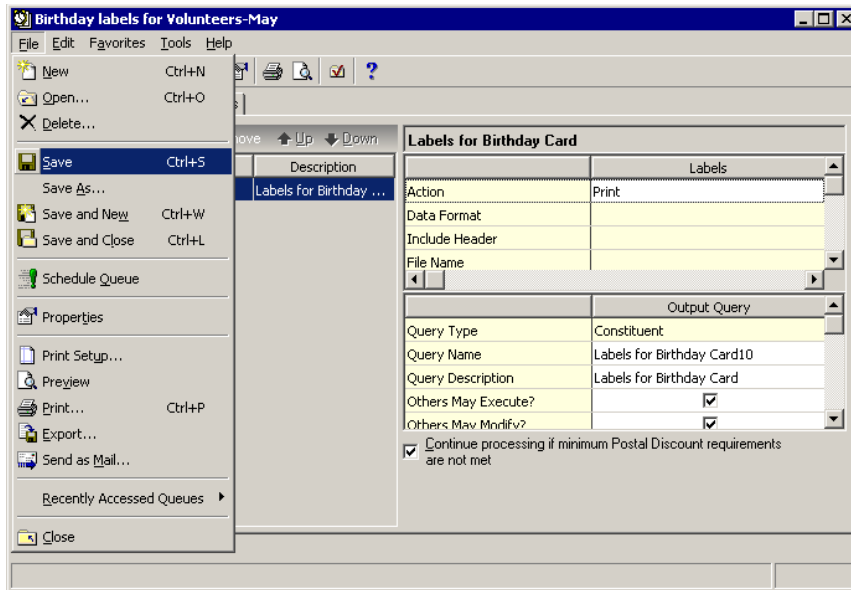
Note: You can also save a queue by selecting **File**, **Save As** from the menu bar of a Queue screen. The Save Queue As screen appears so you can enter a new name for the queue. For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 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.
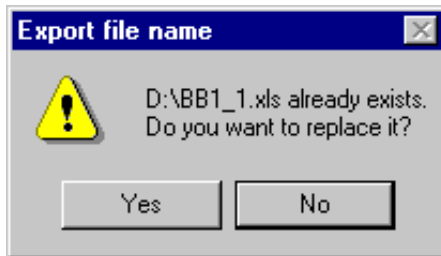
2. To replace the existing file, click **Yes**. You return to the Queue screen. To return to the Queue screen and rename the file, click **No**.

3. From the Queue screen, select **File**, **Save** again. The Save Queue As screen appears.
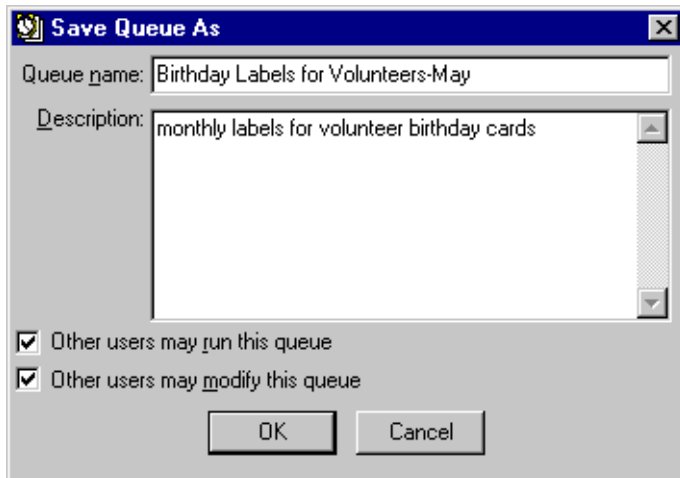
4. In the **Queue name** field, enter a name for the queue.

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.

2. Click **Queue**. The Queue page appears.
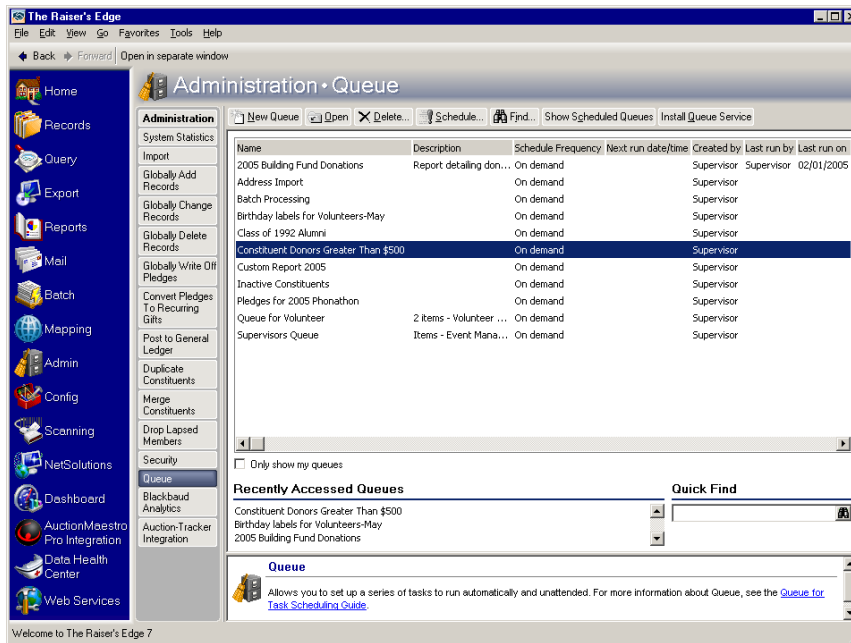
3. In the grid, select the queue to open.
4. Click **Open** on the action bar at the top of the page. The Queue screen appears.
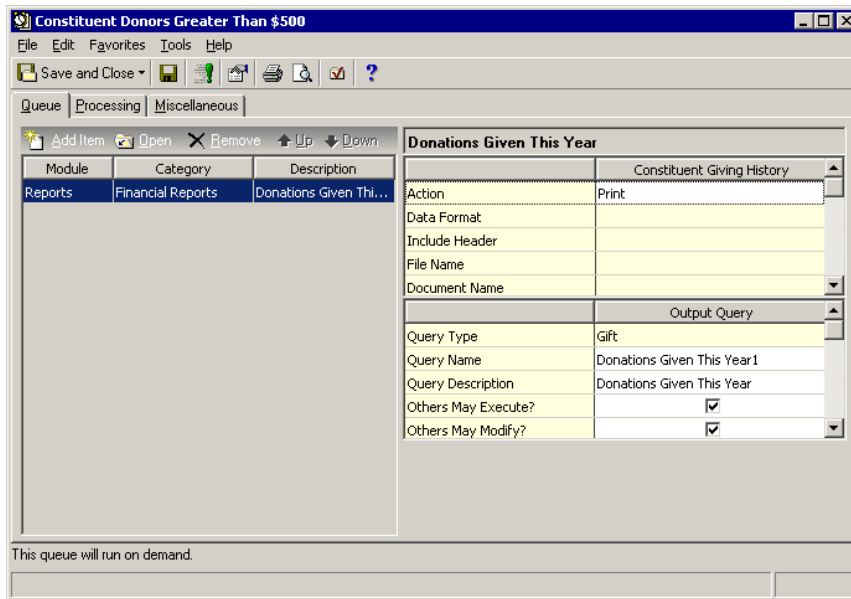
5. To create a new queue from this open queue, select **File**, **Save As** from the menu bar. The Save Queue As screen appears.
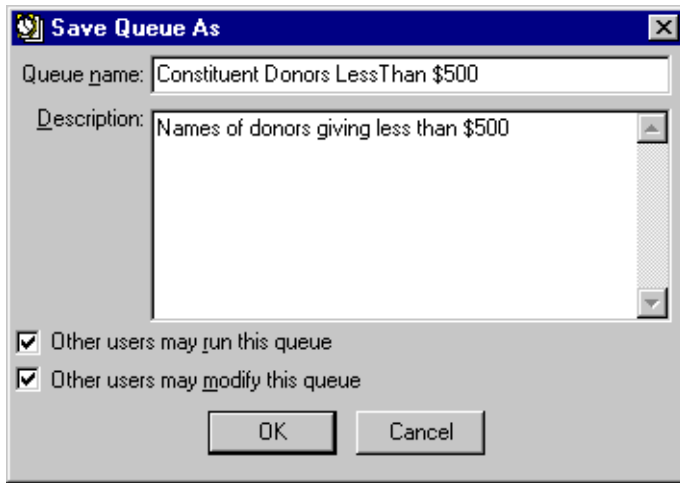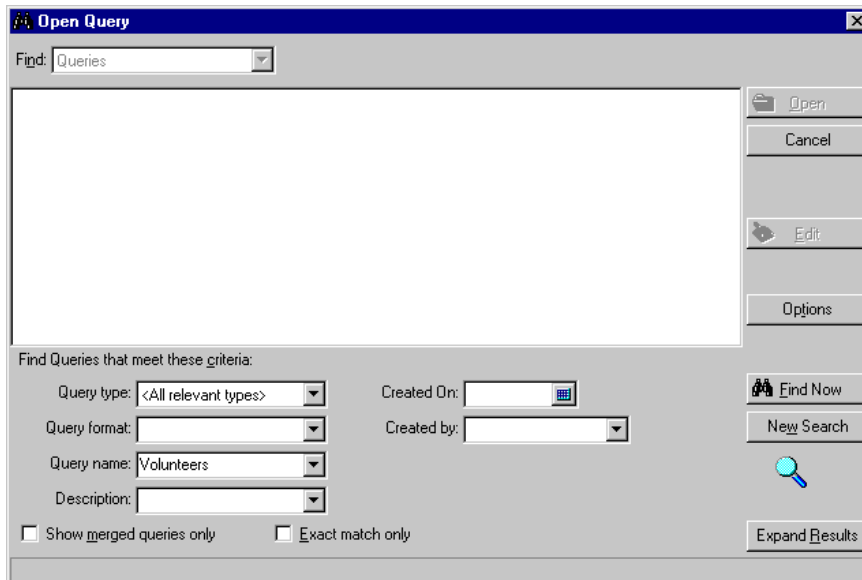
6. In the **Queue name** field, enter a new name for the queue.

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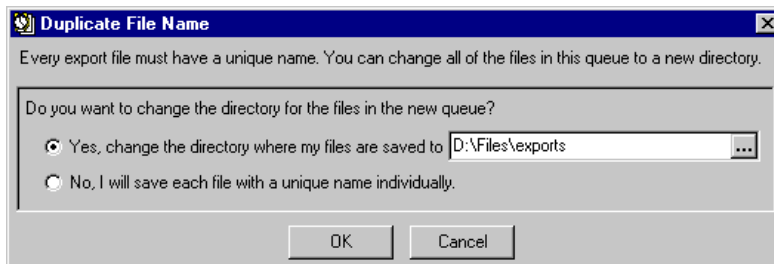
When you create a new queue from an existing queue that contains export file names and paths, you must change the directory for the export file names and paths in the new queue.

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.
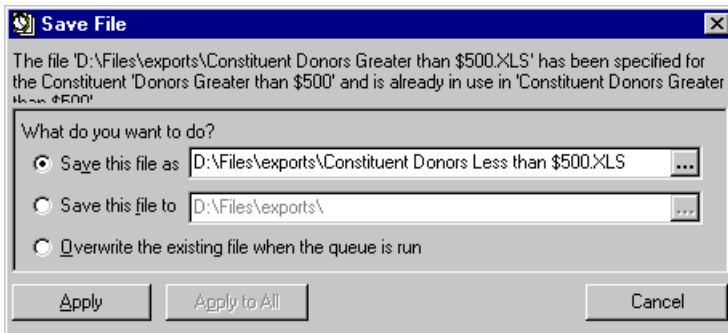
15. To select a different file name to save in the default directory, mark the **Save this file as** option and enter a new name for the file. You can also click the ellipsis to browse for a new file name.

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. Whenever you include an 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.
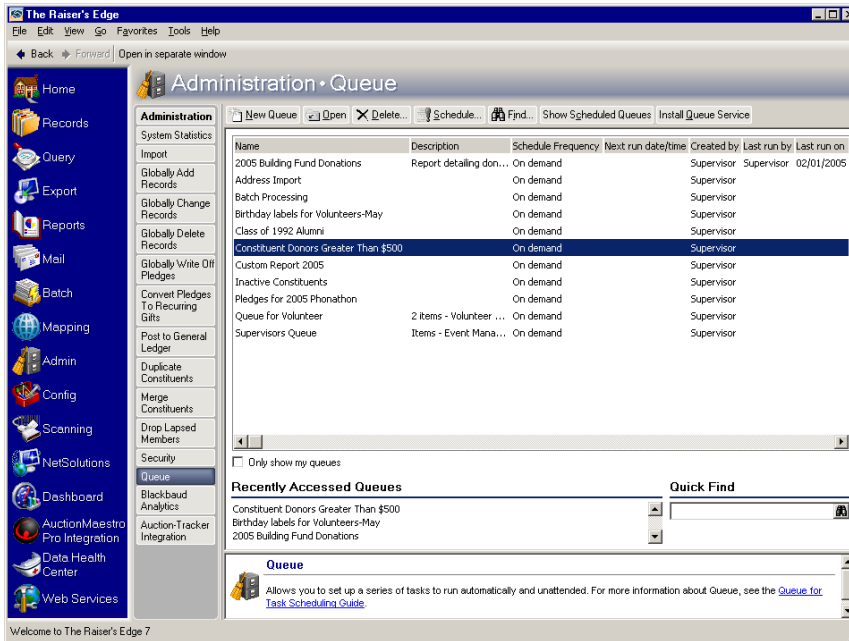
3. In the grid, select the queue to open.

4. Click **Open** on the action bar at the top of the page. The Queue screen appears.
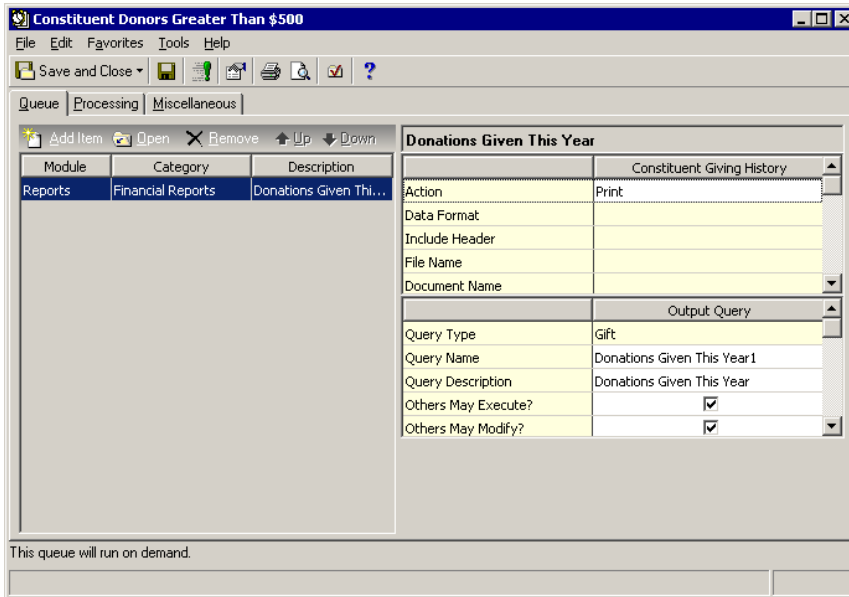
5. From the menu bar, select **Tools**, **Queue Options**. The Queue Options screen appears.
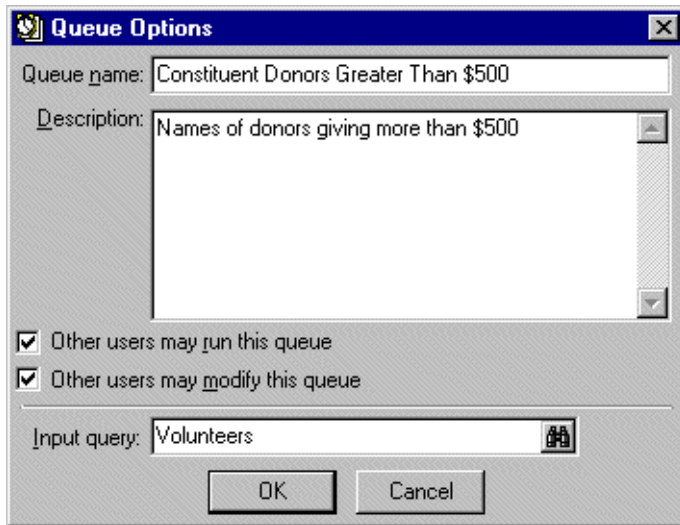
6. In the **Input query** field, click the binoculars to search for a query. When you select a query in the **Input query** field, you specify that the queue use the properties of the input query. For this example, you can use the Volunteers query as the input query for this queue. The Volunteers query lists all volunteers in your database.

    The Open Query screen appears.

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.
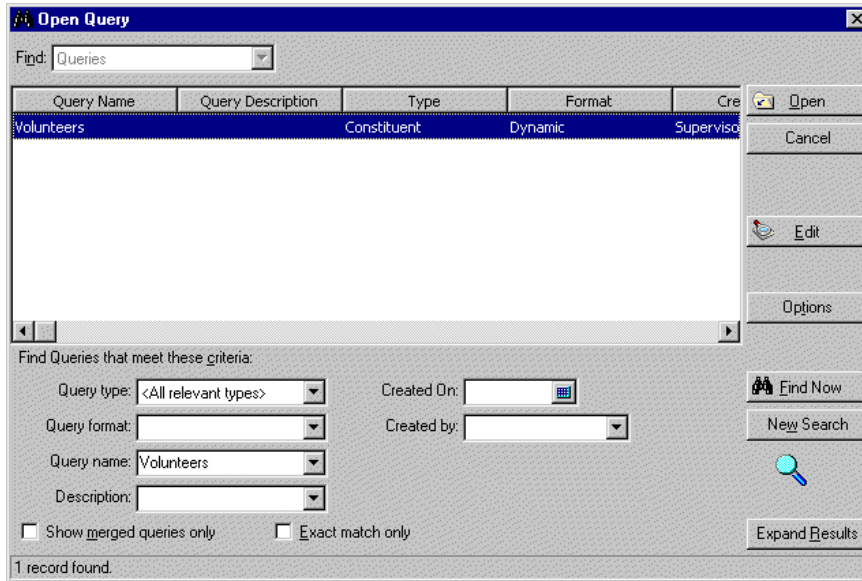
9. Click **Open**. You return to the Queue Options screen. The Volunteers query now appears in the **Input query** field.

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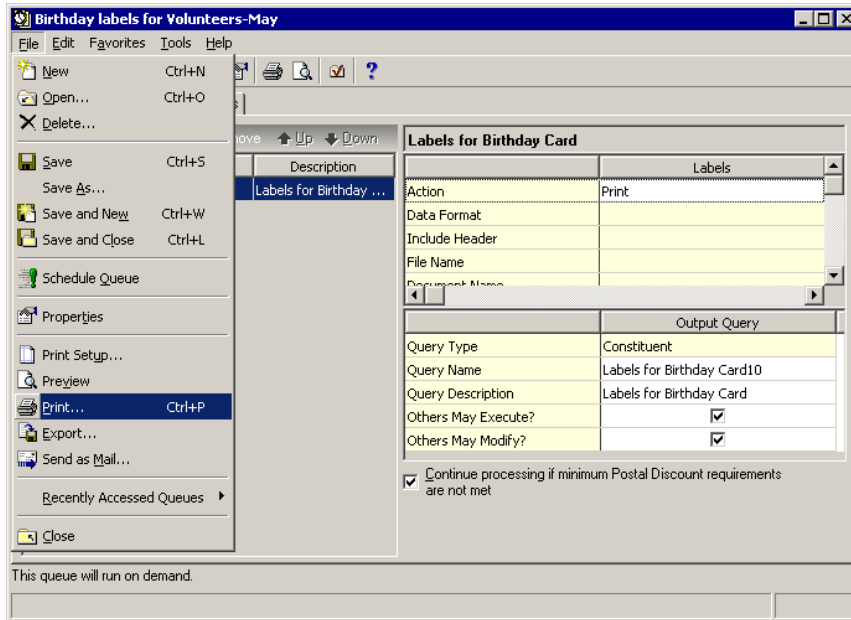
> **Tip**: You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL** + **P** on your keyboard to print a queue.

