

Portal Reports: Basics to Experienced User Tips

October 5, 2023



Dashboards

Finding a Dashboard or Report

- Find a Dashboard or Report you **have** used “recently” (2 months or so)
 - Click the Dashboards or Reports tab
- Find a Dashboard or Report using **Global Search**
 - Type your Split State (SSx) in the Global Search box (top center), Enter
 - Select the Dashboards or Reports from the **left** menu list
- Finding reports through the Reports Tab > **All Folders**
 - To find reports that don’t have your split state in the title
 - Click on Reports Tab > All Folders > then folder with the desired report

Tip Sheets – VP02 – Select a Dashboard and VP02 – Run a Report

Dashboards For Split States

Available Dashboards	Split State Reports Included	Available Filters
Prospects	Prospects – Active Prospects – On Hold Prospects – No Match Volunteers – Leave of Absence	District
Leader	Volunteers (By District and Site) Sites (Active Sites Only)	District
Supervisor	Volunteers (By District and Site) Sites (Active Sites Only) Pending Approvals (Reimbursements)	District
Certifications	Vol & PV Certification Status All PVs and Vols Cert (Pie Chart)	Volunteer Status, District, Certification Status
Session Management	APPT (Appointments) AVAIL (Volunteer Availability) SHIFTS WAITLIST	Location Name

Find a Report or Dashboard in your Recent List

The screenshot shows the AARP Foundation dashboard interface. At the top is a navigation bar with the following items: Home, Dashboards, Reports, Contacts, Manage Reimbursements, Orders, Libraries, Training, and More. The 'Dashboards' item is highlighted in yellow, and a red arrow points to it from below. Below the navigation bar is a sub-header area with 'Dashboards' and 'Recent' (with 17 items). A search box labeled 'Search recent dashboards...' and a settings icon are also present. Below this is a table listing various dashboards. The 'Recent' category is highlighted on the left, and a red arrow points to the 'TA - R09 - MT1 - Prospects' dashboard entry in the table.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Create...
Recent	TA - R09 - MT1 - Leaders	This Dashboard includes NO information on Reimbursements and is available to Regional Leaders.	Tax-Aide: Leaders	Shawn Logue	11/1/2019, 4:00 PM
Private Dashboards	TA - R09 - MT1 - Prospects	This Dashboard includes a list of ALL Prospective Volunteers in Active, On Hold, No Match and Leave of Absence status.	Tax-Aide: Prospects	Shawn Logue	11/1/2019, 4:02 PM
All Dashboards	TA - R09 - MT1 - Supervisor	This Dashboard includes Reimbursement information and is available to State Leaders that have Supervisory responsibility.	Tax-Aide: Supervisors	Shawn Logue	11/1/2019, 4:03 PM
FOLDERS	TA - R08 - CO1 - Prospects	This Dashboard includes a list of ALL Prospective Volunteers in Active, On Hold, No Match and Leave of Absence status.	Tax-Aide: Prospects	Robin Murphy	6/29/2017, 8:49 AM
All Folders					
Created by Me					
Shared with Me					



Use Global Search to Find a Dashboard or Report

The screenshot shows the AARP Foundation Tax-Aide website interface. At the top left is the logo with the tagline "Free tax assistance for those who need it most". A search bar at the top center contains the text "mt1" with a magnifying glass icon to its left. A red arrow points upwards to the search bar. To the right of the search bar is a user profile icon. Below the search bar is a red navigation bar with links: Home, Dashboards, Reports, Contacts, Manage Reimbursements, Orders, Libraries, Training, and More. On the left side, there is a sidebar with "Search Results" and a list of categories: All, Contacts, Reimburseme..., Files, Volunteer Eve..., Awards, Locations, Reports, Dashboards, and People. A red arrow points to the "Dashboards" link. The main content area is divided into two sections. The top section is titled "Contacts" with "5+ Results • Sorted by Relevance" and a "View Mo" link. It contains a table with columns: NAME, CONTACT RECORD TYPE, VOLUNTEER ID, MAILING ADDRESS CITY, and MAILING ADDRESS STATE. The bottom section is titled "Reimbursements" with "5+ Results • Sorted by Relevance" and a "View Mo" link. It contains a table with columns: REIMBURSEMENT ID, VOLUNTEER, ASSIGNMENT, RECORD TYPE, REIMBURSEMENT TYPE, and STATUS.

