

# R Script Monthly Report

This document serves a quick summary of the required documents and steps for using the Month Reports R Script and the various reports automated by it. Individual reports are demarcated with a commented out row of equal signs. Check the title of each report carefully before running and refer to documentation for needed imports. Run all script in code break sections. Each break has an explanation to ease code recycling.

## 1 Monthly Summary of All Actions

Run the first Monday of each month.

### 1.1 Required Reports

- Director's Numbers  
Pre created and located in All Directors/Director's Numbers for R Script.csv
- Monthly Actions Individual  
Vista View - ADV Scheduled Actions Completed By
- Monthly Actions Organization  
Vista View - Scheduled Action Completed By Org

Save reports in the All Directors folder in L: Drive folder.

### 1.2 Running Script for Monthly Summary of All Actions

- Director's Numbers as DN should not require any modification, as the file is unchanged.
- Check file names of Monthly Actions Individual and Monthly Actions Orgs. Modify the file name of the read.csv command.
- Change the output file name in the write.csv command.

## 2 Visits Only for Date Range Summary

Run the first Monday of each month or as requested

### 2.1 Required Reports

- Director's Numbers  
WILL NOT NEED TO REIMPORT IF RUNNING FIRST MONDAY  
Pre created and located in All Directors/Director's Numbers for R Script.csv
- Monthly Actions Individual  
Vista View - ADV Scheduled Actions Completed By  
MODIFY THE DATE RANGE IN THE WHERE CLAUSE

- Monthly Actions Organization  
Vista View - Scheduled Action Completed By Org  
MODIFY THE DATE RANGE IN THE WHERE CLAUSE

Save reports in the All Directors Folder in the L: Drive folder.

## 2.2 Running Script for Visits Only for Date Range Summary

- Check file names for Range.Actions.Ind and Range.Actions.Orgs
- Check output of Range.Summary before reording columns.  
Check order and modify subset function as needed.  
This will need modified depending on the number of months in the range.
- Change names of output files in the write.csv commands.  
There will be 2 files - a list of all actions and the summary table.

## 3 Mailing List with Filters

Run as requested. May need run multiple times in one shot. Watch file names on imports, especially if this is being run multiple times in one day. The filters are:

- All Alum and Alum Non Grads
- All Assigned Friends
- Unassigned Friends with Giving or Pledges of More than \$100

Will need to import library reshape2 unless already imported from other reports.

### 3.1 Required Reports

- Zip Codes  
Free Online Zip Code Tools. Copy and save as CSV in Excel.  
Check States in range before running Prospects report.  
Name column "Zips" for recognition in R Script.
- Prospects  
Portal Prospects Report. Filter states only. Check Zip Code web output for states.
- Giving  
Portal - Cumulative Giving From Selected Fiscal Year Forward  
Use previous fiscal year.
- Employees  
Vista Views - Employees  
Should be pre-ran and relatively stable.

### 3.2 Running Script for Mailing List with Filters

- Check file names for 4 imported files
- Before Remove DNC Codes check `summary(filteredlist$NO_MAIL)` and `summary(filteredlist$CallRules)` for DNC Codes.

Leave bad number and Do Not Call codes. May need to modify filters, but not likely.

- Change name of output files in the `write.csv` command.