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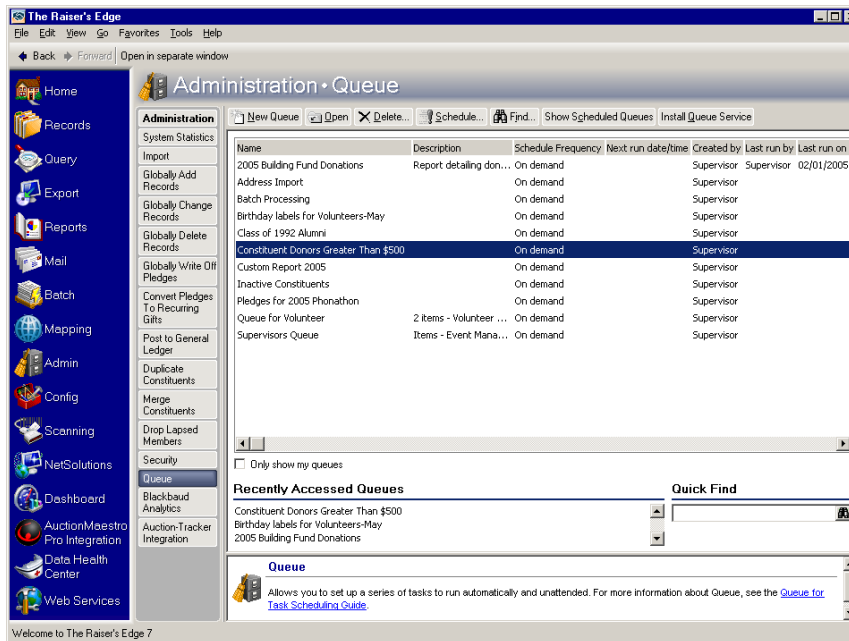
> **Warning**: When the time comes for a queue to run, if the queue has been deleted, a message appears informing you that the queue could not be found.

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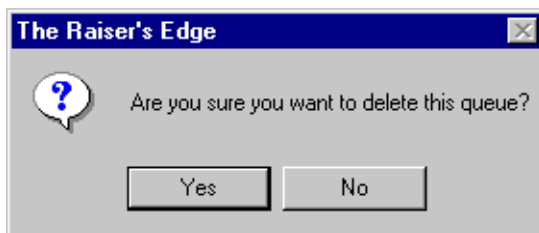
If you do not have security rights to delete a queue, the **Other users may modify this queue** checkbox has not been marked, or if you did not originally create the queue, you receive the message "User not authorized to delete this queue."

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.
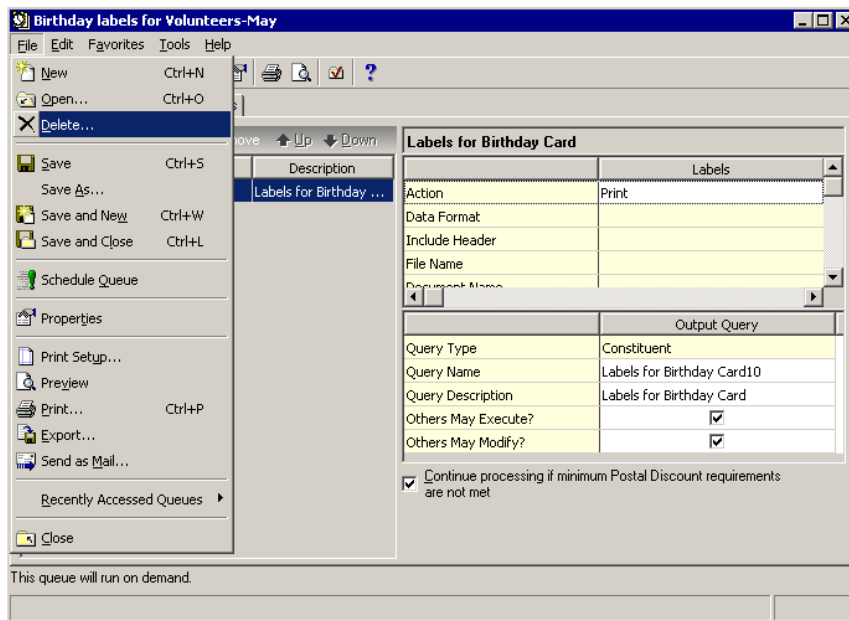
A message appears asking if you are sure you want to delete the queue.
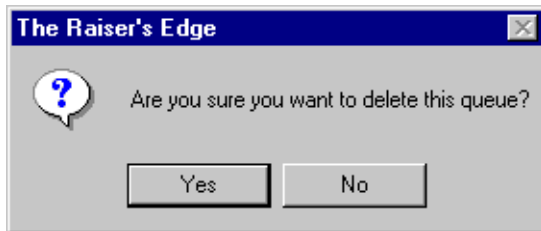
2. To permanently delete the queue, click **Yes**. To return to the Queue screen, click **No**.

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

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 only applies to the import task you are including in the queue if you have selected **Create import file**, and the 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.
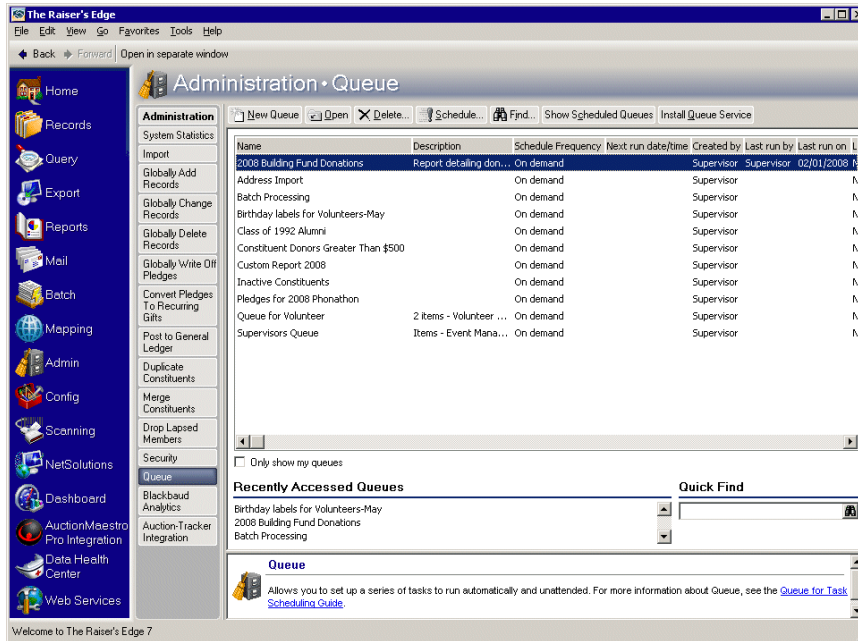
3. On the action bar, click **New Queue**. The Add Items to New Queue screen appears. For more information about accessing the queue page, see "Accessing a Queue" on page 6.
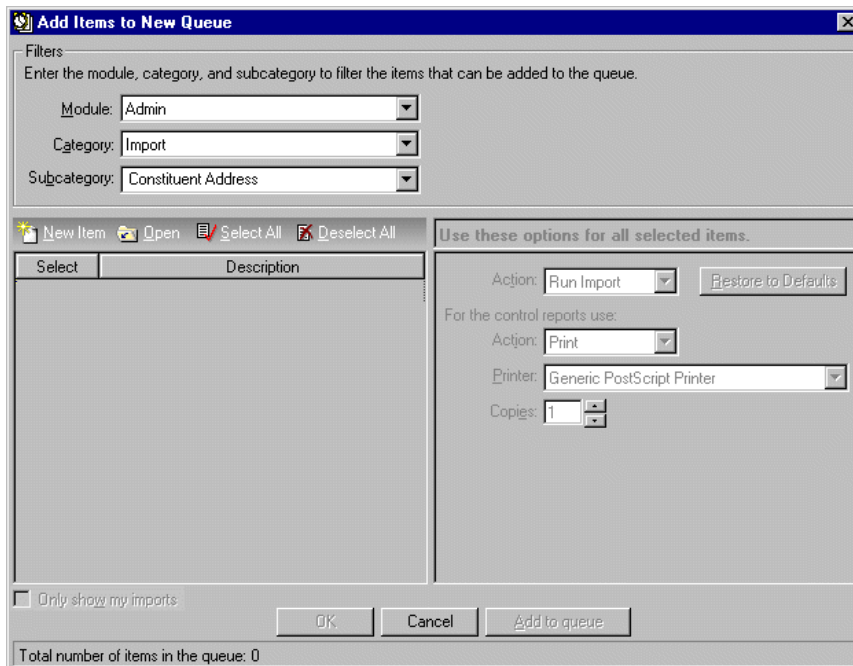
4. In the **Module** field, select "Admin" to run a queue for the Admin module.

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.

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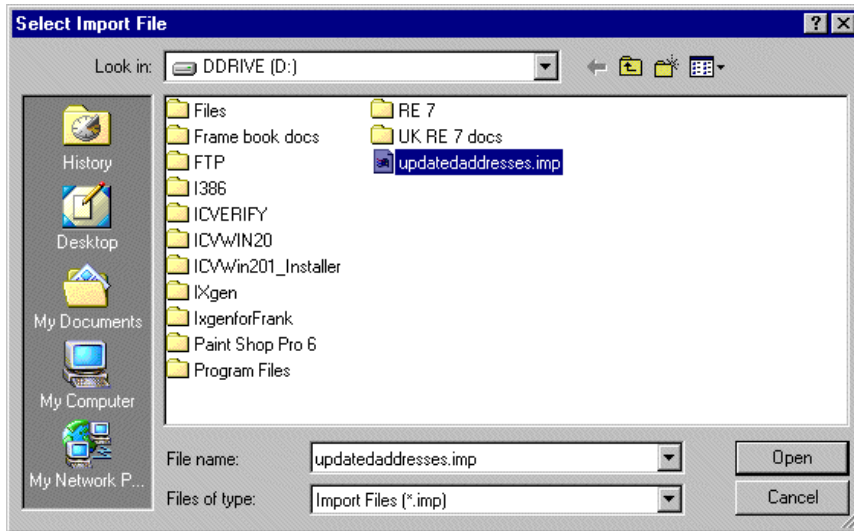
Select the name of the file to import and click **Open**. You return to the Import screen.

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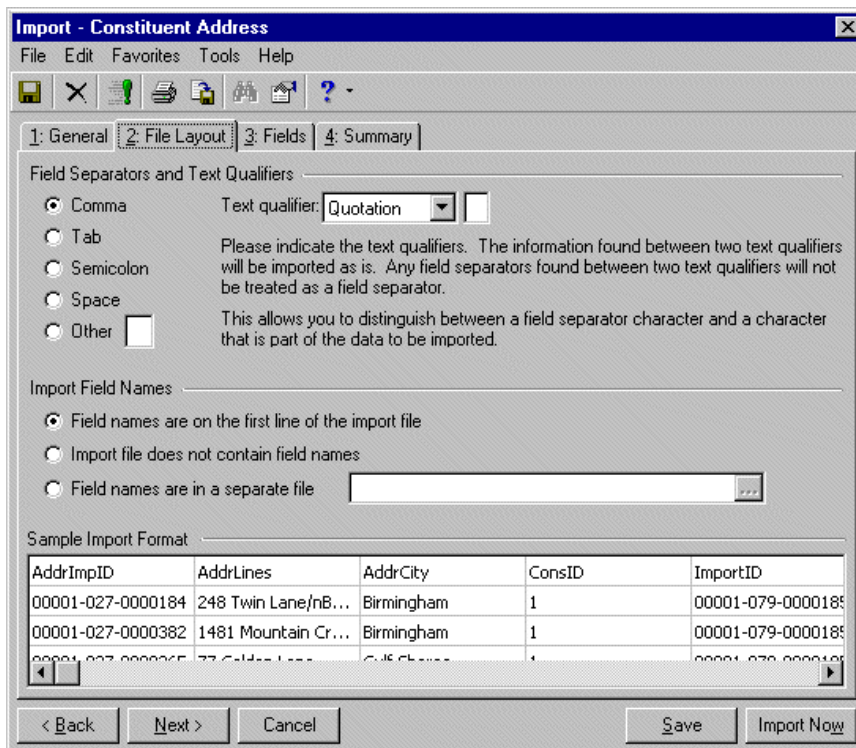
The parameters on the File Layout tab must exactly match the parameters you specified when you created the import file to be sent to the outside research company.

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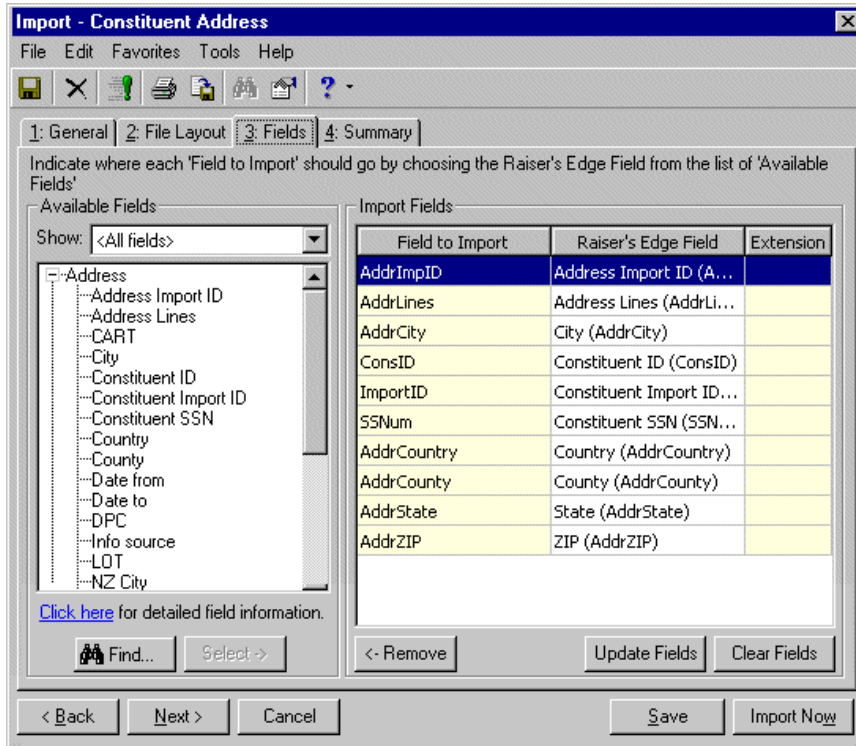
Note: The import values contained in your import file must be arranged in the same order you arrange the field names on the Fields tab.

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.
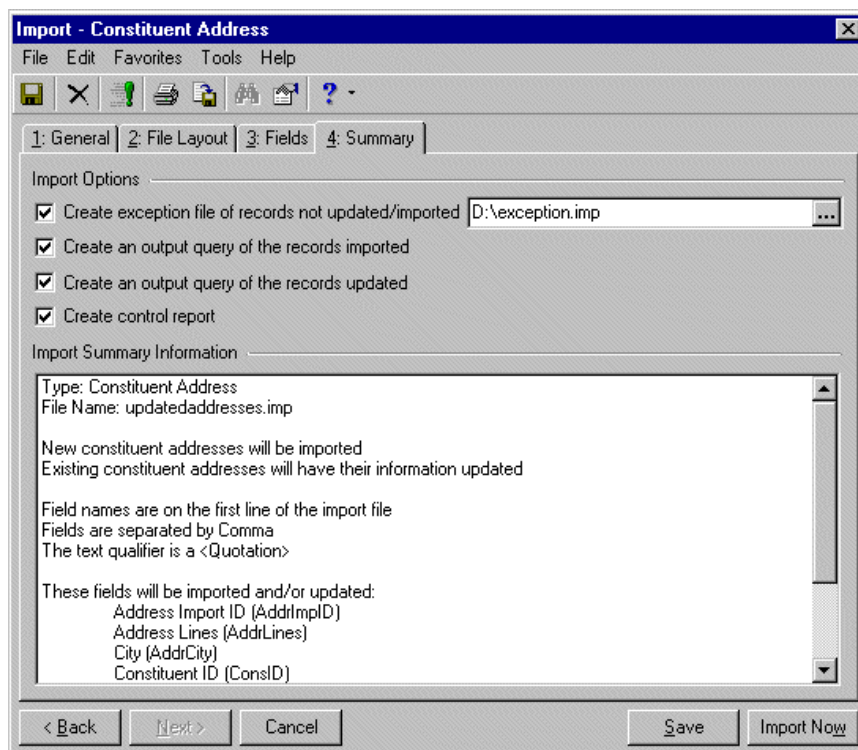
22. In the **Import Options** frame, you can choose to create an exception of files not updated or imported, an output query of the records imported or updated, or a control report. For this example, mark all checkboxes. Later, when you add the queue item to the queue, on the Queue screen, you can specify 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.
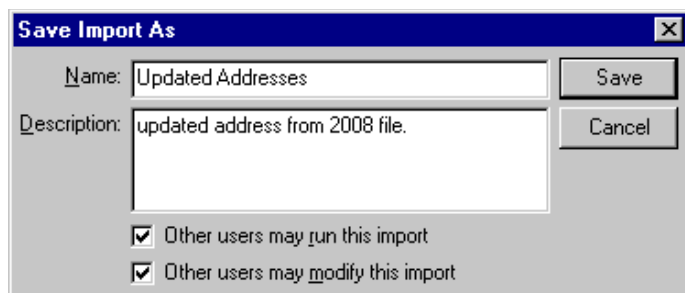
24. In the **Name** field, enter "Updated Addresses".

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.

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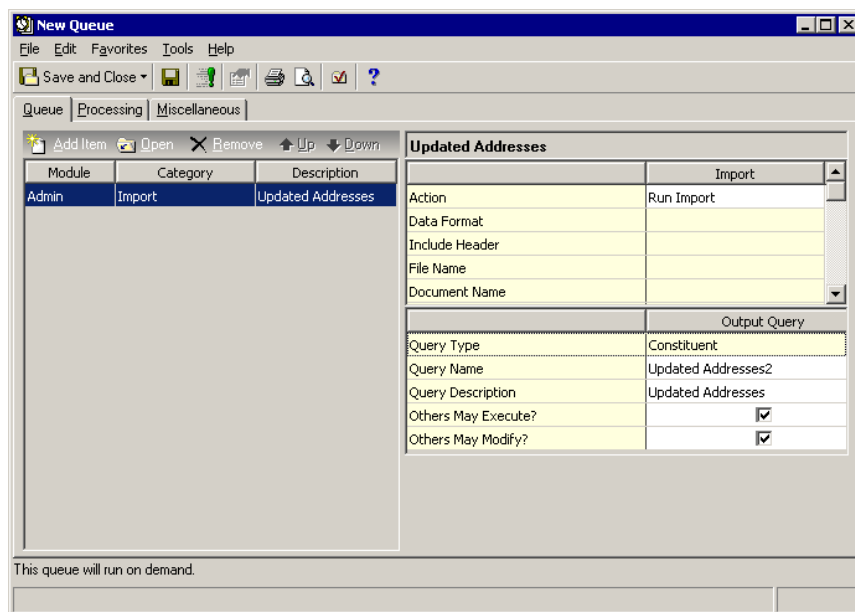
Note: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

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.
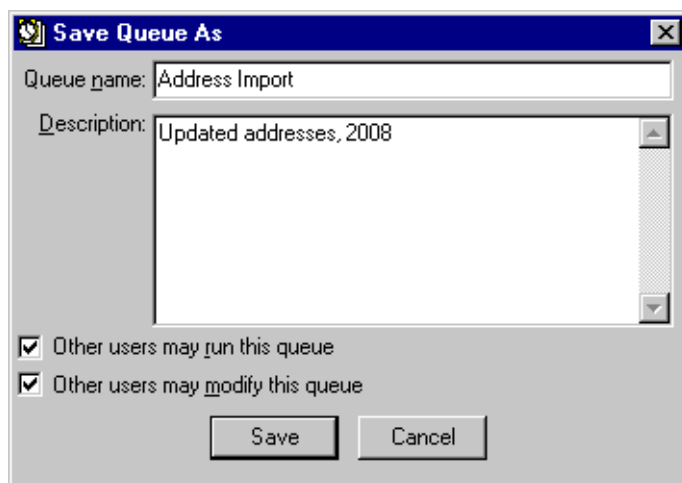
Note: When you save a queue to your database, any export file name that you enter is validated against other export file names in your database. If duplicate file names exist, a message appears asking if you want to change the current file name. For more information about saving a queue, see "Saving 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.
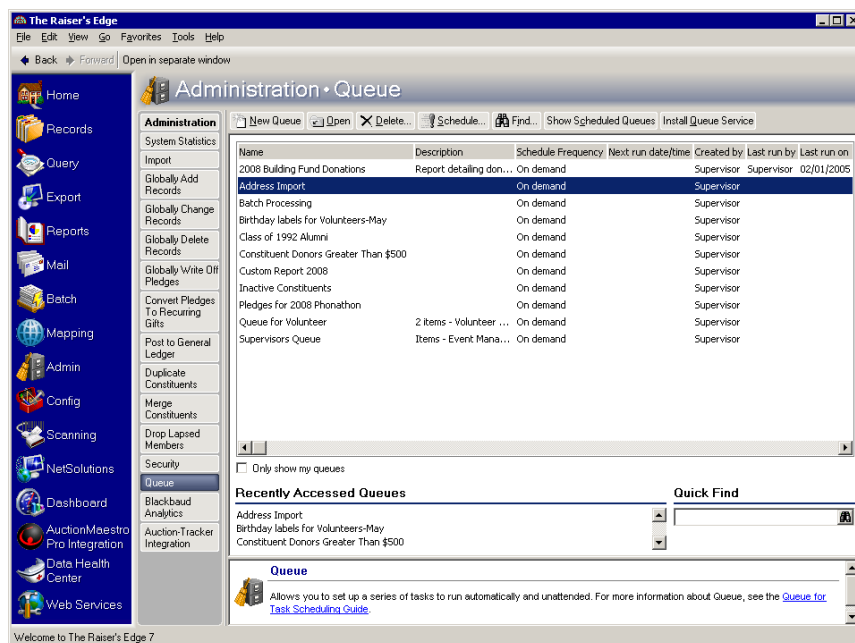
3. In the grid, select "Address Import".
4. Click **Schedule** on the action bar at the top of the page.