NAME	CONTACT RECORD TYPE	VOLUNTEER ID	MAILING ADDRESS CITY	MAILING ADDRESS STATE
[blurred]	AARP Volunteer	[blurred]	[blurred]	[blurred]
[blurred]	AARP Volunteer	[blurred]	[blurred]	[blurred]
[blurred]	AARP Volunteer	[blurred]	[blurred]	[blurred]
[blurred]	AARP Volunteer	[blurred]	[blurred]	[blurred]
[blurred]	AARP Volunteer	[blurred]	[blurred]	[blurred]


REIMBURSEMENT ID	VOLUNTEER	ASSIGNMENT	RECORD TYPE	REIMBURSEMENT TYPE	STATUS
[blurred]	[blurred]	[blurred]	Expense Reimbursement	Itemized	Scheduled for Payment
[blurred]	[blurred]	[blurred]	Expense Reimbursement	Itemized	Scheduled for Payment

Dashboards - Layout

Dashboard **TA - R09 - MT1 - Prospects**  Refresh 

This Dashboard includes a list of ALL Prospective Volunteers in Active, On Hold, No Match and Leave of Absence status.
As of Jul 23, 2022 9:34 AM Viewing as Yanna Guo

District

All 

Prospects - Submitted ...

Program Route To...↑	Record Cou...
TA-R09-MT1-D04	1
TA-R09-MT1-D05	2
TA-R09-MT1-D07	1
TA-R09-MT1-D09	5

[View Report \(MT1: Prospects - Active\)](#)

Prospects - On Hold

Program Route T...	Record C...
TA-R09-MT1-D03	6
TA-R09-MT1-D04	7
TA-R09-MT1-D05	1
TA-R09-MT1-D06	4
TA-R09-MT1-D07	12
TA-R09-MT1-D08	7
TA-R09-MT1-D09	4

[View Report \(MT1: Prospects - On ...\)](#)

Prospects - No Match

Program Route T...	Record C...
TA-R09-MT1-D02	7
TA-R09-MT1-D03	10
TA-R09-MT1-D04	15
TA-R09-MT1-D05	32
TA-R09-MT1-D06	15
TA-R09-MT1-D07	15
TA-R09-MT1-D08	3

[View Report \(MT1: Prospects - No ...\)](#)

MT1: Volunteer - Leave...

Program Route T...	Record C...
TA-R09-MT1-D02	3
TA-R09-MT1-D03	15
TA-R09-MT1-D04	9
TA-R09-MT1-D05	8
TA-R09-MT1-D06	12
TA-R09-MT1-D07	21
TA-R09-MT1-D08	5

[View Report \(MT1: Volunteer - Leav...\)](#)

Your turn to practice

1. In the Portal, click on the Dashboards Tab
 - Note – this is your “**Recents**” list
2. Next, find a Dashboard using Global Search
3. In the Global Search box, type “SSx” (your split state) then Enter
4. On **left** side, click on “Dashboards”
5. Note the 5 Dashboards for your split state
6. Click on a Dashboard to run it
 - Find Filter box(es), Results boxes, and “View Report” at bottom of each box
7. Filter the Dashboard using the “District” dropdown list
8. Click on “View Report (xxxxx)” to run report

The screenshot shows a dashboard titled "Dashboard TA - R09 - MT1 - Leaders". Below the title, there is a "District" dropdown menu currently set to "All". A red box labeled "7. Filter" points to this dropdown. Below the dropdown is a table titled "Volunteers" with columns "Position: Program..." and "Rec...". The table contains five rows of data. A red box labeled "Results Box Don't click in the Box!" points to the table. At the bottom of the dashboard, there is a "View Report (TA - R09 - MT1 - ...)" link. A red box labeled "8. View Report" points to this link.

Position: Program...	Rec...
TA-R09-MT1	6
TA-R09-MT1-D02	5
TA-R09-MT1-D02-S61053230	13
TA-R09-MT1-D03	7
TA-R09-MT1-D03-S61053315	31

Reports

Overview - Reports

- Many reports for many different purposes
 - Split State Reports via Dashboards
 - Other Split State Reports
 - National reports

Tip Sheets – VP02 – Run a Report, Also by specific topics

Other (not found via Dashboard) Split State Reports

Split State Reports [Reports Folder]

