

Portal Reports: Basics to Experienced User Tips

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Before we begin, log into the Volunteer Portal on your laptop



Agenda

Portal Reports: Basics to Experienced User Tips

- Before we begin, log into the Volunteer Portal on your laptop
- **Objectives:**
 - Hands-on practice; Q&A's; Learn something new
- **Topics** – Finding and Using:
 - Dashboards, Dashboard Filters
 - Reports – Layout; Filtering and Exporting; Tips and Tricks

Dashboards

Finding a Dashboard or Report

- Find a Dashboard or Report you **have** used “recently” (~2 months)
 - 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
 - For National / non-Split State reports, Global Search on word in report title

Tip Sheets – VP02.07 – Select a Dashboard; VP02.08 – 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 Dashboard in your Recent List

The screenshot shows the AARP Foundation portal interface. At the top, there is a navigation bar with tabs: Home, Dashboards, Reports, Contacts, Manage Reimbursements, and Orders. The 'Dashboards' tab is highlighted in yellow. Below the navigation bar, there is a section for 'Dashboards' with a sub-section for 'Recent' (17 items). On the left side, there is a sidebar with categories: DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards) and FOLDERS (All Folders, Created by Me, Shared with Me). The main content area displays a table of dashboards with columns for Dashboard Name and Description. The 'TA - R09 - MT1 - Prospects' dashboard is highlighted with a red arrow.

DASHBOARDS	Dashboard Name	Description
Recent	TA - R09 - MT1 - Leaders	This Dashboard includes NO information on Reimbursements and is available to Regional Leaders.
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.
All Dashboards	TA - R09 - MT1 - Supervisor	This Dashboard includes Reimbursement information and is available to State Leaders that have Supervisory responsibility.
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.
All Folders		
Created by Me		
Shared with Me		

To find a “recent” Dashboard

1. Click on “Dashboard” in red tabs bar
 2. Default view will be “Recent” on the left
 3. Find the desired dashboard
 4. Click on the dashboard title
- “Reports” tab works the same way

Find Dashboards Using Global Search

1. Enter Split State in Global Search box

2. Limit Results to Dashboards

3. Click blue link for desired dashboard

AARP Foundation Tax-Aide

Home Dashboards Reports Contacts Manage Reimbursements Orders Libraries More ▾

Search Results

All

Dashboards

Expand List

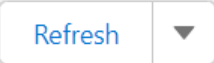
Refine By

Title

Dashboards
5 Results • Sorted by Relevance ▾


TITLE	DESCRIPTION
TA - R09 - MT1 - Prospects	This Dashboard includes a list of ALL Prospective Volunteers in ...
TA - R09 - MT1 - Leaders	This Dashboard includes NO information on Reimbursements an...
TA - R09 - MT1 - Certifications	
TA-R09-MT1 Session Management Dashboard	
TA - R09 - MT1 - Supervisor	This Dashboard includes Reimbursement information and is avail...

Dashboards - Layout

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

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

Dashboard
TA - R09 - MT1 - Leaders
This Dashboard includes NO information on
As of Jul 1, 2023 11:20 PM-Viewing as Shawn Logu

District
All

7. Filter

Volunteers

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

Results Box
Don't click in the Box!

8. View Report

View Report (TA - R09 - MT1 - ...)

Reports

Overview - Reports

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

Tip Sheets – VP02.08 – Run a Report, Also by specific topics

Other Useful Split State Reports (not found via Dashboards)

Split State (SSx) Reports [\[Global Search Keyword\]](#)

- All Sites (including Inactive Sites) [\[SSx sites\]](#)
- Efile & Flash Reports (4) [\[SSx efile or SSx flash\]](#)
- Reimbursements (10) [\[SSx reimb\]](#)
 - Most useful / updated – “SSx: All Reimbursement – Current”
- Zip Code Route To [\[SSx zip\]](#)
- Other Volunteer Reports
 - Emergency Contact [\[SSx Emerg\]](#)
 - Years of Service [\[SSx Years\]](#)
 - All Volunteer Roster [\[SSx Roster\]](#)

National Reports – For Special Purposes

National Reports [Search Keyword]

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

- Split-State Mileage Cap [mile or cap]
- TA - All Zip Code Route To [national zip]
- Assignment Specific Reports (SC, ASC, etc.) [coord; specialist; committee, etc.]