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.

> 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.

7. 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.

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.

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.

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.

Batch

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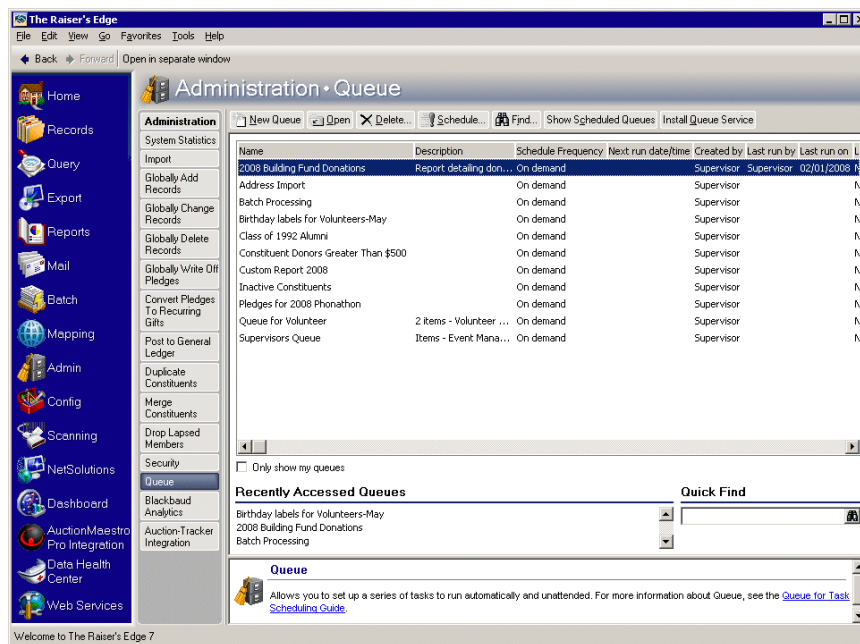
Note: Nonrecurring gift batches that have been previously committed will not appear in the list of gift batches available for selection in a queue. For more information about creating gift batches, see the *Batch Guide.*

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.

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.

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.

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.

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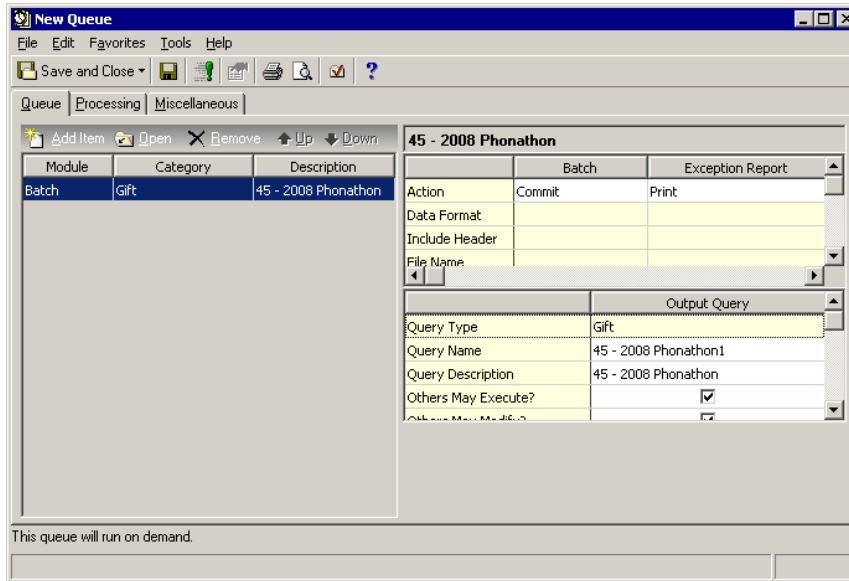
Note: On the Processing tab, you can specify what to do if an error occurs while running the queue. For information about the Processing tab, see "Processing Tab" on page 154.

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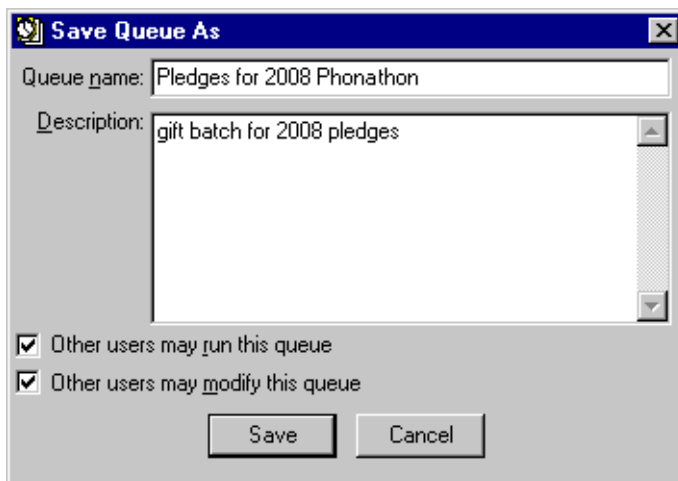
25. In the **Queue name** field, enter "Pledges for 2008 Phonathon".

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.

30. 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.
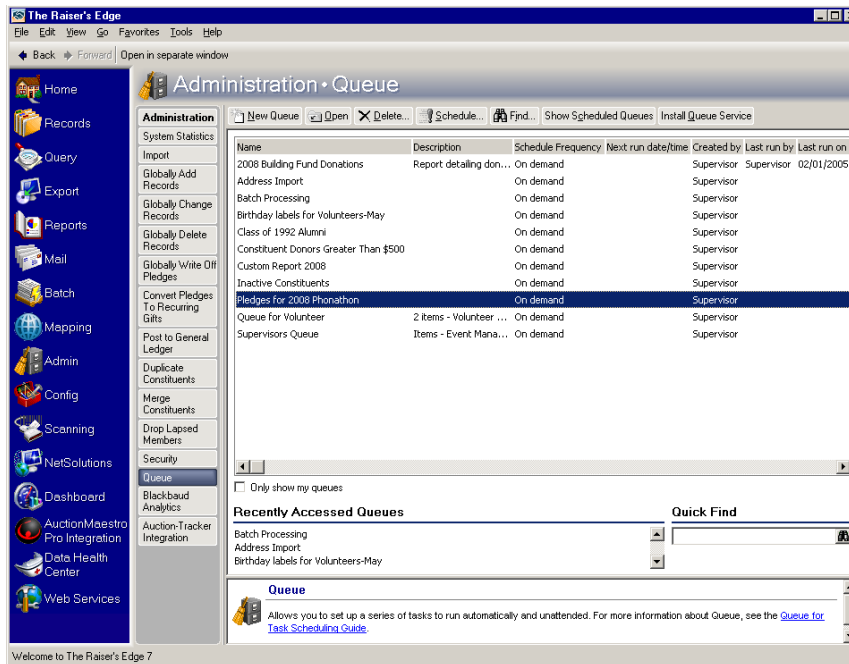
3. In the grid, select "Pledges for 2008 Phonathon".

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.

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.

Note: On the Run 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 "6:30 PM" to run the queue at 6:30 tonight.

7. 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.

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.

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.

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.

Export

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.

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.

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. 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 *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.

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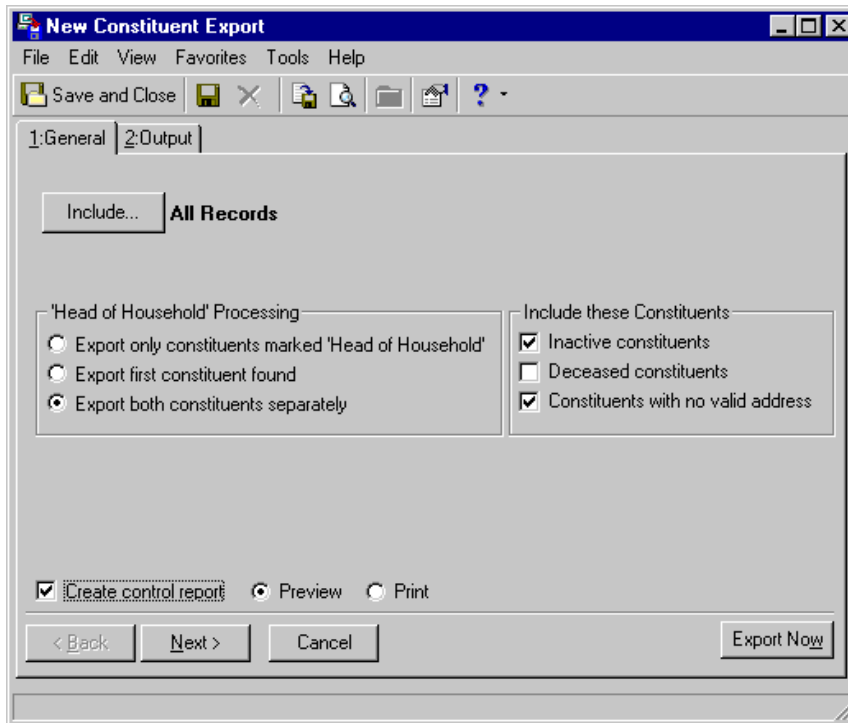
Note: If you choose to include **All Records**, every constituent record in the database is included in the processing.

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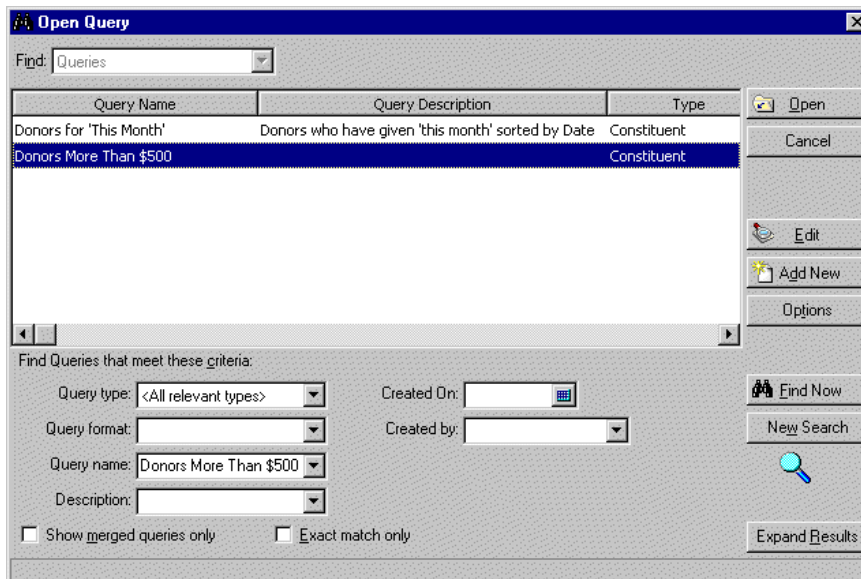
10. In the **Query name** field, enter "Donors More Than $500". This is an existing query that lists the names of constituents who donated more than $500 to your organization.

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.
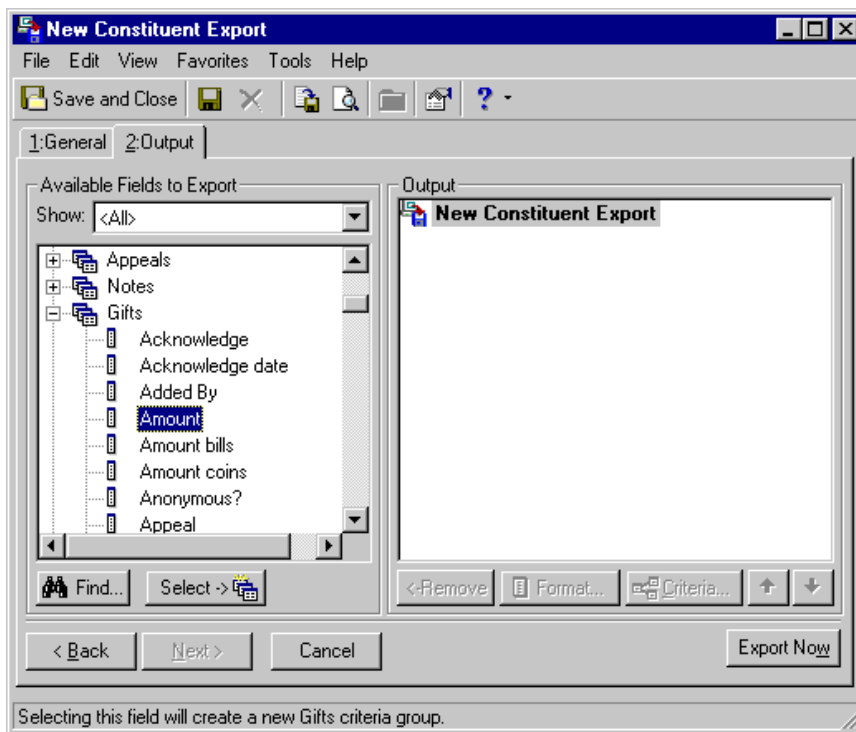
16. In the **Show** field, select "<All>". You can select a specific group of fields or select "<All>" to see a complete list of Available Field categories.

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.

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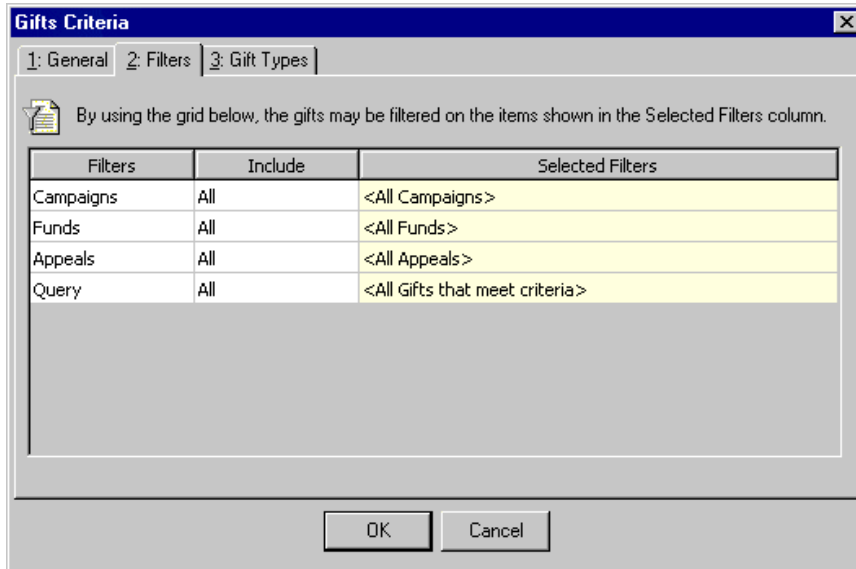
25. You can include or exclude records by selecting the filters to include in the **Campaigns**, **Funds**, **Appeals**, and **Query** fields. For this example, you do not need to select anything on the Filters tab to include all campaigns, funds, appeals, and queries.

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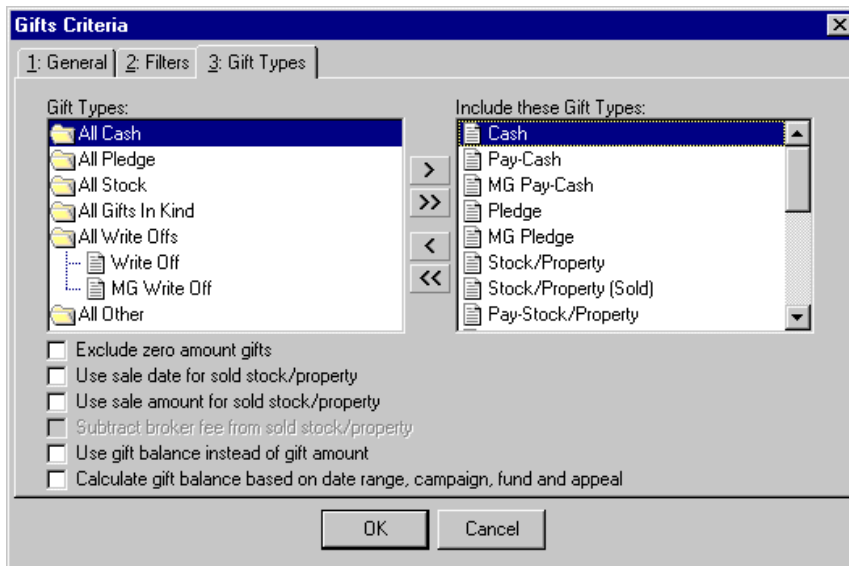
27. In the **Gift Types** box, you can select gift types to include when exporting. For this example, you do not need to mark anything. All gift types default into the **Include these Gift types** box, except the gift types Write Off and MG Write Off.

    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.
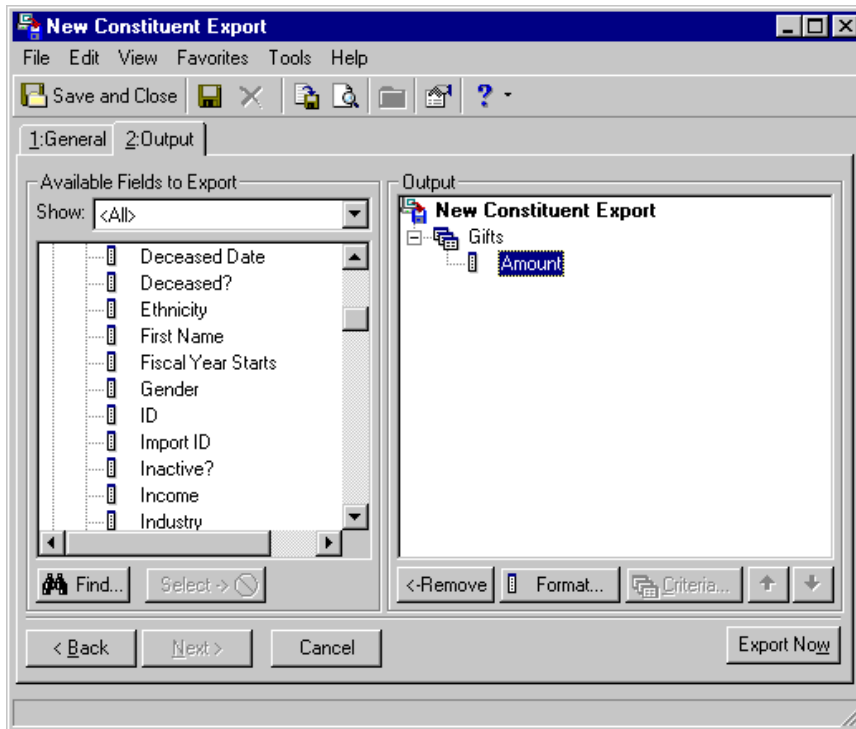
29. In the **Available Fields to Export** box, to reveal the **First Name** and Last Name fields, click the Biographical group.