- All Sites (including Inactive) [Tax-Aide: Sites]
- Efile & Flash Reports (4) [Tax-Aide: Efile (or Flash) Reports]
- Reimbursements (10) [Tax-Aide: Reimbursement (Cumulative) or (Current)]
- Zip Code Route To [Tax-Aide: Zip Code Routing]
- Other Volunteer Reports
 - Emergency Contact [Tax-Aide: Emergency Contact]
 - Years of Service [Tax-Aide: Years of Service]
 - All Volunteer Roster [Tax-Aide: All Volunteer Roster]

National Reports – Special Purpose

National Reports [[Reports Folder](#)]

Note – these reports show data for the whole Tax-Aide Program

- Split-State Mileage Cap [[Tax-Aide](#)]
- Sites with Service Type [[Tax-Aide: Sites](#)]
- Assignment Specific Reports (SC, ASC, etc.) [[Tax-Aide](#)]

Reports - Layout

Report: Locations with Program Locations and Programs
TA - R09 - MT1 - Sites ←

A list of all active sites in MT1.

Enable Field Editing | 🔍 | Add Chart | ⌵ | ↻ | Export

Total Records
25 ←

Kalispell 1/3 ⌵ ⌶ ✕

<input type="checkbox"/> Program: Parent Program ↑ ▾	Program Location: Program Loca... ▾	Program: SIDN ▾	Program: Program ▾	Progra... ▾	Program: Stat
<input type="checkbox"/> TA-R09-MT1-D02 (1)	HAVRE SENIOR CITIZENS CENTER	S61053230	TA-R09-MT1-D02-S61053230	5950101	Active
Subtotal					
<input type="checkbox"/> TA-R09-MT1-D03 (1)	Kalispell Center Mall Tax-Aide	S61053315	TA-R09-MT1-D03-S61053315	5990106	Active
Subtotal					
<input type="checkbox"/> TA-R09-MT1-D04 (3)	MISSOULA SENIOR CENTER	S61053100	TA-R09-MT1-D04-S61053100	5980101	Active

Reports – Layout – Bottom of Report

- Notice two scroll bars on the right side of many reports
- Use the far right scroll bar to get to the very bottom of the Report
- At the bottom are some options to change details on the formatted report, to eliminate extra lines
- Also at the bottom, is a Horizontal Scroll Bar, which will help you navigate right / left

				2	
Subtotal					
<input type="checkbox"/> TA-R09-MT1-D10 (4)	THOMPSON FALLS SENIOR CENTER	S61053340	TA-R09-MT1-D10-S61053340	5983700	Active
	HOT SPRINGS SENIOR CENTER	S61053013	TA-R09-MT1-D10-S61053013	5984501	Active
	RONAN SENIOR CENTER	S61053009	TA-R09-MT1-D10-S61053009	5986401	Active
	POLSON SENIOR CENTER	S61053008	TA-R09-MT1-D10-S61053008	5986002	Active
Subtotal					
Total (25)					

Row Counts Detail Rows Subtotals Grand Total

Your turn to practice

- Find the parts of a Report:
 - Report title
 - Change a column width
 - Use the search option to search for something
- Use the far right scroll bar to scroll to the bottom of the report
 - Scroll to the right using the scroll bar

Report: Locations with Program Locations and Programs
TA - R09 - MT1 - Sites
 A list of all active sites in MT1.

Total Records: 25

Program: Parent Program	Program Location: Program Loca...	Program: SIDN	Program: Program	Progra...	Program: Stat
TA-R09-MT1-D02 (1)	HAVRE SENIOR CITIZENS CENTER	S61053230	TA-R09-MT1-D02-S61053230	5950101	Active
Subtotal					
TA-R09-MT1-D03 (1)	Kalispell Center Mall Tax-Aide	S61053315	TA-R09-MT1-D03-S61053315	5990106	Active
Subtotal					
TA-R09-MT1-D04 (3)	MISSOULA SENIOR CENTER	S61053100	TA-R09-MT1-D04-S61053100	5980101	Active

Subtotal					
TA-R09-MT1-D10 (4)	THOMPSON FALLS SENIOR CENTER	S61053340	TA-R09-MT1-D10-S61053340	5983700	Active
	HOT SPRINGS SENIOR CENTER	S61053013	TA-R09-MT1-D10-S61053013	5984501	Active
	RONAN SENIOR CENTER	S61053009	TA-R09-MT1-D10-S61053009	5986401	Active
	POLSON SENIOR CENTER	S61053008	TA-R09-MT1-D10-S61053008	5986002	Active
Subtotal					
Total (25)					
Grand Total					

