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Introduction

The Data On Demand tool provides authenticated administrators the ability to access and manage their refreshed data from a directory project on their own schedule. This reporting tool will enable users to define their own queries based on their data set. For example, administrators may be most interested in obtaining email addresses that were updated within the last week, and running that query on a weekly basis; or mailing addresses or phone numbers that changed within the last 20 days, etc. Data on Demand gives administrators maximum control over what data elements will be accessed at what time interval, in addition to what format and method of delivery is preferred.
Define Report Queries

Define Report Queries allows administrators with proper access level to create, upload, or combine report lists.

**Create a report list**

Create a report list allows administrators to create a list using Standard or Advanced Query Builder. Standard Query Builder allows the administrator to build a basic query using a hierarchy tree structure. Advanced Query Builder allows the administrator to create complex queries.

**How to create a report list using Standard Query Builder**

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Click the **Create a report list** button.
4. Select the **Standard Query Builder** tab, if not already selected.
5. Enter the **list name**. See figure 1.
6. Click the expand icon (±) to view the available fields in the appropriate table. Use the collapse icon (−) to hide the fields.
7. Enter the appropriate value(s) for each field. **Query OK** message displays when the query is valid.
8. Click **Save list**, or **Cancel** to abort. The **Create & Manage Lists** page will display with the newly created list at the top of the list.

<table>
<thead>
<tr>
<th>Operators</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Equal To</td>
</tr>
<tr>
<td>!=</td>
<td>Not Equal To</td>
</tr>
</tbody>
</table>

Figure 1
### Date Search Options
Date Search Options allow administrators to extend their ability to target by date.

<table>
<thead>
<tr>
<th>New Search Options</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous n days</td>
<td>Captures records where the date is previous to number (n) days the list is run</td>
<td>Capture all records where registration date is within the last 4 days; Enter the number 4</td>
</tr>
<tr>
<td>Previous n weeks</td>
<td>Captures records where the date is previous to number (n) weeks the list is run</td>
<td>Capture all records where registration date is within the last 3 weeks; Enter the number 3</td>
</tr>
<tr>
<td>Previous n months</td>
<td>Captures records where the date is previous to number (n) months the list is run</td>
<td>Capture all records where registration date is within the last 2 months; Enter the number 2</td>
</tr>
<tr>
<td>Previous n years</td>
<td>Captures records where the date is previous to number (n) years the list is run</td>
<td>Capture all records where registration date is within the last year; Enter the number 1</td>
</tr>
<tr>
<td>Next n days</td>
<td>Captures records where the date is in the next number (n) days the list is run</td>
<td>Capture all records where membership expiration date is within the next 4 days; Enter the number 4</td>
</tr>
<tr>
<td>Next n weeks</td>
<td>Captures records where the date is in the next number (n) days the list is run</td>
<td>Capture all records where membership expiration date is within the next 3 weeks; Enter the number 3</td>
</tr>
<tr>
<td>Next n months</td>
<td>Captures records where the date is in the next number (n) days the list is run</td>
<td>Capture all records where membership expiration date is within the next 2 months; Enter the number 2</td>
</tr>
<tr>
<td>Next n years</td>
<td>Captures records where the date is in the next number (n) days the list is run</td>
<td>Capture all records where membership expiration date is within the next year; Enter the number 1</td>
</tr>
<tr>
<td>Day-of-year previous n days</td>
<td>Captures records where the day of the year is number (n) days previous to the time the list is run.</td>
<td>Capture all members, who's renewal date was yesterday; Enter the number 1</td>
</tr>
<tr>
<td>Day-of-year next n days</td>
<td>Captures records where the day of the year is number (n) days away from the time the list is run.</td>
<td>Capture all members, who's birthday is today; Enter the number 0.</td>
</tr>
</tbody>
</table>
Search Extensions
Search Extensions enables administrators to search across data fields and modules such as ClassNotes, Permanent Email, Career Advisory Network, etc.

For example: An administrator can obtain a list of all Florida alumni/members from the class of 1999, who posted a Career News - Professional Accomplishment ClassNote within the last 3 months.

Administrators may activate the new Search Extensions via the Application Manager > Search Definitions tab.

