



Aristotle 360TM

AI360 Custom Reports User Guide

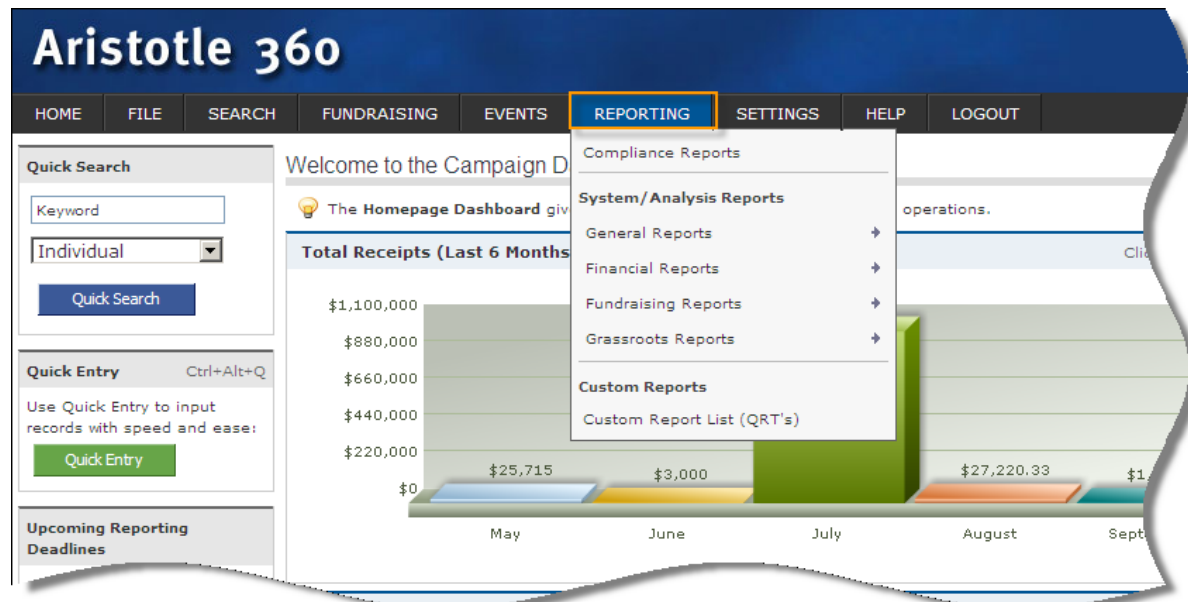
April 2013

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Custom Reports

Special reports developed specifically for NAR are located under the **Reporting** tab in the **Custom Report List (QRTs)** section.



Under the **REPORTING > Custom Reports (QRT's)** section, you will find the following useful reports:

- **NAR – Local Board Performance** – contributions by Local Board. You can choose to run this report by Individual (aggregate for the individual under each local board), Detail (all transactions for individual in a local board), or Local (aggregate for the entire board). You may see receipts from other boards in this report. Those are receipts that were given to your board by a member of another.
- **NAR – State Awards** – contributions for state/local level donor clubs that are \$99 and above.
- **Major Investor Recommendations** – a list of members that have the contributions necessary to be recommended for a new or increased NAR Major Investor recognition level, based on receipts, previous NAR Major Investor Level and current NAR Investor Donor level.
- **Major Investor** – This report creates a list of the NAR Major Donors by State, Level and Years.
- **Individual Summary Report** – Total RPAC investment detail for one member.
- **President's Circle Report** - Generates report of NAR President's Circle members and their RPAC investments.
- **Group Performance Report** – RPAC Investments from members of a group of State/Local level committees. Your Association's Committees can be imported to the system as Groups by the Aristotle data team.
- **Office Performance Report** – contributions by offices within a local board.