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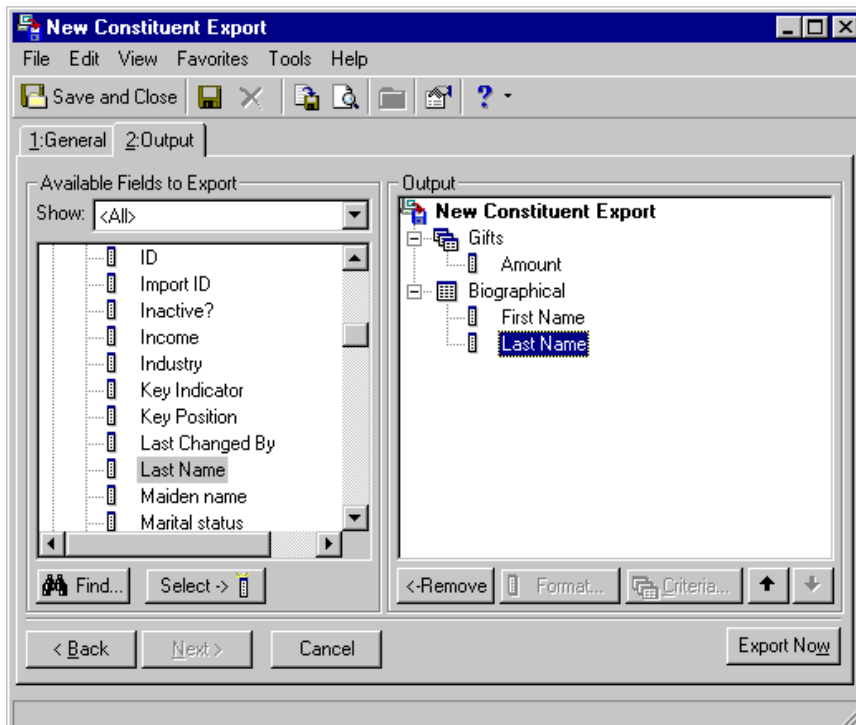
31. Click **Save**. The Save Export As screen appears.

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.

38. 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.

39. 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.

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.

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.
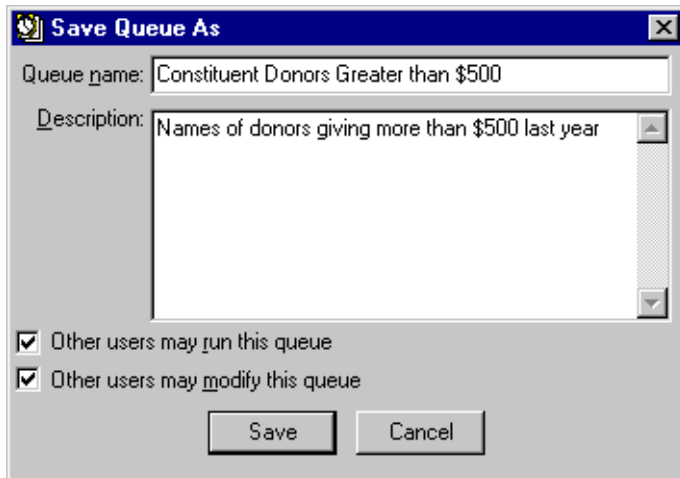
46. In the **Queue name** field, enter "Constituent Donors Greater than $500".

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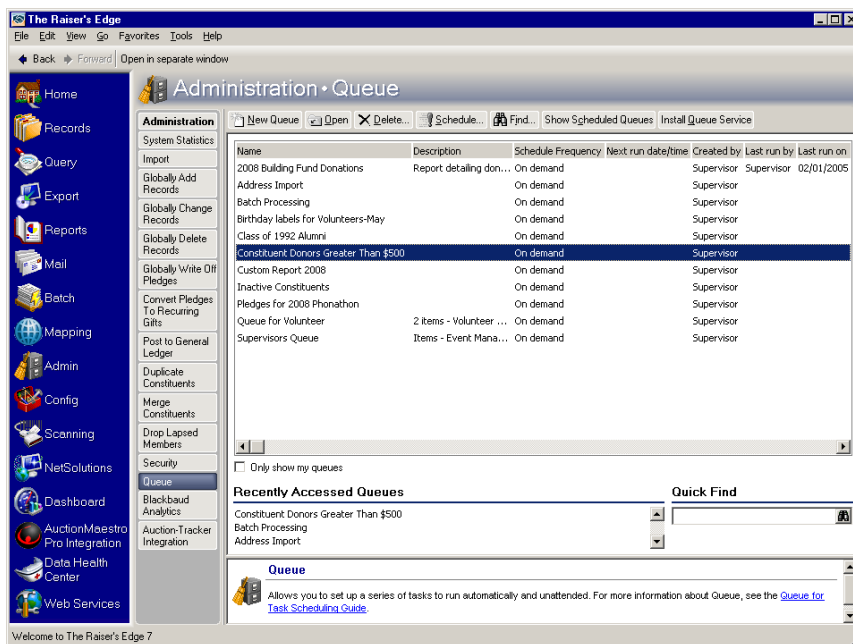
3. In the grid, select "Constituent Donors Greater than $500".
4. Click **Schedule** on the action bar at the top of the page.

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.

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.

7. 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.

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.

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.

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.

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.

Mail

> **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 merge wizard on the mail parameter form to set up the word merge. Examples of mail tasks that support 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.

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.

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.

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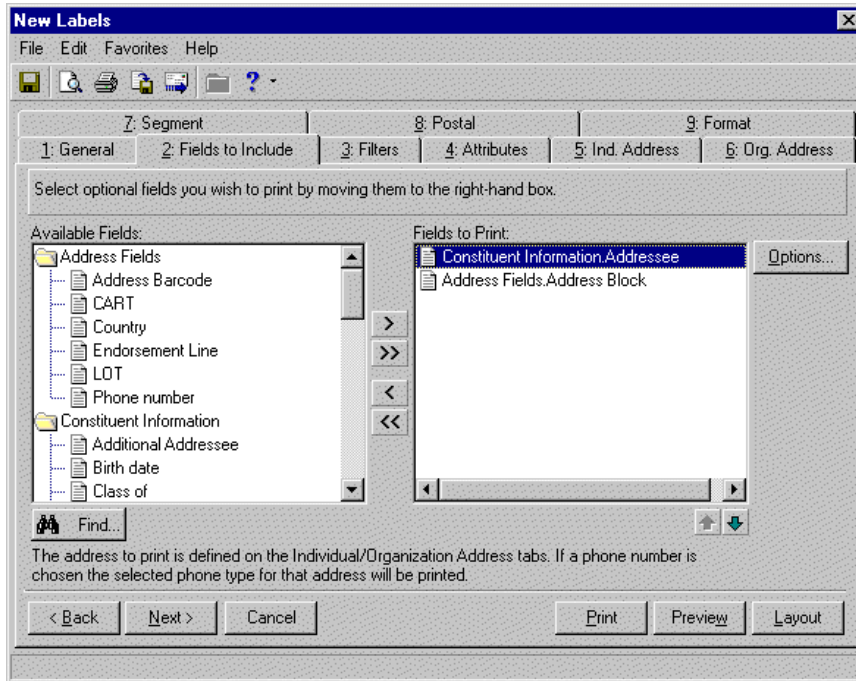
Note: To see if a field has options available, select the field. If the **Options** button is disabled, the field does not have options. If the **Options** button is enabled, click it to access and select the available options for the particular field.

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.

MAIL 99

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

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.

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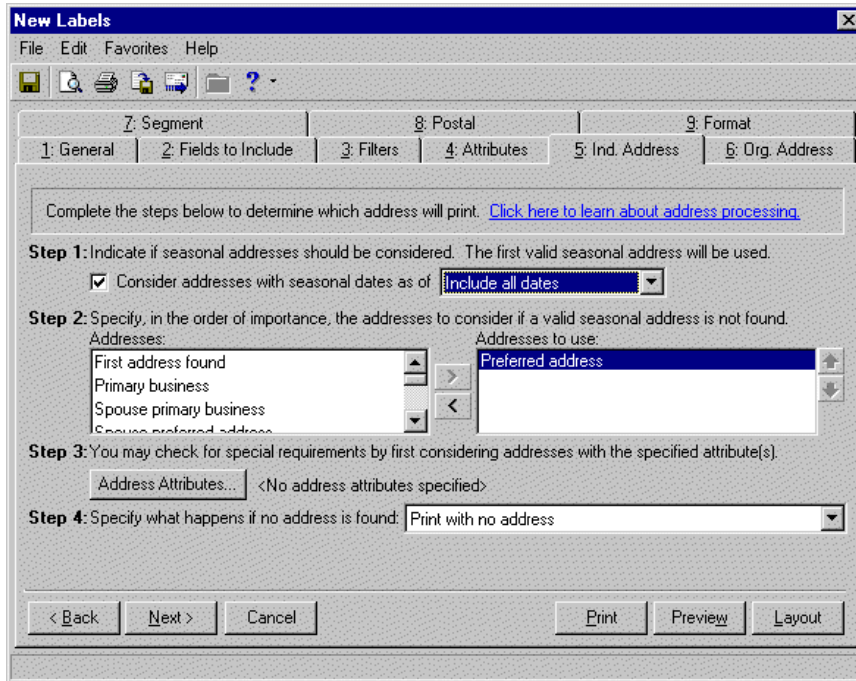
Note: *The Raiser's Edge* only checks the address types listed in the **Address to Use** box. If the program should check all address types during address processing, move all available address types from the **Addresses box** to the **Addresses to use** box.

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.

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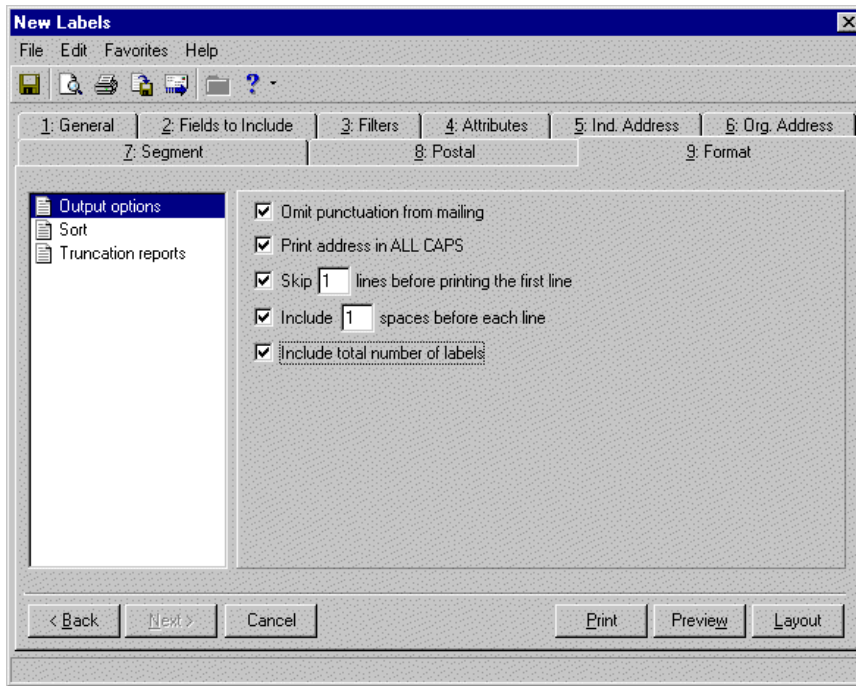
27. From the list, select **Output options** to enter formatting preferences for the information printing on the labels. For example, you can omit punctuation from the mailing or print the addresses on your labels in all capital letters.

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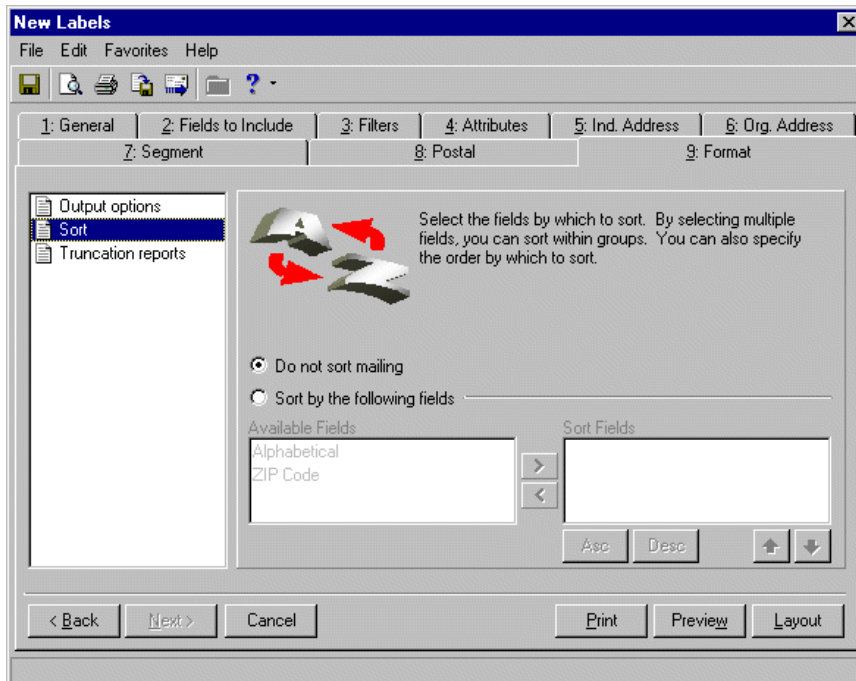
29. From the list, select **Truncation reports** to choose settings for printing a truncation report.

    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*.
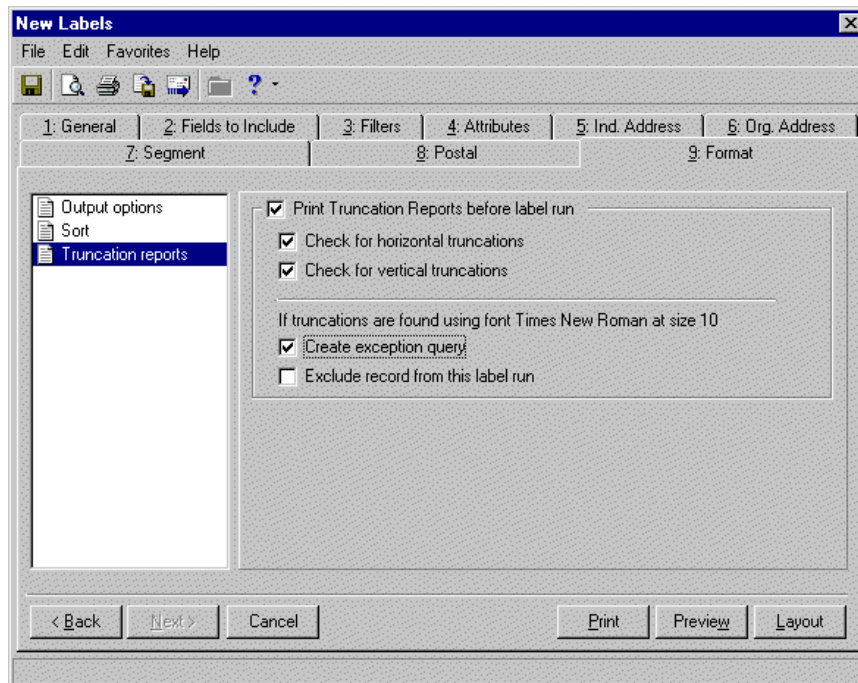

30. Click **Save** on the toolbar. The Save Mailing As screen appears.
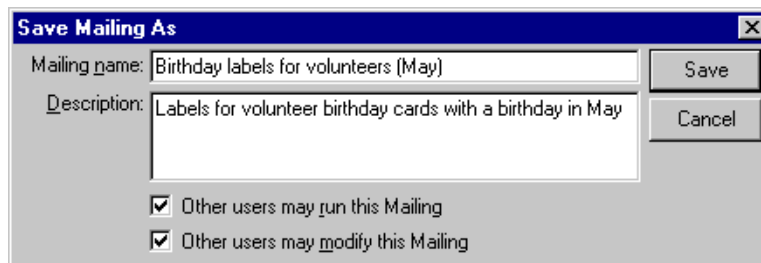
31. In the **Mailing name** field, enter "Birthday labels for volunteers (May)".

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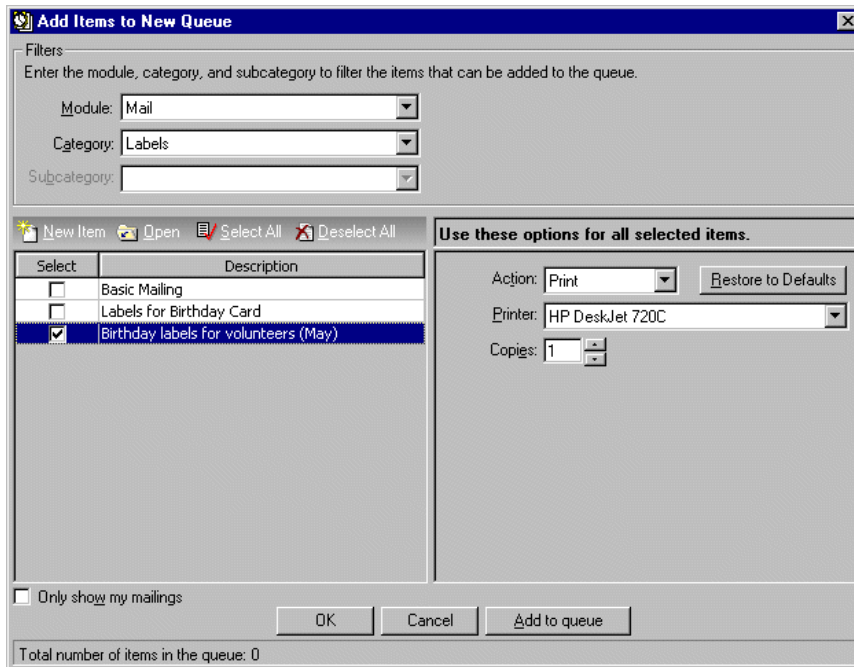
37. On the Add Items to New Queue screen, in the **Select** column, mark the checkbox next to "Birthday labels for volunteers (May)" to add this queue item to the queue.

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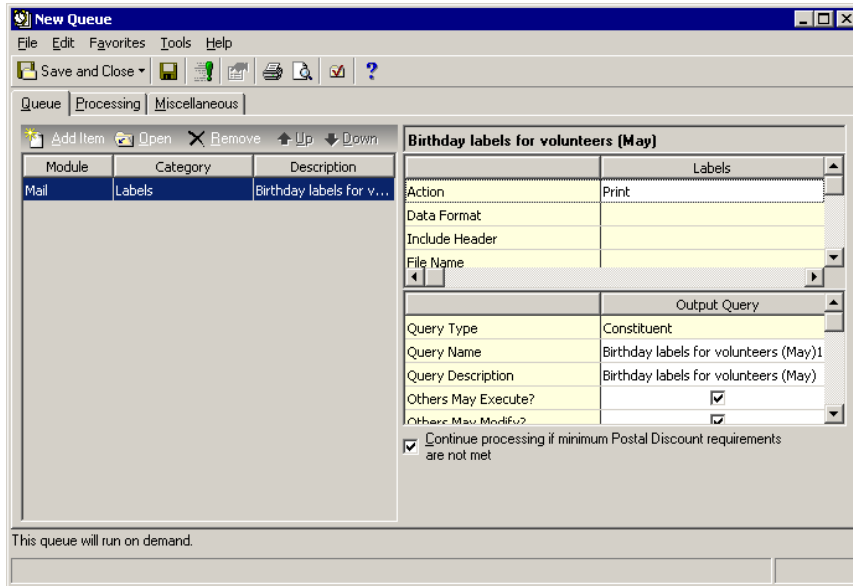
Note: The **Continue processing if minimum Postal Discount requirements are not met** checkbox defaults to marked if valid postal information exists on the Postal tab.

