Reports and Dashboards

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Getting Started with Reporting

Views vs Reports

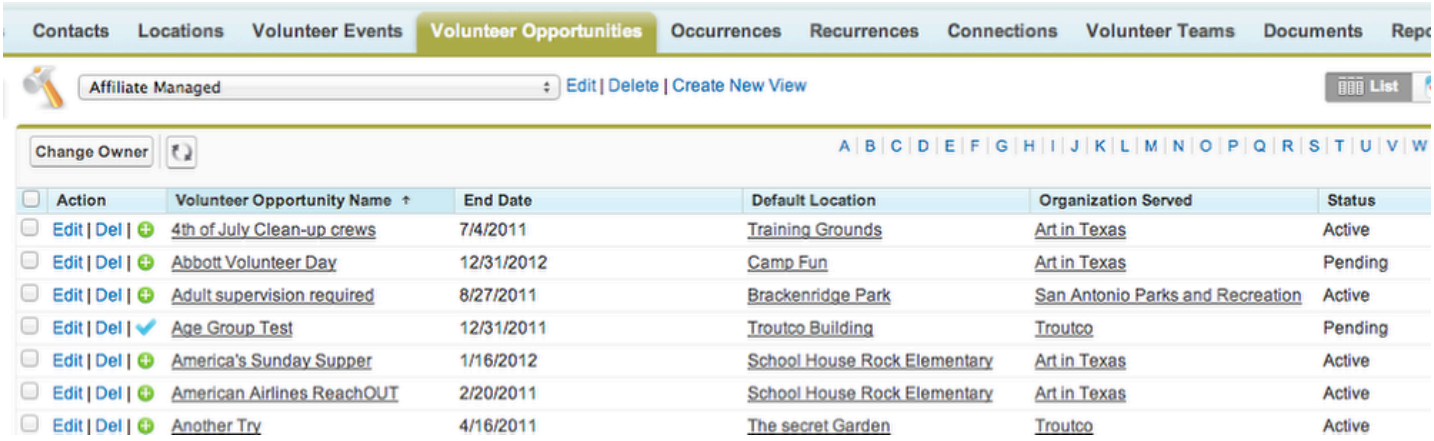
So far we've talked about "Views" as a way of looking at multiple records of data at once.

But Views have limitations.

The deepest view of data is found in reports.

What are the differences?

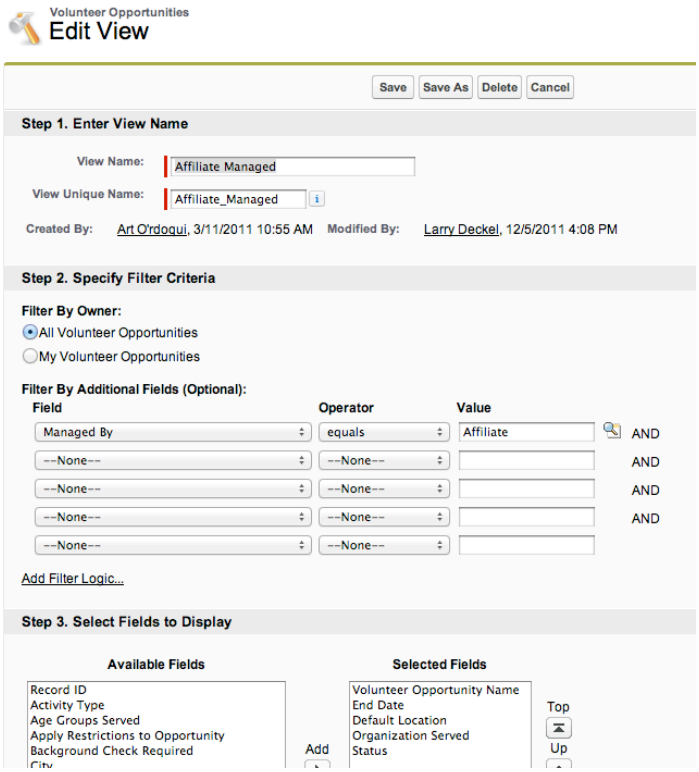
Views



Action	Volunteer Opportunity Name	End Date	Default Location	Organization Served	Status
Edit | Del	4th of July Clean-up crews	7/4/2011	Training Grounds	Art in Texas	Active
Edit | Del	Abbott Volunteer Day	12/31/2012	Camp Fun	Art in Texas	Pending
Edit | Del	Adult supervision required	8/27/2011	Brackenridge Park	San Antonio Parks and Recreation	Active
Edit | Del	Age Group Test	12/31/2011	Troutco Building	Troutco	Pending
Edit | Del	America's Sunday Supper	1/16/2012	School House Rock Elementary	Art in Texas	Active
Edit | Del	American Airlines ReachOUT	2/20/2011	School House Rock Elementary	Art in Texas	Active
Edit | Del	Another Try	4/16/2011	The secret Garden	Troutco	Active

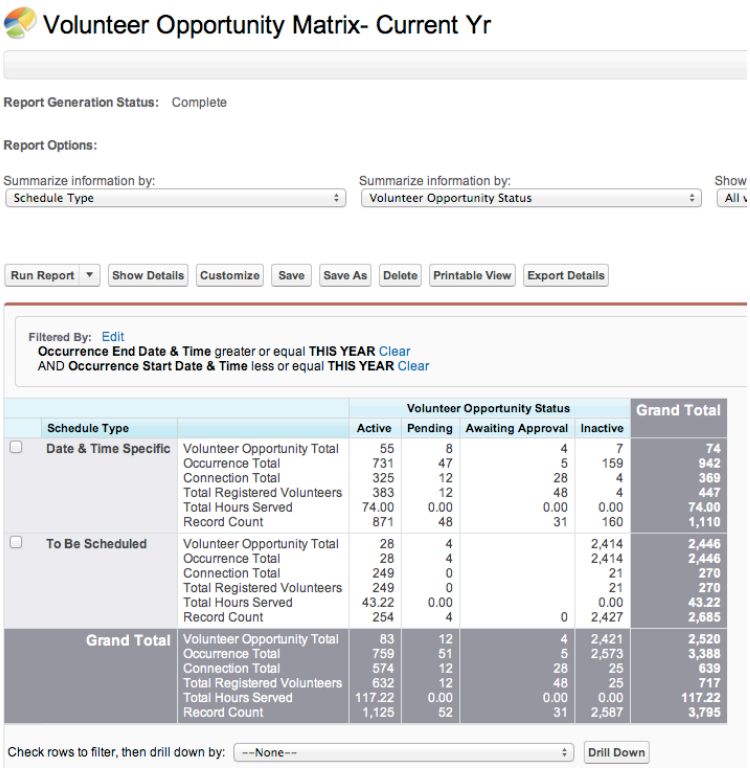
Views are a way to search and see a number of records at once. You are able to filter records, and select which fields you want to appear in the 'view'

In this view, we are looking at Volunteer Opportunity Records that have been filtered to show just affiliate-managed opportunities.



A view can filter and display any fields that are in that ONE object.

To get deeper information about data - we use reports.



Reports allow you to do far more than views:

- You can bring in data from more than one object at once (This report combines fields from Volunteer Opportunities, Occurrences and Connections) all together.
- You can group data based on specific fields to make information more meaningful
- You can perform records and mathematical calculations based on any of the numerical data in the system.
- You can create visual views of summarized data through Dashboards
- You can export the data into excel or a .csv file in order to analyze it further!

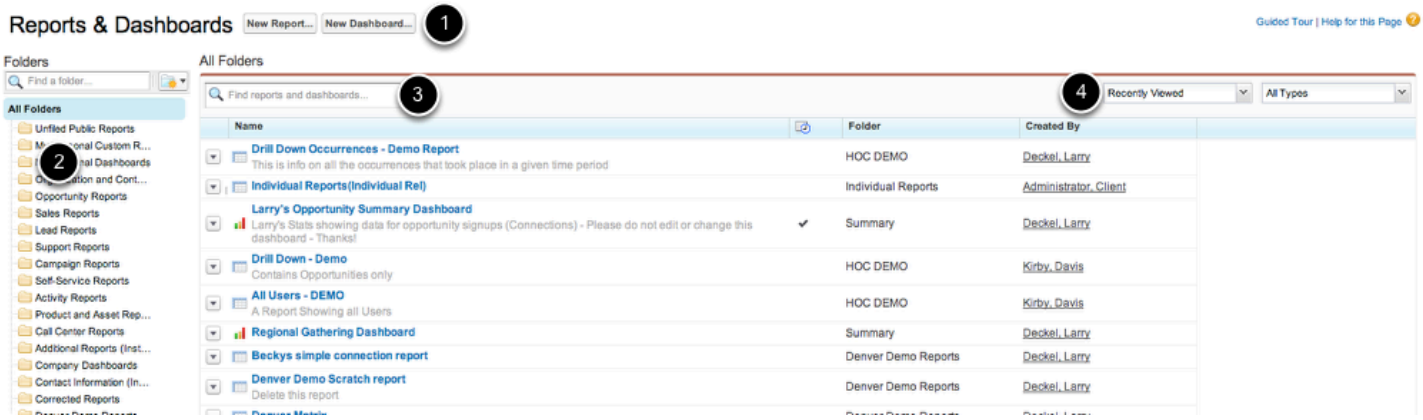
Introduction to Reporting

One of the most powerful features in HOC is it's ability to do to the minute accurate reporting. In this lesson, we are going to take a quick tour of the Object: Reports.

As of Winter 12 release -- Salesforce has combined both Reports and Dashboards access into one tab marked Reports.

(There is still a 'Dashboards" tab available -- but its somewhat redundant now.

The Reporting Object



1. Creating New Reports and Dashboards is done here - at the top of the object.

2. All folders that reports are stored in here. You can do a 'quick find' for a specific folder by using the magnifying glass at the top of the column. Clicking on a specific folder will put the list of reports in that folder in the section to the right.

