

## Parish Reporting System

Reporting Xpress is the **new online** reporting tool that will be used to access Parish Reports for the Annual Catholic Appeal. This system will replace the current AA Reporting tool which was accessed through Citrix. With the new system, users will access their parish reports via the new self-serve online portal. Reports will be available anytime and anywhere (mobile friendly).

### What information do I need to access this new reporting tool?

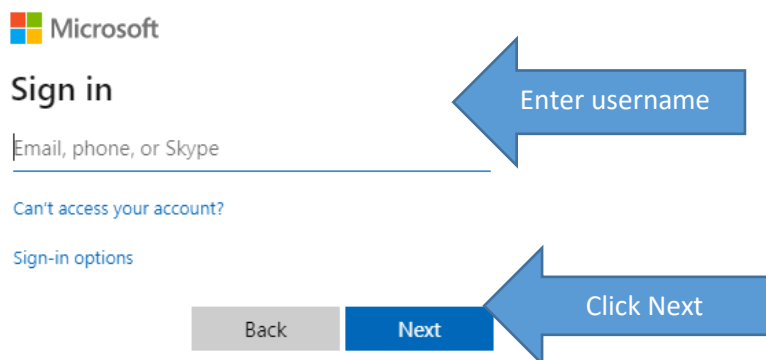
To access the Reporting Xpress online portal, users will enter the following address: <https://archstl.reportingxpress.org>



Your username and password has been to sent to you from the ACA Office. To reset your password, please contact our office at 314.792.7680 or [acaoffice@archstl.org](mailto:acaoffice@archstl.org).

### What will I see when I get ready to login?

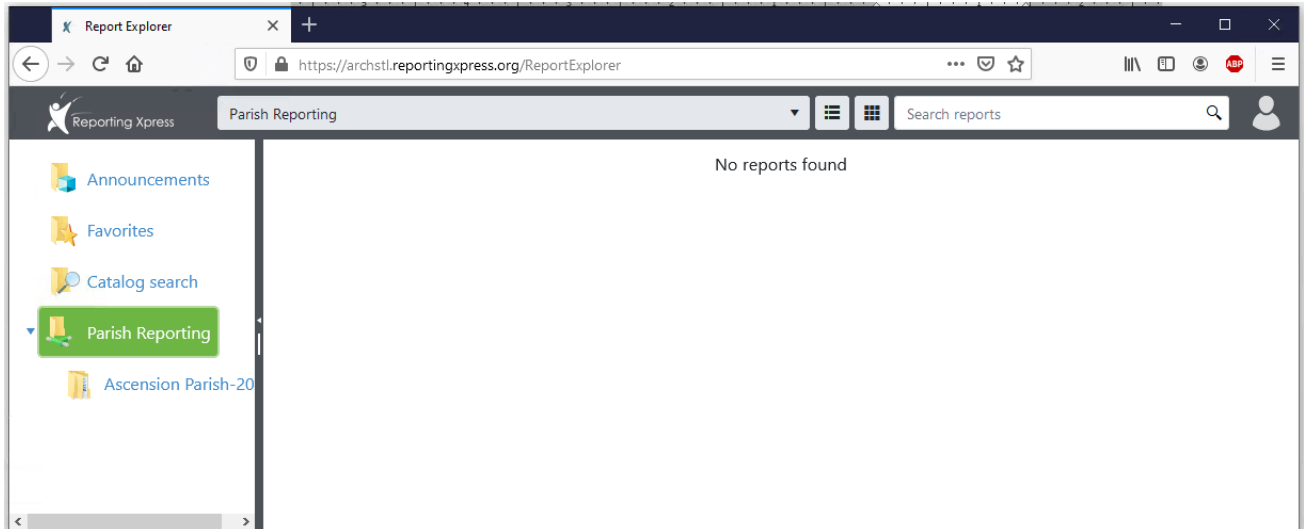
You login to the Reporting Xpress portal via a Microsoft login page. You will then be prompted to enter your username and password, which was provided to you by the Stewardship and Annual Catholic Appeal office. After logging in the first time, you will be prompted to create your own password.



A pop up screen will ask if you would like to save your password; it is recommended that you DO NOT save your password for automatic login. After closing the pop up screen, you will be taken to the Reporting Xpress portal.