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.
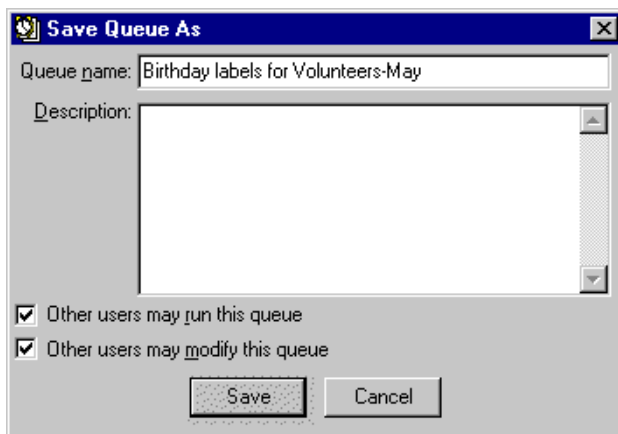
44. In the **Queue name** field, enter "Birthday Labels for Volunteers-May".

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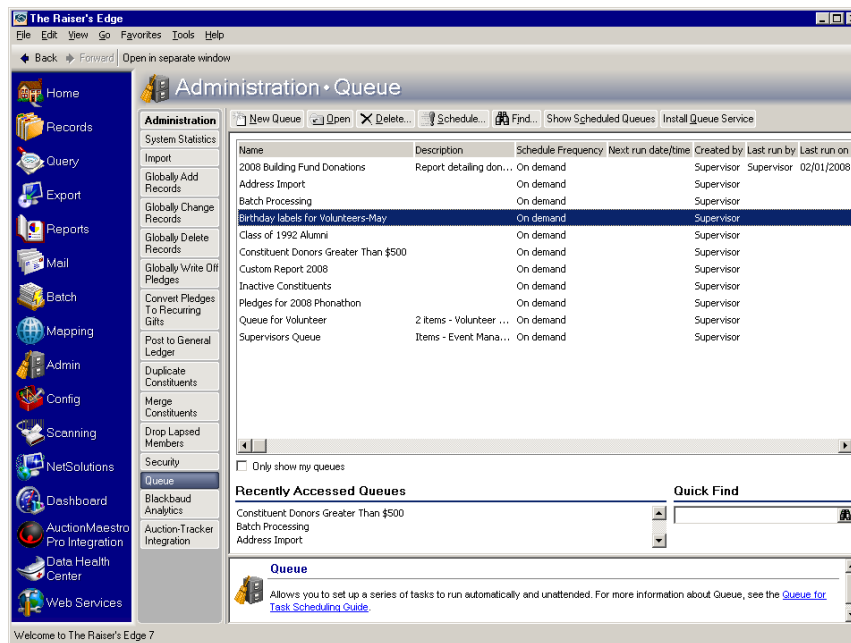
3. In the grid, select "Birthday Labels for Volunteers-May".
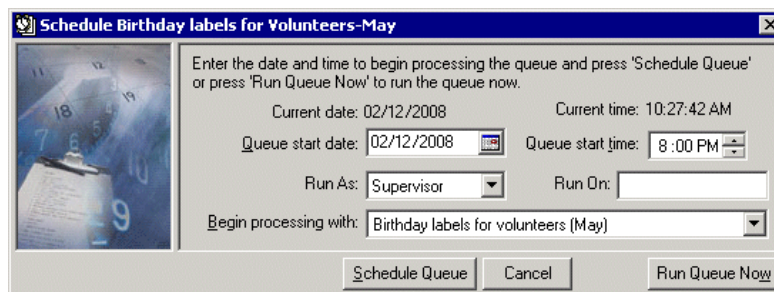4. Click **Schedule** on the action bar at the top of the page.

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.

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.

7. 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.

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.

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.

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.

Query

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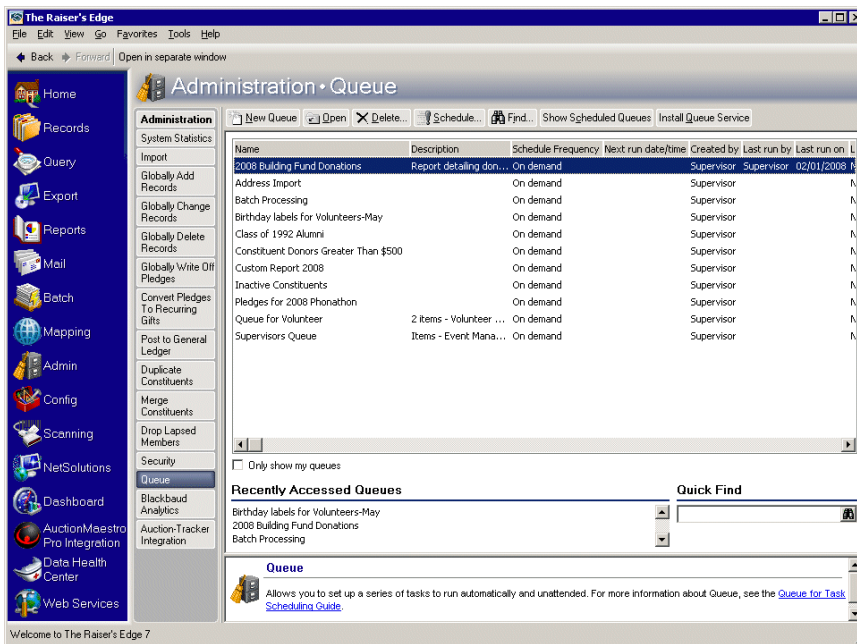
For more information about saving a queue from an existing queue, see "Creating a New Queue from an Existing Queue" on page 30.

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.

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.

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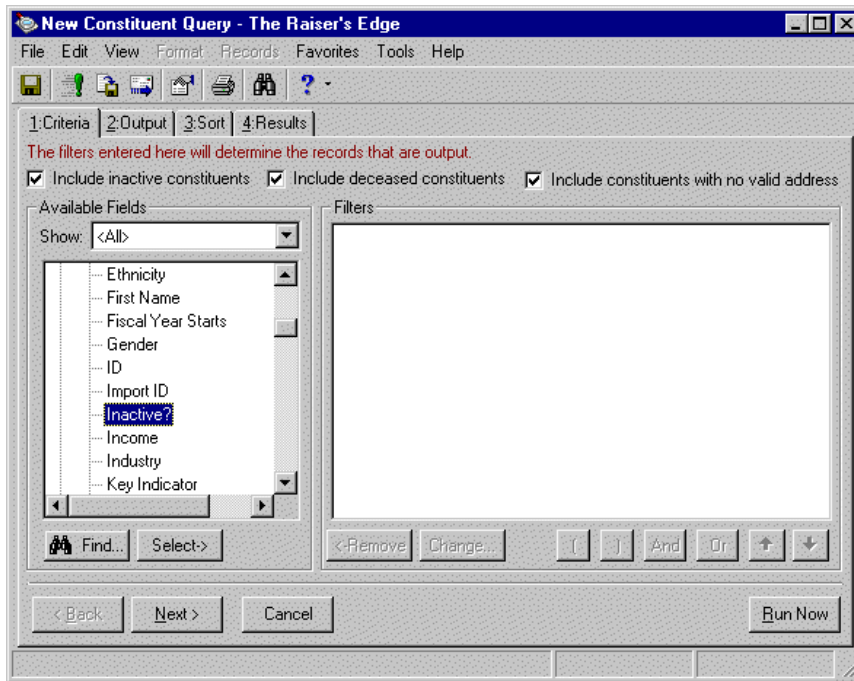
Tip: You can use the **Find** button to easily locate a field in the **Available Fields** box.

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.
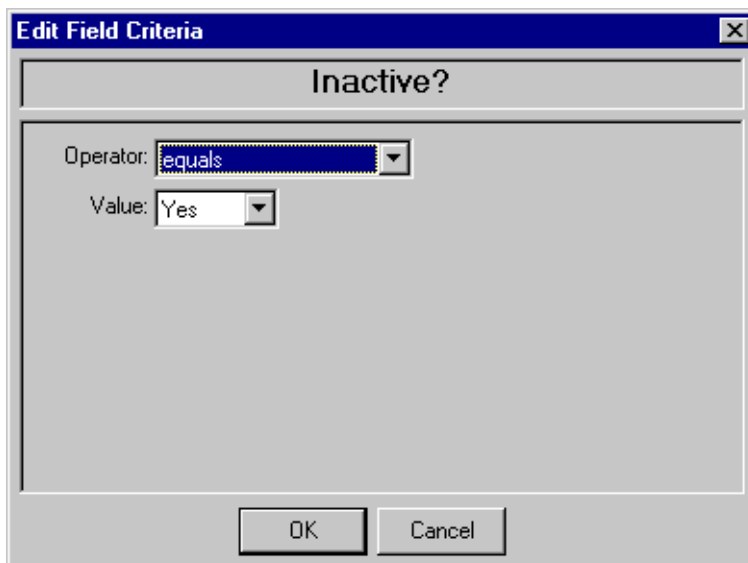
12. In the **Operator** field, select "equals". For more information about criteria fields, see the *Query & Export Guide*.

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.
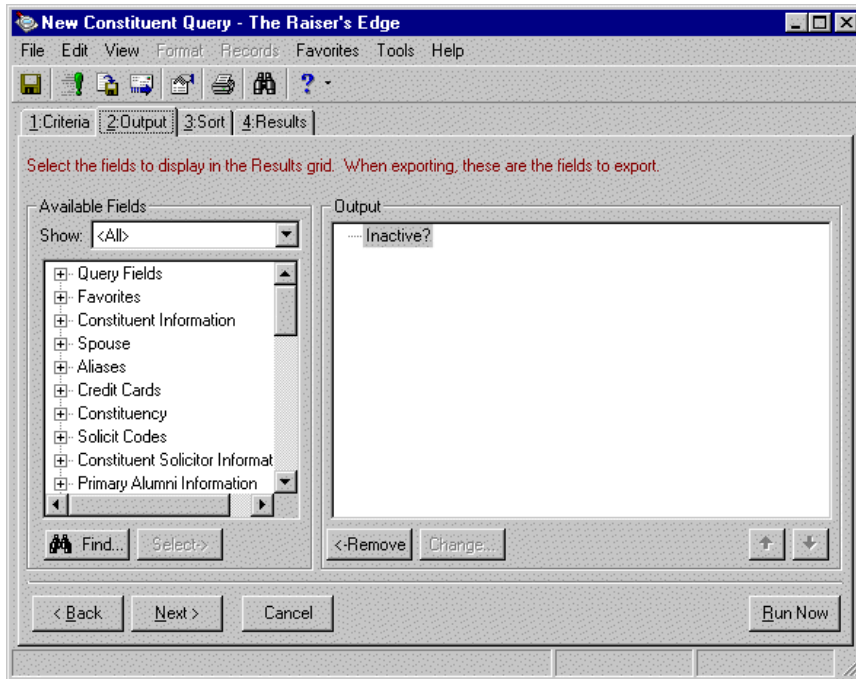
16. In the **Show** field, select "<All>". You can select a specific group of fields or select "<All>" to see a complete list of Available Field categories.

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.
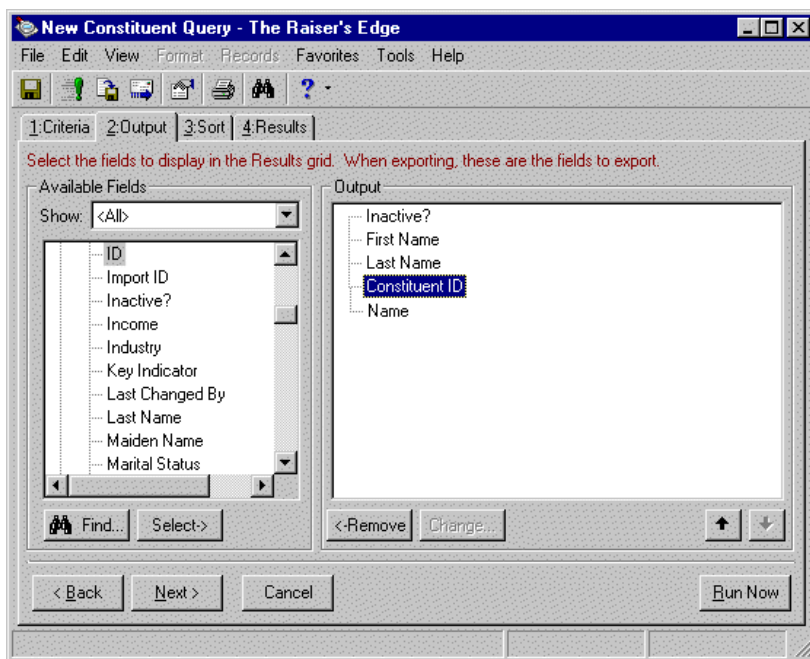
20. Select the Sort tab.
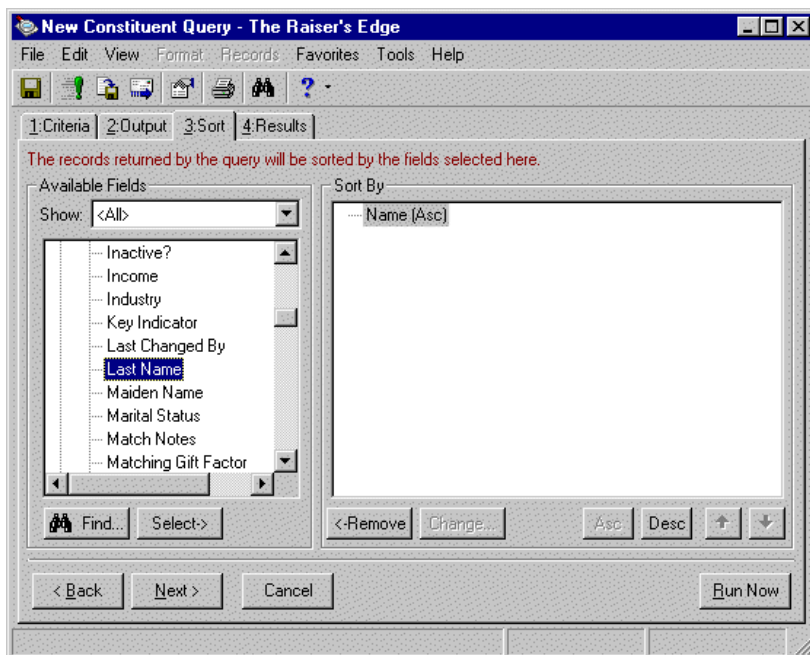
21. To reveal criteria fields under each group, in the **Available Fields** box, click the plus sign to the left of the group name. To reveal the **Name** field, click the Constituent Information group.

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.

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.

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.

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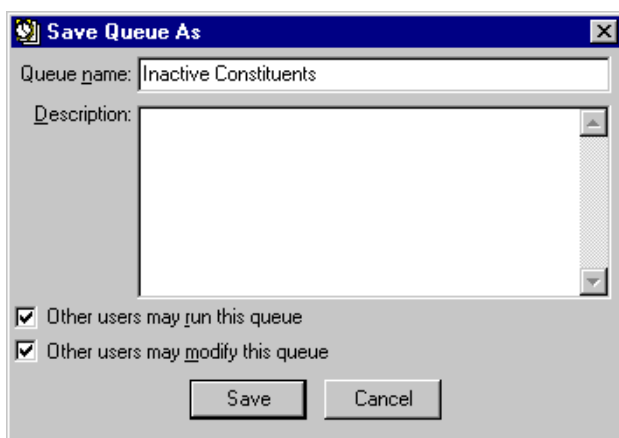
38. In the **Queue name** field, enter "Inactive Constituents".

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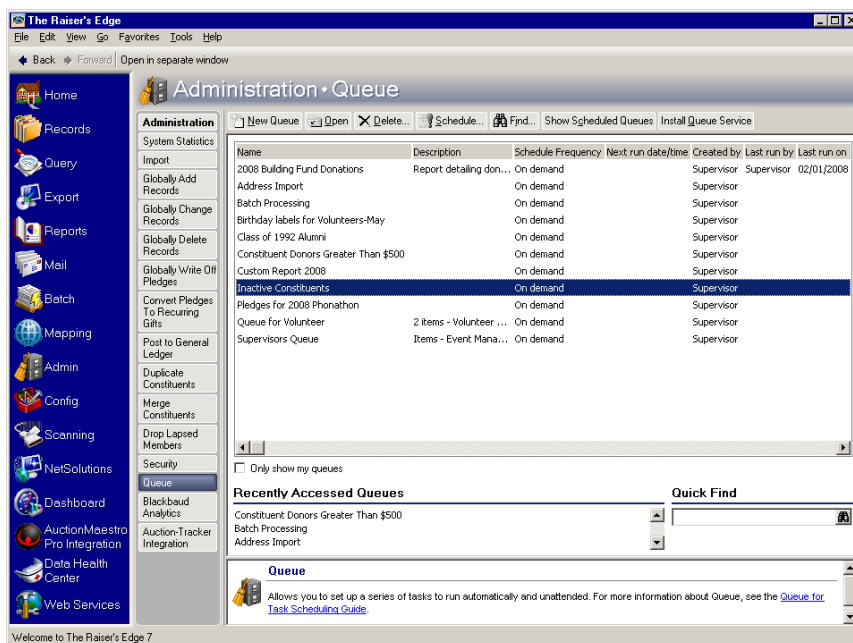
3. In the grid, select "Inactive Constituents".
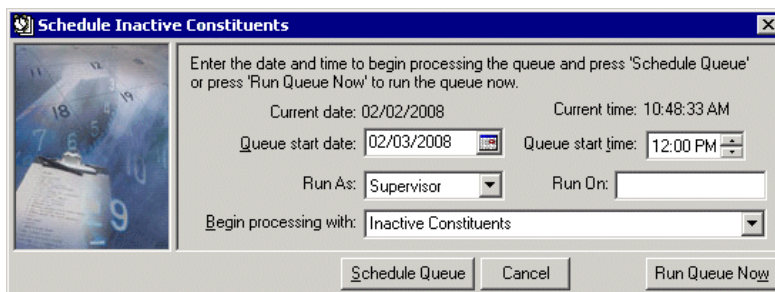4. Click **Schedule** on the action bar at the top of the page.

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.

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.

7. 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.

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.

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.

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.