NAR – Local Board Performance Report

Purpose

Performance report by Local Association. The report can display the information in a variety of levels:

- **Detail:** Each transaction from an individual within each Local Association. For example, if John Smith invests \$50 and \$100 to one Local Board, both of those transactions will be displayed as separate line items.
- **Individual:** Aggregate for each member who has contributed to a local. For example, if John Smith invests \$50 and \$100 to one Local Association, this level of the report will display John Smith's total of \$150 as a single line item. This report also shows outstanding Major Investor pledges, individual contributions to the President's Circle, and each members' portion of the contributions to NAR (including the divide between hard and soft dollar contributions)
- **Local:** Aggregate by Local Association, split into individual and organization investment totals. No transaction detail is included in this level. This report also shows the local association's aggregate of outstanding pledges, President's Circle contributions, and total money sent to NAR (including the divide between hard and soft dollar contributions)
- **Local Summary:** Aggregate for the entire Association, made up of individual and organization contributions. No transaction detail is included in this level.
- **Non-Giving:** Displays contact information for all individuals who have primary membership in a Local Association, who have not yet invested in RPAC within the specified recognition year or timeframe. Information included on this report: home/work/mobile phone, email, member type, office ID, office name, office address and email.

NAR - Local Board Performance

Description: Contribution report based on Local board credit. Summarized by Local, Individual or Detailed listing.

Instructions: For Report Display output you must use the "Individual (Print)" Level.

Contributions are included regardless of contributors membership in the board.


NonGiving: Based on Recognition Year; includes only Active members (according to NRDS); a contribution to any local in the state, not just their Primary Board is counted as giving.


Level:

Received By:

Recognition Year:

Local Association:

Start Date: 

End Date: 

Exclude Credits:

Batch:

NRDS Id:

.csv Report Display

Click the drop-down arrow on the **Level** field and select the report you would like to see. Levels are described above.

Select the Recognition Year that you would like to review. Defaults to the current NAR Recognition Year.

Enter date parameters, if you do not want to see the entire Recognition Year.

Optional:

- Enter a batch number, if you are looking for a specific batch of receipts.
- Enter a NRDS number, if you are looking for a specific member's receipts.

Click **Run** to run the report.

NAR – State Awards Report

This report is used to retrieve a list of members who have reached donor levels above \$99. Your Association can send Aristotle your specific state/local level award levels and they will be imported for this report.

Report Criteria

NAR - State Awards

Description: Report on State Specific Award Levels. These are maintained under the Custom Fields panel on the individual page using the Custom Fields Group "State Awards".

Instructions: Check *Only Show New Awards* to limit the report to individuals who have reached an Award level but not had it assigned to their profile.

Check *Add Awards to Individual Records* to add the Award to the *Custom Fields Panel* for any individual on the report that does not already have the award.

Active Only: No


Include All Contributors:


Received By: Wyoming Association of Realtors (902)


Recognition Year: 2013

Local Association: (0) All

Only Show New Awards:

Reached Award By: 

Assigned Award After: 

Assigned Award Before: 

Add Awards to Individual records:

Sort: Board

- Board
- Level
- Name

Select your association.

Select the **Recognition Year** that you would like to review. Defaults to the current NAR Recognition Year.

If you check the “Include All Contributions” checkbox, all contributors will appear on the list allowing you to see which members are close to achieving a state award.

You may enter date parameters, though the report will always show you the individual’s aggregate for the recognition year.

Reached Award By: {Date} – This displays contributions required to reach the award level must have been received *on or before this date*.

Assigned Award After: {Date} -- If entered then then an award must have been assigned (added to the individuals record) and it must have been *on or after the date entered*.

Assigned Award Before: {Date} -- If entered then an award must have been assigned and must have been *before the date specified*.

You may choose to only see “New Awards.”

Click **Run** to run the report.

Major Investor Recommendations Report

This report provides a list of members that have the contributions necessary to be recommended for a new or increased NAR Major Investor recognition level, based on receipts, previous NAR Major Investor Level and current NAR Investor Donor level.


NAR - Major Investor Recommendations

Description: This report lists individual members that have the contributions necessary to be recommended for a new or increased Major Donor recognition level. It uses the rules set forth by the **RPAC Trustees**.

Instructions: **The Year parameter is the Year of the recommendation to check.**

The Margin parameter can be used to see who is close to qualifying (e.g. if margin is set to 100 then if someone is \$100 away from getting to golden R they will be recommended for this)

Year: 2012 ▾

States: 

- Guam ▲
- Hawaii
- Iowa
- Idaho**
- Illinois
- Indiana
- Kansas
- Kentucky ▼

Margin:

.csv Report Display

Click the drop-down arrow on the **Year** field and select the year to review. The default is the current year.

