

Reporting Webinar –V Sys One June 2011

When you start working with reports there are three things to keep in mind:

Filters – Filters tell the program how to pick and choose which information will come out in the report.

- Built-in filters – Many reports have built-in filters in the form of drop-down menus in the report. These are for big classifications of filtering (group, volunteer type, people type, exclusions.) We have tried to build these in for the most common needs.
- Filters you add – In many reports you will find a blue link for Add another filter which will allow you to select more options for filtering. If you do not see it on a report, try going into Advanced/custom and looking for the report there. Sometimes that will bring up extra options.

Sorting – Sorting determines how the data will be organized as it comes out to the report. Do you want it to be organized by the person's last name? Maybe for mailing labels you want it to be organized by zip code.

Results – Results are how the data you have chosen is displayed. For what we will be working with today these are the built-in reports, some of which can be easily customized from the report while others require the report designer to customize.

Where do I find reports?

For an individual person – In the Person Lookup tool, right click on the person's name and select the report. You can also select multiple people from the list and right click- to print reports for all of them. Or add them to a list to print later. Note: this will automatically print with the default settings for this report.

Some reports that you might want to print this way:

- Profile report (Contacts->Profile)
- Hours Summary by individual
- Volunteer hours crosstab by month

Quick tip: Some folks ask what the difference is between “Summary” and “Detail” Reports. For “Summary” think “Sum->Math->Numbers” – a Summary report will give you numbers or totals of things. A “Detail” report will give you the specific items.

In the Reporting tools – From the reporting tools you can run reports for groups of data (either program or volunteer) based on the filters that you choose.

- Program Statistics
- Program Demographics
- Hours Summary – Quarterly Hours Summary

Quick tip – Summary reports can be BIG, going all the way back in your data if you do not specify dates! If you forget to put in dates (especially in hours summaries), go get a cup of coffee, it may take a while (2-3 minutes).

- Advanced/custom – Birthday list. Here the filter under Add another filter has already been added for you with the date options on the right for the birthdays.
- Advanced/custom – Assignment summaries by job and job group.

Quick tip – How do I know where to look? Try phrasing what you want to know as a statement “I want to know which volunteers have....” , “I want to know what Awards....”. Most of the time this will get you where you need to start.

Custom Column reports:

Where custom columns are good – when you need a lists with different types of data. You can drag and drop what columns you want to appear on the report.

First look at a built-in one –

- Job assignments and associations – note on the left-side there is no sorting, so it will come out in random order until you add a sort order.

Then we build -

- Four column report showing Volunteer's name, service hours this year, Lifetime hours, Awards last year. (Based on Awards)

Quick tip – Do you need to e-mail a copy of a report to someone? Change the "Print to:" option in the report setup to “PDF for e-mail”. This will create it as a PDF and will attach it to an e-mail for you to send.