Reports

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.
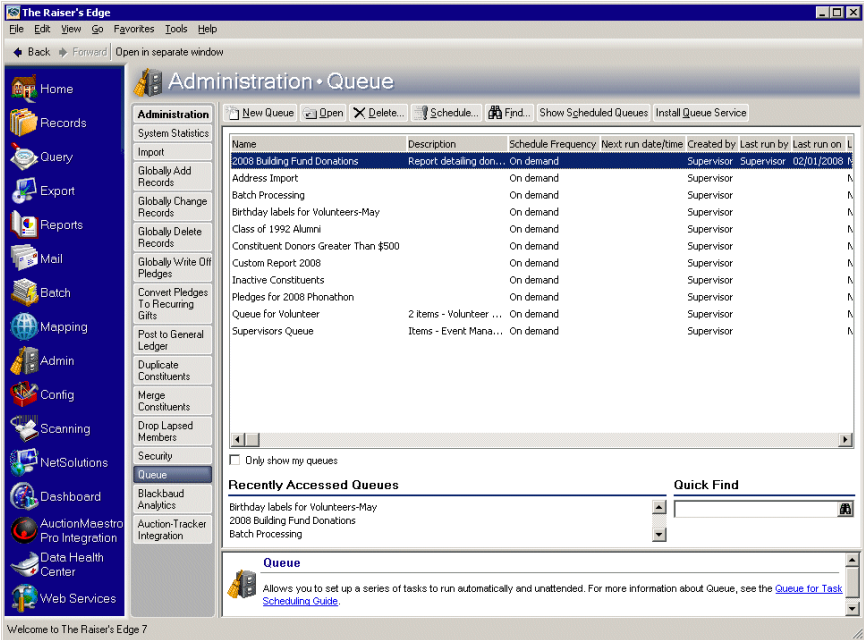
3. Click **New Queue** on the action bar. The Add Items to New Queue screen appears. For more information about accessing the queue page, see "Accessing a Queue" on page 6.
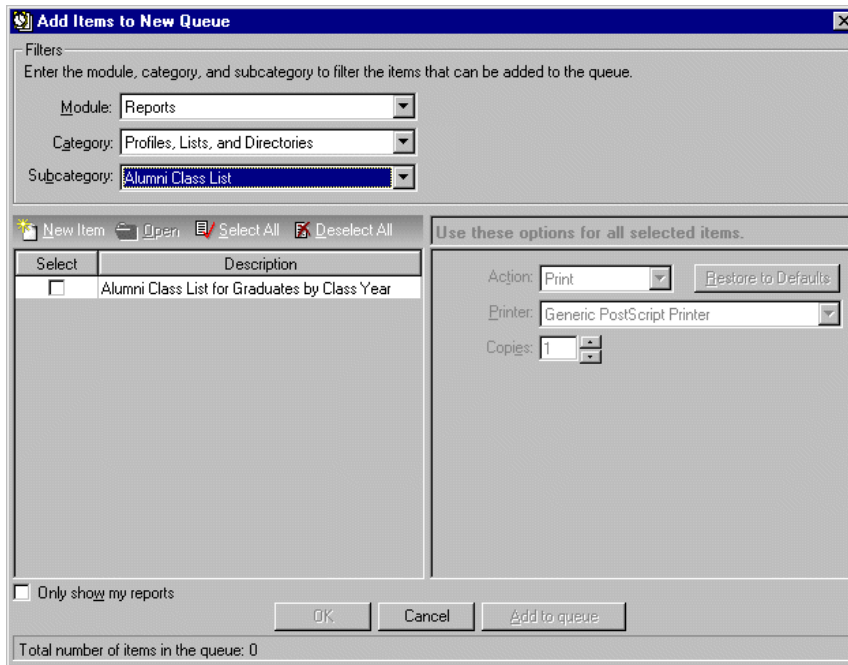
4. In the **Module** field, select "Reports" to run a queue for Reports.

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.
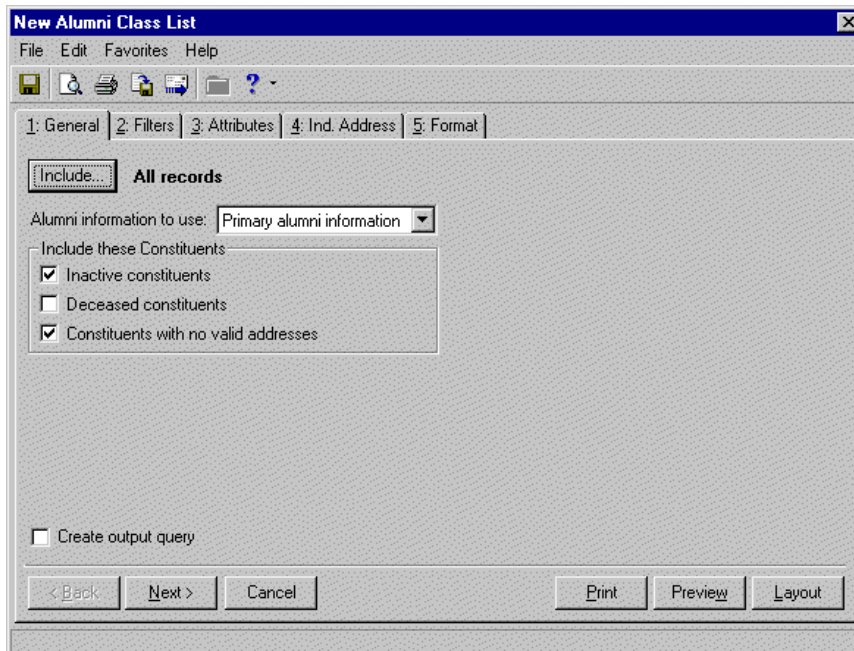
9. From the General tab, Click **Include**.

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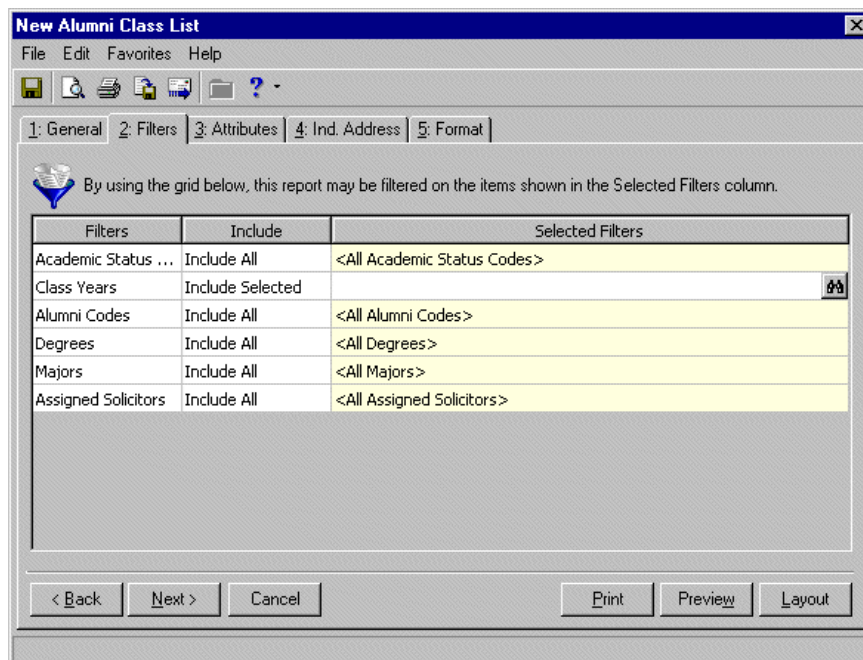
15. In the **Include** column, for the **Class Years** filter, choose "Selected" to include only those that graduated from your organization in 1992.

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.
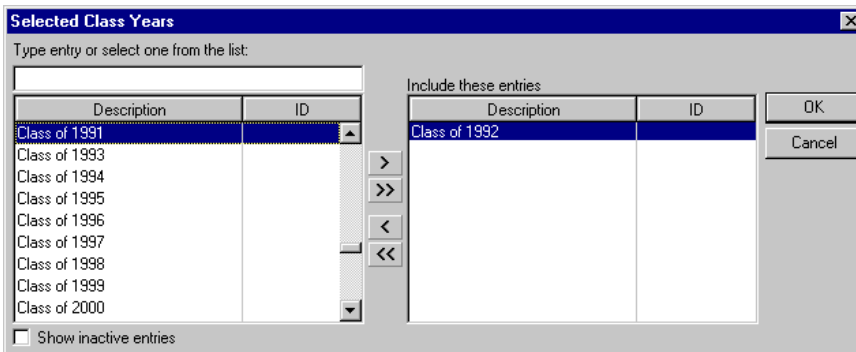

17. In the **Description** column, select "Class of 1992".

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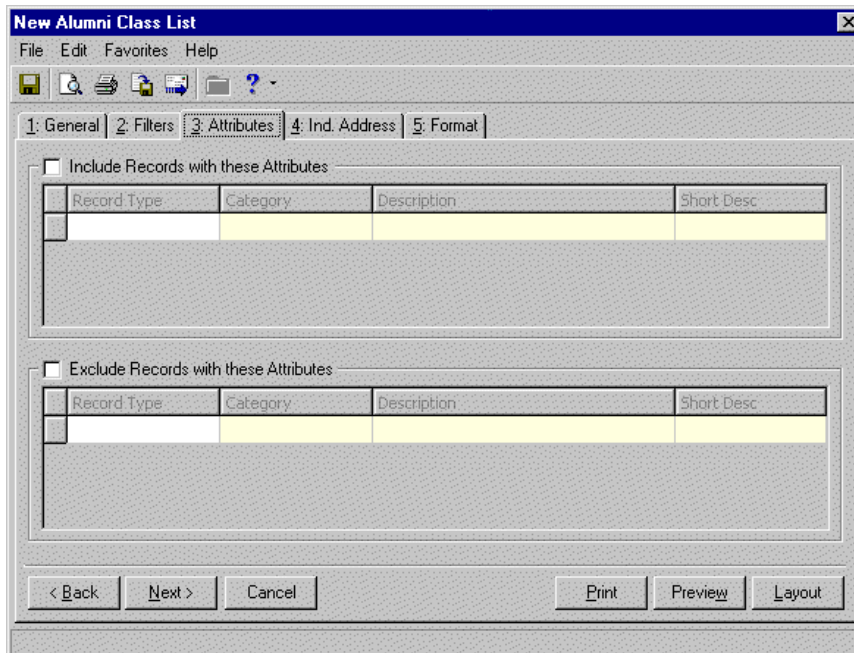
21. On the Attributes tab, you can include or exclude records with specific attributes by marking the respective checkboxes and selecting the attributes to include in the **Record**, **Category**, **Description**, and **Short Desc** fields. For this example, you do not need to mark anything on the Attributes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

22. Click **Next**. The Ind. Address tab appears.
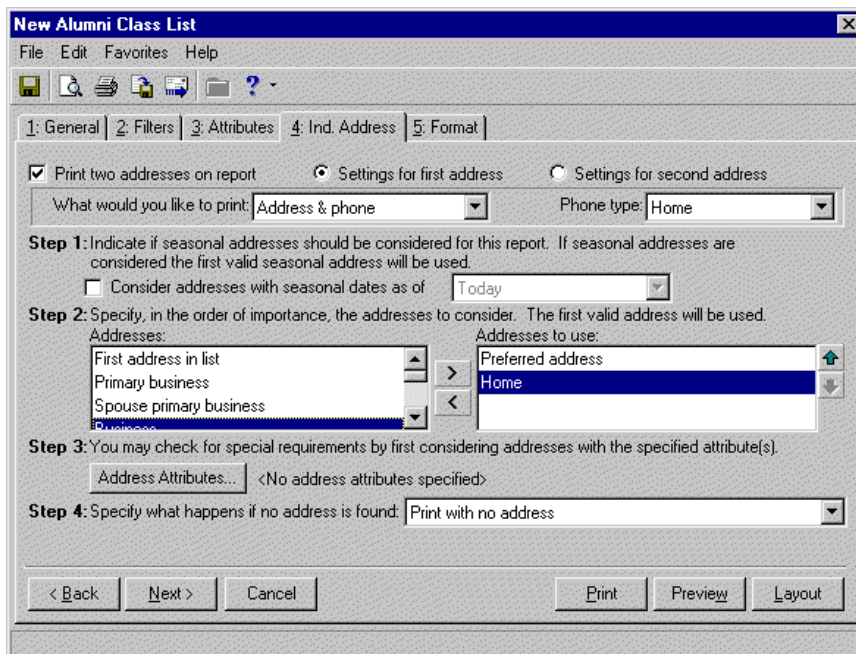
23. In the **What would you like to print** field, select "Address and phone" to print the address and phone number for the graduates that list in the report.

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.

35. Click **Save** on the toolbar. The Save Report As screen appears.
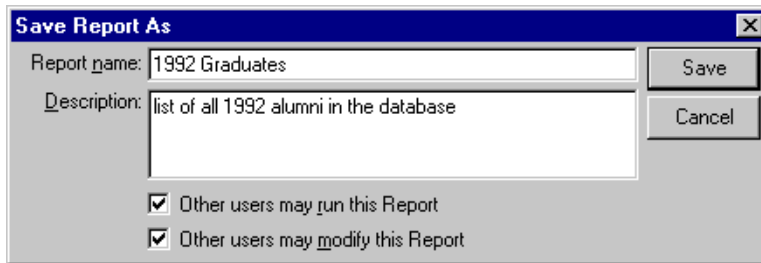
36. In the **Report name** field, enter "1992 Graduates".
37. In the **Description** box, enter "list of all 1992 alumni in the database".
38. To allow users other than you to run the report, mark the **Other users may run this Report** checkbox.
39. To allow users other than you to modify the report, 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.
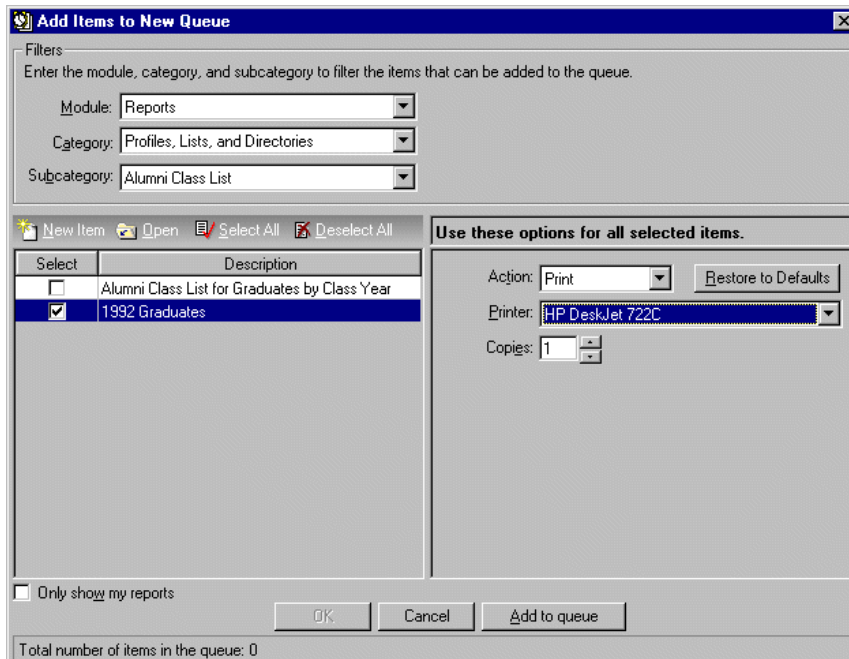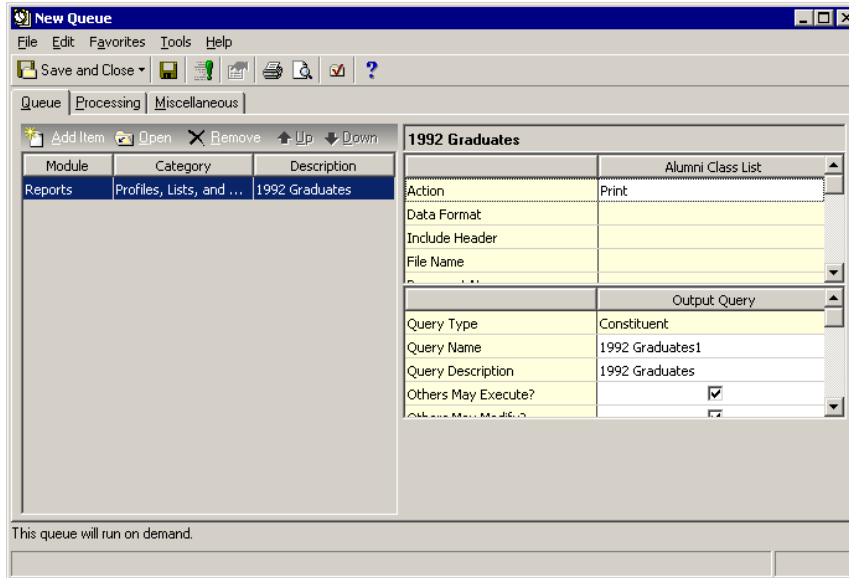

Note: If you select "Send as Mail" in the **Action** field, additional fields such as **Mail to** and **cc** appear for you to specify the recipients of the email. With your cursor in these fields, you can press **F7** on your keyboard for your email address book.

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.

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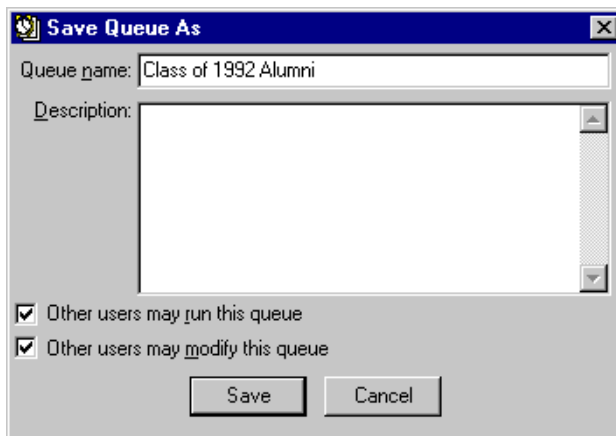
48. In the **Queue name** field, enter "Class of 1992 Alumni".

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.
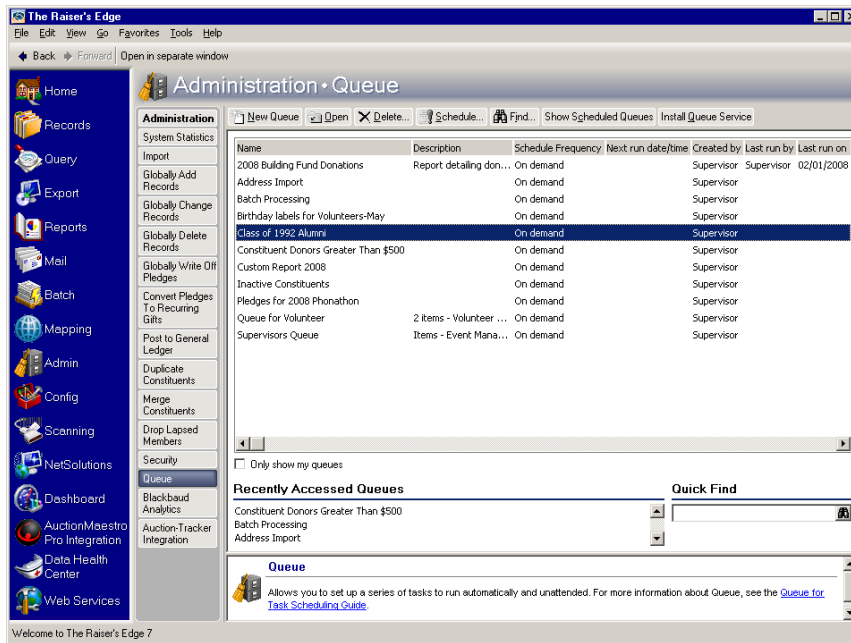
3. In the grid, select "Class of 1992 Alumni".
4. Click **Schedule** on the action bar at the top of the page.
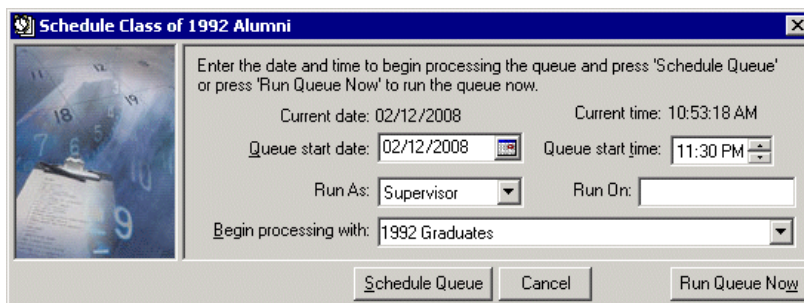
Warning: For a queue to run successfully, the database must be running.

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.

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.