## I'm logged in, now what?

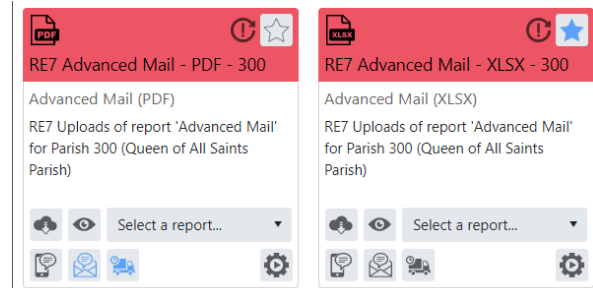
After logging in, you will see the below screen, your parish interface. To view reports, double click the “parish reporting” file folder on the upper left side of your screen to expand it and select your parish folder.



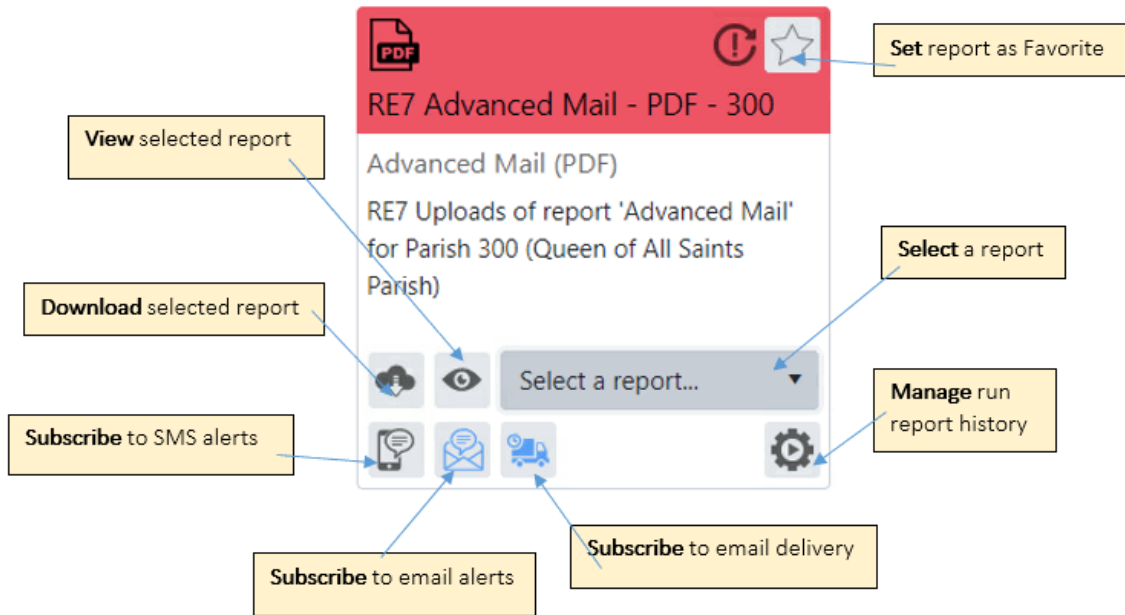
## How do I access my reports?



In the parish reporting folder you will find virtual cards representing each of your parish reports. Each report will have two cards of the same color. One card will access a PDF file and the other will access an excel file.



The list of all available reports and their descriptions is located at the end of this document. A description of the functions of each card is below.



Choose the **Select a Report** drop down box to choose the date of the report you wish to create (most likely the most recent date).

Select the **View** button to view the report online.

Select the **Download** button to download the report.

Select **Subscribe to SMS alerts** to receive a text message when a change to the report is made (usually daily).

Select **Subscribe to email alerts** to receive an email when a change to the report is made (usually daily).

Select **Subscribe to email delivery** to receive a copy of the report to your inbox. You can choose the frequency of delivery.

Select **Set report as Favorites** to place the report in your “Favorites” folder on the parish interface. Consider adding your most commonly viewed reports, such as the progress report and pledge detail, to your Favorites folder.



Select **Manage run report history** to view all reports that have been generated for the parish.

## What are the functions of the interface features?

### Home

At any time while using Reporting Xpress, you can click the Reporting Xpress icon in the top left of the screen to return to your parish interface.

