

Dashboards and Reports



Updated 11/1/2024

DC and AC Portal Resource Guide

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Important Notes Before You Start

- If you have any questions, reach out to your ADS for clarification. Your ADS's job is to support you in administrative and Portal tasks.
- All modules are located in one of two folders:
 - The .pdf versions are located in the Orange Volunteer Portal folder.
 - The PowerPoint versions are available to ADSs in the ADS folder.
- For more information on these topics, go to the Libraries tab and click on the orange Tip Sheet icon. Select the appropriate subfolder to locate the desired Tip Sheet.
 - VP02 Introduction to the Portal Tip Sheets in the portal library cover all Dashboards and Report procedures.
- You may see volunteers with other AARP Foundation programs in the Program Volunteer box and Assignments from these programs (i.e. Driver Safety, States, etc). Do NOT do anything with these. Only work with Tax-Aide.
- In the following slides, red and blue arrows indicate items of interest and actions that should be taken.
- Feedback – Please send any comments, corrections and suggestions for future topics using Submit A Request:
 - Select Operations; Operations Topic - Volunteer Portal and then Other



SECTION 1

Dashboards

Dashboards Overview

See Tip Sheet VP02 – Select A Dashboard



Split State Dashboards

- Each Dashboard contains links to reports related to the Dashboard
 - For example, the Leaders Dashboard contains links to the Volunteer and Sites reports
- Allows quick access to frequently used reports with or without filtering
- Allows filtering reports by District or other fields

Finding a Dashboard

Screenshots are displayed on the following slides.

Find a Dashboard you **have** used “recently” (2 months or so).

- Click the Dashboards tab
- Click on the link for the desired Dashboard


Find a Dashboard using Global Search.

- Type your Split State (SSx, ex. NH1, FL5, etc.) in the Global Search box (top center), click Enter
- Select Dashboards from the left menu list
- Choose your desired Dashboard from the results

Find a Dashboard in your Recent List

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

Dashboards
Recent ←
17 items

Search recent dashboards... 

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Create...	St
Recent	TA - R09 - MT1 - Leaders	This Dashboard includes NO information on Reimbursements and is available to Regional Leaders.	Tax-Aide: Leaders	<input type="text"/>	11/1/2019, 4:00 PM	
Created by Me						
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	<input type="text"/>	11/1/2019, 4:02 PM	
All Dashboards						
FOLDERS	TA - R09 - MT1 - Supervisor	This Dashboard includes Reimbursement information and is available to State Leaders that have Supervisory responsibility.	Tax-Aide: Supervisors	<input type="text"/>	11/1/2019, 4:03 PM	
All Folders						
Created by Me	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	<input type="text"/>	6/29/2017, 8:49 AM	
Shared with Me						

Find a Dashboard Using Global Search



1. Enter Split State in Global Search box

2. Limit Results to Dashboards

- Home
- Dashboards
- Reports
- Contacts
- Manage Reimbursements
- Orders
- Libraries
- Training
- Volunteers

3. Click blue link for desired dashboard

Search Results	
Dashboards	
5 Results • Sorted by Relevance ▼	
TITLE	DESCRIPTION
TA - R05 - OH1 - Certifications	
TA - R05 - OH1 - Prospects	This Dashboard includes a list of ALL Prospective Volunteers in Active, On
TA-R05-OH1 Session Management Dashboard	
TA - R05 - OH1 - Leaders	This Dashboard includes NO information on Reimbursements and is availa
TA - R05 - OH1 - Supervisor	This Dashboard includes Reimbursement information and is available to S

Available Split State Dashboards

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

Dashboards - Layout

It may be necessary to Refresh the page to see updated results. This can only be done once per minute. Clicking on the blue View Report hyperlink automatically brings you to the refreshed report.

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

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 \(MT1: Prospects - Active\)](#)

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 \(MT1: Prospects - On ...\)](#)

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 \(MT1: Prospects - No ...\)](#)

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 \(MT1: Volunteer - Leav...\)](#)

Using Dashboards

Use Drop-down menu to filter for district

Link for Report at bottom of each column

Dashboard
TA - R05 - OH1- Supervisor
This Dashboard includes Reimbursement information and is available to State Leaders that have Supervisory responsibility.
As of Jun 20, 2022 3:33 PM-Viewing as Robin Murphy

District

All

- ✓ All
- contains D01
- contains D02
- contains D03
- contains D04
- contains D05
- contains D06

