

eComm Upgrade: Report Types Submitted ^[1]



January 11, 2019 by [jennifer.mortensen](#) ^[2]

In preparation for the January 24 reporting workshop for eComm Specialists, CU's eComm team assembled a spreadsheet of the primary audiences with whom our users communicate and identified the Salesforce objects that are associated with them. This information will be used to create report templates that will serve three purposes:

1. Ensure that eComm reporting is completed according to best practices
2. Ensure that eComm reporting is as accurate as possible based on the data available
3. Increase the speed at which eComm Specialists can build reports for CU's communicators

The audiences identified for inclusion are as follows:

Internal

- Enrolled Students
- Confirmed Students
- Admitted Students
- CSU-UNC Students
- Faculty
- Staff
- Student Employees
- Executive Leadership
- Retired Faculty
- Retired Staff
- Non-degree seeking students (all, by campus) (+high school concurrent)
- Regents

External

- Alumni
- Interests (i.e. CU Advocates)
- Donors
- Current Parents
- Past Parents
- Friends

The Salesforce objects that will be used to create reports are as follows:

- Contact Object
- Employment Object
- Education & Enrollment Objects
- Interest Object
- IER Object
- Campaign Object
- Campaign Member Object
- Affiliation Object

A screen shot of the template provided to the COE is below.



Report Types for New Org



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	A	B	C	D	E
1					
2	Audience	All		Campus	Residence Hall
3					
4	Internal				
5	Students	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
6	- Enrolled Students	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	- Confirmed Students	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	- Admitted Students	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	- CSU-UNC Students	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
10	- Non-degree seeking students (all, by campus) (+high school concurrent)	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
11	Employees	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
12	- Faculty	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
13	- Staff	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14	- Student Employees	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
15	- Executive Leadership	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
16	- Retired Faculty	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	- Retired Staff	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	- Regents	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
19					
20	External				
21	Alumni	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
22	- Degreed Alumni	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
23	- Alumni Walked on Campus (not degreed, not active enrol)	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
24	Interests (i.e. CU Advocates)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
25	Donors	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
26	Parents	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
27	- Current Parents	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
28	- Past Parents	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
29	Friends	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
30					
31	Other				
32	Unsubscribed Audiences	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
33	- Per Preference Category				

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