### Navigation

There are two options for navigation: the **Navigation Path Tree** and the **Navigation Drop Down**. If a Path (in either option) has a  beside it, then you can expand by clicking on the . Changes in the drop down will also reflect in the Path Tree.

The Path tree can be collapsed by clicking the  to the right of the area.

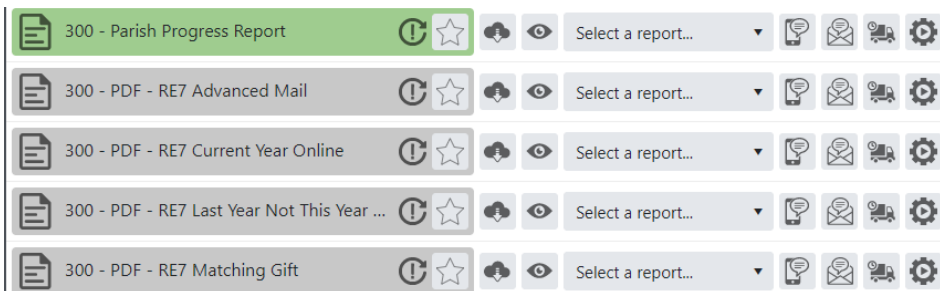
### View

There are two types of views available for the Report Tiles: List or Tiles. If your computer screen’s resolution is less than 800, the view will default to list. You can switch between the layouts by clicking on

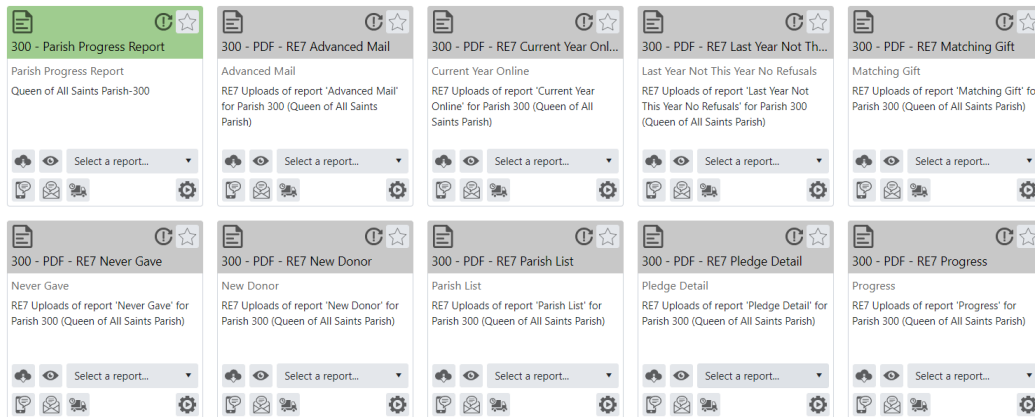


these icons:

### Report List View



## Report Tiles View



## Communication and Notification Preferences

You can change your communication and/or notification preferences and log out using the User Settings

feature in the top right of the screen 



### About Me

- Allows you to manage your email address, culture (language and country (e.g. EN-US), add phone number, add additional details about your notification preferences and subscriptions for email and SMS alerts and/or delivery.
- Notification preferences are initially set when users subscribe to SMS or email notification. These can be configured to be received instantly, daily, or weekly.



### Report Error

- Allows you to report errors directly to Reporting Xpress, however, it is preferred that you first report any issues to the ACA Office at [acaoffice@archstl.org](mailto:acaoffice@archstl.org) or 314.792.7680.



### Session Details

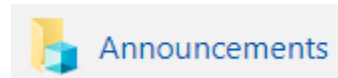
- This allows for the ability to view technical details about the current session. This information will only be needed if requested by Reporting Xpress or the ACA Office for technical assistance and error resolution.



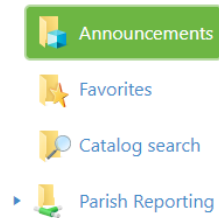
### Log Off

- Log out of the system.