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	Total In-Person	Total One Visit Scan	Total Two Visit Scan	Total Drop-off	Total Publish Appo
27	13	0	3	14	2

<input type="checkbox"/> Program: Parent Program ↑ ▾	Program Location: Program Location Name ▾	Program: SIDN ▾	Program: Program ▾	Program: National ID ▾
<input type="checkbox"/> TA-R09-MT1-D02 (1)	HAVRE SENIOR CITIZENS CENTER	S61053230	TA-R09-MT1-D02-S61053230	5950101
Subtotal				
<input type="checkbox"/> TA-R09-MT1-D03 (1)	KALISPELL GATEWAY COMMUNITY CENTER	S61053315	TA-R09-MT1-D03-S61053315	5990106
Subtotal				
<input type="checkbox"/> TA-R09-MT1-D04 (5)	Missoula Public Library (AD HOC)	S61053160	TA-R09-MT1-D04-S61053160	NI0081779
	Western MT Clinic NowCare Southgate Mall	S61053105	TA-R09-MT1-D04-S61053105	NI0081836

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 bottom of the report **screen**
- Other scroll bar moves up and down within the report
- At the bottom are options to change details on the formatted report
- Also at the bottom, is a Horizontal Scroll Bar, which will help you navigate right / left

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

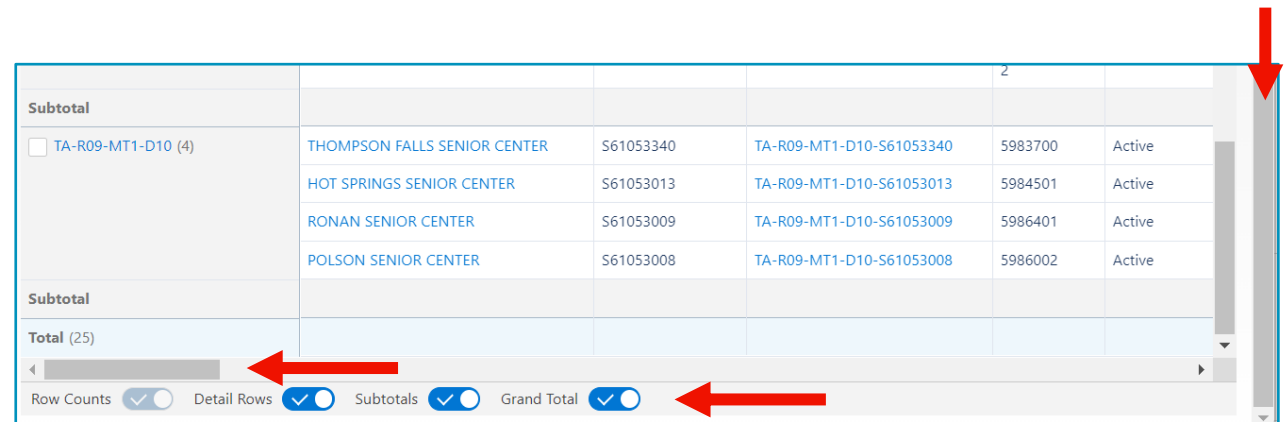
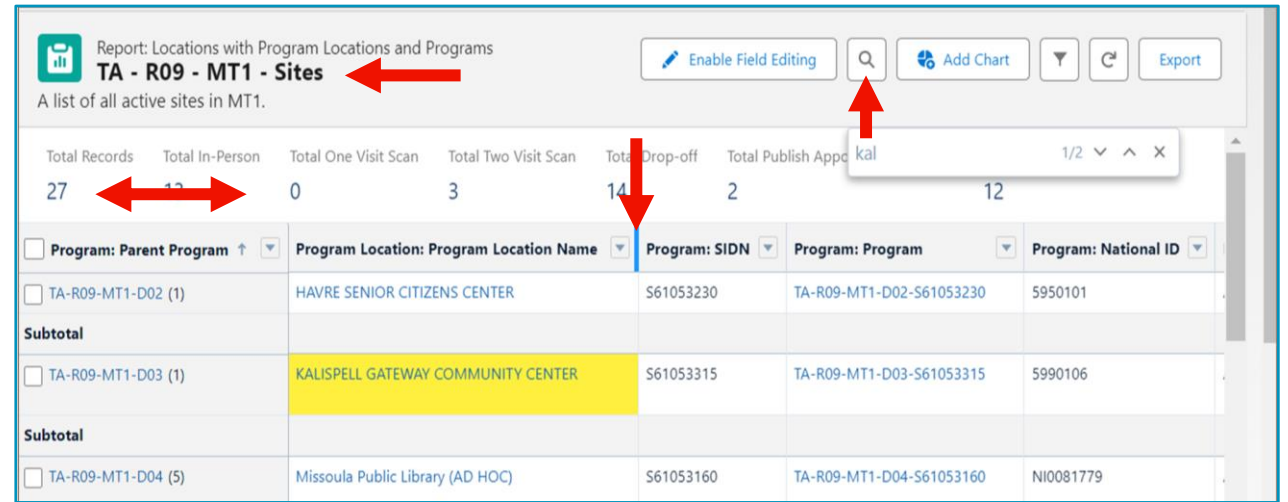
Subtotals