TA-R05-OH1-D01-S44050101	7
TA-R05-OH1-D01-S44050102	9
TA-R05-OH1-D01-S44050103	8
TA-R05-OH1-D01-S44050105	8

[View Report \(TA - R05 - OH1 - Volunteers\)](#)

Sites

Program: Parent Program ↑	Record Count
TA-R05-OH1-D01	6
TA-R05-OH1-D02	3
TA-R05-OH1-D03	5
TA-R05-OH1-D04	9
TA-R05-OH1-D05	7
TA-R05-OH1-D06	6
TA-R05-OH1-D09	13

[View Report \(TA - R05 - OH1 - Sites\)](#)

SECTION 2

Reports

Reports Overview

See Tip Sheet VP02 – Run a Report



There are many reports created for many different purposes

- Split State Reports via Dashboards – These are the most commonly used reports by DCs and ACs
- Other Split State Reports – not on Dashboards

Finding a Report Not in a Dashboard

There are two main ways to locate a report in the Portal.

- Find a Report you have used “**Recently**” (2 months or so)
 - Click the Reports tab, then on the Report link to run it
 - This is a useful means to locate a favorite report without searching every time.
 - Note that reports in the “Recent” list will not be filtered
- Find a Report using **Global Search**. Several reports are not found using Dashboards
 - Use the Global Search box to find these reports
 - Type your Split State (SSx and a keyword) in the Global Search box (top center), Enter
 - Select the category “Reports” from the **left** Search Results list
 - Searching without the keyword will give all split state reports

Useful Split State Reports

There are several useful Split State reports in addition to the Split State reports found through the Dashboards which are useful to District and Administration Coordinators.

The recommended search string is listed in brackets after the report name.

- Efile and Flash Reports (4 per split state) [SSx efile or SSx flash]
 - Current Year or Cumulative data for active sites
- Reimbursements (7 per split state) [SSx reimb] – District Coordinators only (ACs will not get this data)
 - Most useful / updated – “SSx: All Reimbursement – Current”
- Zip Code Route To [SSx zip]

Useful Split State Reports, cont'd

Other Useful Volunteer Reports

- Emergency Contact [SSx emerg]
 - All volunteers with phone and emergency contact
- Years of Service [SSx years]
 - Lists each volunteer once with contact info and assignments
- All Volunteer Roster [SSx roster]
 - Same as Years of Service WITHOUT assignments

Using Global Search to Find a Split State Report

When searching for a report, **avoid** using the full report name. Use the split state and search string consisting of a word or part of a word in the report title instead, i.e. “NH1 Leader”.

The search function is **literal**, not intuitive, for reports. “Year” will give more results than “Years”. “SS-x” will give no results, as this format is not used in the portal.

When searching for a report using the full program name, **include spaces** before and after the hyphen. “TA - R01 - NH1 – Leaders”
NOT “TA-R01- NH1-Leaders”

The screenshot shows the AARP Foundation Tax-Aide search interface. At the top, the search bar contains the text "mt1 years". A red box highlights the search bar with the text "SSx and Keyword". Below the search bar, the navigation menu includes "Home", "Dashboards", "Reports", "Contacts", "Manage Reimbursements", "Orders", "Libraries", and "More". The "Search Results" tab is circled in red. The search results show one result: "TA - R09 - MT1 - Years of Service". The "Reports" category is selected in the left sidebar.

REPORT NAME	DESCRIPTION
TA - R09 - MT1 - Years of Service	

Report Layout

Click on Column Header to Sort OR To Change Width

Filter



Report: Locations with Program Locations and Programs

TA - R09 - MT1 - Sites

A list of all active sites in MT1.

Report Name

Enable Field Editing



Add Chart



Export

Search

Kalis 1/2 v ^ x

Total Records 26
Total In-Person 12
Total One Visit Scan 0
Total Two Visit Scan 3
Total Drop-off 13
Total Publish Appointments Online 1
Total Active Waitlist 12