## What do all the File Folders on the Left side of the Screen mean?

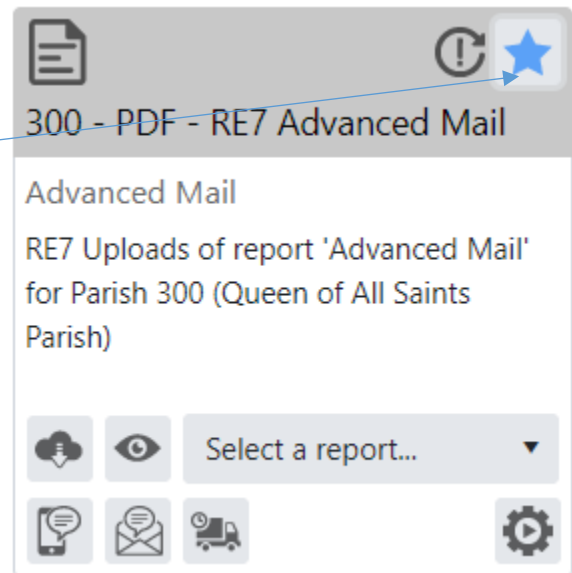


If the System administrator has any messages for you, they will appear in this folder. Also, if you have subscribed to any of your reports, you will receive a text notification of your announcement if you provided a cell phone number in the notification set-up.



This folder contains all reports that you have selected as your favorite. We suggest placing your most commonly accessed reports, such as your progress report and pledge detail, in your Favorites folder.

When you click on the STAR in the top right corner of any report tile, the color will change to blue. This will place the report in your Favorites folder for easy access.

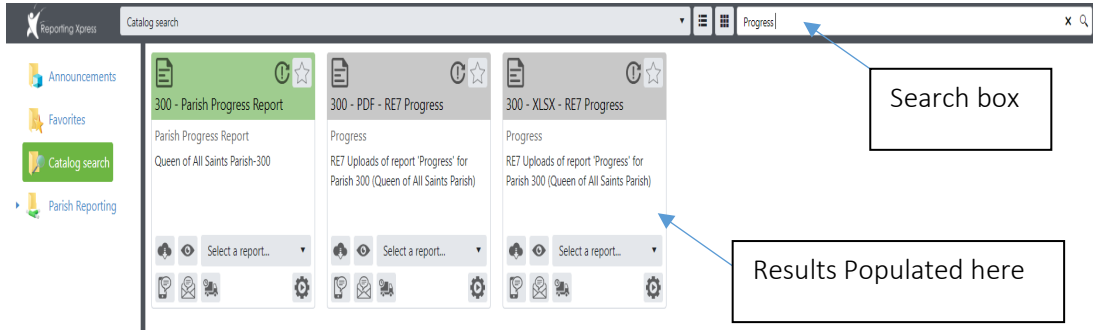


This folder allows you to search for reports containing text or numbers.

1. To utilize the catalog search folder, at the top of the screen type what report you are looking in the search folder box.

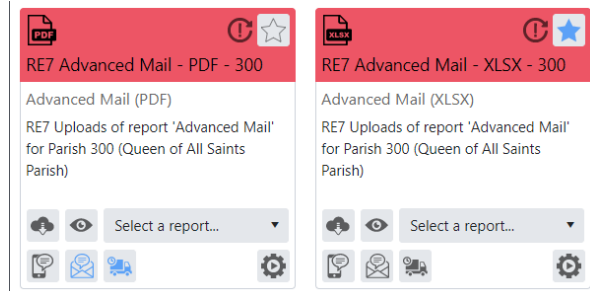


- Example: Type “Progress” in the Search field, and the three reports that have the word “Progress” in the title will be populated.