ClassNotes
Administrators are able to capture all alumni/members who have ever submitted a ClassNote (Yes/No) within the Online Community, who have submitted a ClassNote for a specific Type, and the date range of when the ClassNote was last updated.

Profile Photo
Administrators are able to capture all alumni/members who have uploaded a profile photo (Yes/No) and the date range of when the profile photo was uploaded.

Resume Upload
Administrators are able to capture all alumni/members who have uploaded a resume (Yes/No) and the date range of when the resume was uploaded.
Career Advisory Network (CAN)
Administrators are able to capture all alumni/members who have registered for the CAN and the date range of when the alumni/member registered for the CAN.

Perm Email
Administrators are able to capture all alumni/members who have a permanent email address (Yes/No), an active permanent email addresses (Yes/No), a permanent email address with a specific Mail or Domain name, their permanent email forwarding to a specific email address, enabled Greylisting (Yes/No), and who have created a permanent email address within a certain date range.

Change History
Administrators are able to capture the Change History for all alumni/members.

Email Marketing
Administrators are able to capture all alumni/members who opened an email or clicked on a specific link.

Discussion Groups
Administrators are able to capture all alumni/members who are members of any discussion group (Yes/No) or who are members of a specific group. The Discussion Groups search extension applies to both versions (Legacy Discussion Groups and Groups 2.0).
Social Networking
Administrators are able to capture all alumni/members who have at least one friend (Yes/No).

Online Giving*
Administrators are able to capture all alumni/members who have made a donation (Yes/No), who submitted their donation within a certain date range, who gave a particular dollar amount, and who gave a particular total giving amount.

Memberships*
Administrators are able to capture all alumni/members who have completed a membership form (Yes/No), who have submitted their membership within a certain date range, and who have joined at a specific membership amount.

*Indicates applications listed under the Transactions section. The new Event Registration and Surveys applications will also fall under the Transactions section.
How to create a report list using Advance Query Builder

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Click the **Create a report list** button.
4. Enter the list name. See **figure 2**.
5. Select the appropriate table, field, and logical operator (equal to/not equal to).
6. Enter the appropriate value(s).
7. Select the appropriate Boolean operator (and/or). **Query OK** message displays when the query is valid.
8. Click **Save list**, or **Cancel** to abort. The **Create & Manage Lists** page will display with the newly created list at the top of the list.

**Boolean Operators (and/or):** Use Boolean operators to join simple queries to create complex queries.

**OR** is used to join synonymous or related statements, and instructs the reporting tool to retrieve any record that contains either (or both) of the terms, thus broadening your search results.

**(Degree Class Year = 2006) or (Degree Class Year = 2007)**

**AND** is used to join when both (or all) the conditions must appear in the items you retrieve.

**(Degree Class Year = 2006) and (Address State/Province = VA)**

**Parenthesis:** Use parenthesis to group statements together to clarify the order of operations. For example: I could create a list of Virginia Young Alumni, which would be all members with class year equal to 2006 or 2007 and State equal to VA. See **figure 3**. The operations within the innermost pair is performed first, followed by the next pair out, etc., until all operations within parentheses have been completed. Then any operations outside the parentheses are performed.

**Query OK**

**(Degree Class Year = 2006) or (Degree Class Year = 2007)) and (Address State/Province = VA)**

Notice the double parenthesis class year equal to 2006 or 2007.
How to capture all records

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Create a report list button.
4. Expand the Select All section.
5. Set Send to all equal to Yes.

IMPORTANT!
Be sure Search All is checked in Application Manager > Search Definitions for all appropriate administrators. See Search Definitions under Application Manager for more information.