Number of Records

<input type="checkbox"/> Program: Pa	am Location: Program Location Name	<input type="checkbox"/> Program: SIDN	<input type="checkbox"/> Program: Program	<input type="checkbox"/> Program: National ID	<input type="checkbox"/> Program: Status	<input type="checkbox"/> Open Date
<input type="checkbox"/> TA-R09-MT1-D02 (1)	HAVRE SENIOR CITIZENS CENTER	S61053230	TA-R09-MT1-D02-S61053230	5950101	Active	2/5/2024
Subtotal						
<input type="checkbox"/> TA-R09-MT1-D03 (1)	KALISPELL GATEWAY COMMUNITY CENTER	S61053315	TA-R09-MT1-D03-S61053315	5990106	Active	2/1/2024
Subtotal						
<input type="checkbox"/> TA-R09-MT1-D04 (4)	Missoula Public Library	S61053160	TA-R09-MT1-D04-S61053160	NI0081779	Active	2/5/2024
	Clearwater Credit Union Headquarters	S61053100	TA-R09-MT1-D04-S61053100	5980101	Active	2/1/2025

Report Layout, cont'd

This slide reviews the layout on the bottom of the Reports display

- Notice two scroll bars on the right side of many reports (hard to use in some browsers)
- Use the far right scroll bar to get to the bottom of the Report Screen
- The Horizontal Scroll Bar helps to navigate right/left
- At the bottom are options to change details on the formatted report

Navigate to
bottom of
screen



					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)					

Horizontal Scroll Bar

Options to turn off Details

Row Counts Detail Rows Subtotals Grand Total

Filtering Reports – Why and How

Why Filter Reports?

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

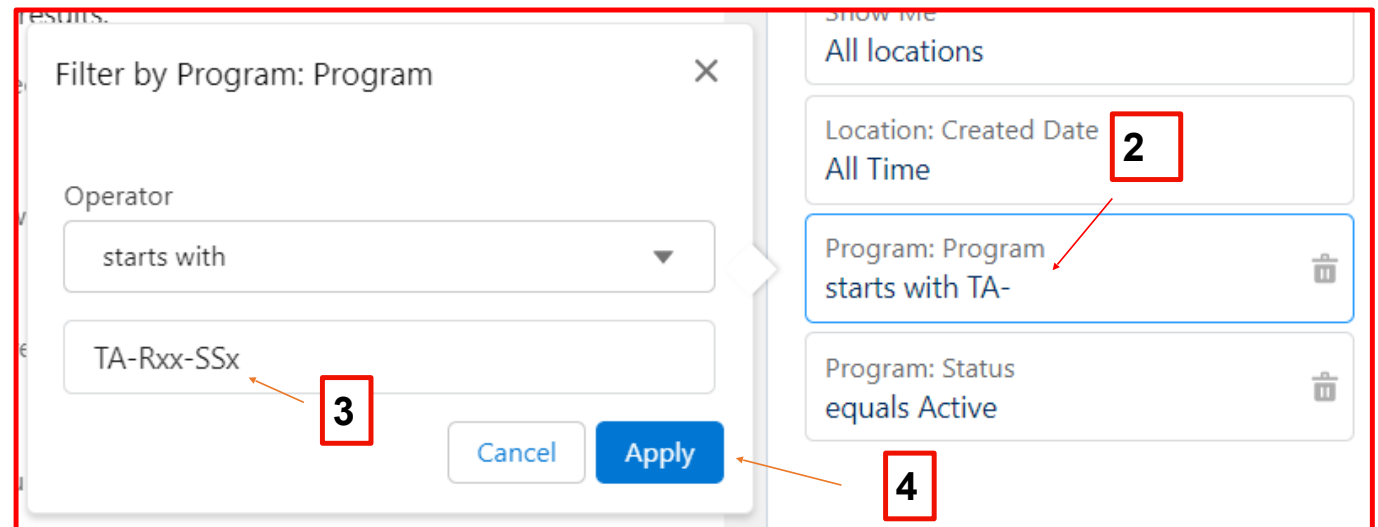
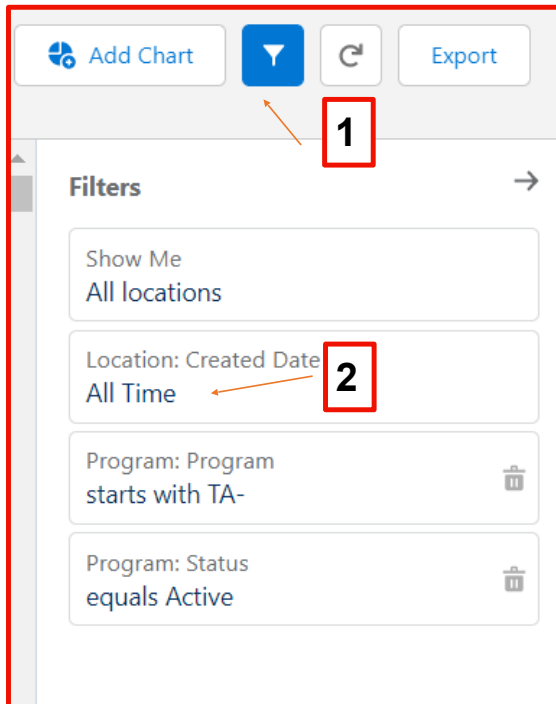
Tips for Filtering Reports

- **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 (Program or Date fields)
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”.