Row Counts Detail Rows Subtotals Grand Total

Find Reports Through Reports Tab – All Folders

Home Dashboards **Reports** Contacts Manage Reimbursements Orders Libraries Training More ▾

Reports
All Folders
25 items

Search all folders... ⚙



REPORTS	Name	Created By	Created On	Last Modified By
Recent	Tax-Aide: Reimbursements (Cumulative)	Robin Murphy	2/27/2016, 7:58 PM	Robin Murphy
Created by Me	Tax-Aide: Reimbursements (Current Year)	Robin Murphy	5/11/2017, 5:46 AM	Robin Murphy
Private Reports	Tax-Aide: Session Management	Kristie Jen	11/5/2020, 7:30 AM	Sarah Panella
All Reports	Tax-Aide: Session Management Pilot	Kenny Wright	6/8/2018, 7:08 PM	Robin Murphy
FOLDERS	Tax-Aide: Sites	Robin Murphy	2/27/2016, 7:57 PM	Robin Murphy
Created by Me	Tax-Aide: Years of Service	Robin Murphy	7/19/2016, 3:44 PM	Robin Murphy
Shared with Me	Tax-Aide: Zip Code Routing	Robin Murphy	9/2/2016, 5:59 AM	Robin Murphy
FAVORITES				

Filtering Portal Reports – Why and How

Why Filter Reports?

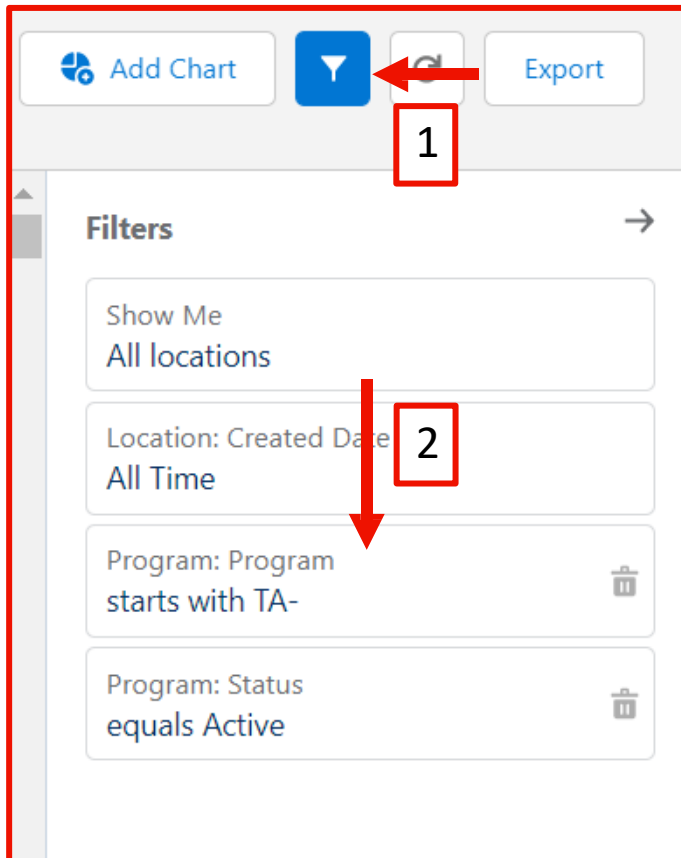
- To limit a report to data of interest (Date, District, status)

Tips for Filtering Reports

- **Dashboards** are easy way to filter **Reports** – pick in dropdown boxes
- Other reports – click on the filter icon at top right of report
 - Select a field, edit the criteria, and click “Apply”
- Many reports and / or fields in reports cannot be filtered
 - “Lock” icon means it can’t be filtered 
 - “Trash Can” icon or no icon means it can be filtered 