<table>
<thead>
<tr>
<th>Database Field Name</th>
<th>Field Name in Data on Demand</th>
<th>Possible Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEX_STATUS</td>
<td>misc.Rec_Status</td>
<td>Lost alumni undeliverable from NCOA, Deceased via Harris, Incomplete Address via Harris, Lost Identified by Harris via Mail/Phone, No Mail, Non Alum via Harris, No Mail/No Phone, No Phone, Omit, Duplicate via Harris, Duplicate, Deceased, Lost Identified By Client, Non Alum, Temporary Exclude</td>
</tr>
<tr>
<td>ORIG_DEX_STATUS</td>
<td>misc.Rec_Status_Orig</td>
<td>Lost alumni undeliverable from NCOA, Deceased via Harris, Incomplete Address via Harris, Lost Identified by Harris via Mail/Phone, No Mail, Non Alum via Harris, No Mail/No Phone, No Phone, Omit, Duplicate via Harris, Duplicate, Deceased, Lost Identified By Client, Non Alum, Temporary Exclude</td>
</tr>
<tr>
<td>DEX_UPDATE_SOURCE</td>
<td>misc.Rec_Update_Source</td>
<td>Returned Mail, NCOA Update, Lost/Trace Update, Respondent Update</td>
</tr>
</tbody>
</table>

Note: If none of the above criteria are met, it is assumed that the record had NO UPDATE.

| EMAIL_UPDATES       | misc.Email_Append           | Y (only holds value up until constituent responds) [blank] |
| PHONE_RESEARCH_UPD  | misc.Phone_Research         | Y (only holds value up until constituent responds) [blank] |
Upload a report list
Upload a report list allows administrators with the proper access level to upload a list of unique IDs or upload a tab-delimited text file containing email address, first name, and last name.

**IMPORTANT!**
The file to be uploaded for use with Data On Demand is expected to be a plain text file containing unique ID’s (client ID) only, one entry per line. Each ID record line should be terminated by a carriage return/line feed (CR/LF or 13/10 ASCII).

### How to upload a list of IDs
1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Click the **Upload a report list** button.
4. Enter the **list name**.
5. Click the **Browse** button to search for the text file of Unique IDs to upload.
6. Click **Begin upload**, or **Cancel** to abort. The **Create & Manage List** page will display with the newly uploaded list at the top of the list.

### How to upload a list of email addresses
1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Click the **Upload a report list** button.
4. Click the **Upload a list of email addresses** tab. The **Upload a list of email addresses** page will display. See figure 5.
5. Enter the **list name**.
6. Click the **Browse** button to search for the text file of Unique IDs to upload.
7. Click **Begin upload**, or **Cancel** to abort. The **Create & Manage List** page will display with the newly uploaded list at the top of the list.

**IMPORTANT!**
The ability to upload email addresses is an additional feature. Please contact your Client Relations Manager for more information on this feature.
Combine report lists
Combine report lists feature allows administrators with the appropriate access level to create a composite list using existing lists.

How to combine lists of reports
1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Combine report lists button (Combine report lists). The Create composite list page will display. See figure 6.
4. Enter the list name.
5. Select the combination method (add, take the intersection with, or subtract).
6. Select an available list. The list type will display next to the list.
7. Click the Add button (Add) to add the list, click Remove button (Remove) to remove the list, and click the Insert button (Insert) to insert a new list and combination method.
8. Click Check List to verify the new list is valid.
9. Click Save list, or Cancel to abort. The Create & Manage List page will display with the newly saved list at the top of the list.

Add
The Add method will combine the elements in all selected lists.

Intersection
The Intersection method will combine only the set of elements that are in the selected lists.

Subtract
The Subtract method will subtract the elements found in all selected lists.
**Edit, duplicate, and delete report lists**

Standard and Advanced Query Builder lists can be edited, duplicated, and deleted. Uploaded ID and Email Lists can only be deleted. An administrator must have appropriate access controls setup in the Application Manager tool in order to successfully manage report lists.

**How to edit a report list:**

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The Define Report Queries tab will display.
3. Click the **Edit** link next to the appropriate report list. See figure 7. The Create report list page will display with the list name displayed.
4. Click the expand icon (±) and collapse icon (−), to view and hide the available fields.
5. Make all necessary modifications. Query OK message displays when the query is valid.
6. Click **Save list**, or **Cancel** to abort. The Create & Manage Lists page will display.

**How to duplicate a report list:**

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The Define Report Queries tab will display.
3. Click the **Duplicate** link next to the appropriate report list. See figure 7. The Create report list page will display with the list name displayed as Copy of <Original List Name Here>.
4. Modify the list name.
5. Click the expand icon (±) and collapse icon (−), to view and hide the available fields. Query OK message displays when the query is valid.
6. Click **Save list**, or **Cancel** to abort. The Create & Manage Lists page will display with the newly saved report list.