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
 - Turn off “Detail Rows” to see summary





Filtering Portal Reports – Why and How

Why Filter Reports?

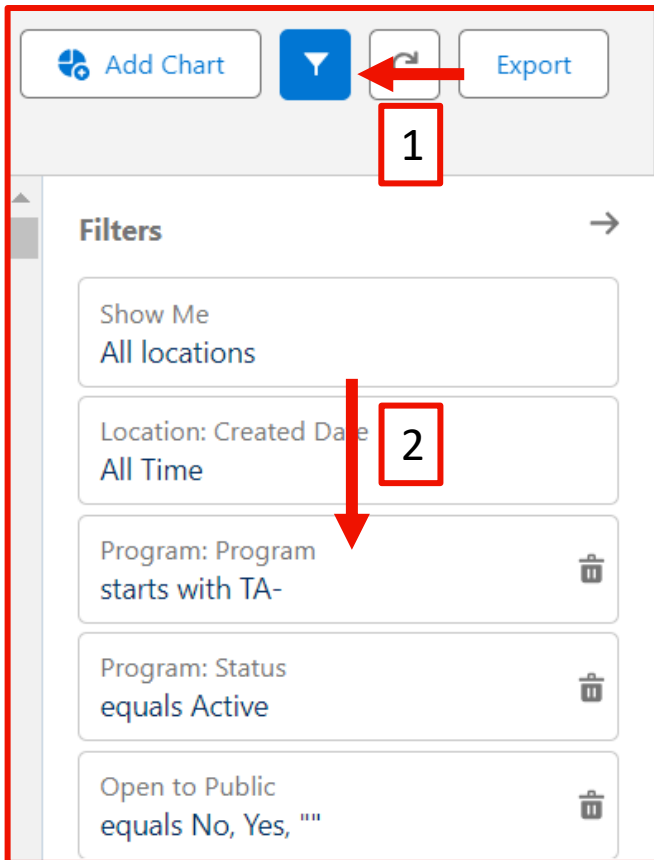
- To limit a report to data of interest (Date, District, status)

