How To Guide for
Viewing and Creating Reports

Volunteer Center Instructions
Below is a guide for organizations to run system reports and create custom reports using 1-800-Volunteer.org. Be sure to customize and verify all steps before distributing this guide (either via email or hard copy). It is best to personalize it by adding your logo, special instructions and contact information.

Community Foundation of the Eastern Shore, Inc. ShoreCAN Volunteer Center

How To Guide for
Viewing and Creating Reports

Easy to Use instructions for **viewing, creating, and exporting reports** on **volunteer** activity with your organization. These reports provide both an overview and detailed look into how well our volunteer recruiting and management system is working for you.

Logging in to your organization account

1. Go to www.shorecan.org and click on the 1-800-Volunteer Logo. Click the **Login** link in the upper right hand corner of the screen.
2. Enter the **Username** and **Password** you created or provided to you by the Volunteer Center.
3. Click **Login** at the bottom of the form. Continue with steps below.

Accessing your reports

1. From your Organization Home screen, click on the down arrow next to the **Reporting** option in the left navigation column. This arrow will allow you to select the reporting area you wish to view from a drop down list of options. A brief desciption of the different report sections are explained below.

System Reports: These reports cover the basic information about who your volunteers are and what they have done. It also provides information on your opportunities and the number and types of referrals (volunteers who express interest) you have received. Most reports can be filtered by date range, service category, and location.

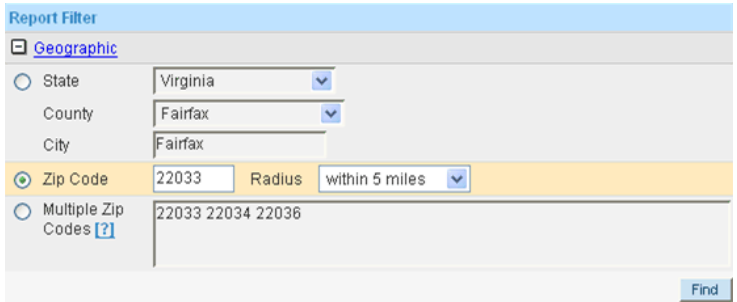
Email Reports: These reports allow you to email all volunteers or filter by name, age, and registration date. You are also able to use the reports to email volunteers who have expressed interest in / signed up for specific volunteer opportunities and events.

Custom & Saved Reports: If there is information not contained in the System Reports, you can create custom queries that will allow you to see different views of your activity and data Saved Reports allow you to store report criteria that you have used previously to save time when running the same reports again.

Report utilities

You may perform a number of functions when viewing any **System Report** including **filtering**, **saving**, and **exporting**.

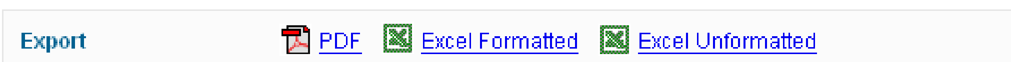
1. **Filtering** appears at the top of each System Report and allows you to refine the full list of results by **date** and **geography**, or additional critieria as appropriate for the data type (e.g. volunteers, opportunities)



2. **Saving** a report appears at the bottom of each System Report and allows you to **save the critieria, not the actual data** for a report so that you can access it without having to set your filtering each time.

   NOTE: What you are saving is the report criteria and not the actual data in the report. To save the actual data, you will need to export the report into one of the file formats available in the section below.

3. **Exporting** a report allows you to transfer information and data from a System Report to save or for use in other applications such as Microsoft Excel or Adobe Acrobat (PDF). The format options are listed below.



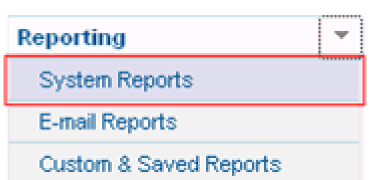
   PDF: Portable Document Format (PDF) is for use in Adobe Acrobat and the best format for presentation. The report criteria and column headings will appear in a nicely formatted style.