3. You can search for reports and dashboards quickly using this search lookup. (Note: If you don't have "All Reports" selected in the folders section to the left, it will only find results in the specific folder you've selected.

4. If you don't do a search -- the default list you see will be "Recently Viewed" and "All Types"

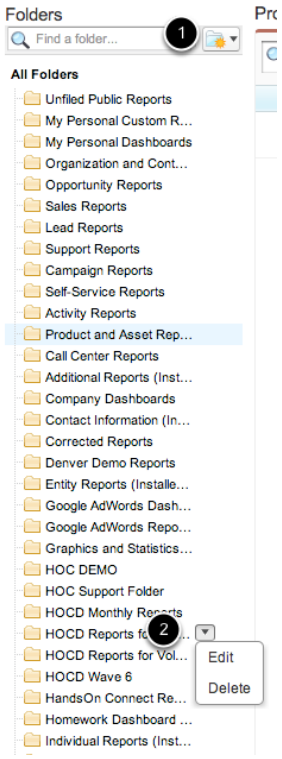
You can select "All Items" or "Reports I created" as a search filter as well.

The "Type" picklist allows you to view ALl types, just REPORTS, or just DASHBOARDS>

5. This tab will show you the most recent reports used.

SalesForce comes with a number of reports already built into the system. Some of them will mean something to your organization, some of them will not. Remember that Salesforce calls Organizations: Accounts. Remember, as well, that there is a big difference between a opportunity in Salesforce (which is a Sales thing) and a Volunteer Opportunity.

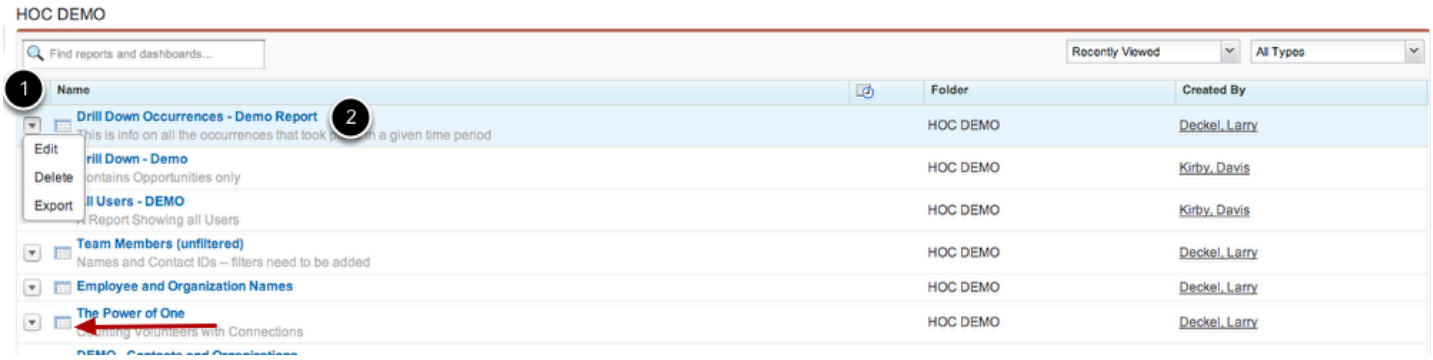
The Folder Section



1. The dropdown at the top allows you to create a new reports folder or new dashboard folder.

2. If you select an existing folder, a drop down appears to the right. Click on the triangle to edit the folder properties or delete the folder.

The Report Section



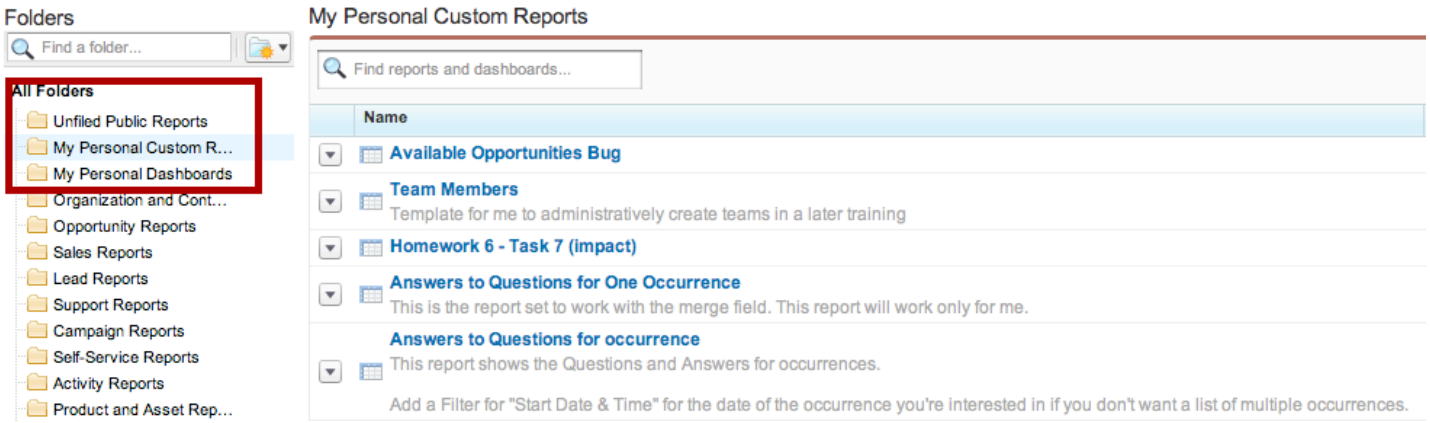
The report section shows you the individual reports that match your search criteria or folder selection (from the left folder list)

1. The picklist to the left of the report name drops down when you click on it. It allows you to Edit, Delete or Export the report directly.

2. Clicking on the Report Name will RUN the report.

The little icons to the left of the item denotes whether its a report (Looks like a little spreadsheet) or a dashboard (looks like a little chart)

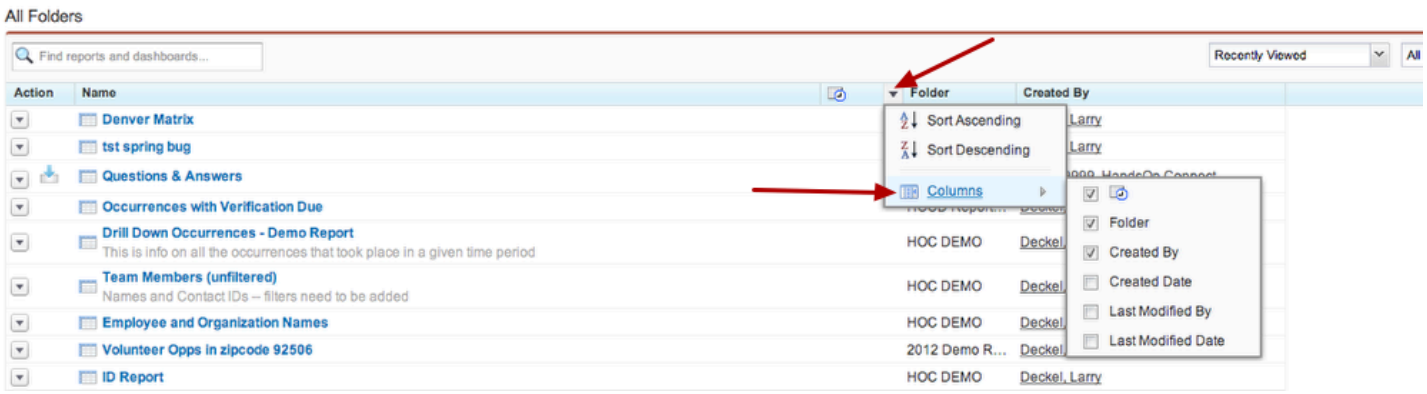
There are three 'special' folders that every user has access to:



Unfiled Public Reports is a place to stash reports that you are experimenting with and aren't sure where they should be stashed. It's a temporary holding area until you decide what folder you ultimately think I report should live in.

My Personal Custom Reports and My Personal Dashboards are places to store reports that are for your use only. This way you don't clutter up the folders shared with other users with reports you intend only for your own personal use. No one else can access the reports or dashboards stored in your 'personal folders'

You can customize what columns appear in the reports tab by clicking on a column heading



Columns can be resized by dragging the column width.

You can also control what columns appear and what order they are sorted by, by clicking the dropdown arrow and choosing a sort, and/or click columns to choose which columns of information appear in your reports.

HandsOn Connect Reports that are 'Ready to Run"

HandsOn Connect Standard "Starter" reports

HandsOn Connect has a number of reports included.

For most HandsOn Connect customers the reports are found in the following folders:

- **HOC Basic Reports**
- **HOC Custom Button Reports**
- **HOC Managerial Reports**
- **HOC Monthly Reports**
- **HOC Sharing Portal Reports ***
- **HOC Support**

* The Folder "HOC Sharing Portal Reports was added in late December, 2018. It contains six reports that serve as starter reports for partners in the sharing portal and replaces an older folder called "Partner Reports". If you were a customer before January, 2019 and wish to have the sharing portal reports and its folder added to your instance of HandsOn Connect - please open a support ticket and we will add these reports to your instance.

Customers who had an existing instance of Salesforce when they added HandsOn Connect - have the same reports as listed below - but they will be organized in different folders. Additional folders that hold some of these reports may include:

- HOC 2.12 Release
- HandsOn Connect Reports
- HOC Entity Reports
- HOC Graphics and Statistics
- HOC Import Templates
- HOC Referrals and Service Hours
- HOC Reports (self Report)
- HOC Summary
- HOC Team Reports

Just search for the reports mentioned below by name, and you should find them in your instance. You can move the reports into the folder organization schema listed below if desired.

HOC Basic Reports

# of Connections per vol (Calendar Yr)- Shows the number of connections grouped by Contact based on the start date of the connection occurring this Calendar Year.