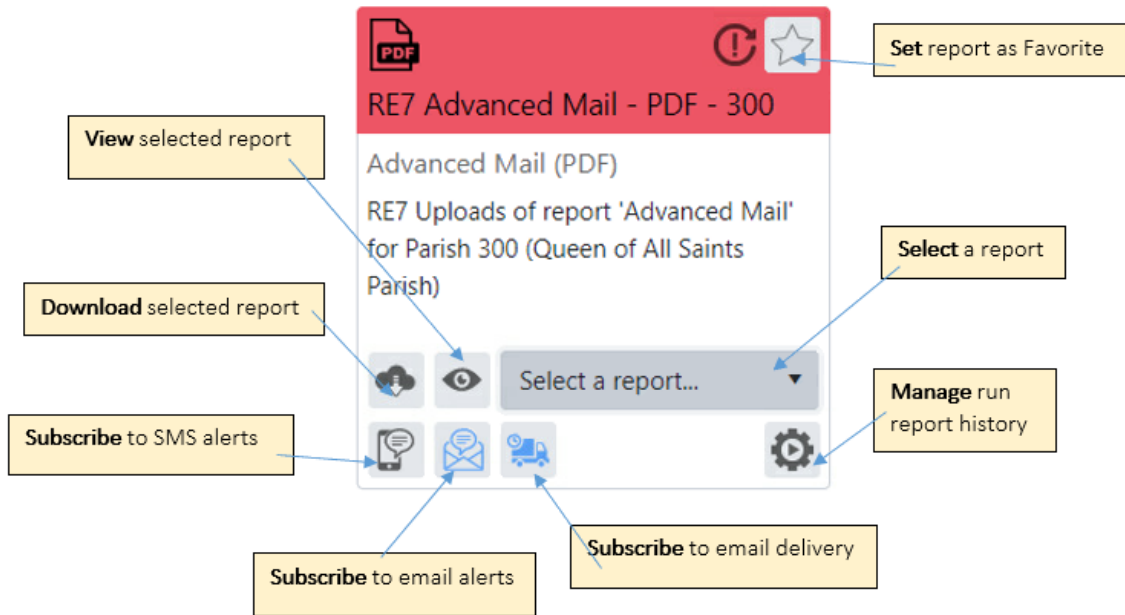


## ▶ Parish Reporting

In your parish folder within the parish reporting folder you will find cards representing all of your parish reports. Each report will have two cards of the same color. One card will access a PDF file and the other will access an excel file.



The list of all available reports and their descriptions are located at the end of this document in the appendix. A description of the functions of each card is below.



Choose the **Select a Report** drop down box to choose the date of the report you wish to create (most likely the most recent date).

Select the **View** button to view the report online.

Select the **Download** button to download the report.

Select **Subscribe** to SMS alerts, to receive a text message when a change to the report is made (usually daily).

Select **Subscribe** to email alerts, to receive an email when a change to the report is made (usually daily).

Select **Subscribe** to email delivery, to receive a copy of the report to your inbox. You can choose the frequency of delivery.

Select **Set** report to favorites to place the report in your “Favorites” folder on the parish interface. Consider adding your most commonly view reports, such as the progress report and pledge detail, to your Favorites file.

Select **Manage** run report history to view all reports that have been generated for the parish.



## What does subscribing to the reports mean?

Subscribing to reports allows the user to be alerted when new reports are ready for viewing. To subscribe, you **must** ensure that your contact information in the About Me section in the User Settings is up to date. There are three ways to subscribe:

1. *Subscribe to SMS alerts* will send a text message to your phone letting you know that a new version of the report has been uploaded in the folder.
2. *Subscribe to Email alerts* will send an email to your email address notifying you that a new version of the report has been uploaded in the folder.
3. *Subscribe to Email delivery* will send you the actual report as an attachment once it has been updated in the folder.

## I want to subscribe to the report, now what?

To subscribe, simply click the button of the subscription method you would like and you're done! Once you have subscribed, the icon will change to blue.

If you want to go back and make sure your subscription is confirmed, you can go to **User Settings > About Me** to verify your settings

## How do I change how often I am subscribed to reports?

To change the frequency of your subscribed notifications, go to **User Settings > About Me**. There will be a section titled *Notification Preferences*. In the drop down you have the ability to select: *Instant, Daily, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, or Saturday*. When these notification preferences are selected, it will apply to ALL of the subscribed reports.

Example: You subscribed to the Parish Progress Report via a text notification and the LYBUNT Report via an email notification. If you update your notification preferences to Monday, then both notifications will sent on Monday.

## I want to unsubscribe from the report, how do I do that?


To unsubscribe from a report, click the button on the report tile of which subscription method you would like to unsubscribe from. Once you have unsubscribed, the icon will no longer be blue.



If you want to ensure your subscription has been canceled, you can go to **User Settings > About Me** to confirm.