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

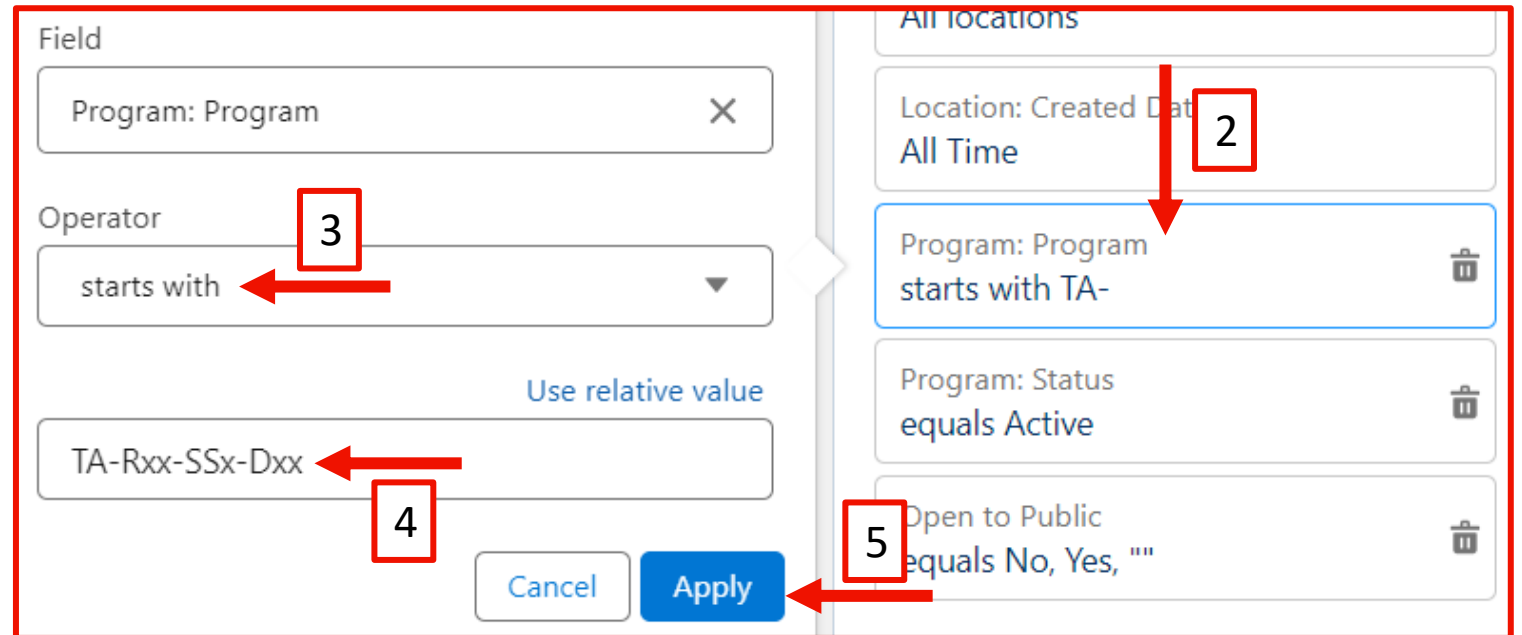


2) Select one of the available Fields that is not locked
(Ex: Program)

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

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

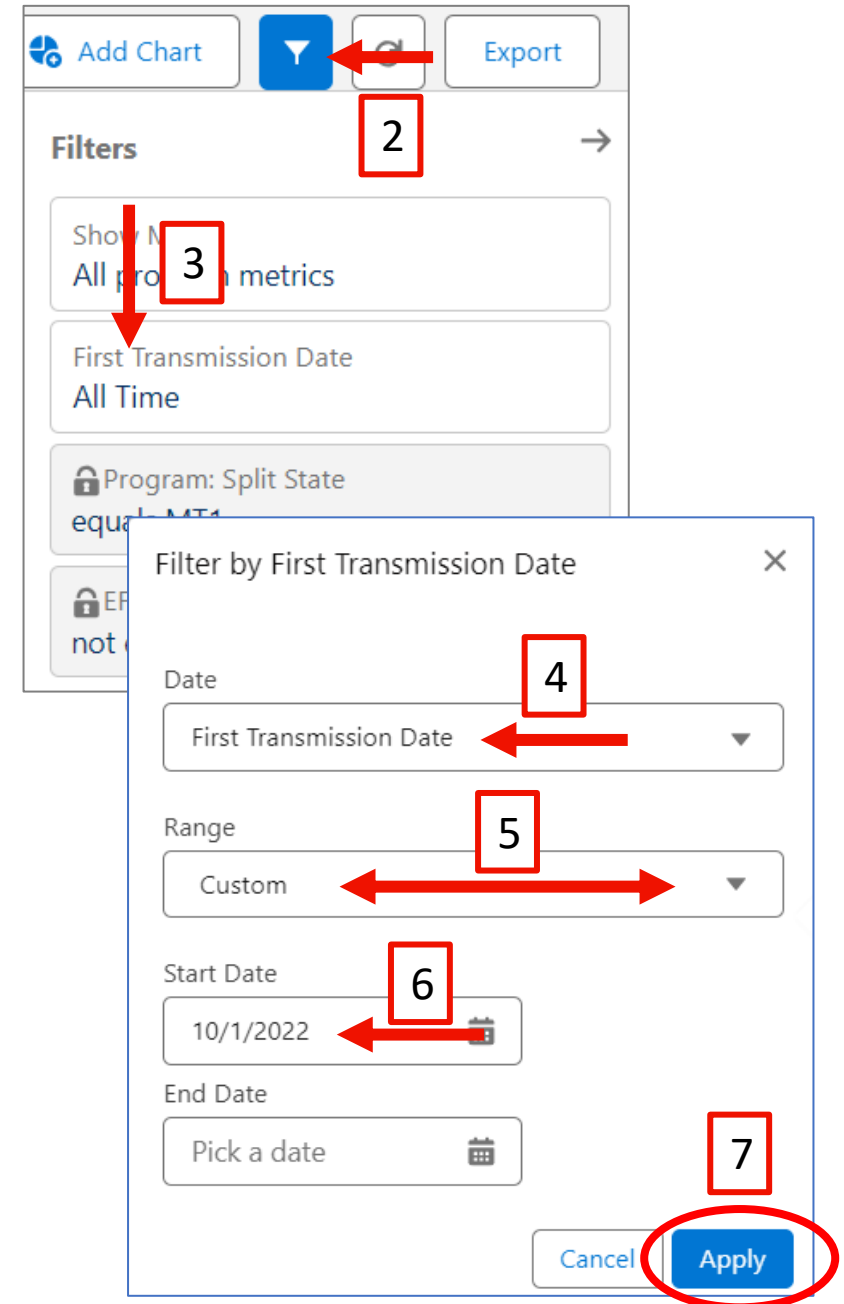
5) Click on "Apply"