**How to delete a report list:**

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The Define Report Queries tab will display.
3. Click the **Delete** link next to the appropriate report list. See figure 7. An “Are you sure…” popup window will display. See figure 8.
4. Click **OK**, or **Cancel** to abort.

**Calculate**

Calculate allows administrators to calculate the number of records in the list. Unknown displays until the administrator clicks the **Calculate** link. The number of records must be re-calculated after the list has been edited.

**Display**

Display allows administrators to view the newly saved list on screen.
Define Report Content

Define report content allows administrators with proper access level to create and modify field lists as report content.

**How to create content:**

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Select the **Define Report Content** tab. The **Define Report Content** page will display.
4. Click the **Create a field list** button.
5. Enter the **Field list name**.
6. **Select report fields** from the available list on the left.
7. Click the **Add to field list** button. The selected fields will appear in the **Selected fields** list on the right.
   To remove selected fields: Select fields in the **Selected Fields** list and click the **Remove from field list** button.
8. Click **Save this field list**. The **Define Report Content** page will display with the newly saved field list at the top of the list.

**Re-order Fields**

Use the **Move Up** and **Move Down** buttons to change the order in which fields are displayed in the report. See figure 10.
Drag and Drop
The Drag and Drop Selection tab enables administrators to easily create and reorder selected data fields.

How to use drag and drop:

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Select the **Define Report Content** tab. The **Define Report Content** page will display.
4. Click the **Create a field list** button.
5. Click the **Drag and Drop Selection** tab.
6. Select the appropriate table tab at the top of the tab. The available data fields will load in the list to the left.
7. Select a field by clicking and holding the cursor, and drag the field to the Selected Fields list on the right. See figure 11.
8. Release the field. The field will display at the bottom of the Selected Field list. See figure 12.
9. Continue steps 6 – 8 until as needed.

Re-order Fields
Drag and drop fields in the order you wish them to display top-to-bottom will display left-to-right.
**Field Filter**
Administrators can quickly find fields by typing in a keyword into the field filter. The available field list will update with only the matching fields. *See figure 13.*

**To return to the full list of available data tags:**
1. Highlight the Keyword.
2. Click the **Delete** button on the keyboard.
   The original list of available fields will display.
Edit, duplicate, and delete report content
Administrators with proper access level can edit, duplicate, and delete report content (field list details).

How to edit a report content:

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Select the Define Report Content tab. The Define Report Content page will display.
4. Click the Edit link next to the appropriate field list name. See figure 14. The Field list details page will display with the field list name displayed.
5. Make all necessary modifications to the field list.
6. Click Save this field list. The Define Report Content page will display.

How to duplicate a report list:

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Select the Define Report Content tab. The Define Report Content page will display.
4. Click the Duplicate link next to the appropriate field list name. See figure 14. The Field list details page will display with the field list name displayed as Copy of <Original Field List Name Here>.
5. Modify the Field list name.
6. Make all necessary modifications to the content.
7. Click Save this field list. The Define Report Content page will display with the newly saved field list at the top of the list.

How to delete a report list:

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Select the Define Report Content tab. The Define Report Content page will display.
4. Click the Delete link next to the appropriate field list. See figure 14. An “Are you sure…” popup window will display. See figure 15.
5. Click OK, or Cancel to abort.
Assemble Reports

Assemble reports allows administrators with proper access level to assemble the report by combining the report list and the report content (field list).

**How create new report:**

1. Login to the Admin Tool.
2. Click the **Data on Demand** link in the left navigation under **Community Reports**. The **Define Report Queries** tab will display.
3. Click the **Assemble Reports** tab. The **Assemble Reports** page will display.
4. Click the **Define a report** button ( ). The **Report definitions details** page displays. See **figure 16**.
5. Enter the **Report definition name**.
6. Select the **Output format**.

*Note: Comma-delimited (.csv) files will automatically open in Microsoft Excel.*

7. Select a **report list**.
8. Select a **field list**.
9. Click **Save this report definition**. The **Assemble Reports** page will display with the newly created report at the top of the list.
Edit, duplicate, and delete reports

Administrators with proper access level can edit, duplicate, and delete reports.