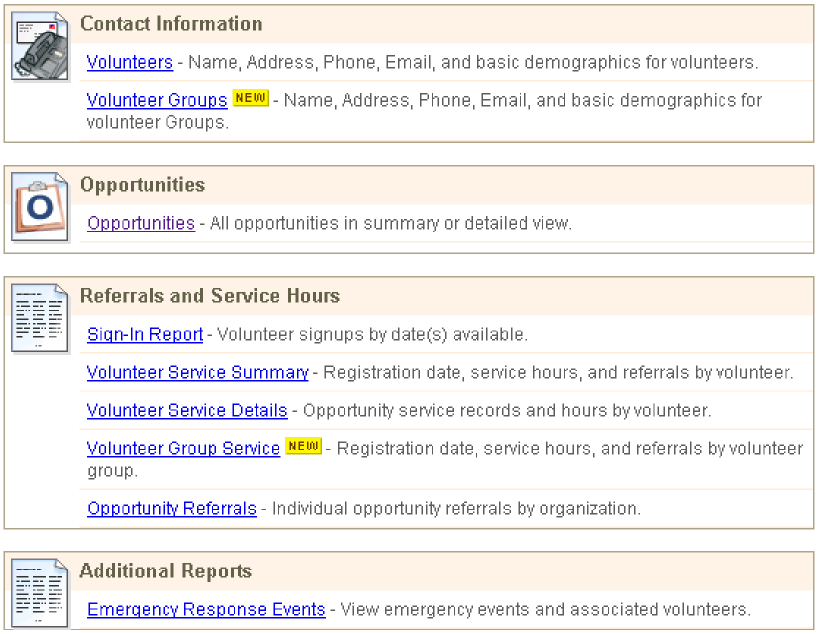
   Excel Formatted: This format is useful for Microsoft Excel and retains as much of the formatting on the screen as possible including borders and shading.

   Excel Unformatted: This option will provide you with a Comma Separate Values (CSV) format which is viewable in Microsoft Excel, but only contains the data and column headings. This format is very useful if you plan to use this data in another system because most systems will accept the CSV format.

<u>How to run System Reports</u>

1. Click on **System Reports** from the **Repor**t drop down menu and the following choices are displayed.





2. To pull a list of your volunteers, including basic demographic data, use the **Volunteers** or **Volunteer Groups** reports listed under the **Contact Information** section. These reports allow you to filter by name, gender, ethnicity, status, registration date, age, or geography. Results will contain contact and address information plus basic demographics. An explanation of a few key criteria is shown below.

   Privacy Level: This is the communication preference that the volunteer indicated when registering. You should only be contacting volunteers according to their communication preferences. For an explanation of the privacy levels, see the How to Guide for Creating Volunteer Profiles and Assigning Volunteers to Opportunities.

   Registration Date: The date the volunteer first registered with the system. If these volunteers were added during a data migration, the date may be when they volunteer first registered with your organization.

   RSVP Volunteers: Age 55+ volunteers who are part of the Retired Senior Volunteer Program (RSVP).

   Group Leader: The primary contact for the group.

3. To pull a list of your opportunities including the details of each opportunity, use the **Opportunities** report. This report can be exported and printed as a useful handout. This report can be viewed in **brief** (default, limited number of fields in report style columns) or **detailed** (a full length list of the opportunities). An explanation of a few key criteria is shown below.

   Date Range: This will display volunteer opportunities which occurred during this time period. Even if only a portion of the opportunity occurred in this time frame, it will appear in the results.

   Social Issue and Population Served: You can filter by these criteria which are specific on the Detail page of the volunteer opportunity and allow volunteers to search by category.

4. To pull a list of individual volunteers and a summary of their service hours and referrals, use the **Volunteer Service Summary** report listed in the **Referrals and Service Hours** section. Filters include name, status, and dates of service.

ID	First Name	Last Name	Registration Date	Hours	Referrals
232187	Jonathan	Gibbs	09/15/2005	4.0	1
233831	Katherine	Watier	09/15/2005	3.0	1

Showing 2 of 2. 1

Total Volunteers:	2
Total Hours:	7
Total Referrals:	2

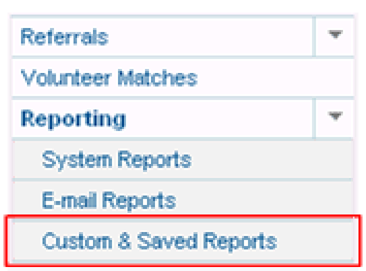
5. To pull a list of the individual volunteers and the details of their service hours and referrals, use the **Volunteer Service Detail** report displayed in the **Referrals and Service Hours** section. Filters include name, opportunity, and service dates.