Connections Overview (Current Year) - Shows all connections grouped by VO Type, Volunteer Opportunity and Occurrnence for the current Calendar Year and provides basic information such as opportunity coordinator, status, attendance numbers, and hours served.

Connections Verifications Due - Shows the connections that are confirmed and have 'please verify' for the attendance status)

Contact's Skills and Interests - Shows contacts that have identified a skill set and what impact areas they are interested in along with whether or not they accept invitations and contact information. (formerly known as *Individual Reports (interests & Skills)*

Contacts - Shows hours served, contact information and other demographic information for all contacts in the system grouped by the Account Name.

Feedback Reports (Projects) - Shows the occurrence and connection information filtered for those that have provided a feedback rating.

Grand Summary (Current Year) - Shows the Number of Volunteer Opps, Occurrences, Connections, hours Served, and Guest Hours Served grouped by Schedule Type and Project Type for all projects and activities. Filtered by Occurrence= Active, Attendance Status NOT EQUAL to Decline, Canceled, or Not Attended.

HOC Skills - Shows all the skills in HandsOn Connect grouped by category.

Number of Accounts Created by Month - Shows the number of accounts created each month

Number of Contacts created by month - Shows number of contacts created by month

Occurrence Overview Report - Shows all occurrences grouped by volunteer opportunity. Information displayed includes opportunity coordinator information, attendance numbers, hours served.

Organizations Report - Shows Status, Impact Area, Type, Primary Contact, Addresses, and other related information for all the organizations in your system and grouped by type.

Orgs with Opportunities Avail in Search - Shows the number of organizations with Active Volunteer Opportunities with Active, Upcoming occurrences and the total of each.

Total Active Future Project Occurrences - Shows the number of ACTIVE upcoming Date & Time specific occurrences and To Be Scheduled occurrrences that are still open.

Unverified Self-Reported Hours - Lists all Connections where hours have been self-reported by volunteers, but not yet verified.

Volunteer Demographics 1 - Shows demographics for Gender, Ethnicity/Race, and Person with Disability. Great for Dashboard chart for demographics.

Volunteer Demographics 2 - Shows demographics for Education Level, Marital Status, and Employment Status. Great for Dashboard chart for demographics.

Volunteer Leaders Still Needed - Shows the upcoming occurrences, grouped by Volunteer Opportunity, that are in need of a volunteer leader, along with the Volunteer Opportunity name, location, and start date.

Volunteer Opportunity Matrix- Current Yr - Shows the Number of Volunteer Opps, Occurrences, Connections, Hours Served, and Guest Hours Served grouped by Schedule Type and Project Type for all projects and activities. Filtered by Occ= Active; Attendance Not Equal to Decline, Canceled, Not Attended.

Volunteer Opportunity- Summary Report - Shows the Managing Organization, Total Occurrences, Total Connections, Total Attended, and Total hours served for each volunteer opportunity in the system

Volunteer Orientation & Connection - Shows the Volunteers that have completed orientation and if they have any connections

Volunteer Team Captains - Shows the contact information for Volunteer Team Captains and basic information on the # of members, Team Hours Served

Volunteer Team Overview - Shows the number of hours served, number of members, associated organization and visibility by Volunteer Team

HOC Custom Button reports

Questions & Answers. - Do Not Edit the filters for this report since it is used for the "Run Answers Report" link found in the Occurrence record. It shows the answers to the custom questions for the related occurrence. Do not rename this report or the button will not work.

View Service Hours (Org Record) - Do Not Edit the filters for this report since it is used for the "View Service Hours" link found in the Organization record. It shows the number of volunteer hours served by schedule type for ALL volunteer opportunities for that organization record. Do not rename this report or the button will not work. (Note: This button may only exist in legacy HandsOn Connect organization page layouts)

HOC Managerial Reports

These reports give you an overview of information about your use of Salesforce - and provide tools for importing data.

Active Users- Lists all the active users, regardless of profile, in your system

Adjustments made to Reports- shows who has modified a report within the last 30 days

Approval Needed - Partners (Past Due) - Shows the Connections that volunteers have made to your opportunities that are Pending Approval and Past Due,

Contact Import Template- Use this report to create a template for importing contacts

Contacts and Employers- Shows the Contacts and their related Employer and Organization. Can be used to determine which contacts could be related to their employers instead of the "Individual" organization.

Custom Reports by User- Shows who is creating custom reports in your system.

Document Library- Shows all the documents in your system grouped by folder

Inactive Users? - Shows the users that haven't logged into the system within the past 90 days. Date range can be customized.

Login Leaderboard- Shows the number of log-ins by Active Users within the last 7 days. Can be used to create a Login Leaderboard dashboard

Number of Documents Added by Month- Shows the number of documents added each month to the system.

Number of Open Tasks grouped by Assignee- Shows the number of open tasks assigned to internal users

Number of Tasks and Calendar Activities- Shows the number of tasks and calendar activities grouped by month

Opt in for Communciations - Shows the contacts that have opted in for your organization's communications and provides phone, email, and postal information.

Org and Contacts Import Template- Use this report to export and create a template that can be used for importing Organizations and Contacts.

Organization Import Template- Use this report to create a template for importing organizations.

Parent and Related Organizations - Shows the organizations that are related to a Parent Organizations and the related Primary Contact, Opportunity Coordinator, and Phone number

Self-Reported Orgs unmatched in database - List of all organizations self-reported by volunteers where an active organization was not found. Use to see if you have a 'close match' &

want to update the Existing Organization field or contact new organizations to recruit as active partners.

Team Member Import Template - Use this report to get the basic template for importing Team Members. You will need to modify the filter to the organization name you wish to use and then add additional columns (Team ID, Team Member Status, and Captain) to the template after exporting.

Users Logged in (Last 7 Days) - Shows the users that have logged into your system within the past 7 days.

Here are links to using the import templates for batch adding data to Salesforce

Importing Organizations and Contacts in Salesforce

Batch adding Team Members

HOC Monthly Reports

Active Occurrences (This Month)- Shows the occurrences that are active for the current month grouped by schedule type

Contacts Created Last Month- Reports on the contacts that were created during the previous month.

Date & Time Project Occ (Last Month)- Shows the number of confirmed, attended, not attended, unreported, and hours served for all the Date & Time project occurrences during the previous month

Express Interest Project - Last Month- Shows the number of connections created for Express Interest projects last month. Grouped by Schedule Type and Occurrence.

New Agency Partners- Shows the Nonprofit Organizations that were created during the previous month, their status, and primary contact.

Total Hours Confirmed (Last Month)- Shows the number of hours for connections with an end date equal to last month and attendance status equal to Attended (and Hours Verified). Report is grouped by Schedule Type

HOC Sharing Portal Reports

These reports are in a folder that you can make available in the CMS to the sharing portal. These are starter reports for your partner organizations. Add more based on information you wish to share with your partner organizations.

Occurrences visible on public site - Shows the upcoming occurrences of volunteer opportunities that are visible on the public site for volunteers to sign up or express interest.

Upcoming Connections - Shows connections coming up today and in the future, grouped by pending and confirmed.

Volunteer Engagement Report- Shows all volunteer connections grouped by contact as well as summary of hours served and number of connections by contact.

Volunteer Opportunity Overview - Shows statistics for all volunteer opportunities past and present.

Volunteers and Connections - Searchable - Use the search box and/or the sorting and filtering capabilities in the report header to find info on your volunteers and their connections to your opportunities.

Volunteer Awaiting Confirmation - Shows volunteers with upcoming connections in Pending Approval Status. These volunteers should be confirmed or declined to participate in your Volunteer Opportunity

HOC Support

These reports are used by the support team for onboarding your instance and troubleshooting your data issues. Please leave these where they are - but you can run them yourself, and/or make variations that you store in folders you create.

Missing Information- Occ - Shows if any Occurrences are missing the required fields. (Run this report to see if any of your occurrences have become corrupted due to missing required information. (This corruption is generally the result of deleting parent records (Volunteer Opportunity, Locations, etc) that are required for occurrences.

Missing Information- VO - Shows if any Volunteer Opportunities are missing the required information. (Run this report to see if any of your volunteer opportunities are corrupted because they are missing required information).

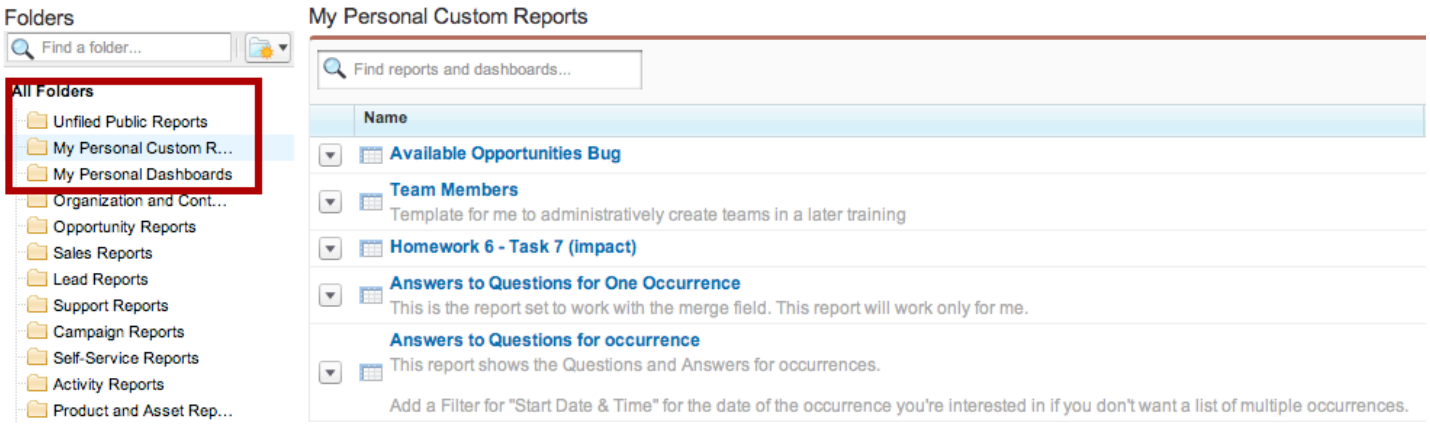
Object Change Report (Search Update) - This report tells you if a request to update search was sent to the search server when you edited a volunteer opportunity or occurrence.