**How to edit a report list:**

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Assemble Reports tab. The Assemble Reports page will display.
4. Click the Edit link next to the appropriate report. See figure 17. The Report definitions details page will display.
5. Make all necessary modifications to the report details.
6. Click Save this report definition. The Assemble Reports page will display.

**How to duplicate a report list:**

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Assemble Reports tab. The Assemble Reports page will display.
4. Click the Duplicate link next to the appropriate report. See figure 17. The Report definitions details page will display with the report definition name displayed as Copy of <Original Report Definition Name Here>.
5. Modify the Report definition name.
6. Make all necessary modifications to the email details.
7. Click Save this report definition. The Assemble Reports page will display with the newly created report at the top of the list.

**How to delete a report list:**

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Assemble Reports tab. The Assemble Reports page will display.
4. Click the Delete link next to the appropriate report. See figure 17. An "Are you sure..." popup window will display. See figure 18.
5. Click OK, or Cancel to abort.
Run Reports

Run reports tab allows administrators with the proper access level to download, email, or display a saved report.

How to download a report:

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Run Reports tab. The Run Reports page will display.
4. Select the appropriate report to generate from the dropdown menu.
5. Click Download report. A File Download window will appear. See figure 19.
6. Click the Save button on the File Download window. See figure 20.

Note: Click Open to open the report, or click Cancel to abort.

Notice the default name will be ReportBuilder-Report_Name. The file extension (.csv/.txt) depends on the Output Format selected when the report was assembled.

7. Click the Save button. A Download complete window will display. See figure 22.
8. Click Open to open the report.

Note: Comma-delimited (.csv) files will automatically open in Microsoft Excel. See figure 23.

For more information about importing reports see Appendix A: Importing a Report into a Spreadsheet.
How to email a report:

1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Run Reports tab. The Run Reports page will display.
4. Select the appropriate report to generate from the dropdown menu.
5. Click Email report. An onscreen confirmation will display stating the Report has been emailed successfully to the administrator’s preferred email address. See figure 24.
How to display a report:
1. Login to the Admin Tool.
2. Click the Data on Demand link in the left navigation under Community Reports. The Define Report Queries tab will display.
3. Click the Run Reports tab. The Run Reports page will display.
4. Select the appropriate report to generate from the dropdown menu.
5. Click Display report. The report will display. See figure 25.
Application Manager

Application Manager allows administrators to set Search Definitions, Tag Definitions, and access control permissions for the Data on Demand tool.

**IMPORTANT!**
Administrators new to the Data on Demand tool MUST do some initial setup prior to successfully generating a report via the Data on Demand Tool. The item is indicated below with an *.

---

**Access Control**

**How to grant access to Data on Demand:**

**IMPORTANT!**
A Data on Demand administrator must already be an administrator within the Admin Tool.

1. Login to the Admin Tool.
2. Click the Application Manager link in the left navigation under Community Maintenance. The Search Definitions tab will display.
3. Click the Access Control tab. The Access Control tab will display. See figure 26.
4. Select the administrators name from the list.
5. Click the Edit access settings for selected admin button. The Access Control Settings page will display. See figure 27.
Select an **Administrator level**.

### Administrator Levels

**Admin Level 1** (Super Admin) – This is the highest level of administrative access. Level 1 Super Administrators can see all lists, content, and emails owned by other administrators. They also have the ability to grant access to other administrators.

**Admin Level 2** – This is the second level of access. Level 2 Administrators can be granted the same access as the Level 1 Super Administrator. The difference between a Level 2 Administrator and a Level 1 Super Administrator, is that the Level 1 Super Administrator can modify/remove the access permissions for a Level 2 Administrator. A Level 2 Administrator cannot modify/remove access permissions for a Level 1 Super Administrator.

**Admin Level 3** – This is the lowest level of access. Level 3 Administrators can only view lists, content, and emails he/she owns.

7. Check the checkbox under the Data on Demand section next to all the appropriate **Features**, or check the Select/Deselect All button.

### Feature Descriptions

- **Create/edit Data on Demand Definitions** – The admin can create and edit what fields appear in the report.
- **Generate a Data on Demand Report** – The admin can download, email, and display the generated report.