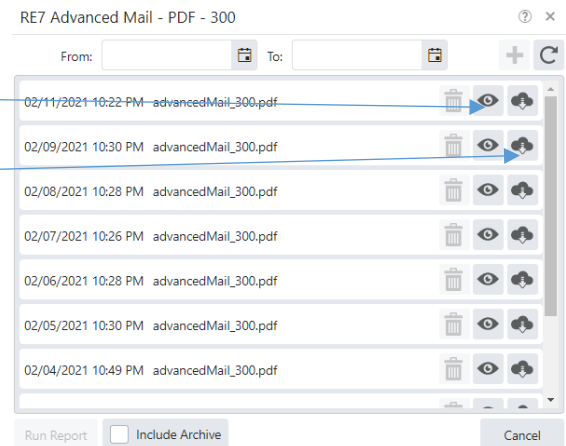
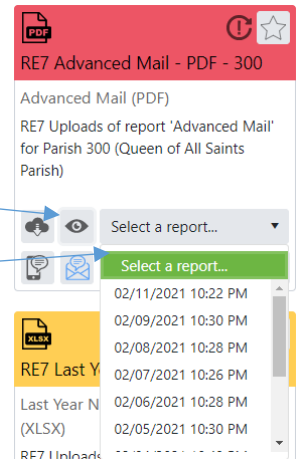
## I'm ready to view my reports, how do I do that?

To view your report, you will start by:

1. Select which version of the report you want to view from drop down box. (**Select a Report**)
2. Select the icon for how you want to access the report:

- a.  Download Button - Allows you to download the report or save it to your desktop.

- b.  View Button – Automatically opens the report.
  - i. If no report is first selected, user will be prompted to select the report to view and then will open in web browser view.
- c.  Run Button - Allows you to open the report.
  - i. If you select this button, user will be prompted to select the report to view and then will open in a web browser that gives the user the option to view the report or download the report.
  - ii. If you select view, it will open the report in a web browser.
  - iii. If you select download, it will open the report in a PDF format.



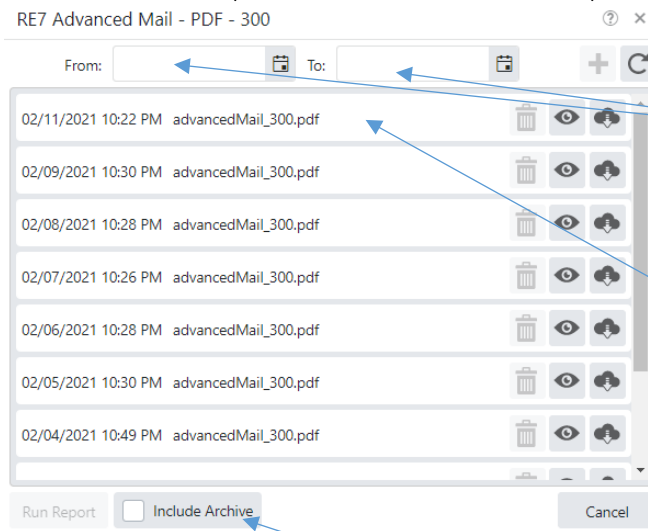
### What if the data in my report does not match up with my records?

If the report data does not coincide with what you believe to be true, please contact: ACA Office at 314-792-7680 or by email at [acaoffice@archstl.org](mailto:acaoffice@archstl.org)

I want to view an older copy of a report, but it is not available when I click on the “select a report” drop down

To search for older/archived reports not listed in the “select a report” drop down, complete the following:

1. On the Report Tile, click the “Select a Report...” drop down.
2. Select the “More” option at the bottom of the drop-down menu.



Enter the dates for which you would like to view the report

Search Results will populate here

3. Enter the date range of the report which you are looking for.
  - a. If necessary, click 'Include Archive.'
4. All reports meeting your date range criteria will be listed.
5. Select the report you want to view.
  - a. You then have the option to download or view the report.

### **Can I print the reports?**

Yes, at any time you are able to print the reports from your PDF viewer or from the web browser.

### **I need some help navigating the system. Who can help?**

Should you require any assistance navigating the system for the first time, you can contact the ACA Office at 314-792-7680 or by email at [acaoffice@archstl.org](mailto:acaoffice@archstl.org).

### **List of Available Reports**

All reports are available in two formats, .PDF and Excel, and can be either viewed or downloaded. The reports available are:

- Advance Mailing
- Current Year Online Gifts
- LYBUNT
- Matching Gifts
- Never Gave
- New Donor
- Parish List
- Pledge Detail
- Parish Progress Report
- SYBUNT
- Not Given This Year
- Three Year Giving History