Report on all HOC Reports - Shows all Unmanaged Report Folders and their reports associated with HOC. (Edit this report to include folders you may be using for reports - and it'll give you a list of all reports that are of value to you!)

Managing Reports with Folders

Report Folders With Special Characterisics

There are three 'special' folders that every user has access to:



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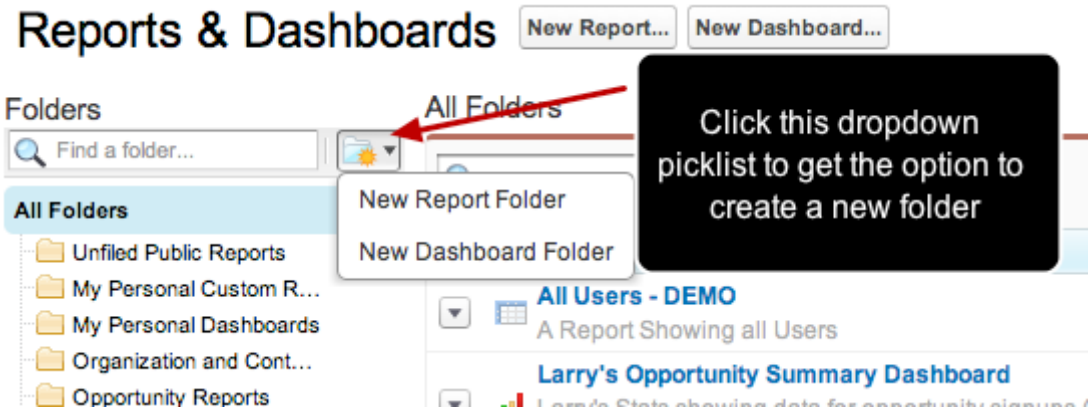
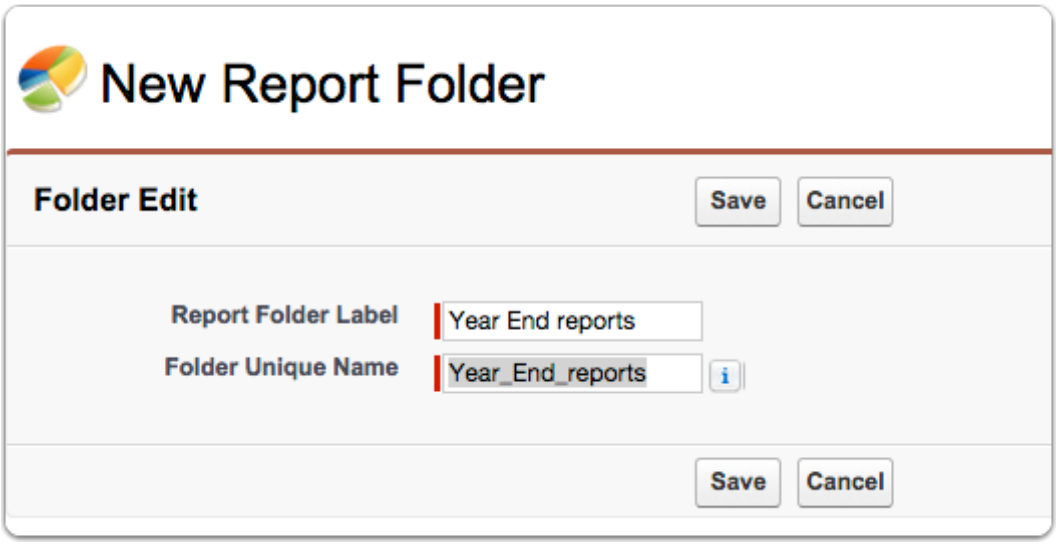
Creating a New Report Folder

In this lesson, we will learn how to create a new folder, set permissions for that folder, and how to edit permissions in existing folders.

Use the New Folder Button to create a new folder



Give the folder a specific name

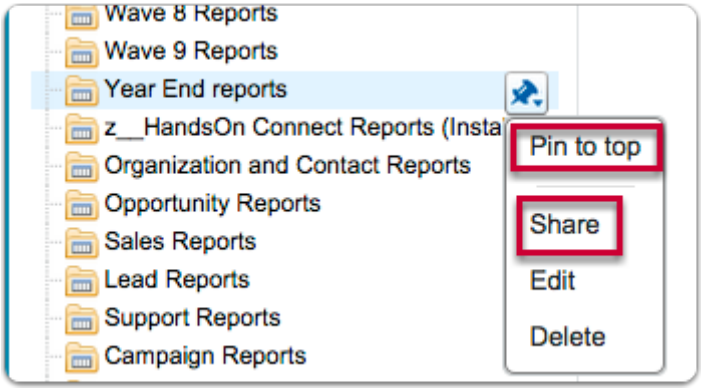


After creating the folder, select the folder to set its characteristics

Selecting "Pin to top" will pin the folder at the top of your list of folders. This is handy for frequently used report folders!

Click on Share to set who can access the folder. (For existing folders, you can click on Share and modify who the folder is shared with). Only share folders with customer portal users if they need access to the folder in the portal. Be selective of which folders you share with partners and volunteer leaders. (Note: when they view the report, they will only see the records that they have permission to view -- so the same report will appear differently on the admin site, and to each customer portal user).

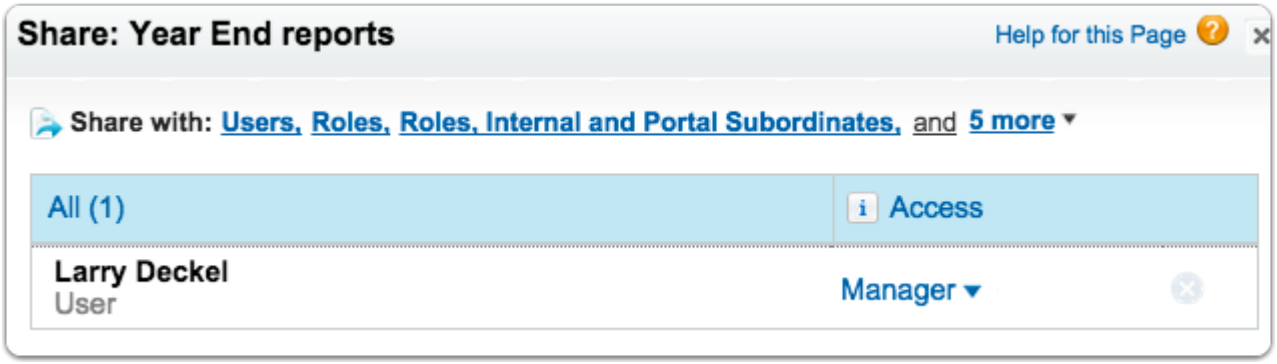
Note: If you do not see this option - see below in this post "Note: If you've not upgraded...." and update your settings!



Set who the folder is shared with:

By default, the folder is shared with a user, you, who created the report. Your access is Manager.

You can choose to look up users, roles, or other 'groups' of users by clicking on the "Share with" links. The 5 more options include "Roles and Internal Subordinates" "Public Groups" "Portal Roles" "Portal Roles and Subordinates" "Customer Portal Users". Each allows you to select from those lists.

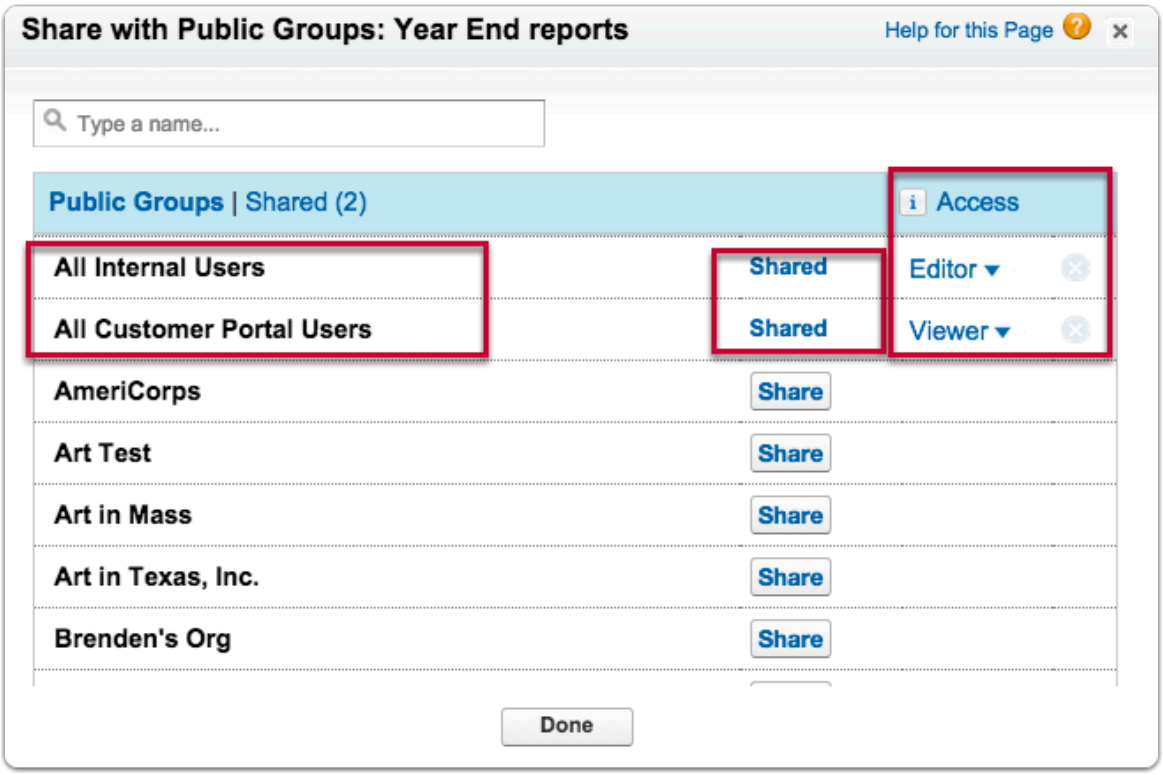


To share with everyone on your staff (internal users), and/or to share with all customer portal users, select "Public Groups"

Click on the Share button next to the groups "All Internal Users" and/or "All Customer Portal Users" (if you wish to share in the partner and Volunteer Leader portals). OR, share a folder with just one public group, or one user. You can fine tune your sharing accordingly.