Tip Sheet – VP14 (new VP02.09) – How to Filter Reports

Your turn to practice

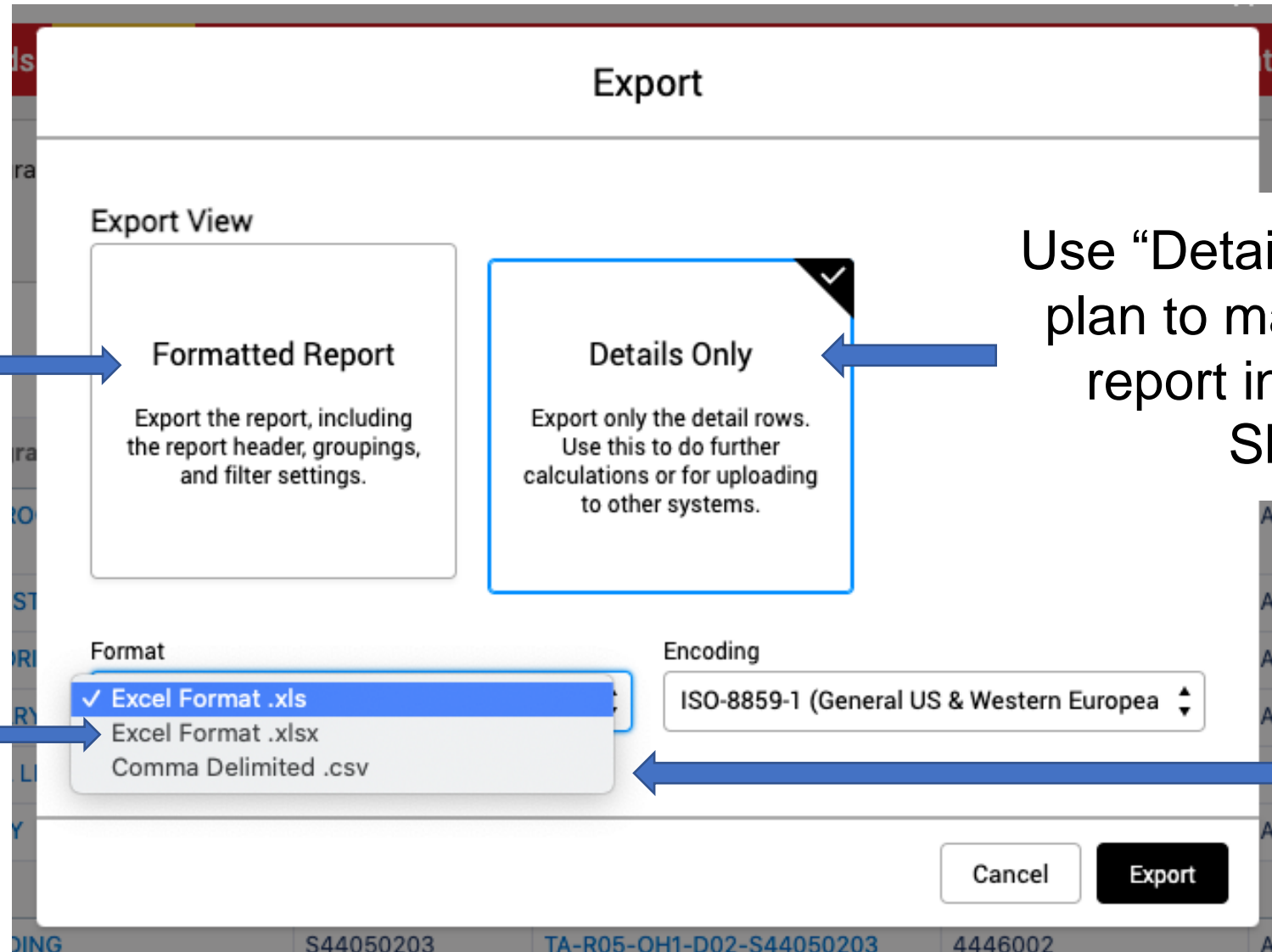
1. In Global Search, enter “SSx efile” to find and run your “SSx Efile Report **Cumulative**” report
2. Click on the Filter tool
3. In the window that opens, click on “First Transmission Date” (no icon)
4. In the window that opens, leave the box labeled “Date” as is
5. In the box labeled “Range”, click on “Custom” from the drop-down list
6. Enter Start Date as 10/1/2022
7. Click “Apply”
8. Resulting report will show two years of eFile data for comparison