How to Filter a Report using the Filter Tool

1) Click on Filter Icon
Filter window opens

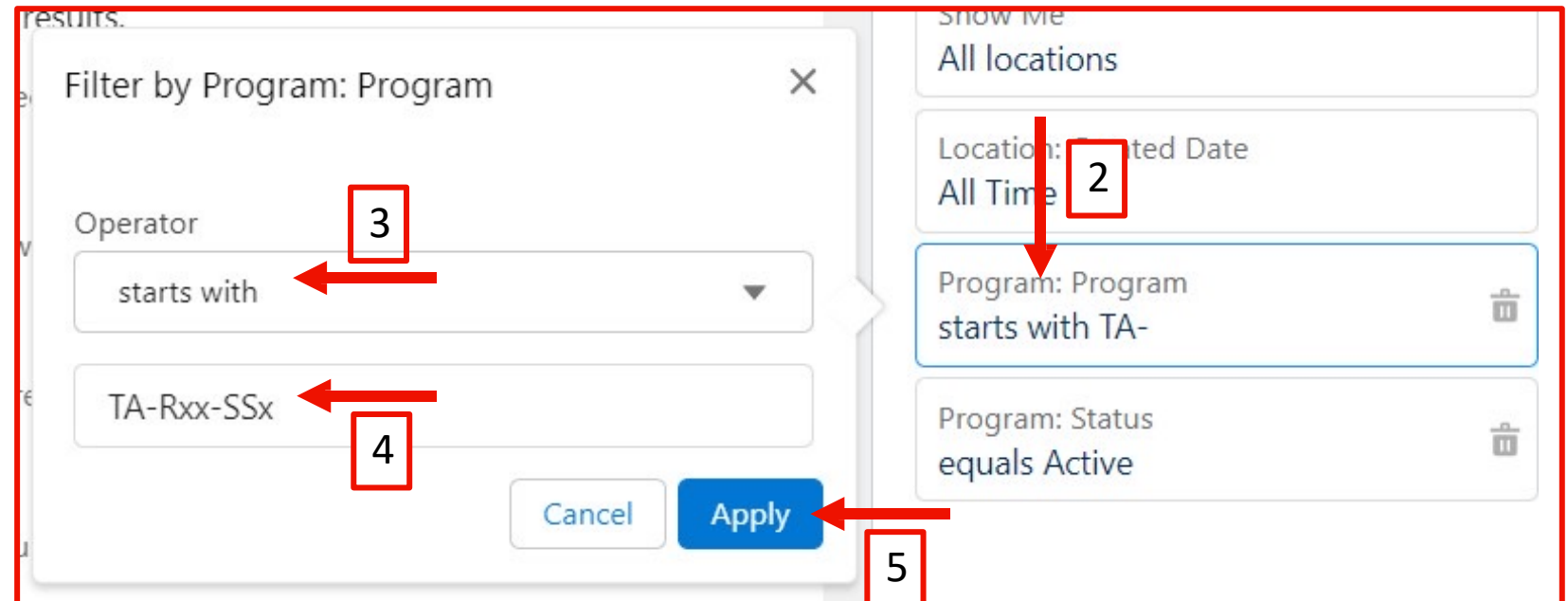


2) Select one of the available Fields that is not locked
(Ex: Program)

3) Set Operator using drop down box (Ex: Starts with)

4) Edit Field to filter as needed (Ex: TA-Rxx-SSx)