Then select the level of access for each group you share with.

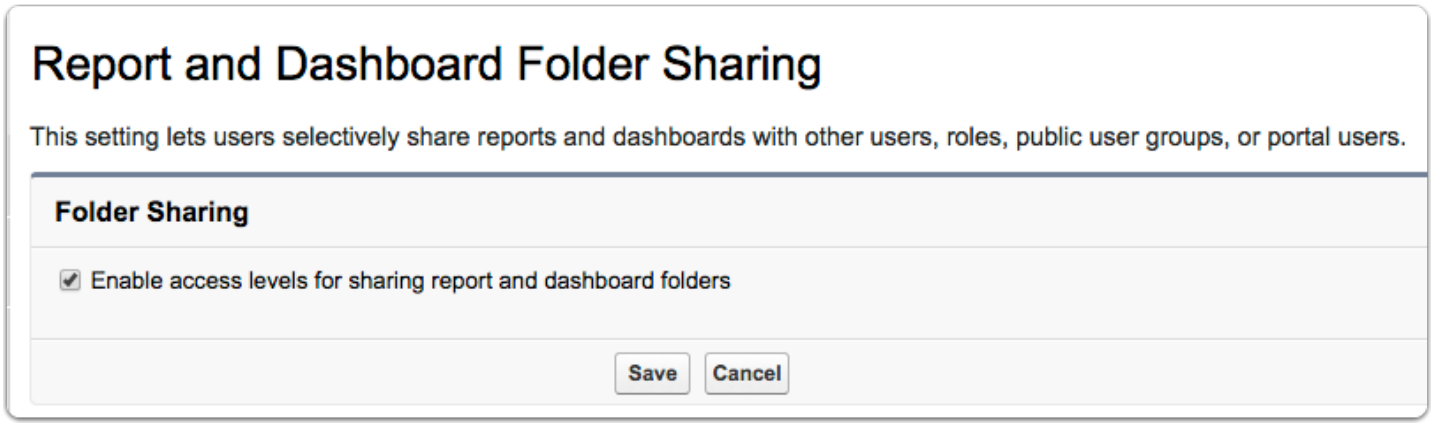
- Viewers can only view reports (that's all that's possible for customer portal users)
- Editors can view and edit reports
- Managers have complete control over the report and can change sharing and/or delete reports.



Note: If you've not upgraded your salesforce instance to use improved reporting sharing:

The sharing instructions above apply to users of the new report & dashboard user interface.

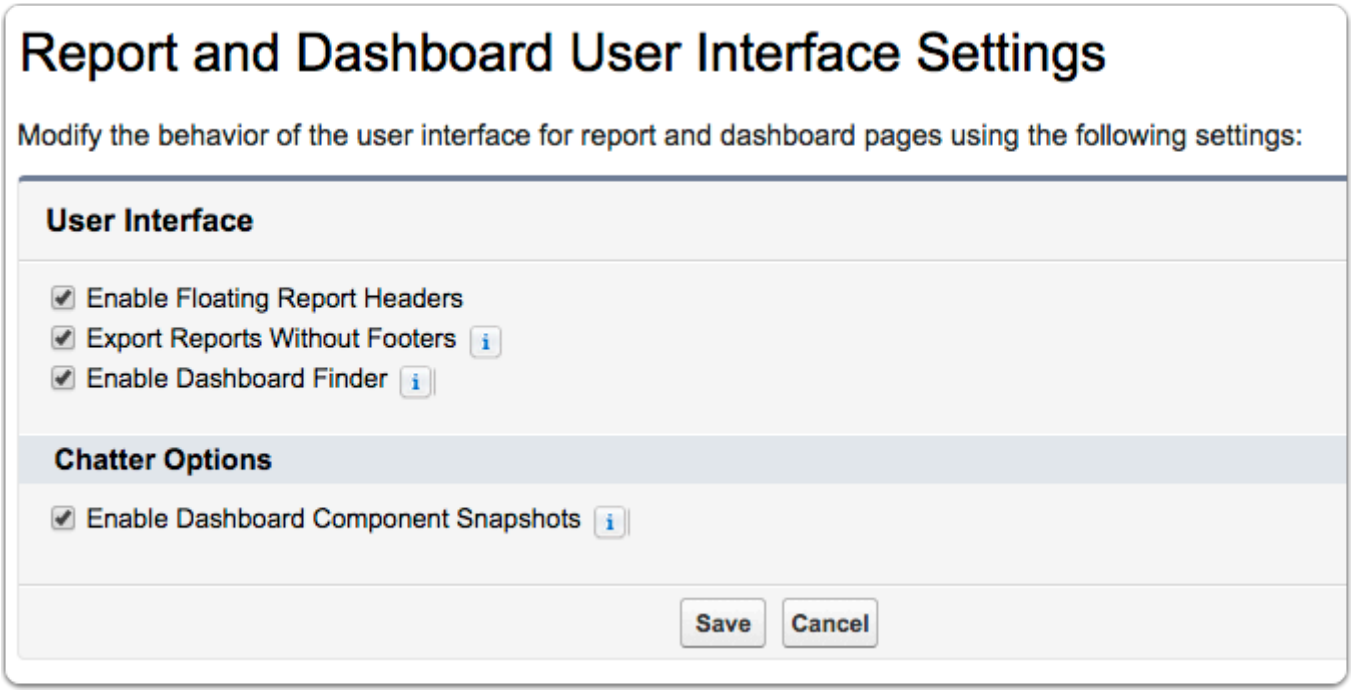
To enable this: go to Settings / Customize / Reports & Dashboards / Folder Sharing and check the box:



Also update your Report and Dashboard User Interface Settings

There are great new reporting features that also must be enabled if they are not already.

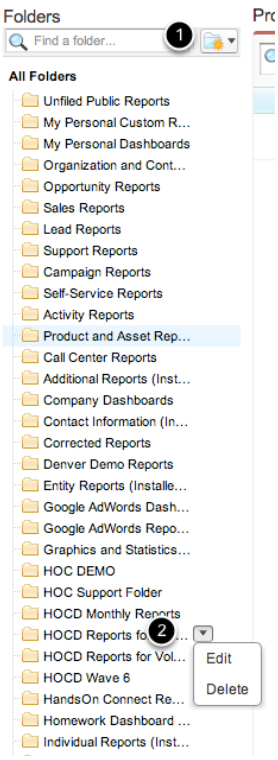
Go to Setup / Customize / Reports * Dashboards / User Interface and check all boxes as shown:



Controlling which reports are available to whom (customize portal access to reports)

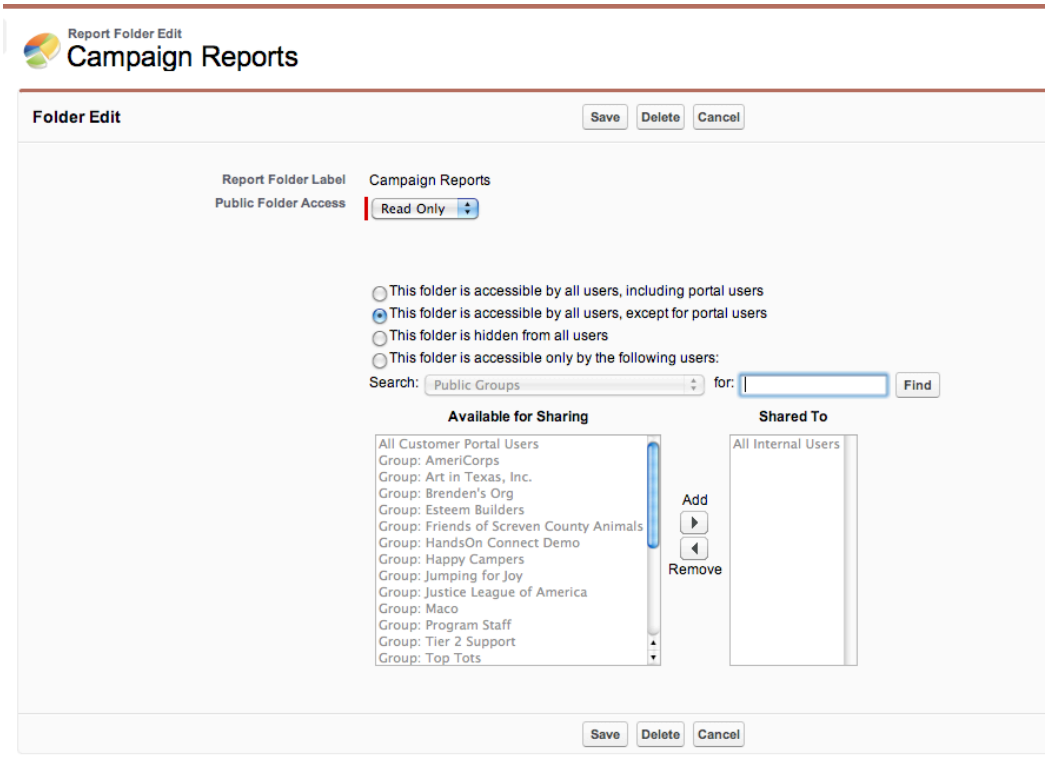
Salesforce has a TON of stock salesforce-centric reports which would only be confusing to your partner organizations and volunteer leaders. You can control which report folders are viewable within the portals.