Volunteer Name	Organization	Opportunity	Start Date	End Date	Hours
Gibbs, Jonathan	Red Cross of the National Capital Area	April Emergency Preparedness Workshop	04/03/2006	04/03/2006	4.0
Watier, Katherine	Red Cross of the National Capital Area	April Emergency Preparedness Workshop	06/08/2006	06/08/2006	3.0

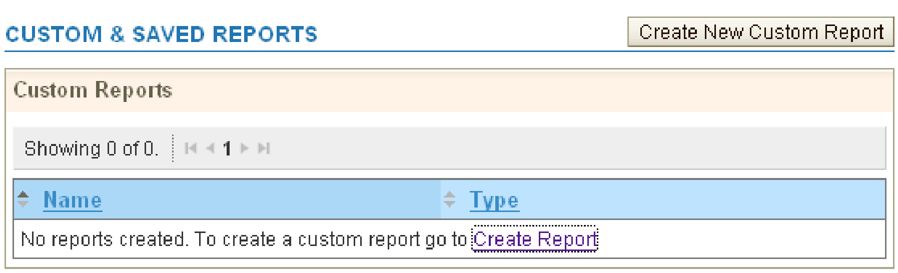
6. To pull a list of the individual referrals for each opportunity, use the **Opportunity Referrals** report from the **Referrals and Service Hours** section. Filters include geography, opportunity status, social issues, and populations served.

Creating a custom report

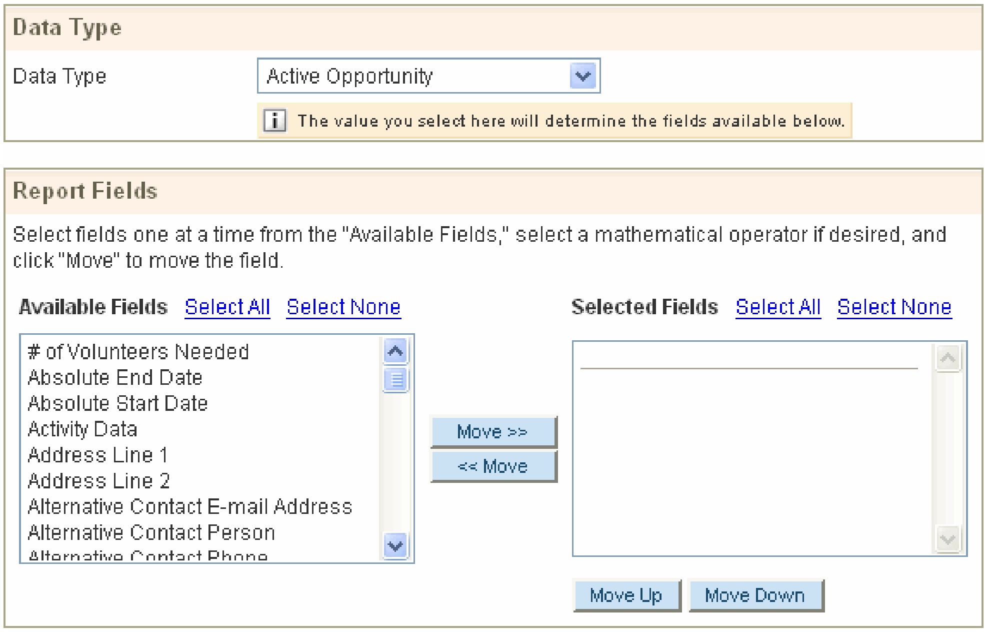
1. To create a report that is not available in the system reports, you may choose to use the Custom Report feature by clicking on **Custom & Saved Reports** from the Reporting drop down menu.