7. 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.
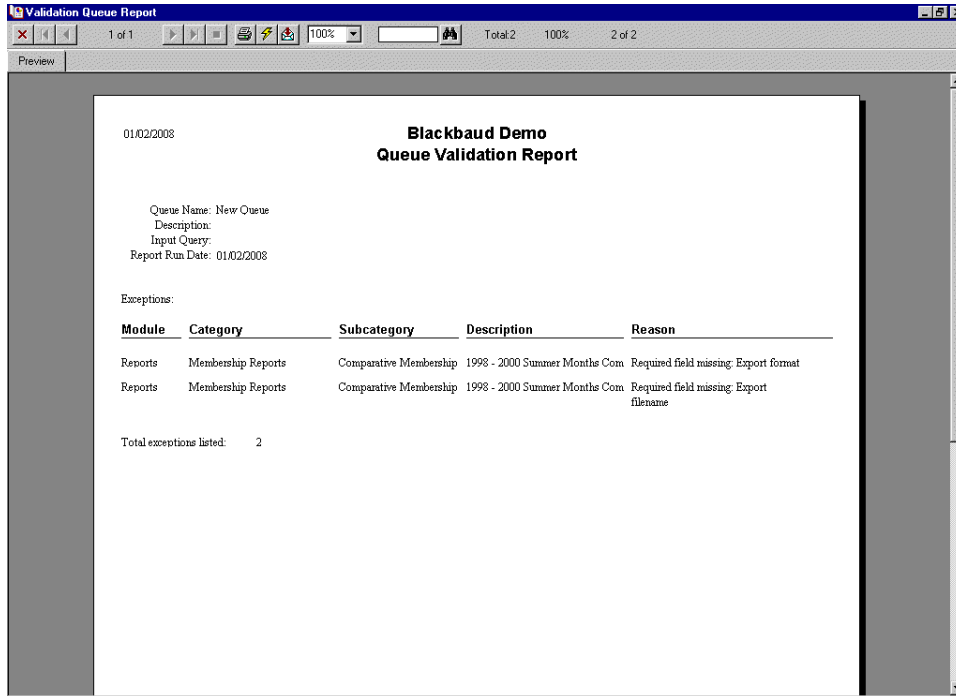
Queue Reports for Reports

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.
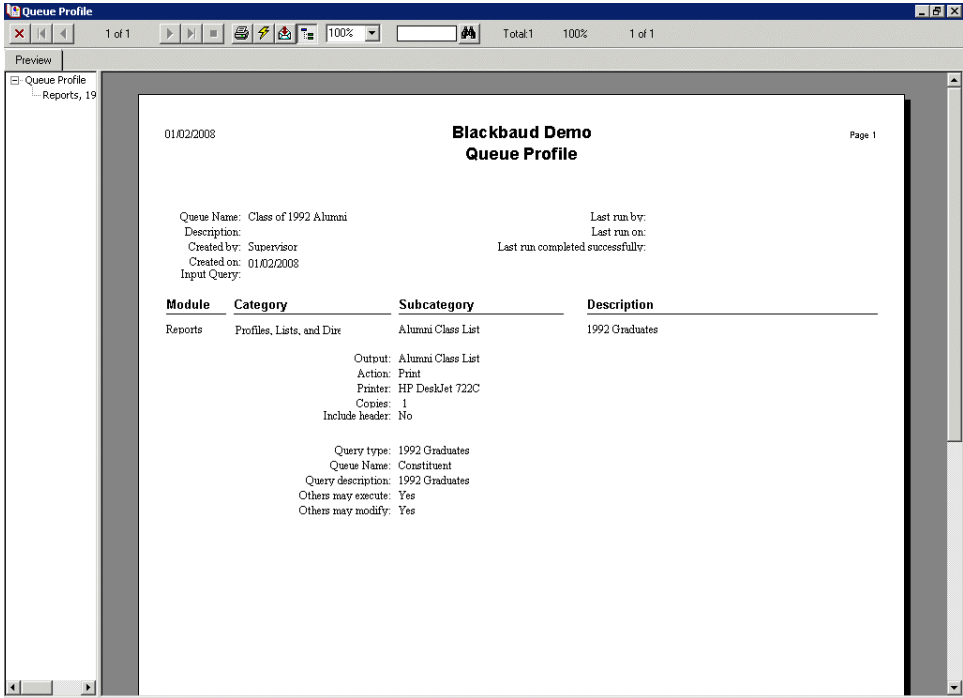
Validation Report

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.

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.

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.

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.

Recurring Queues

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.
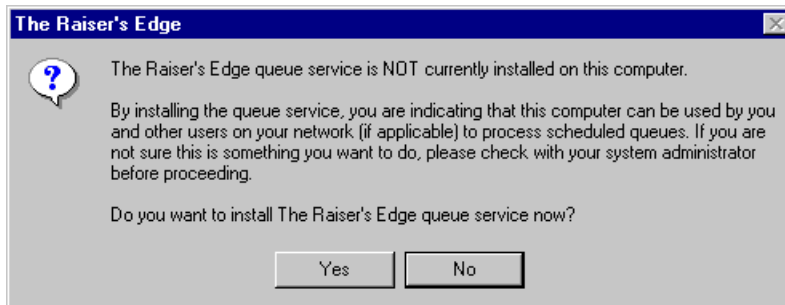
▶ **Installing Queue Service**

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

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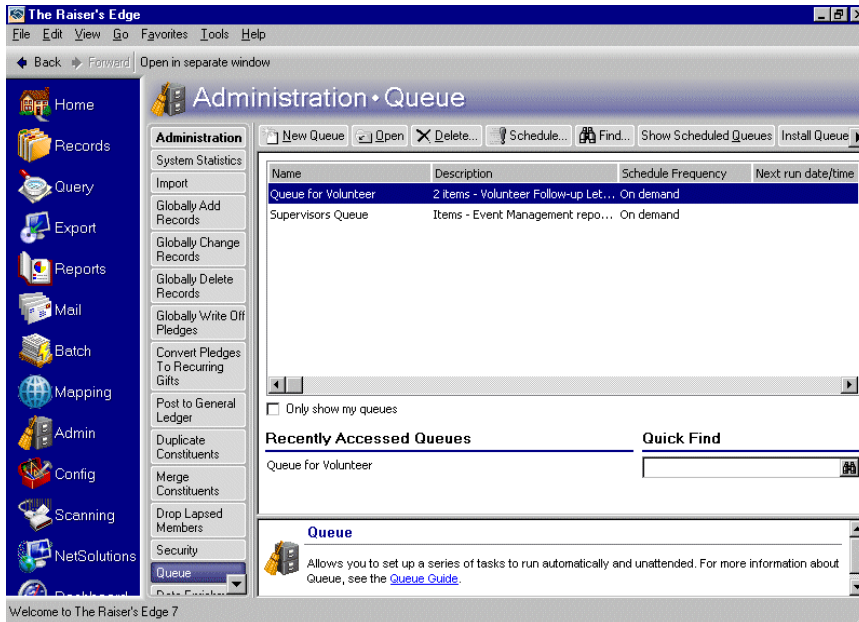
3. On the action bar, click **Install Queue Service**. An installation screen appears, asking you if you are sure you want to install Queue Service.

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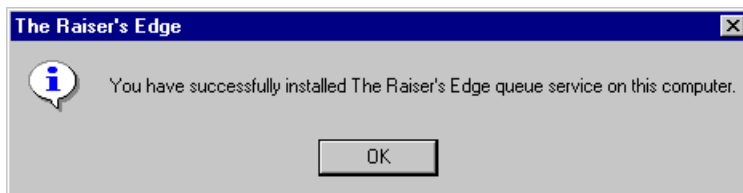
When the Queue Service installation is successful, you can begin running recurring queues. If you receive a message indicating the installation was unsuccessful, contact Customer Support.

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.
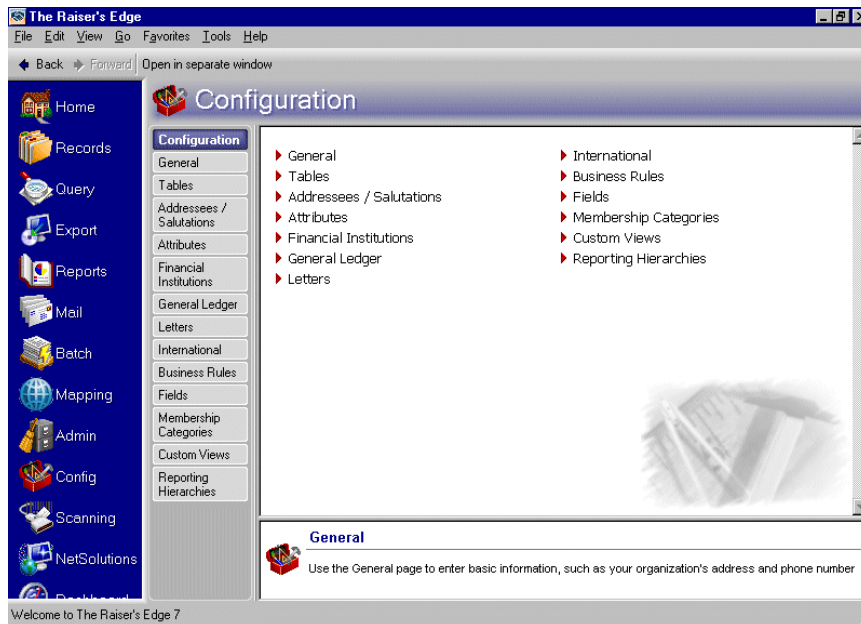
2. Click **Business Rules**. The Business Rules page appears.
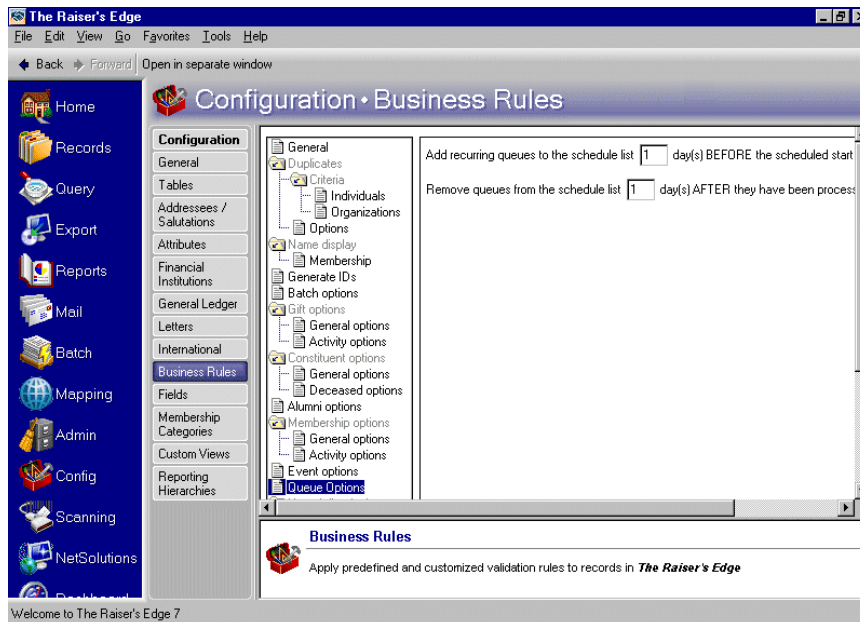
3. From the tree view on the left, select **Queue Options**. The queue options appear on the right.

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.
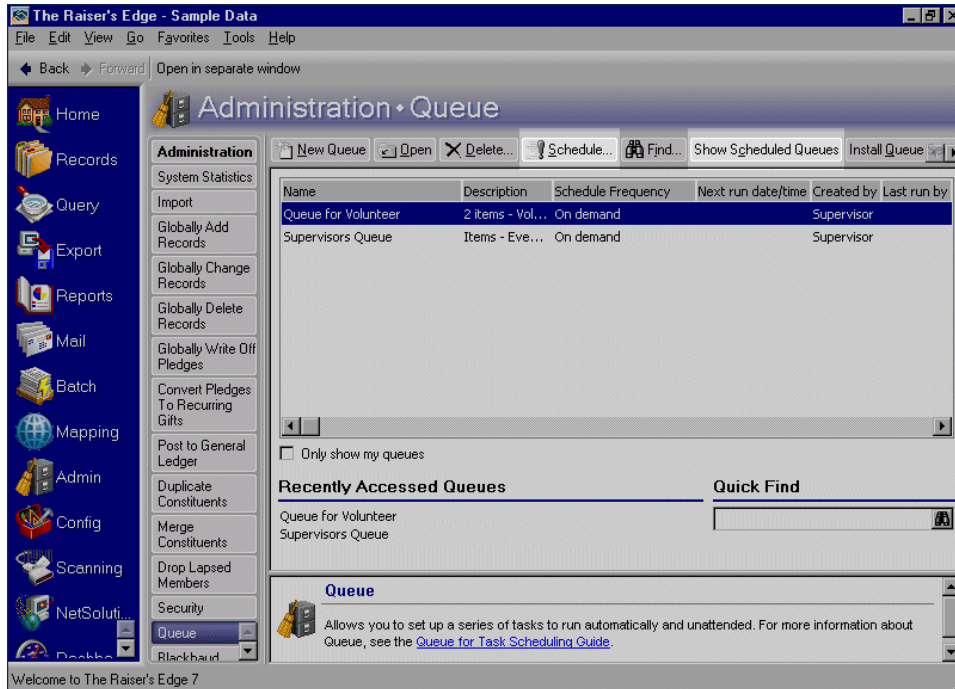

Before you begin processing recurring queues, from the Queue page, you must first click the **Install Queue Service** button. This installs Queue Service on your computer. It is important to remember that Queue Service must be installed before any recurring queues can be processed.

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.
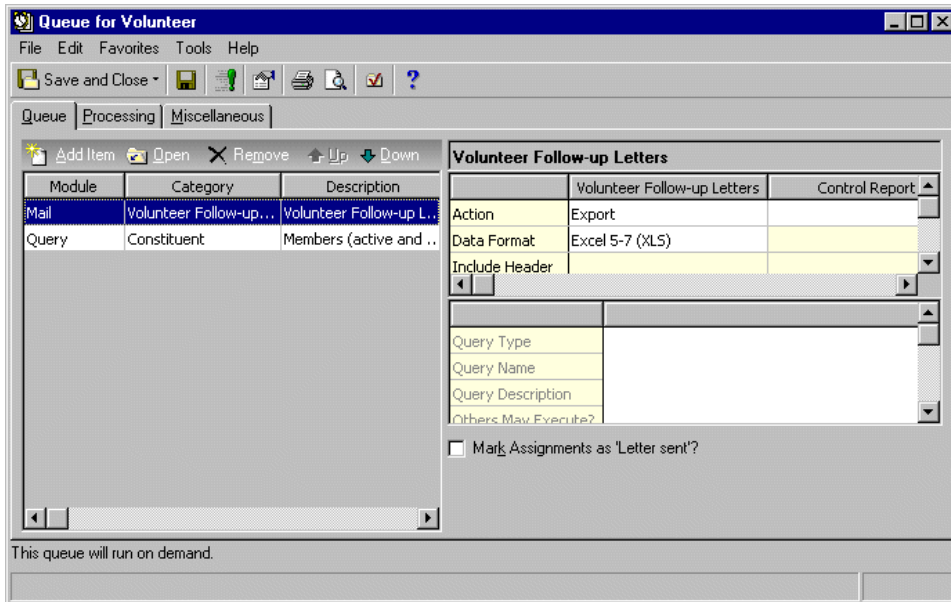
Queue Tab

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.

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 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.
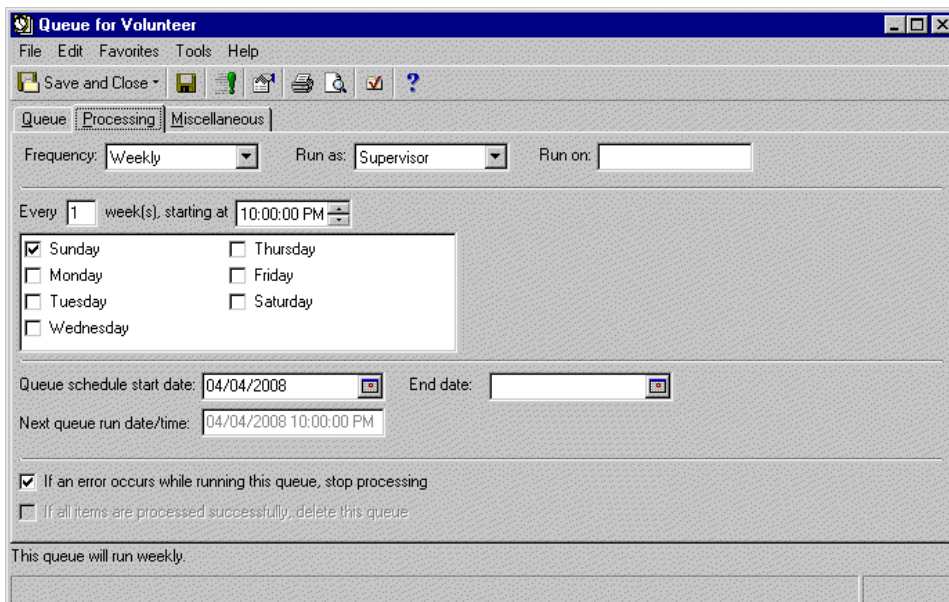
On the Processing tab, enter a start date and end date for running the queue in the **Queue schedule start date** and **End date** fields. Your choices in these fields default in the **Next queue run date/time** field. To stop the process if an error occurs while running the queue, mark the **If an error 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.
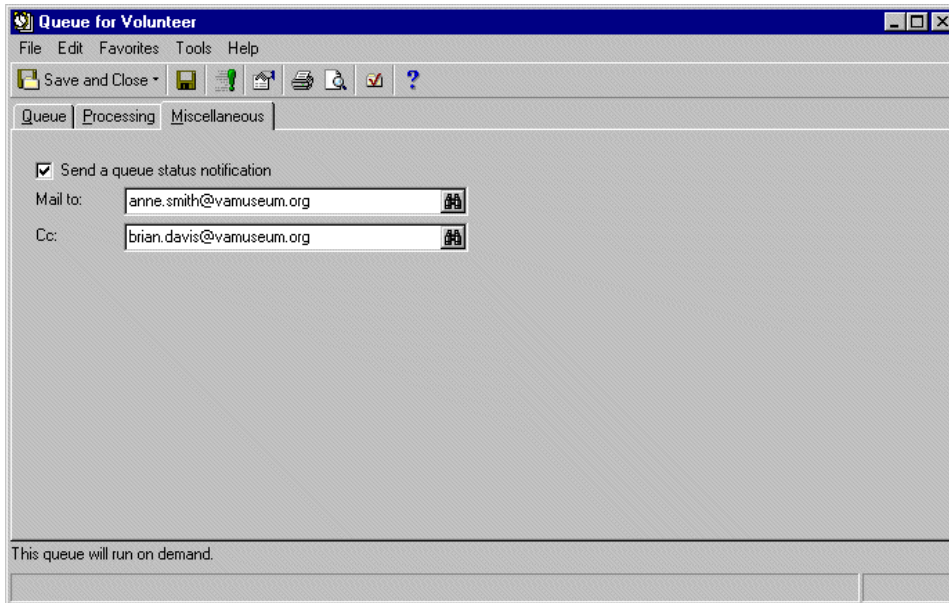
Send a queue status notification. To send a notification specifying the status of a queue upon processing, mark the **Send a queue status notification** checkbox. When you mark this checkbox, the **Mail to** and **Cc** fields are enabled so you can specify recipients of the email.

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.
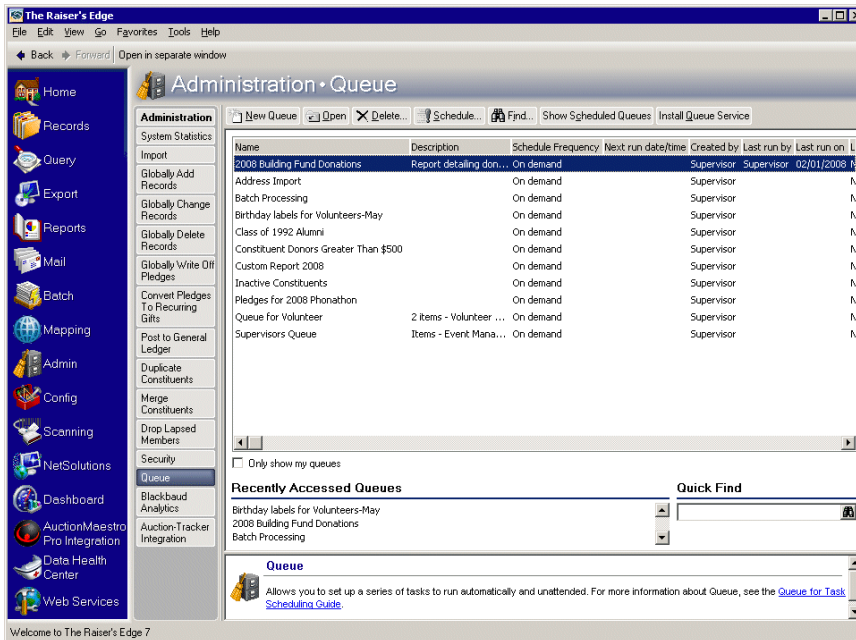
> **Tip**: You can use shortcut keys to move around ***The Raiser's Edge*** without using your mouse. For example, press **ALT** + **N** on your keyboard to create a new queue.