Reports are organized in folders, and you can control who can access each folder.



Go to a folder by selecting it from the Folder picklist, and then click on the dropdown picklist that will appear - and select edit.

Campaign Reports, for example, is a standard salesforce report, and of no interest to your portal partners, so let's make it, and all the reports in it, invisible so as not to clutter their page.



You can make each folder that you have reports in either Read Only, or Read/Write (which means the users with access can add reports to the folder)

You can control who has access to the folder. Select "This folder is accessible by all users, except for portal users" to exclude it from VLs and Partners.

You can create a folder with a report that is specific to one public group (one of your partners). Then only they will have access to this folder.

Create folders and reports to meet the specific needs of your partners, VLs, and staff, and house each in separate folders so you can control access.

Only grant access to reports that are meaningful and useful to the people who can access them.

It is recommended that the System Administrator examines all the reports, and hides any that don't meet their staffs needs from their view. Then the array of reports will be less confusing.

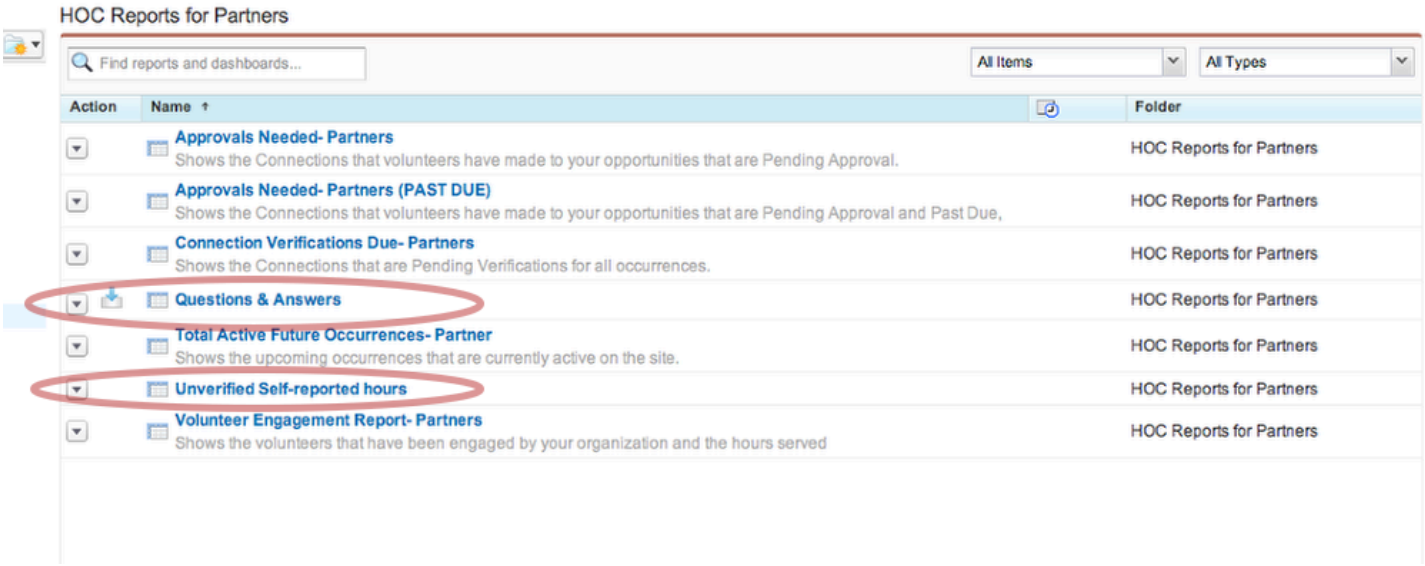
Make custom reports in folder categories that make sense to you and your staff.

Note: The output of any report will be limited to the

records that the running user has access to.

Users running reports will only see THEIR data.

Give special thought to the report folder(s) you make accessible to your portal users



For Wave 8 and beyond, there is a stock folder called "HOC Reports for Partners". Make sure that all reports you want your partner to have access to exist in this folder.

Two **Important** reports that should be in this folder are:

1) Questions & Answers. (This is used to provide the answers to questions via the button in the occurrence record). Note: (this report has a merge field in it so running the report in the folder itself will get NO results. It's intended to be run from within the occurrence record where it will merge the occurrence ID.

2) Unverified Self-Reported Hours

If you have enabled self-reporting in your instance, this report makes it easy for your partners to see verifications that are due for self-reported opportunities with their organization.

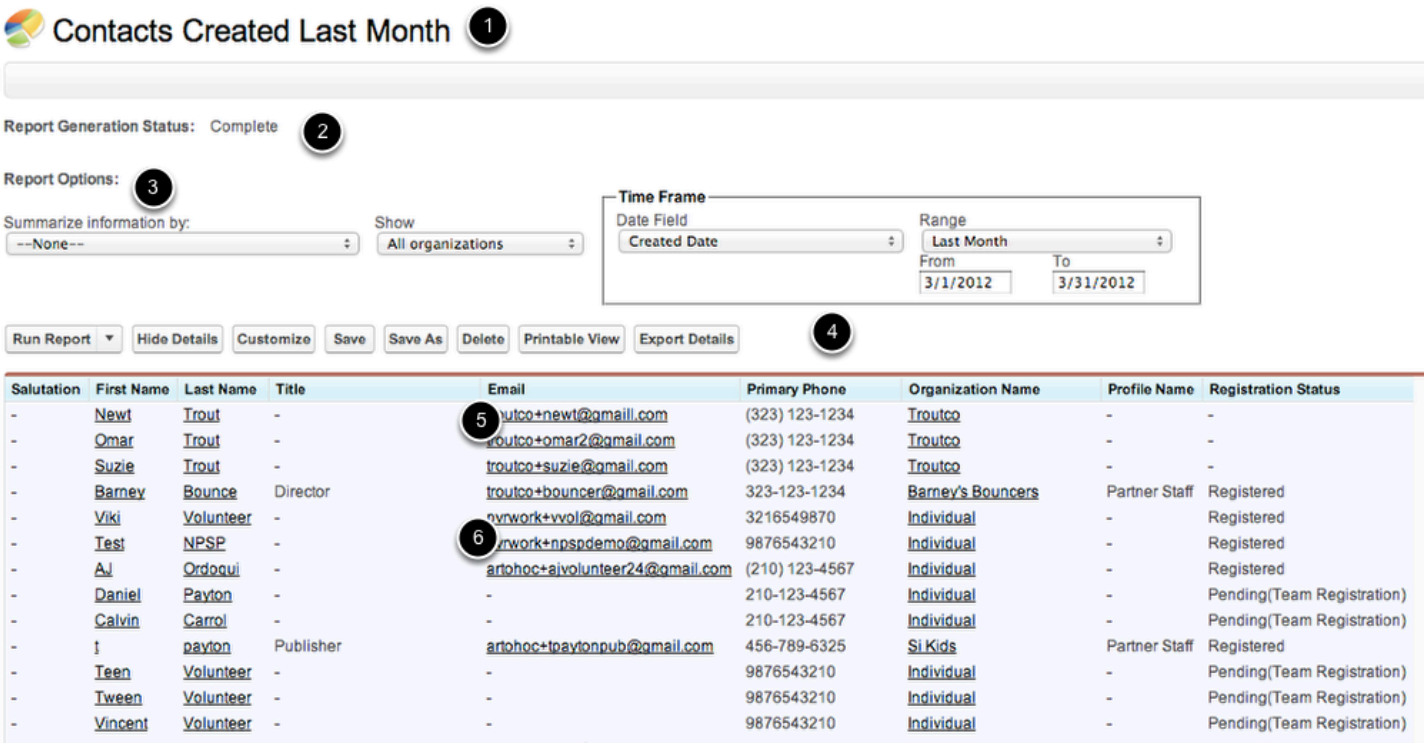
No need to include a copy here if you do not have self-reporting turned on!

Working with Reports

Running a Report

Running a report is sometimes as simple as hitting a button. This lesson will get you familiar with the Run Report Window, basic filters, basic summaries, and sorting your data.

Let's get familiar with the different areas of this screen.



Salutation	First Name	Last Name	Title	Email	Primary Phone	Organization Name	Profile Name	Registration Status
-	Newt	Trout	-	utco+newt@gmaill.com	(323) 123-1234	Troutco	-	-
-	Omar	Trout	-	troutco+omar2@gmail.com	(323) 123-1234	Troutco	-	-
-	Suzie	Trout	-	troutco+suzie@gmail.com	(323) 123-1234	Troutco	-	-
-	Barney	Bounce	Director	troutco+bouncer@gmail.com	323-123-1234	Barney's Bouncers	Partner Staff	Registered
-	Viki	Volunteer	-	nyrwork+vvol@gmail.com	3216549870	Individual	-	Registered
-	Test	NPSP	-	rwork+npspdemo@gmail.com	9876543210	Individual	-	Registered
-	AJ	Ordoqui	-	artohoc+ajvolunteer24@gmail.com	(210) 123-4567	Individual	-	Registered
-	Daniel	Payton	-	-	210-123-4567	Individual	-	Pending(Team Registration)
-	Calvin	Carrol	-	-	210-123-4567	Individual	-	Pending(Team Registration)
-	t	payton	Publisher	artohoc+tpaytonpub@gmail.com	456-789-6325	Si Kids	Partner Staff	Registered
-	Teen	Volunteer	-	-	9876543210	Individual	-	Pending(Team Registration)
-	Tween	Volunteer	-	-	9876543210	Individual	-	Pending(Team Registration)
-	Vincent	Volunteer	-	-	9876543210	Individual	-	Pending(Team Registration)

I have chosen to run the report "Contacts Created Last Month" - that is in the HOC Monthly Reports Folder.