Reports – Exporting

“Formatted Report” will look like online report

Excel Format .xlsx is best if importing into Excel or Sheets



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

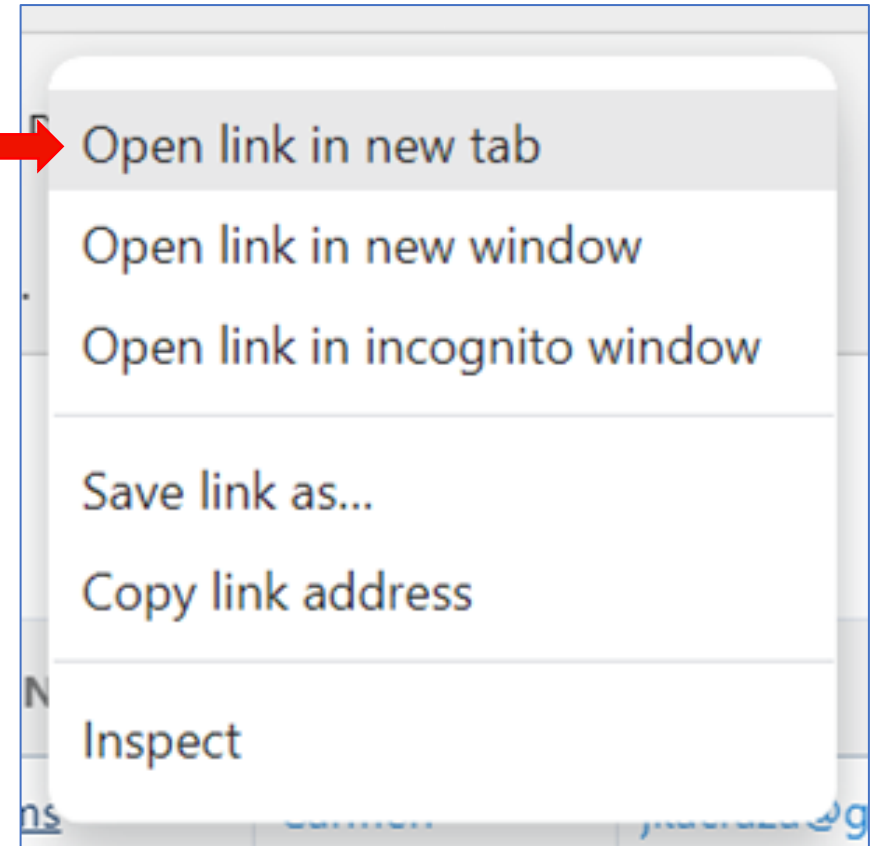
Comma Delimited .csv is best if fields have more than 255 characters

The Right Click Tip - The Problem (1 of 2)

- You have a report with a list of names that you want to step through
 - Clicking on the name takes you to the Contact Record
 - Clicking the Browser Back button takes you back to the report
 - **BUT** it reruns the report possibly changing the order and not remembering your place in the list

The Right Click Trick – The Solution

- Use a **Right Click (*)** on the name and choose “Open link in new tab”
- Then click on the new tab to view or edit the record
- When finished, close the new tab
- The original tab is as you left it and shows your last selection



- * **Control Click** on Apple Macs; **Press** on iPad
- * Mouse with scroll wheel, click wheel while pointing to the hyperlink.

