



Giving Season with Reporting Studio

Custom visualization how-to guide

This guide walks you through a series of custom visualization how-tos you can use in Reporting Studio to track the success of your Giving Season campaign.

Each how-to helps you quickly surface key insights – from participation rates and donation volume to top nonprofits and volunteer hours – so you can see and share your impact with ease

How to use this guide

Each how-to in this guide outlines a simple, repeatable process you can follow to build a custom report or visualization in Reporting Studio.

Before you begin, we recommend completing these on-demand courses:

- [Introducing Reporting Studio](#)
- [Custom Reporting with Benevity Reporting Studio](#)

What's inside each how-to

Each how-to follows a 5-step structure:

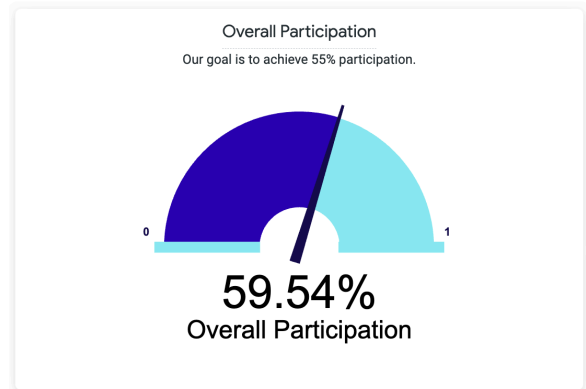
- 1. Explore**
Choose the dataset (or "Explore") that contains the metrics you want to visualize.
- 2. Data**
Add or adjust the fields used in your chart or report.
- 3. Filters**
Refine your data with filters like date range or transaction type.
- 4. Visualization**
Select your chart style (bar, gauge, map, etc.).
- 5. Run**
Select Run to generate your visualization.

Helpful resources *(B-Hive login required)*

- [Discovering Quick Starts](#)
- [Using Explores](#)
- [Creating a data visualization](#)
- [Customizing visualization colors](#)

Visualizing participation with a radial gauge

Use a radial gauge to track progress toward your participation goals. This visualization gives you a clear, visual snapshot of metrics like accepted terms of use, donation participation, or volunteer participation.



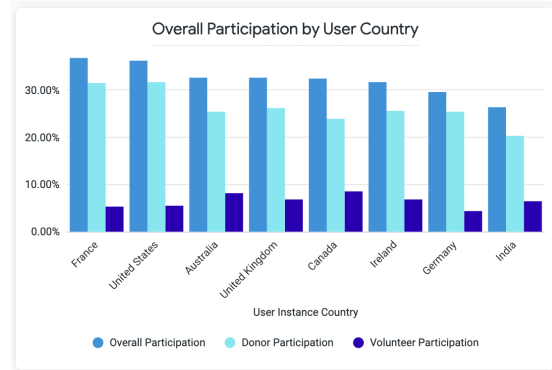
Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Participation Explore
2. Data	<ul style="list-style-type: none"> From Participation: <ul style="list-style-type: none"> Add the Overall Participation measure.
3. Filters	<ul style="list-style-type: none"> Adjust the Date Range Filter to is in range. <ul style="list-style-type: none"> Choose your desired start and end date and time
4. Visualization	<ul style="list-style-type: none"> Select the Radial Gauge visualization type from the three-dot menu (⋮) in the Visualization section.
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

The screenshot shows the configuration interface for a visualization. It includes a sidebar with a field list, a filters section with a date range filter set to 'is in range' from 2024/12/02 12:00 am to 2024/12/20 12:00 am, a visualization section where 'Radial Gauge' is selected, and a data table at the bottom showing 'Overall Participation' at 59.54%.

Comparing participation by location

Use this view to see participation across different regions or demographics in your company. You can also segment by other fields like department or business unit.



Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Participation Explore Use the Quick Start: Donor and Volunteer Participation by User Instance Country.
2. Data	<ul style="list-style-type: none"> From Participation: <ul style="list-style-type: none"> Add the Overall Participation measure.
3. Filters	<ul style="list-style-type: none"> Adjust the Date Range Filter to is in range. <ul style="list-style-type: none"> Choose your desired start and end date and time
4. Visualization	<ul style="list-style-type: none"> Use the default bar chart or modify as needed (e.g., horizontal or vertical orientation).
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

The screenshot shows the configuration for the 'Overall Participation by User Country' visualization. The interface includes a sidebar with field lists, a filter configuration area, a visualization toolbar, and a data table at the bottom.