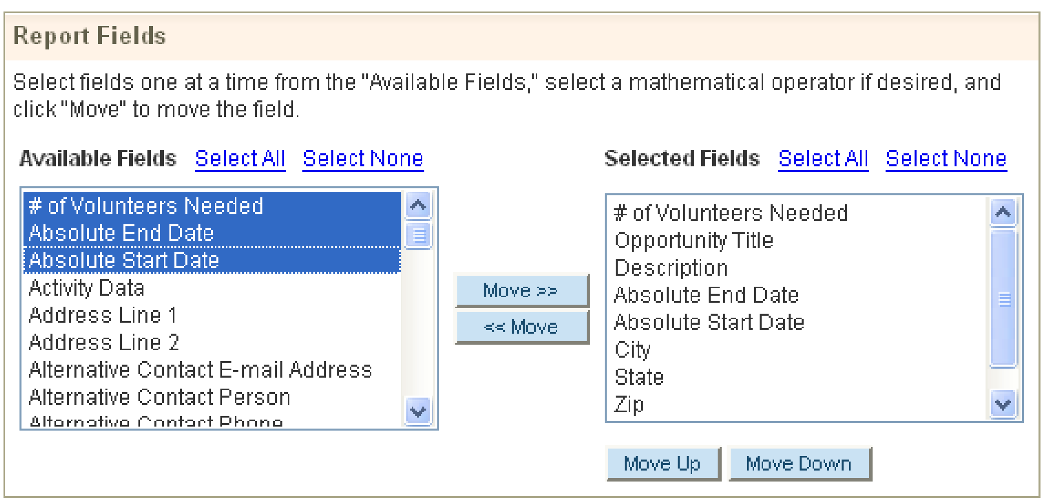
2. Click **Create New Custom Report** in the upper right to start creating your new report.



3. Select the **Data Type** that you wish to work with in the drop down list (e.g. Volunteer Data, Active Opportunity Data, Archived Opportunity Data, Volunteer Referrals) and you will see the list of available fields populated in the **Available Fields** section.



4. Select the fields that you wish to show in the report by clicking on the name of the field under the **Available Fields** section and then clicking the Move >> button to add to the **Selected Fields**. You may add several fields by holding down the "Ctrl" key on your keyboard and then selecting the fields with your mouse. You may also move the Selected Fields up and down to change the order of the report output/columns by clicking on the field name and then clicking Move Up or Move Down.



5. In the Report Criteria Section, you have the option to specify criteria for the fields that you chose in the Selected Fields section. To specify criteria for fields, click on an **Available Field** in the left column and then click **Move**. Next, click on the "operation" desired (greater than >,less than <, =, or like) below the Available Fields column and enter your comparison value.

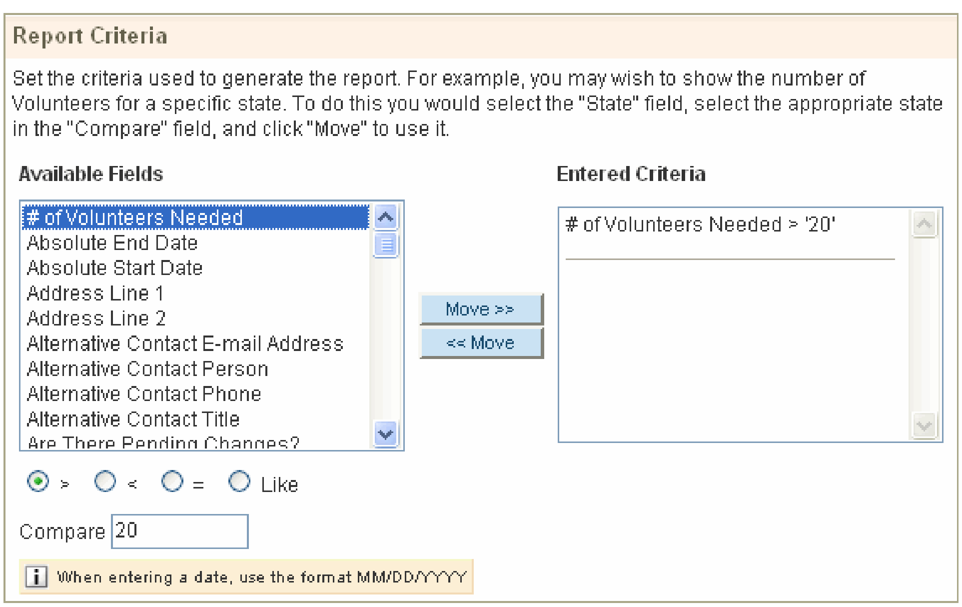
   Example: You would like to see a list of opportunities where a large number of volunteers, more than 20 for example, is needed.