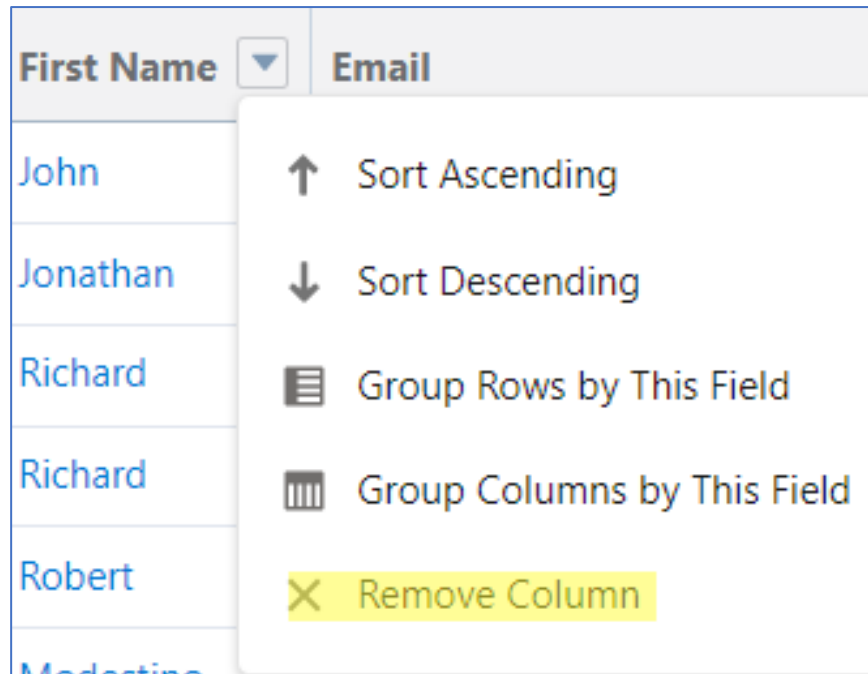
Modifying Reports Presentation (1 of 4)

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 – the first column on most reports
- 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 (2 of 4)

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

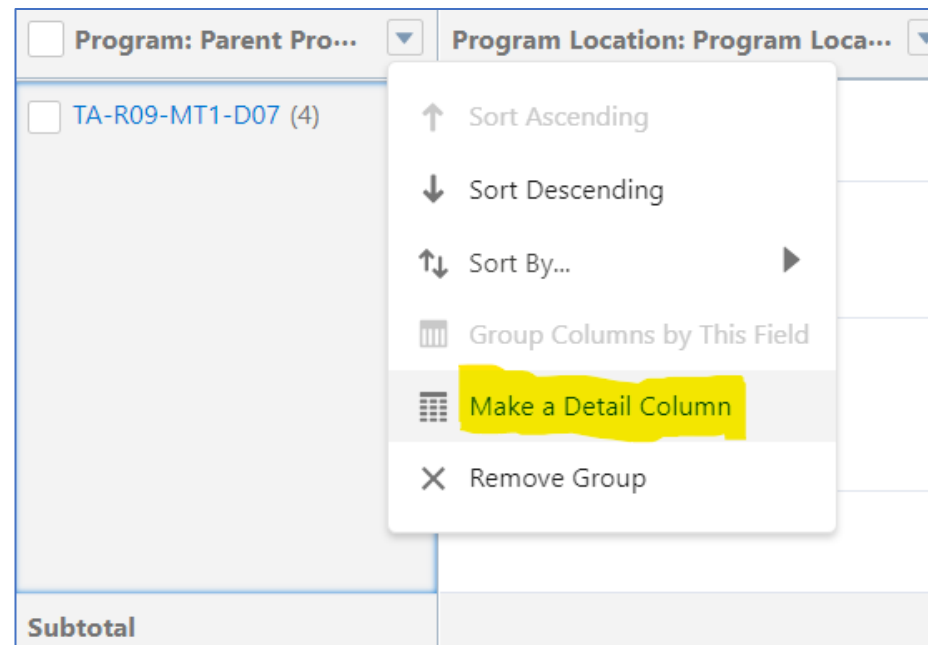


First Name	Email
John	
Jonathan	
Richard	
Richard	
Robert	
Modestine	

- ↑ Sort Ascending
- ↓ Sort Descending
- ☰ Group Rows by This Field
- ☷ Group Columns by This Field
- ✕ Remove Column

Modifying Reports Presentation (3 of 4)

- 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 (4 of 4)