Select the State.

Input an amount in the **Margin** field to determine a qualifying range. For example, entering **500** will report individuals that are \$500 away from obtaining the next investor level.

Click **Run** to run the report.

Major Investor Report

This report creates a list of the NAR Major Investors by State, Level and Years. The NAR Major Investor levels are confirmed and added by NAR RPAC.

NAR - Major Investor Report

Description: A current listing of NAR-recognized major investors sorted by Contribution Year, State and Investor Level. Current donor lists reflect investor information and funds received from the state association.
Instructions: Select the Association to report. Use the Ctrl button to multi-select.

The screenshot shows a web form with three main sections:

- Associations:** A dropdown menu with a list of state associations: Georgia Association of Realtors, Hawaii Association of Realtors, Iowa Association of Realtors, Idaho Association of Realtors (highlighted in blue), Illinois Association of Realtors, Indiana Association of Realtors, Kansas Association Of Realtors, and Kentucky Association of Realtors.
- Investment Level:** A dropdown menu with three options: Golden R, Crystal R, and Sterling R.
- Year:** A dropdown menu with a list of years from 2013 to 2006, with 2012 highlighted.

Select your state Association

Click the major donor level in the **Level** field to run the report on the selected donor types (control + click to select multiple levels).

Click the year to report on in the **Year** field. The default is the current year. (control + click to select multiple years)

Click **Run** to run the report.

Individual Summary Report

Generates a report of one member's RPAC investments by recognition year.

NAR - Individual Summary Report

Description: Generates a report of all information about a particular member including summary of contributions by year.

Instructions:

NRDS Id:

Association:

Run Report

Enter **NRDS ID**, select **Association** and click **Run Report**.

President's Circle Report

Generates a report of NAR President's Circle members and their RPAC Investments.

NAR - Presidents Circle

Description: Generate report of Presidents Circle Members and their Contributions.

Instructions:

Level:

State:

Year:

Start Date: 

End Date: 

Sort:

[Run Report](#)

Select **Level**: Summary or Detail transactions.

Enter your **State**

Select **Year**

Enter date parameters, if you would like to review a specific time period.

Select your report **Sort** preference: State, Committee, Date or Member.

Click **Run Report**.

Group Performance Report

RPAC Investments from members of a group or State/Local level committees. Your Association's Committees can be imported to the system as Groups by the Aristotle team.

NAR - Group Performance

Description: Contribution information on members of a group.

Instructions: If left blank, Start Date and End Date will be set for the selected recognition year. Select the Group.

Level: Individual

Groups: Ada County - Ada County Test Group (4)

Recognition Year: 2012

Include: All

Source: All

Start Date:

End Date:

.csv Report Display

Run Report

Enter **Level** of your desired report (similar to Local Board Performance Report levels):

- Detail: Each transaction from individuals within the group. For example, if John Smith invests \$50 and \$100, both of those transactions will be displayed as separate line items.
- Group: Aggregate by Group. No transaction detail included in this level.
- Individual: Aggregate for each group member. For example, if John Smith invests \$50 and \$150, this level of the report will display John Smith's total of \$150 as a single line item.
- Individual Report Display: Same information listed above, but this report displays in a print-ready report format with summary and contribution average table at the bottom of the report.
- Non-Giving: Displays all group members who have not yet invested in RPAC in the specified Recognition Year or date parameters.

Select desired **Group**.

Select desired **Recognition Year**.

Select to include **Contributors** and/or **Non-Contributors**.

If you do not want to run the entire recognition year, enter specific date parameters.

Click **Run Report**.

Office Performance Report

Report of contributions broken down by offices.

NAR - Office Performance Report

Description: Contribution report broken down by Offices.

Instructions:

Source: All

Level: Office

Received By: Wyoming Association of Realtors (902)

Recognition Year: 2012

Local Board: 1 National Association of Realtors

Office Id:

NRDS Id:

Run Report

Click the drop-down arrow on the **Level** field and select the report you would like to see

- **Office** displays the aggregate contributions of each office within the board.
- **Individual** displays each individual within an office, the amount he/she has contributed and contact information.