   1. Select the **Active Opportunity** "Data Type" to show a list of Available Fields in the Reporting Fields Section.
   2. Select the fields you wish to show in the report and move them to the Selected Fields box to the right. In this case, you would obviously want to make sure that one of the fields was the "# of Volunteers Needed" so that you could see how many volunteers were needed. You would probably also want to list the name of the opportunity and perhaps additional details such as the location, description, or dates.
   3. Move down to the Report Criteria once you have selected all the fields for the report. To see a report of only the opportunities where more than 20 volunteers are needed, specify the comparison criteria by clicking "# of Volunteers Needed" in the Available Fields Section and then click the appropriate "operator" below the fields, in this case the greater than symbol (>). Specify the value to compare in the box labeled "Compare."

      Note: The type of value will depend upon the field type you select. You may see a drop down box with Yes or No values, a calendar for selecting a date, or a drop down box with answers to a specific question such as "Referral Source."

      The "Like" operator is typically used to find names or titles where you wish to have flexibility to enter partial names. You could enter Last Name Like "Smit" which would return anyone with a last name of Smith, Smithson, Smitten, etc. The equal (=) will return only exact value matches.
   4. After entering your comparison value, click Move to add this criteria to your report. You may specify more than one criteria to narrow your results.

6. Click **Generate Report** to run your report. NOTE: Reports that will return more than 500 rows/results may be delayed overnight. You will be notified if this is the case when you submit the report and you are notified via email when the report is ready for viewing online.



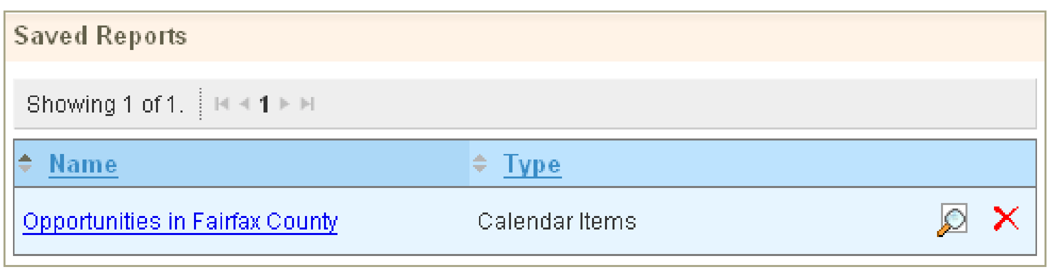
Accessing previously saved reports

1. You may access a report that you have saved previously by clicking on **Custom & Saved Reports** from the Reporting drop down menu.

NOTE: What you saved was the report criteria and not the actual data in the report. Reporting the report via saved reports will yield different reports than the previous request. To save the actual data, you will need to export the report into one of the file formats available.

2. Find the report that you previously saved in the **Saved Reports** section and click on the name of the report or the magnifying glass icon to run the report ***again***. This will execute the same search that you specified previously, but may return different results.

For example, if you run the report described in the example earlier on June 1st and then save the report criteria, you may get a different list of volunteer opportunities on July 1st since new opportunities meeting your criteria have been added since the time you ran the report in June.



What Happens Next?
Your reports are available to you 24/7 and are always up to date. It is important to run reports on a regular basis to track your progress in recruiting volunteers, measuring the impact your programs are having on the community, and seeing how you can improve.

Questions?

Please contact Jon Fitzsimmons at the ShoreCAN Volunteer Center with questions or for assistance.
ShoreCAN Volunteer Center, 1324 Belmont Avenue, Suite 401, Salisbury, MD 21804
www.shorecan.org shorecan@cfes.org