Filters: Date Filters Date Range Filter is in range 2024/12/02 12:00 am until (before) 2024/12/20 12:00 am. Date Filters Time Period Filter is Custom Date Range.

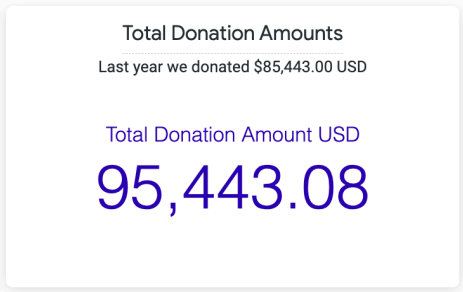
Visualization: Bar chart showing participation rates for Overall, Donor, and Volunteer participation across eight countries.

Data Table:

Users User Instance Country	Participation Overall Participation ↓	Participation Donor Participation	Participation Volunteer Participation
1 France	36.84%	31.58%	5.26%
2 United States	36.19%	31.72%	5.60%
3 Australia	32.62%	25.45%	8.24%
4 United Kingdom	32.62%	26.16%	6.81%
5 Canada	32.47%	23.99%	8.49%
6 Ireland	31.65%	25.54%	6.83%
7 Germany	29.71%	25.36%	4.35%
8 India	26.29%	20.32%	6.37%

Displaying total donation volume

Use this view to display the total amount donated during your Giving Season. This simple visualization gives you a bold number representing program impact.



Creating the visualization

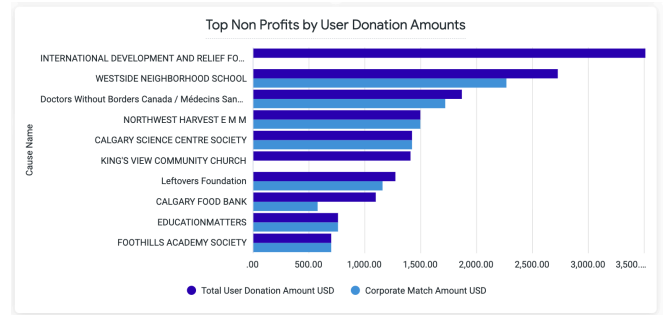
1. Explore	<ul style="list-style-type: none"> Select Donations Explore
2. Data	<ul style="list-style-type: none"> From Converted Currency Amounts: <ul style="list-style-type: none"> Add Total Donation Amount
3. Filters	<ul style="list-style-type: none"> From Common Fields: <ul style="list-style-type: none"> Add Transaction Type → select Donation Add Transaction Date → choose your desired date range Add Currency Display → select your preferred currency From Transactions: <ul style="list-style-type: none"> Add Transaction Description → select relevant donation types
4. Visualization	<ul style="list-style-type: none"> Use the default single value visualization
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

The screenshot shows the 'Total Donation Amounts' view in the software. The interface is divided into several sections:

- Left Sidebar (1):** A list of fields categorized into 'All Fields' and 'In Use'. The 'Converted Currency Amounts' category is selected, showing 'Total Donation Amount' with a count of 1.
- Filters (3):** A configuration area for filters. It includes:
 - *Common Fields Transaction Type:** Set to 'is' with 'Donation' selected.
 - Transactions Transaction Description:** Set to 'is' with a list of donation types: 'Client Direct Donation', 'External User Donation', 'User Donation', and 'User Rewards Donation'.
 - *Common Fields Transaction Date:** Set to 'is in range' with dates '2024/12/02' until '(before) 2024/12/20'.
 - *Common Fields Currency Display:** Set to 'is' with 'USD' selected.
- Visualization (4):** A toolbar with various visualization options. The 'Multiple Value' option is selected.
- Data Table (2):** A table with one row showing 'Converted Currency Amounts Total Donation Amount' with a value of 95,443.08.
- Top Right:** A 'Run' button (5) and a 'See performance details' link.

Identifying top nonprofits by donation amount

This chart helps you showcase the top nonprofits your people supported—by total donation amount, number of donors, or even corporate match contribution.



Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Donations Explore Use the Quick Start: Top 10 Cause Categories by Donation Amount
2. Data	<ul style="list-style-type: none"> Remove Cause Category From Causes: <ul style="list-style-type: none"> Add Cause Name
3. Filters	<ul style="list-style-type: none"> Adjust the Transaction Date to is in range. <ul style="list-style-type: none"> Choose your desired start and end date and time From Transactions: <ul style="list-style-type: none"> Add Transaction Description → select User Donation and External User Donation
4. Visualization	<ul style="list-style-type: none"> Set row limit to 10 (found on the right side of the Data bar) Change the orientation to a horizontal bar chart
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

The screenshot shows the software interface for creating the visualization. It includes a sidebar with field lists, a filter configuration area, a visualization toolbar, and a data table. Numbered callouts (1-5) correspond to the steps in the 'Creating the visualization' section.