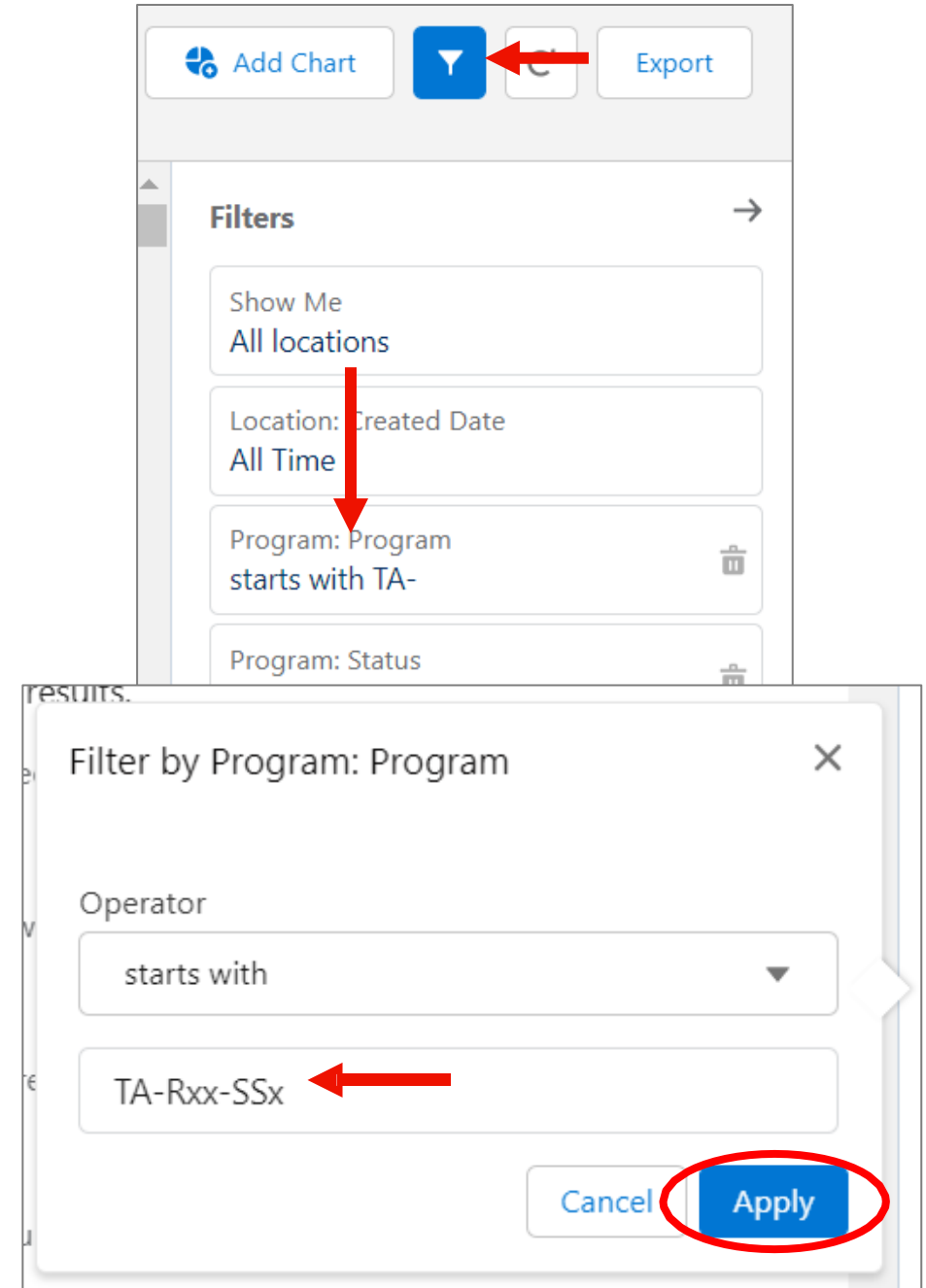
5) Click on "Apply"



Tip Sheet – VP14 – How to Filter Reports

Your turn to practice

- Run the “TA - All Active Sites with Service Type” report
- Click on the Filter tool
- In the window that opens, click on “Program: Program”
- In the window that opens, in the box that has “TA-”, add your region and split state (i.e., “TA-R09-MT1”)
- Then click on “Apply”
- Resulting report will show just the Sites in your split state



Reports – Exporting

“Formatted Report” will look like online report

Use “Excel Format .xlsx” if using Excel or Sheets.

“Comma Delimited .csv” is flexible. Be sure to update file name.

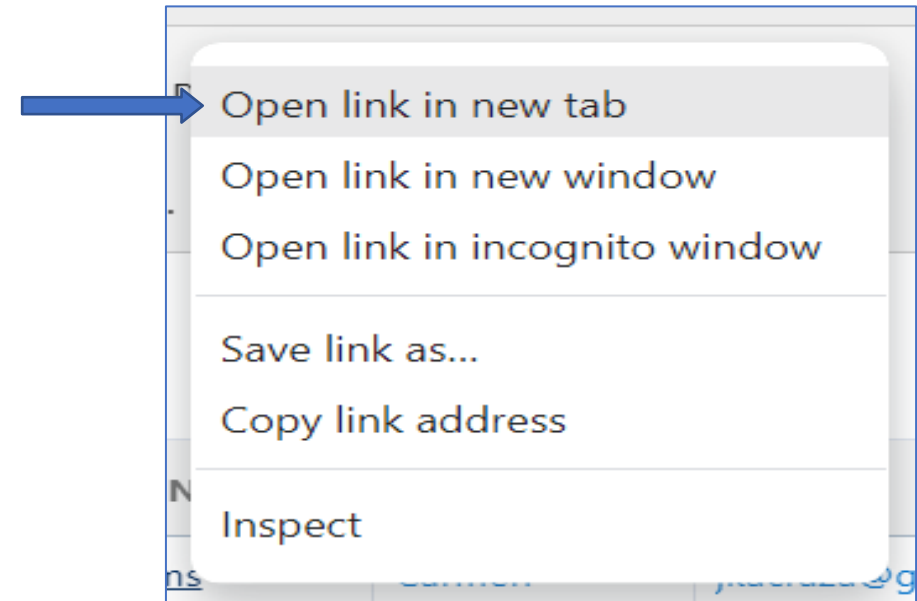
The screenshot shows an 'Export' dialog box with the following elements:

- Export View:** Two options are shown: 'Formatted Report' (with a description: 'Export the report, including the report header, groupings, and filter settings.') and 'Details Only' (with a description: 'Export only the detail rows. Use this to do further calculations or for uploading to other systems.') and a checkmark icon in the top right corner.
- Format:** A dropdown menu is open, showing options: 'Excel Format .xls', 'Excel Format .xls', 'Excel Format .xlsx' (highlighted), and 'Comma Delimited .csv'.
- Encoding:** A dropdown menu showing 'ISO-8859-1 (General US & Western Europea)'.
- Buttons:** 'Cancel' and 'Export' buttons at the bottom right.

Use “Details Only” if you plan to manipulate the report in Excel or Sheets

The Right Click Tip

- A report has a list of volunteers you wish to access
 - Clicking on the name takes you to the Contact Record
 - Returning will rerun the report and changes the order
- Instead, use a **Right Click (*)** and choose “Open link in new tab”
 - Then click on the new tab
 - When finished, close the tab
- Original tab is unchanged



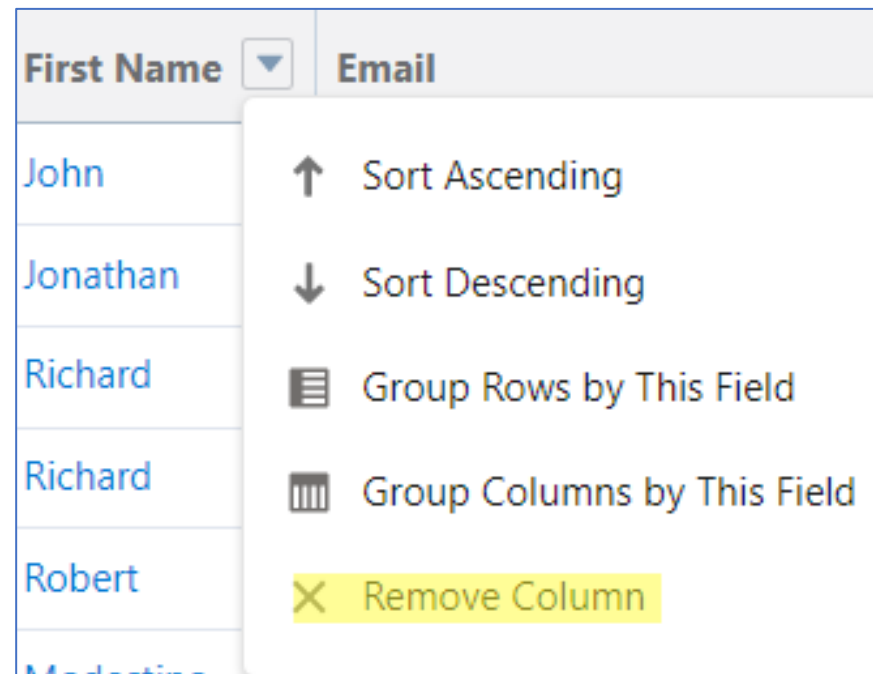
Modifying Reports Presentation

You may want to modify a report because it does not present the data in a way you want.

- You can rearrange the data
 - Drop columns
 - Change Grouping
- There are limitations:
 - The report must present all the data you want
 - You cannot add data to the report
 - You cannot save the modified report in the Volunteer Portal

Modifying Reports Presentation

- Drop / delete columns
 - Click on the Down Arrow on the right of the column name
 - Click “Remove Column”