8. Click the **Save settings** link, or **Cancel** to abort.

**Note**: Selecting any feature for a particular module will activate that module’s link to display in the left navigation of the Admin Tool.
Search Definitions
Search Definitions will allow administrators to define which fields are visible in the search criteria on the Define Report Queries tab.

How to add or edit search definitions:
1. Login to the Admin Tool.
2. Click the Application Manager link in the left navigation under Community Maintenance. The Search Definitions tab will display.
3. Select the administrator’s name from the list.
4. Select Campaign Builder as the application. See figure 28.

Note: The Search Definitions are set for the Campaign Builder and are inherited by the Data on Demand application.

5. Click the Add or edit search definitions for this administrator button. The Current search definitions will display. See figure 29.
6. Click the Select all, Select all accept org_code and hpc_id, or Select none.
7. Click the Save search settings link, or Cancel to abort.

Suggestion: Uncheck all extra fields, which are fields your org is not currently using, to prevent them from displaying in the search criteria.

Figure 28

How to activate the Search All Search Definition
1. Login to the Admin Tool.
2. Click the Application Manager link in the left navigation under Community Maintenance. The Search Definitions tab will display.
3. Select the administrator’s name from the list.
4. Click the Add or edit search definitions for this administrator button. The Current search definitions will display.
5. Scroll down to personal.select_all. See figure 30.
6. Check the Send to all checkbox.
7. Click the Save search settings link, or Cancel to abort.

Figure 29

IMPORTANT!
In order to capture ALL members/alumni you must select Select ALL under Search Definitions.
Tag Definitions
Tag Definitions will allow administrators to define which fields are visible in the available field list on the Define Report Content tab.

How to add or edit tag definitions:
1. Login to the Admin Tool.
2. Click the Application Manager link in the left navigation under Community Maintenance. The Search Definitions tab will display.
3. Click the Tag Definitions tab. The Tag Definitions tab will display.
4. Select the administrator’s name from the list.
5. Select Data on Demand as the application.
6. Click the Add or edit tag definitions for this administrator button. The Current tag definitions will display. See figure 31.
7. Select or deselect the appropriate tags. Select all and Select none are also available at the top of the page.
8. Click the Save tag settings link, or Cancel to abort.

Note: If there is a tag you wish to activate and it is not displaying on the Tag Definition page, contact your Client Relations Manager.

Campaigns
Campaigns are not used for the Data on Demand application. They are used for Email Marketing and Event Registration.
Appendix A: Importing a Report into a Spreadsheet

To import a report into Microsoft Excel for Windows, follow these steps.

1. Open Microsoft Excel.
2. Click File > Open. The Open dialog box appears. See figure A.
3. In the Files of type list, select All Files (*.*)
4. Select the report file to import.
5. Click Open.
   The Text Import Wizard dialog box appears. See figure B.
6. Select Delimited if not already selected.
7. Click Next. Excel displays step 2 of the Text Import Wizard. See figure C. In the Data preview section, Excel shows how it will import your data.
8. Click Next. Excel displays step 3 of the Text Import Wizard. See figure D.
9. Click Finish. The report will display. See figure E.
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<tbody>
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<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>2</td>
<td>HARRIS/DECOY10</td>
<td>Neilman</td>
<td>Larry</td>
</tr>
<tr>
<td>3</td>
<td>364626360</td>
<td>Little</td>
<td>Silma K</td>
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<td>4</td>
<td>736069560</td>
<td>Charles</td>
<td>Linda</td>
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Figure E
Appendix B: Reset the Metadata Cache

**IMPORTANT!**
The Data on Demand module caches the metadata fields to improve performance. If metadata changes, the metadata cache needs to be reset.

**How to rest the metadata cache:**

1. Login to the Admin Tool.
2. Click the **Application Manager** link in the left navigation under **Community Maintenance**. The **Search Definitions** tab will display. See figure A.
3. Select the **Org Default** in the **Select and administrator** list box.
4. Select **Campaign Builder** as the application, if not already selected.

   *Note: The Search Definitions are set for the Campaign Builder and are inherited by the Data on Demand application.*

5. Click the **Add or edit search definitions for this administrator** button.
6. Scroll down to the bottom of the page.
7. Click the **Save search settings** link. The cache will be reset and the label names will be replaced.