Causes Cause Name	Converted Currency Amounts Total User Donation Amount	Converted Currency Amounts Corporate Match Amount
1 INTERNATIONAL DEVELOPMENT AND RELIEF FOUNDATION	3,511.61	0.00
2 WESTSIDE NEIGHBORHOOD SCHOOL	2,730.00	2,270.00
3 Doctors Without Borders Canada / Médecins Sans Frontières Canada	1,874.56	1,725.04
4 NORTHWEST HARVEST E M M	1,500.00	1,500.00
5 CALGARY SCIENCE CENTRE SOCIETY	1,423.93	1,423.93
6 KING'S VIEW COMMUNITY CHURCH	1,415.11	0.00
7 Leftovers Foundation	1,275.11	1,161.66
8 CALGARY FOOD BANK	1,100.09	578.41

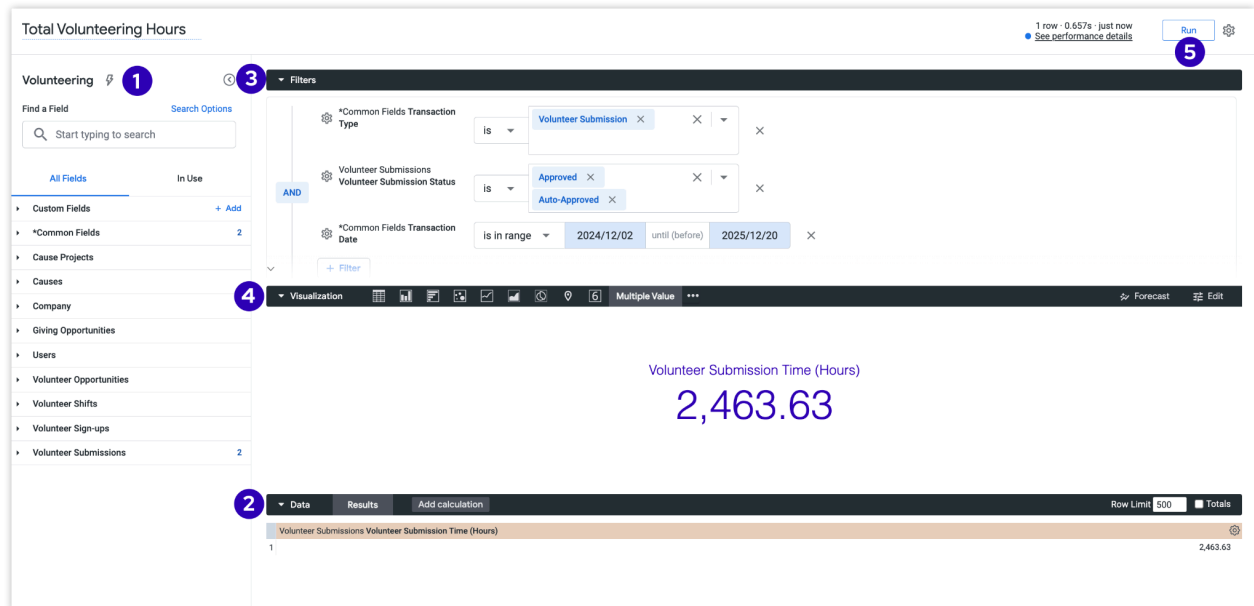
Tracking volunteer hours

Use this visualization to highlight how many volunteer hours your people contributed—either based on when the hours were submitted or when the service occurred.



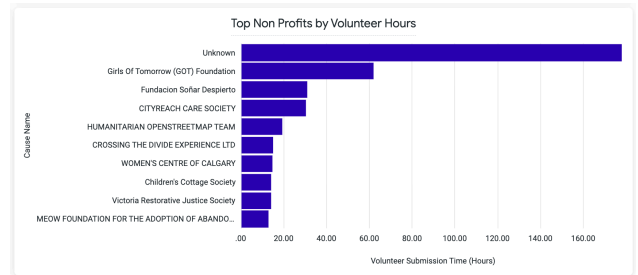
Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Volunteer Explore
2. Data	<ul style="list-style-type: none"> Add Volunteer Submission Time (Hours)
3. Filters	<ul style="list-style-type: none"> From Common Fields: <ul style="list-style-type: none"> Add Transaction Type → select Volunteer Submission From Volunteer Submissions: <ul style="list-style-type: none"> Add Volunteer Submission Status → select Approved and Auto Approved <p>Choose one of the following date filters:</p> <ul style="list-style-type: none"> Option 1: Filter by service date <ul style="list-style-type: none"> From Volunteer Submissions → Add Volunteer Submission Date of Service (Start) Option 2: Filter by submission date <ul style="list-style-type: none"> From Common Fields → Add Transaction Date
4. Visualization	<ul style="list-style-type: none"> Use the default single value visualization
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.