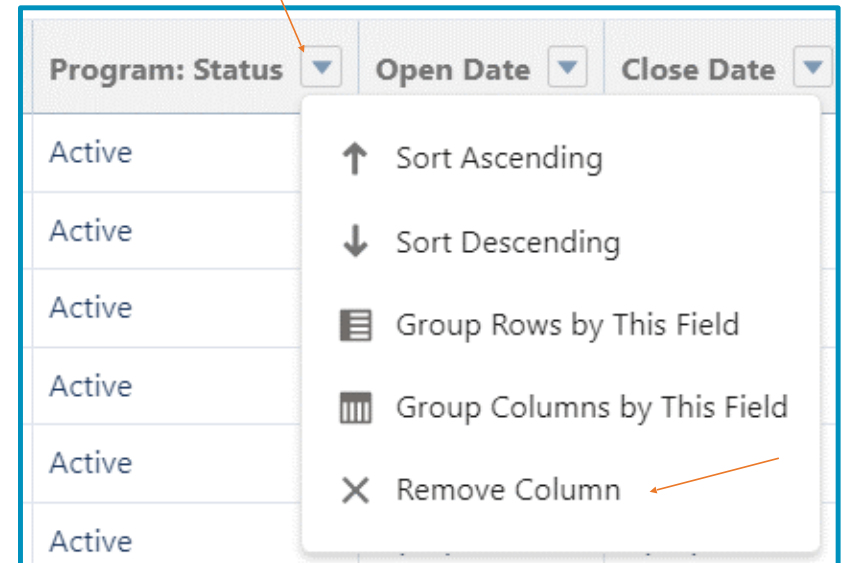


Report Tips - Modifying a Report Layout

- If a report does not present the data in a way you want to see it, you may want to modify the report layout
- You can rearrange the data in two ways:
 - Delete columns
 - Change data groupings – the first column on most reports
- There are limitations:
 - The report must include all the data you want
 - You cannot add data to the report
 - You cannot save the modified report to run again

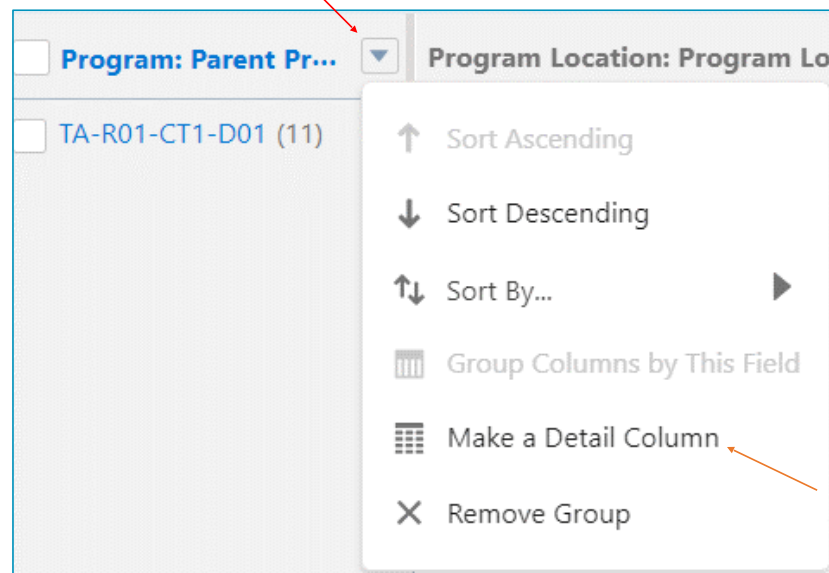
Report Tips - Modifying a Report Layout, cont'd

- How to delete columns of data in a report
 - Click on the Down Arrow to the right of the column name
 - A list box opens
 - Click on “Remove Column”