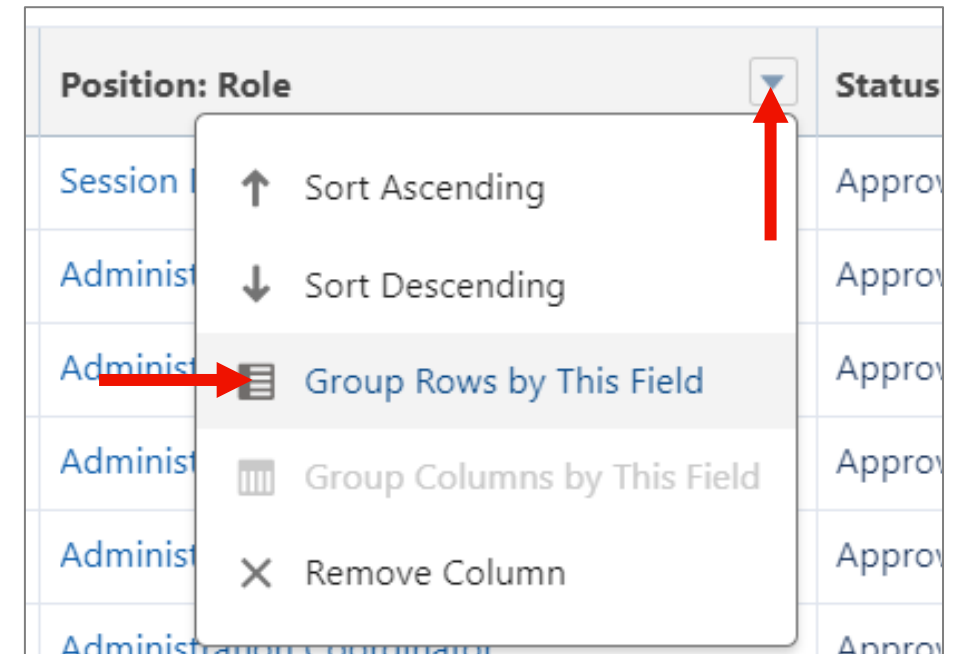
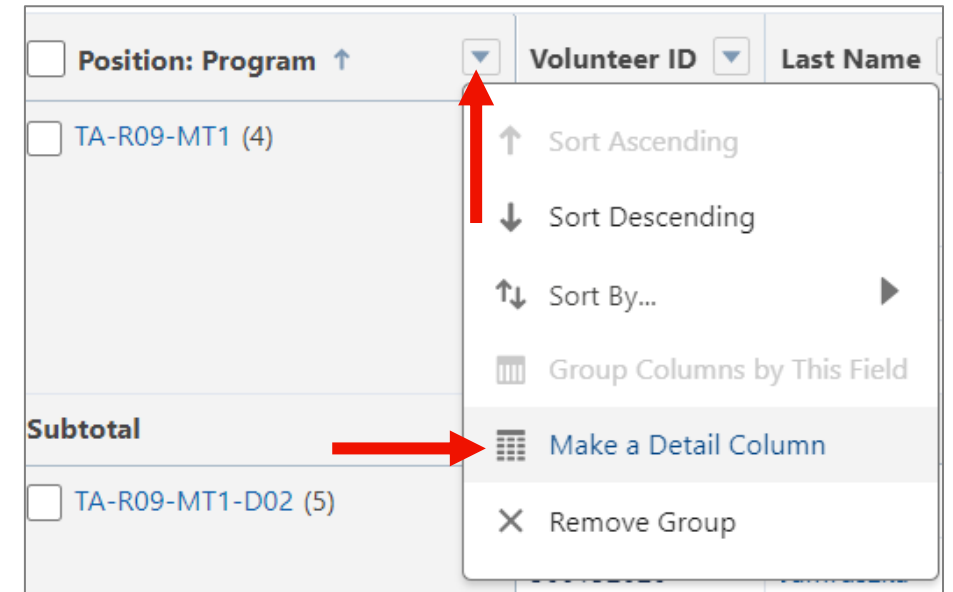
- Create a Group
 - Click on the Down Arrow on the right of the column name you want to Group
 - Click “Group Rows by This Field”

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

- ↑ Sort Ascending
- ↓ Sort Descending
- ☰ Group Rows by This Field**
- ☰ Group Columns by This Field
- ✕ Remove Column

Your turn to practice

1. Run your split state “Volunteers” report (from Supervisor Dashboard)
2. Remove the “Phone” column
3. Make the first column “Position: Program” a “Detail Column”
4. Move to the “Position: Role” column and click on “Group Rows by this Field” (moves to 1st column)
5. Results – volunteer assignments grouped by type
6. Use “Right Click Trick” to open Volunteer records in a new tab, close tab to return to report



IMPORTANT!!

- **Volunteer information is private.**
- As leaders you have access to a large amount of Volunteer personal information from across the Tax-Aide program. It is your responsibility to protect this information.
- **Be aware that no volunteer information may be provided to any outside entity (including IRS SPEC) unless required and approved by National.**

Questions?



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