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.

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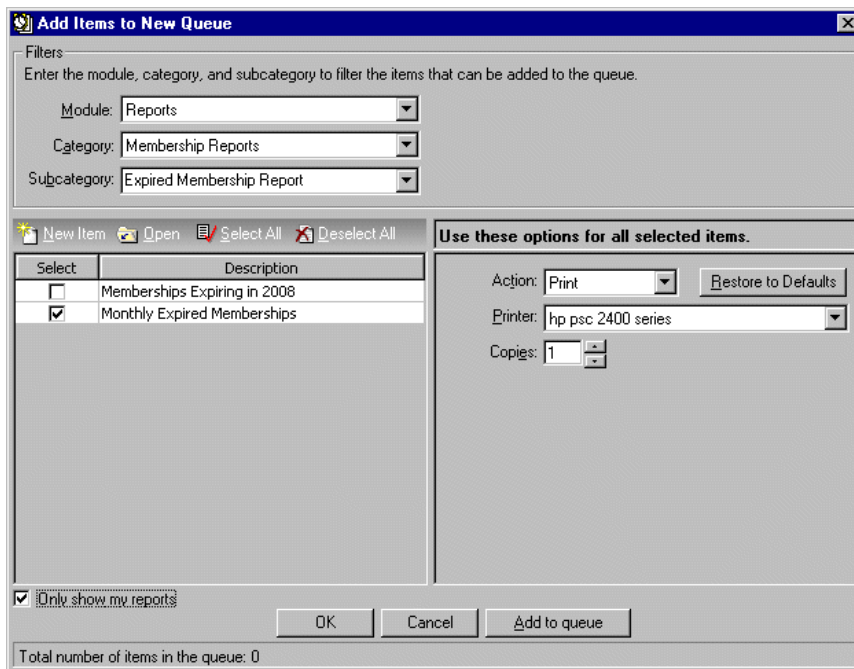
9. In the **Use these options for all selected items** frame, in the **Action** field, select "Print" to print the list of expired memberships.

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.
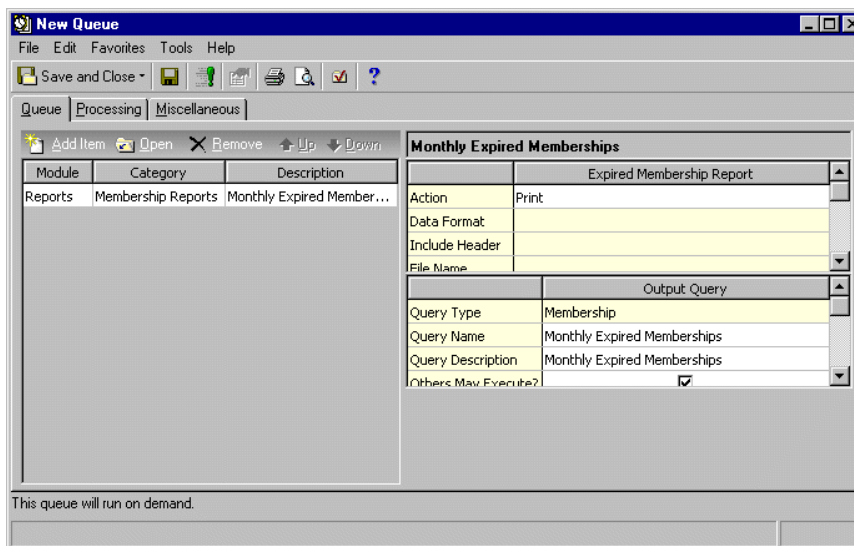
On the left side of the New Queue screen, you can see the list of queue items for the queue. Multiple modules can be included in one queue. When you select a queue item, the preferences you selected for that queue item appear to the right of the New Queue screen. You can change the information on the 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.
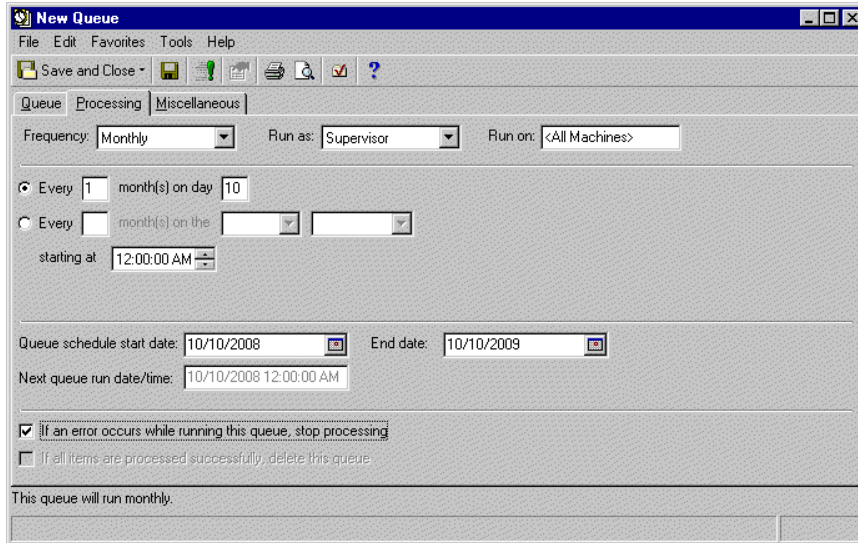
14. In the **Frequency** field, select "Monthly" to run the queue monthly.

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.
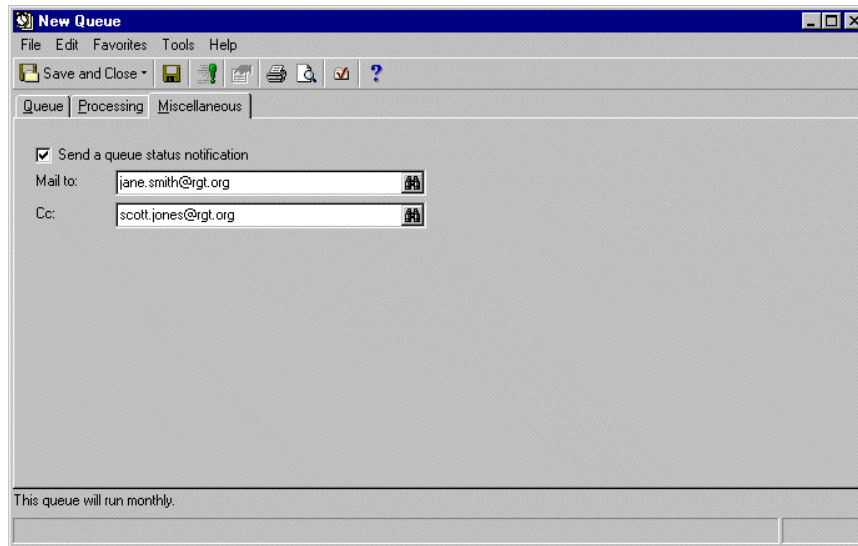
22. To send a queue status notification email, mark the **Send queue status notification** checkbox. The **Mail to** and **Cc** field are enabled.

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.
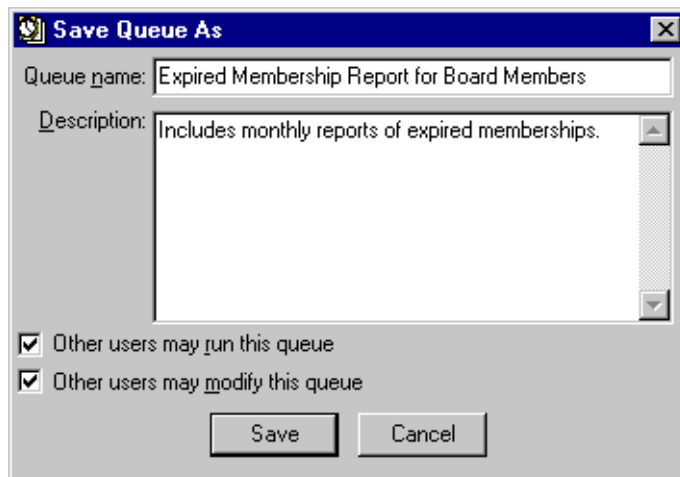
25. In the **Queue name** field, enter "Expired Membership Report for Board Members".

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.
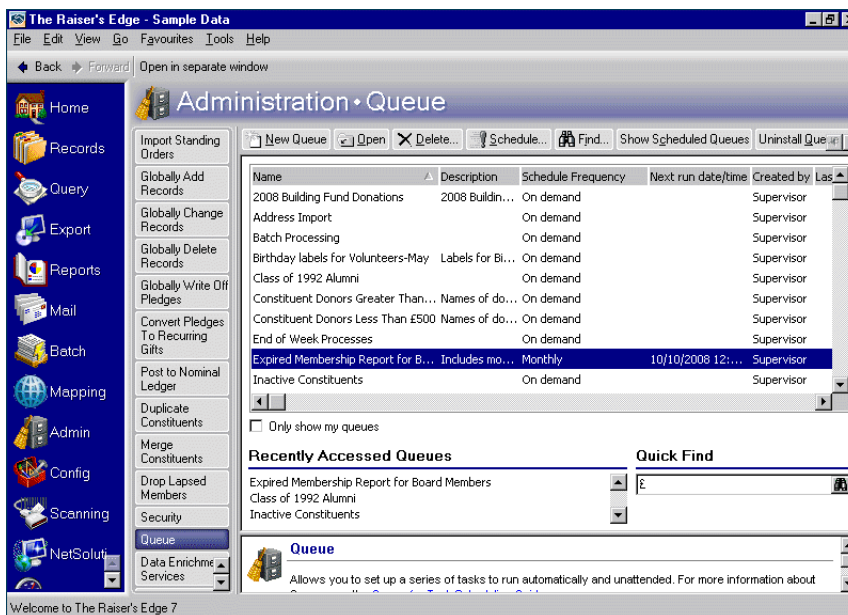
3. In the grid, select "Expired Membership Report for Board Members".
4. Click **Schedule** on the action bar at the top of the page.

   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.

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.
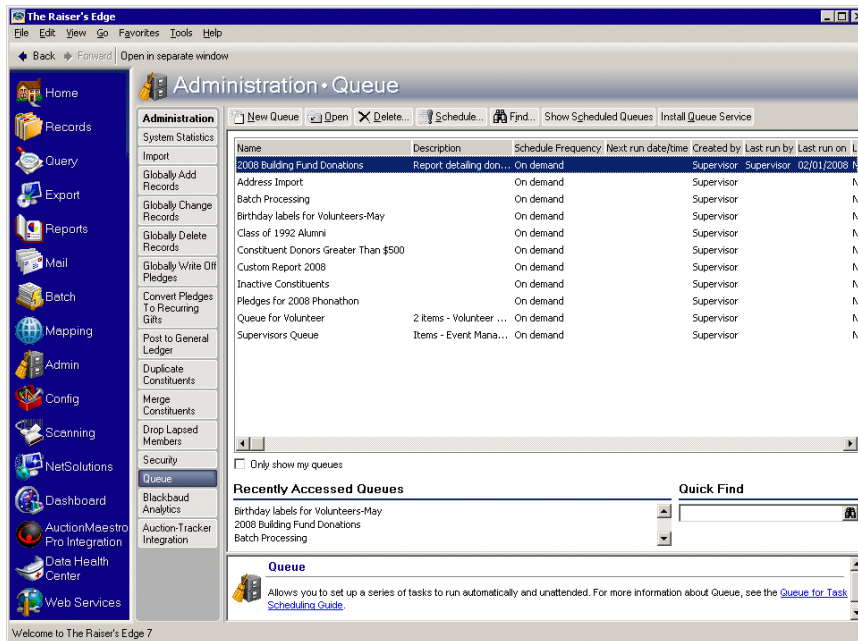
3. On the action bar, click **Show Scheduled Queues**. The Queue Schedule screen appears. For more information about accessing a queue, see "Accessing a Queue" on page 6.
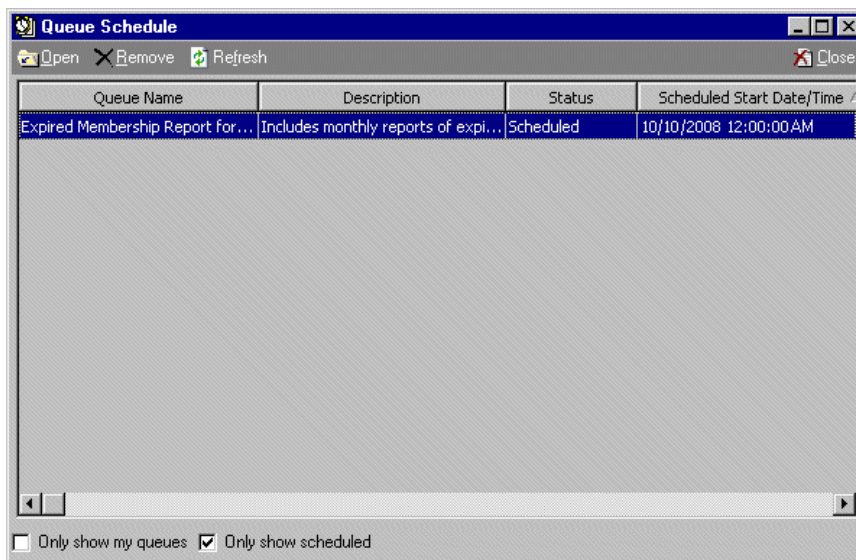
From the Queue Schedule screen, you can view the name, description, and status of a queue. You can also view the scheduled start date/time, actual start date/time, actual end date/time, schedule, and computer name. Depending on your settings for the queue, the **Stop on Errors?** and **Delete on Completion?** 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.
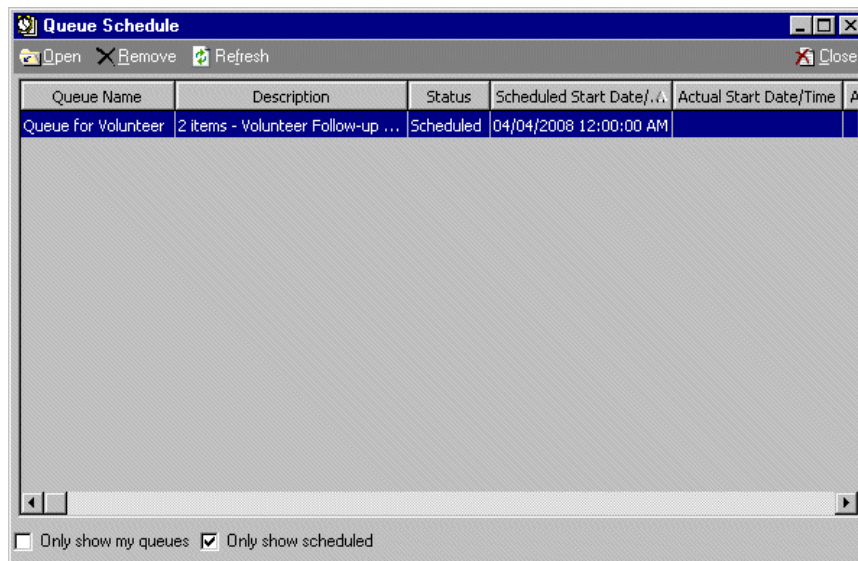
The Queue screen appears.
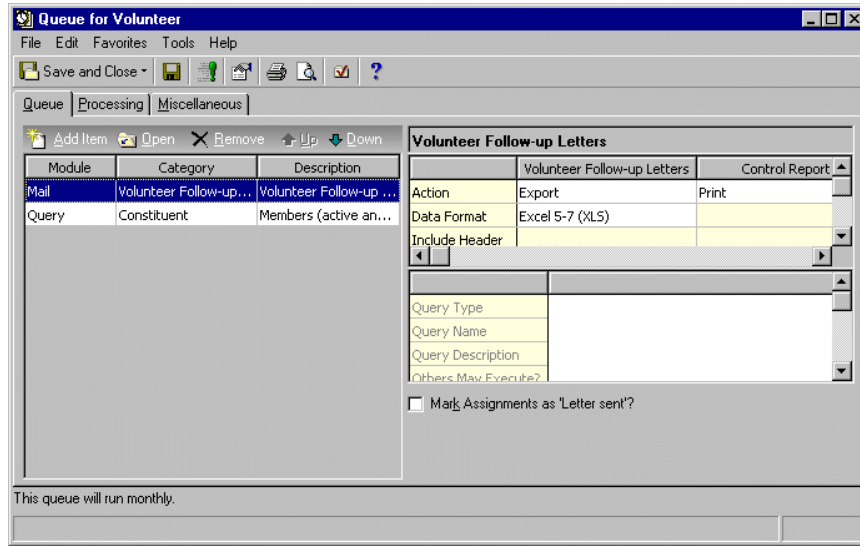
2. Once your changes are complete click **Save and Close** on the toolbar. You return to the Queue Schedule screen.

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.
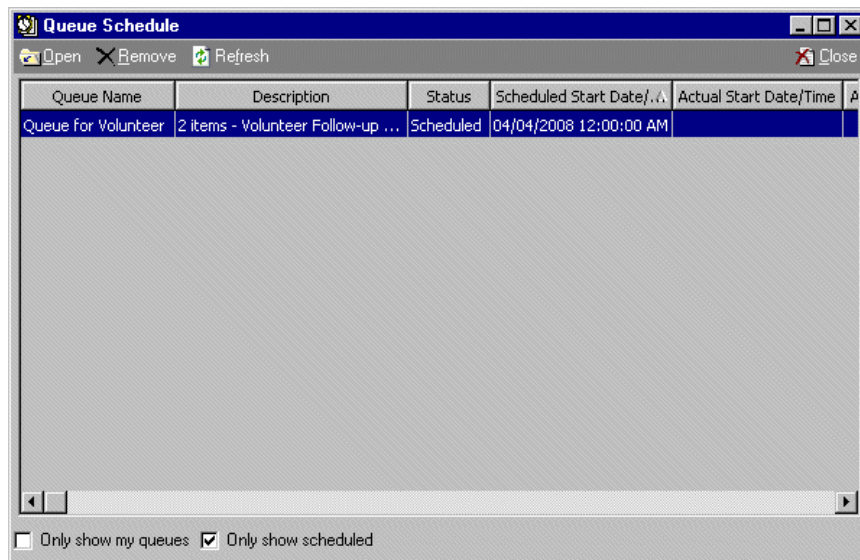
Note: You can delete a queue item from the action bar of the Queue screen. To do this, select the queue item to delete in the grid, and click **Remove** on the action bar. For more information about deleting queues, see "Deleting a queue item from the Queue screen" on page 38.

2. On the action bar, click **Remove**.

   A message appears asking if you are sure you want to delete the queue.
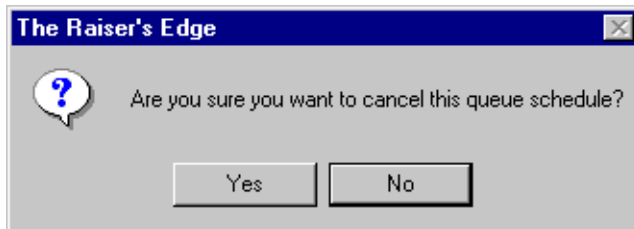
3. To delete the queue from the Queue Schedule screen, click **Yes**. To return to the Queue Schedule screen, click **No**.

   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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about Blackbaud

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