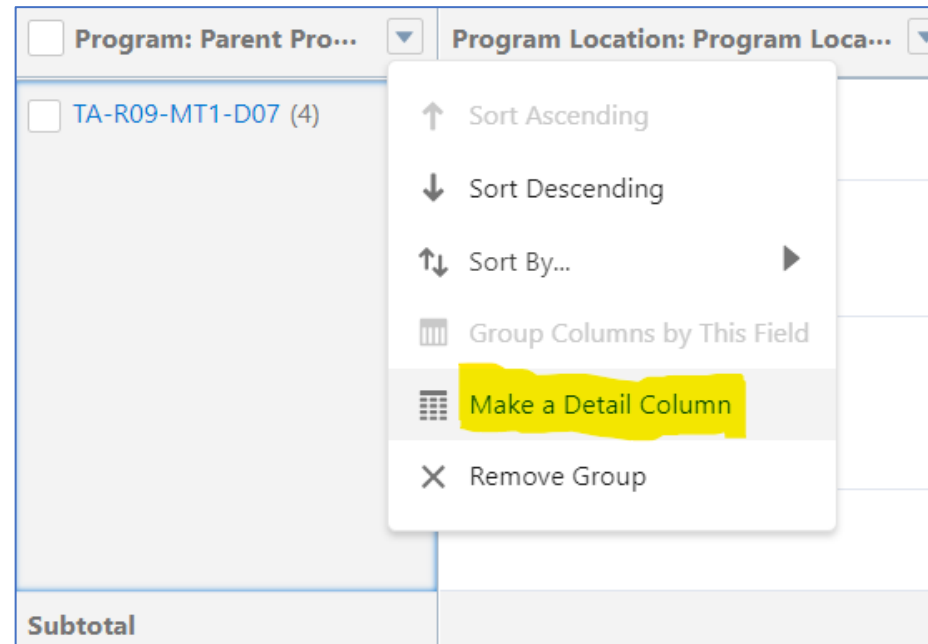


The screenshot shows a table with two columns: 'First Name' and 'Email'. The 'First Name' column header has a dropdown arrow. A context menu is open over this header, displaying several options: 'Sort Ascending', 'Sort Descending', 'Group Rows by This Field', 'Group Columns by This Field', and 'Remove Column'. The 'Remove Column' option is highlighted in yellow. The table rows contain the names: John, Jonathan, Richard, Richard, Robert, and Medestine.

First Name	Email
John	
Jonathan	
Richard	
Richard	
Robert	
Medestine	

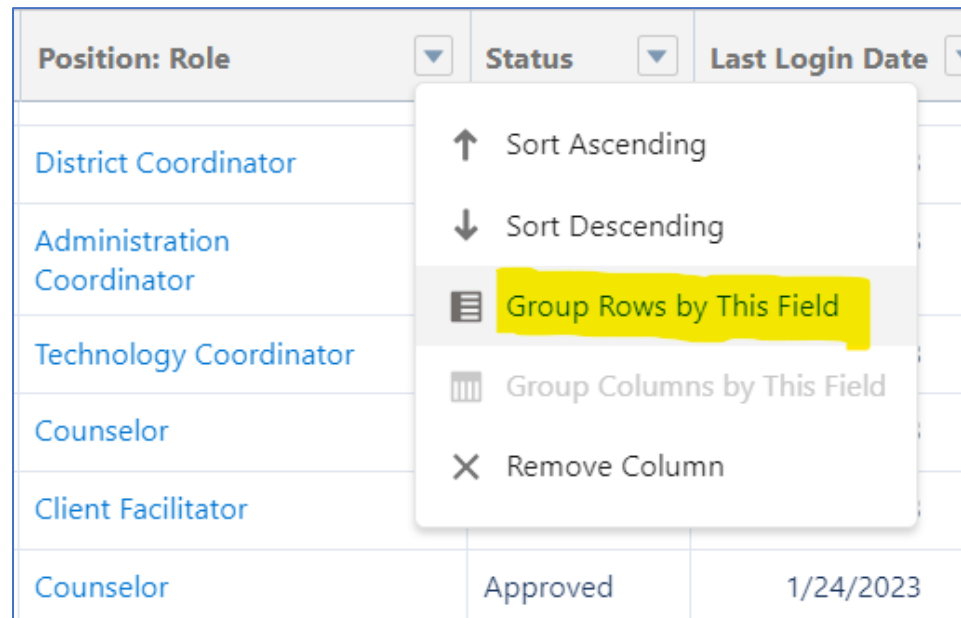
Modifying Reports Presentation

- Remove Grouping and keep the column values
 - Click on the Down Arrow on the right of Grouped column name
 - Click “Make a Detail Column”



Modifying Reports Presentation

- Create a Group
 - Click on the Down Arrow on the right of the column name you want to Group
 - Click “Group Rows by This Field”



Position: Role	Status	Last Login Date
District Coordinator		
Administration Coordinator		
Technology Coordinator		
Counselor		
Client Facilitator		
Counselor	Approved	1/24/2023

Questions?



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