Here are some of the features of the report:

1. The name of the Report

2. Status of the Current Data

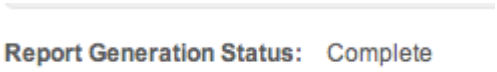
3. Report Options

4. Report Menu (and filters if any additional ones are applied)

5. The data

Number 1 is pretty self explanatory, so let's move on.

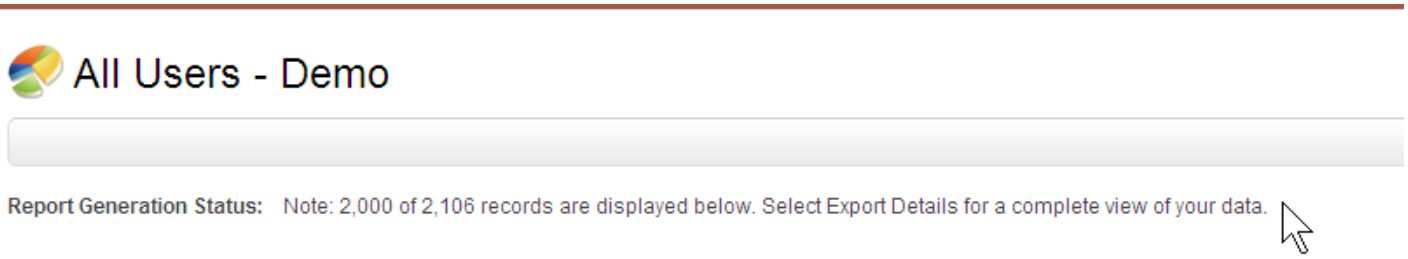
2. Report Generation Status



This tells you if ALL the data is available in the report. In this case it is. But Salesforce has a limit of only showing a maximum of 2000 records.

But let's look at another report for a second - to see what happens when there are more than 2000 records.

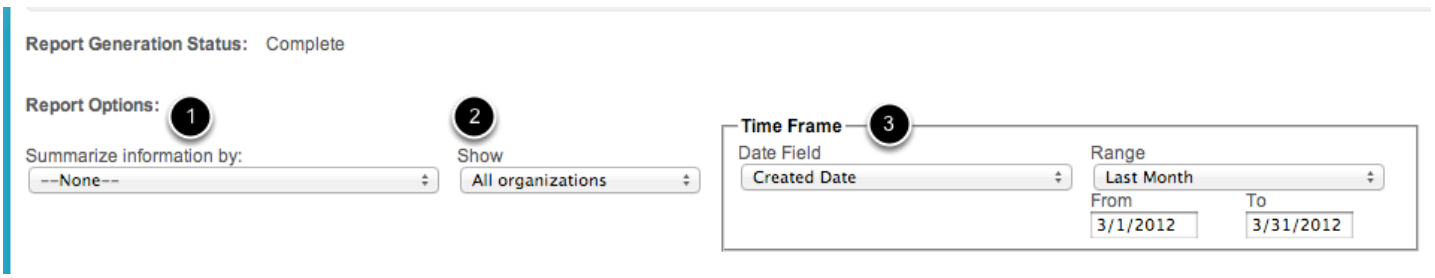
Here's a report that says it contains more than 2000 records:



This report is saying of the 2,106 records that should be in this report, 2,000 are currently listed in the Data below. To see the full list, in this case, we would need to export this data. HOC, by default, will only show 2,000 records in the report window. If your report has more than 2,000 records you will need to export the report to see all the data

Note however that if you are doing summaries and calculated fields in your report - you WILL see accurate calculations based on all the data you've selected. You just can't view more than 2000 records at one time in Salesforce itself.

3. Report Options



BIG PICTURE: This is a very quick and mildly powerful way to customize this report. You have three different Reporting Options (Filters) that will affect the data that the report brings back.

1. Summarize information by - you can summarize by any field that are listed in the objects associated with this report. This report, for instance, works with both the Organization and the Contact Objects.

2. Show: You can choose whether to show MY organizations, MY contacts, but since 'ownership' has no particular meaning in HandsOn Connect - you should always choose to show ALL.

(Note: The primary object here is Organizations - and each organization has a contact - so showing all organizations shows all the contacts!)

3. Time Frame: This is a way to further refine your search. You can specify the date field you want to filter on, and the range of dates to show. So if we wanted to see all contacts based on their orientation completed date, for last year -- then you can filter on those criteria.

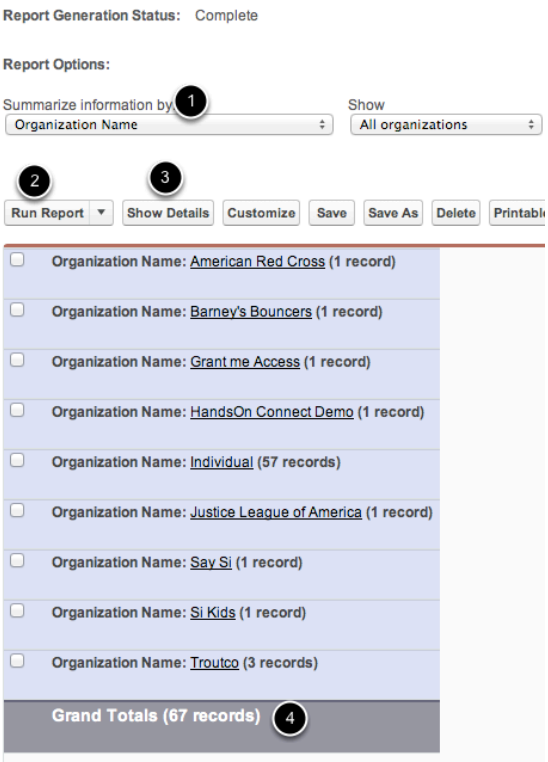
The way to get the most information, without filters is to set:

Summary: None

Show: Whatever option is ALL

Time Frame: All or Custom

Report Options: Summarize information



I can summarize (group) the data on any field in the objects that are part of the report.

Let's say I want to group on the Organizations associated with each contact.

1. I chose Organization Name from the Summarize Information picklist

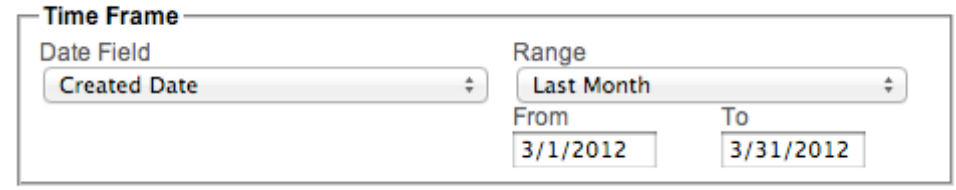
2. I hit RUN REPORT.

3. I can optionally hit "HIDE Details" (which then changes the button to "Show Details" -- to hide the contact names and just see how many organizations my contacts belonged to, and how many contacts (records) are associated with each organization.

4. I can see that I have a total of 67 contacts created last month.

Clicking "Show Details" will show me each individual record that has been grouped together if I want to see WHO the contacts are.

Report Option: Time Frame



You can also choose to filter records based on a given time frame. You can pick any date field and what range of time you want that field to be filtered by.

If I wanted to see all contacts that had been last modified during the current Calendar Year, I could change these filters like this:

The basic filters always available to you are:

1) Do you want to summarize in some way

2) Which records do you want to show based on ownership (usually ALL)

3) What Time Frame do you want to filter to?

Report Menu

1. Run Report: If you have made changes to the report options, you will need to re-run the report to Refresh your data. This is how you do it. Also, this is where you can schedule a report to run. We will cover scheduling later.

2. Hide Details: Like we showed you before if you have summarized the information, you can Hide the individual records to only see the summary, and vice versa.

3. Customize: If you want to add filters, add fields, add formulas... this is where you do it. We will go over this some later..

4. Save: Do you like the way this report works and runs? Then you can save it. This will OVERWRITE the current settings, however, and there is no going back.

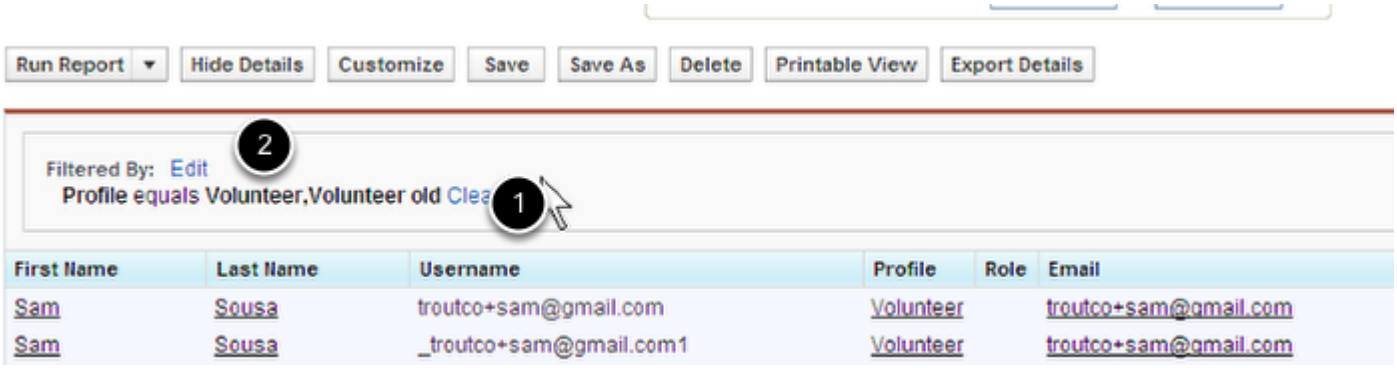
5. Save As: If you used this report as a starting point, and then added filters, fields, etc., and have created a new wonderful report.. you can hit Save As!