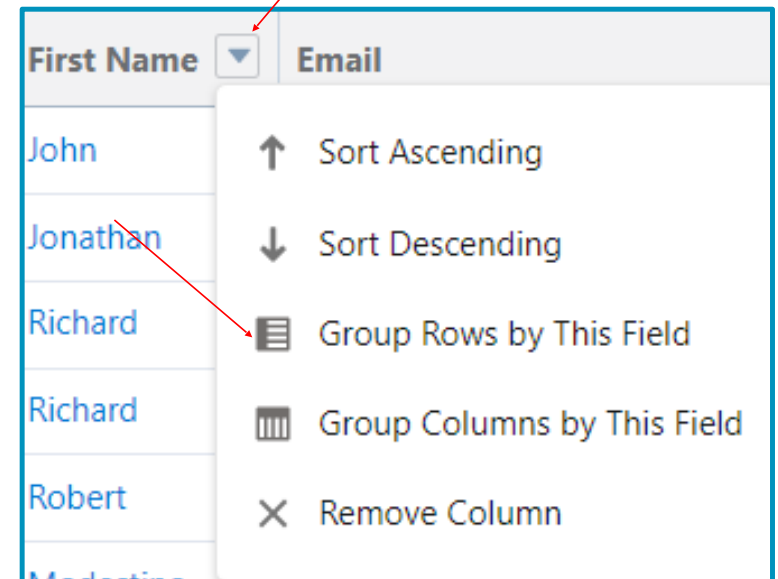
Report Tips - Modifying a Report Layout, cont'd

- Remove a “Grouping” and keep the column values
 - The “Grouped Column” is the first column on a report
 - Click on the Down Arrow to the right of that column name
 - Click “Make a Detail Column”



Report Tips: Modifying a Report Layout, cont'd

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



Reports – Exporting

You need to Export a report in order to print, modify, and or save for records

Formatted Report will look like online report

Details only – **Excel Format (.xlsx)** is best if importing into Excel or Sheets

Export

Export View

Formatted Report
Export the report, including the report header, groupings, and filter settings.

Details Only ✓
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

- ✓ Excel Format .xls
- Excel Format .xlsx
- Comma Delimited .csv

Encoding
ISO-8859-1 (General US & Western Europe)

Cancel Export

Use "Details Only" if you don't want to use a report's formats

Comma Delimited (.csv) is best if cells have more than 255 characters

The Right Click Trick - The Problem

- You have a report with a list of names that you want to step through in Portal records – e.g., Certification or LOA reports
 - 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

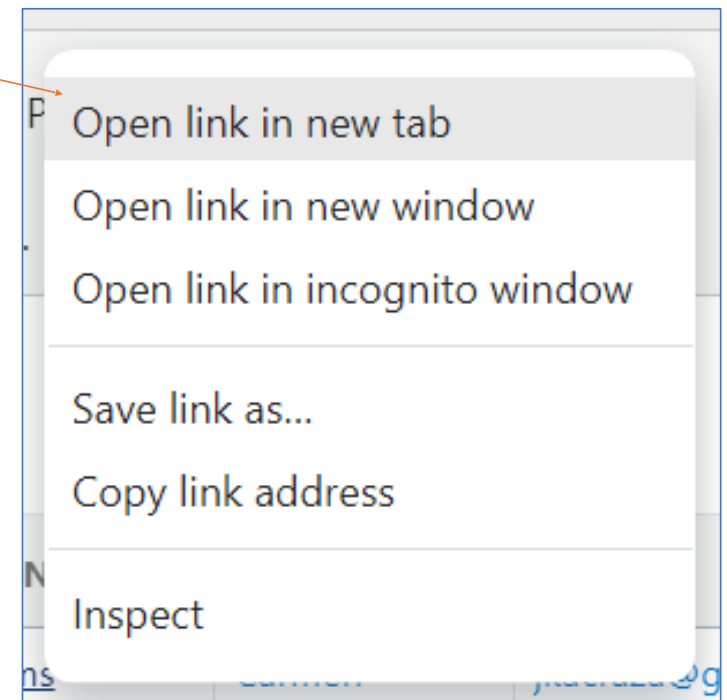
The Right Click Trick – The Solution

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

***Control Click** on Apple Macs

***Mouse on Windows** - Right click

***Mouse on Windows with scroll wheel** - Right click wheel while pointing to the hyperlink



SECTION 3

Important Notice

Personally Identifiable Information

IMPORTANT!!

Volunteer information is private.

Leaders have access to volunteer's personal information for their area (district, etc)

No volunteer information may be provided to any outside entity (including IRS SPEC) unless required and approved by National.

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