Visualizing where users are volunteering

Use this visualization to see top nonprofits by volunteer hours. You can also segment by user groups like office location, department or employee type (from your user file).



Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Volunteer Explore Use the Quick Start: Volunteer Hours by Cause Category
2. Data	<ul style="list-style-type: none"> Remove Cause Category From Causes: <ul style="list-style-type: none"> Add Cause Name
3. Filters	<p>Choose one of the following date filters:</p> <ul style="list-style-type: none"> Option 1: Filter by service date <ul style="list-style-type: none"> From Volunteer Submissions → Add Volunteer Submission Date of Service (Start) Option 2: Filter by submission date <ul style="list-style-type: none"> From Common Fields → Add Transaction Date
4. Visualization	<ul style="list-style-type: none"> Adjust to bar graph Set row limit to 10 (found on the right side of the Data bar)
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

Note: "Unknown Cause Name" appears when users track time to a general volunteer activity (for example, a beach clean-up). To exclude this, add a filter for **Cause Name** and remove it.

10 rows - 0.602s - just now
See performance details

Run

Volunteering 1 3 Filters

Find a Field Search Options
Start typing to search

All Fields In Use

- Custom Fields + Add
- *Common Fields 2
- Cause Projects
- Causes
- Company
- Giving Opportunities
- Users
- Volunteer Opportunities
- Volunteer Shifts
- Volunteer Sign-ups
- Volunteer Submissions 2

4 Visualization

*Common Fields Transaction Type is Volunteer Submission

*Common Fields Transaction date is in range 2024/12/02 until (before) 2024/12/20

Volunteer Submissions Volunteer Submission Status is Approved Auto-Approved

5

Row Limit 10 Totals

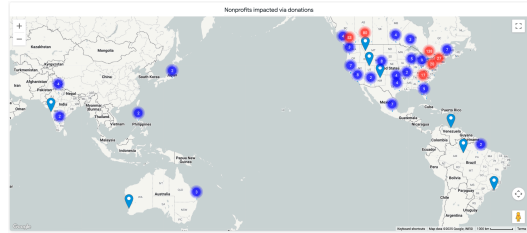
Row limit reached. Results may be incomplete

Causes Cause Name	Volunteer Submissions	Volunteer Submission Time (Hours)
1 Unknown		178.00
2 Girls Of Tomorrow (GOT) Foundation		62.00
3 Fundacion Soñar Despierto		31.00
4 CITYREACH CARE SOCIETY		30.50
5 HUMANITARIAN OPENSTREETMAP TEAM		19.25
6 CROSSING THE DIVIDE EXPERIENCE LTD		15.00
7 WOMEN'S CENTRE OF CALGARY		14.75
8 Children's Cottage Society		14.00

394 fields | 394 displayed

Viewing the global reach of donations

Create a map that shows where donations are going around the world. This view helps you visualize the global impact of your program.



Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Donation Explore
2. Data	<ul style="list-style-type: none"> From Causes: <ul style="list-style-type: none"> Add Cause Map Location
3. Filters	<ul style="list-style-type: none"> From Common Fields: <ul style="list-style-type: none"> Add Transaction Type → select Donation Add Transaction Date → choose your desired date range From Transactions: <ul style="list-style-type: none"> Add Transaction Description → select relevant donation types
4. Visualization	<ul style="list-style-type: none"> From the Edit menu <ul style="list-style-type: none"> Under Points, set the Type to Icon
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

The screenshot displays the Benevity reporting interface for 'Nonprofits impacted via donations'. It features a sidebar with navigation options, a filter panel with the following applied filters:

- Common Fields Transaction Type**: is Donation
- Common Fields Transaction Date**: is in range 2024/12/02 until (before) 2024/12/20
- Transactions Transaction Description**: is Client Direct Donation, User Rewards Donation, External User Donation, User Donation

The visualization section shows a world map with blue location pins indicating donation activity across various countries. A data table at the bottom lists 'Causes Cause Map Location' with 7 rows of coordinates. A yellow warning banner indicates 'Row limit reached. Results may be incomplete'.