6. Delete: Pretty self explanatory and permanent.

7. Printable View: Choose this if you want to print this from the screen as is.

8. Export Detail: This is where you can export the report to a Comma separated Values file (.csv) or Excel file (.xls) We will show you more about this later.

5. Current Filters



If a report has additional filters added to it, this box shows you how the information is currently filtered.

1. To get rid of all filters you would clear them out. Every filter will have its own clear button.

2. To Edit the filters, you would hit the Edit button, which would take you to the Customize Report Screen, which we will go over in another lesson.

6. The Data

Salutation	First Name	Last Name	Title	Email	Primary Phone	Organization Name	Profile Name	Registration Status
-	Otto	Mobile	-	davis.kirby+otto@gmail.com	(404) 555-1212	Individual	Volunteer Leader	Registered
-	Deogee	Smith	Executive Director	davis.kirby+deogee@gmail.com	404 555 1212	FurKids, Inc.	Partner Staff	Registered
-	Quaxo	Catsman	Volunteer Coordinator	davis.kirby+quaxo@gmail.com	404 555 1212	FurKids, Inc.	Partner Staff	Registered
-	Mary	Contrary	-	davis.kirby+contrary@gmail.com	(404) 555-1212	Individual	Volunteer	Registered
-	TestName	TestLast	-	belxio15+01@gmail.com	5556633	Individual	-	Registered
-	TestName	TestLast	-	belxio15+02@gmail.com	5556633	Individual	-	Registered
-	1	1	-	belxio15+03@gmail.com	5556633	Individual	-	Registered
-	member	dutt	-	memberdutt@test.com	-	Individual	-	Pending(Team Registration)
-	hcccnt	volunteer	-	hcccnt+volunteer@gmail.com	12345678901	Individual	-	Registered

This is the listing of the data that has come back from your report based on options and filters. The Columns are the object fields and the rows are the Records. The Column Heading is the Field Name. To find out all the information about the Record, read across the row, to find out all the different answers in a give field, read down a column.

You can sort by a Column by hitting the Header name, hit it again to reverse the order (A to Z then Z to A).

Note the links in the record rows. These will take you to that Record. Use Control+Click to open in a new Tab. Clicking an email link will send an email to that person using your default Mail Program.

Let's go on to Scheduling a Report.

Schedule a Report to Run automatically

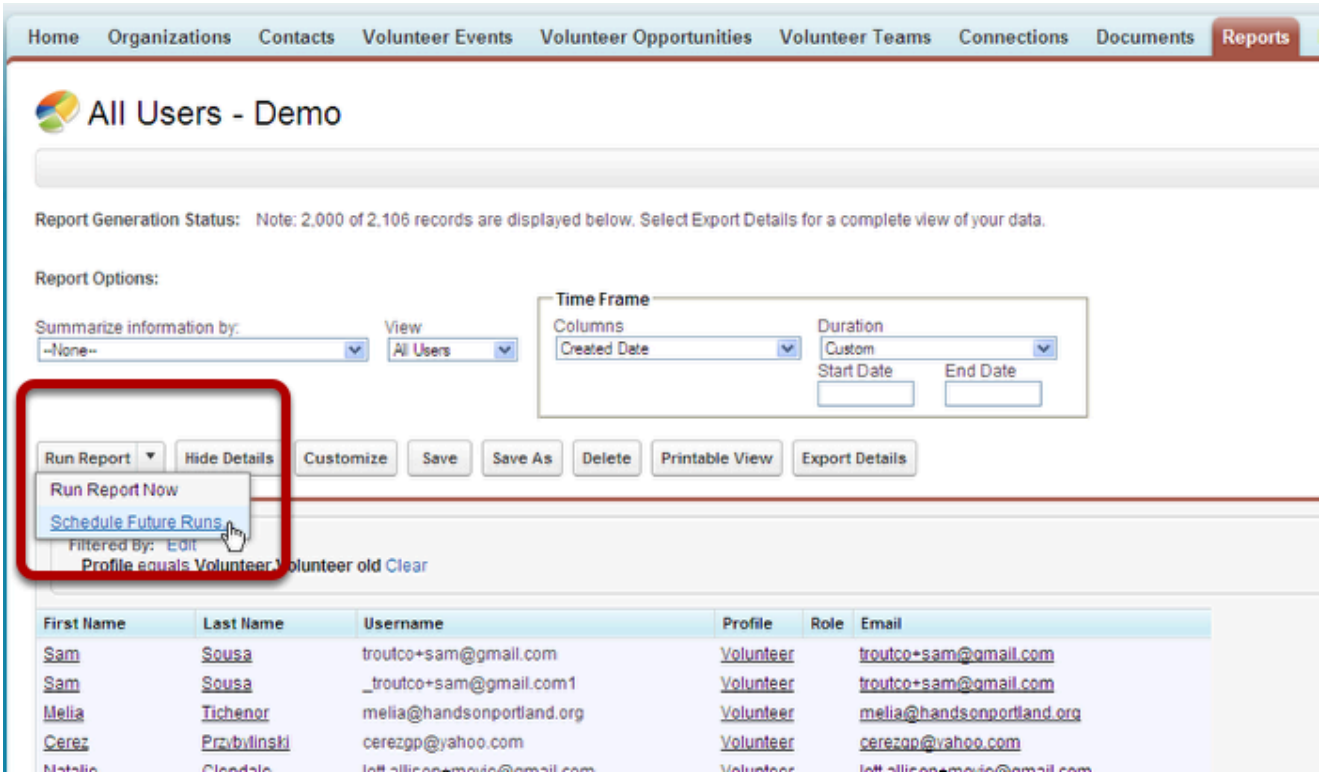
If you have a report that is set up with the filters and the options that you like, you can have the report run automatically at any given period of time and sent to another internal Salesforce User, or to a partner or volunteer leader using the premium portal. (Note: Salesforce does not make it possible to schedule reports to be sent to regular volunteers or basic portal partners or volunteer leaders due to their license types).

In this lesson, we are going to show you how to schedule reports for other internal users or premium portal users.

A few assumptions

You have created a report that is set up properly with the correct filters and the correct options. Make sure, for instance, that if you are wanting to know New Users created in the last month, that the report is set for Duration: Last Month and not a Custom filter.

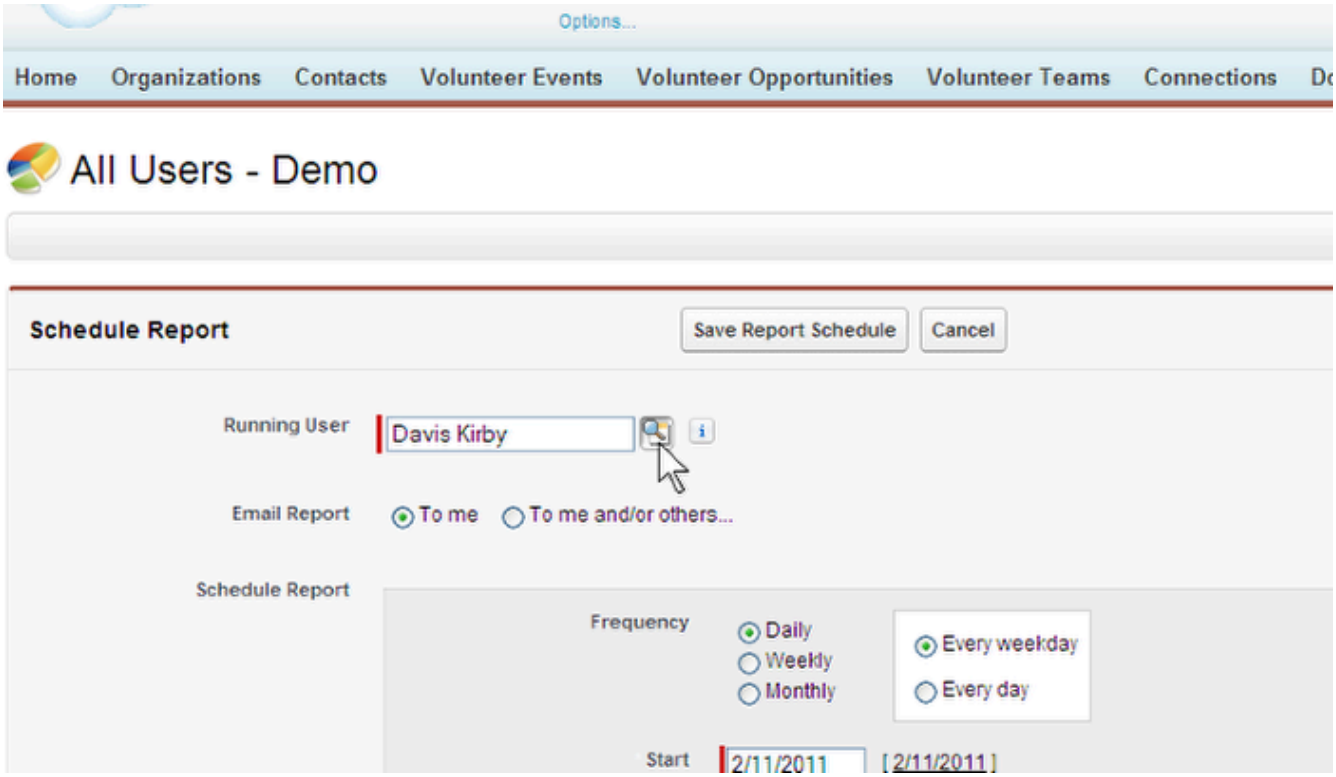
Navigate to the Report you want to run automatically



An important note: Each report can only have one schedule. If a report needs to be run several times, with several different parameters, you have to create separate reports for each parameter.

Use the report Tab/Object and the Search function to find the report you are looking for - you can also navigate to the folder. Click on the link to open and run the report. You'll find yoruself on the Report Details page with the data below it. On the Run button of the Report Menu, click on the arrow to choose other option and choose "Schedule Future Runs." A new window will open.

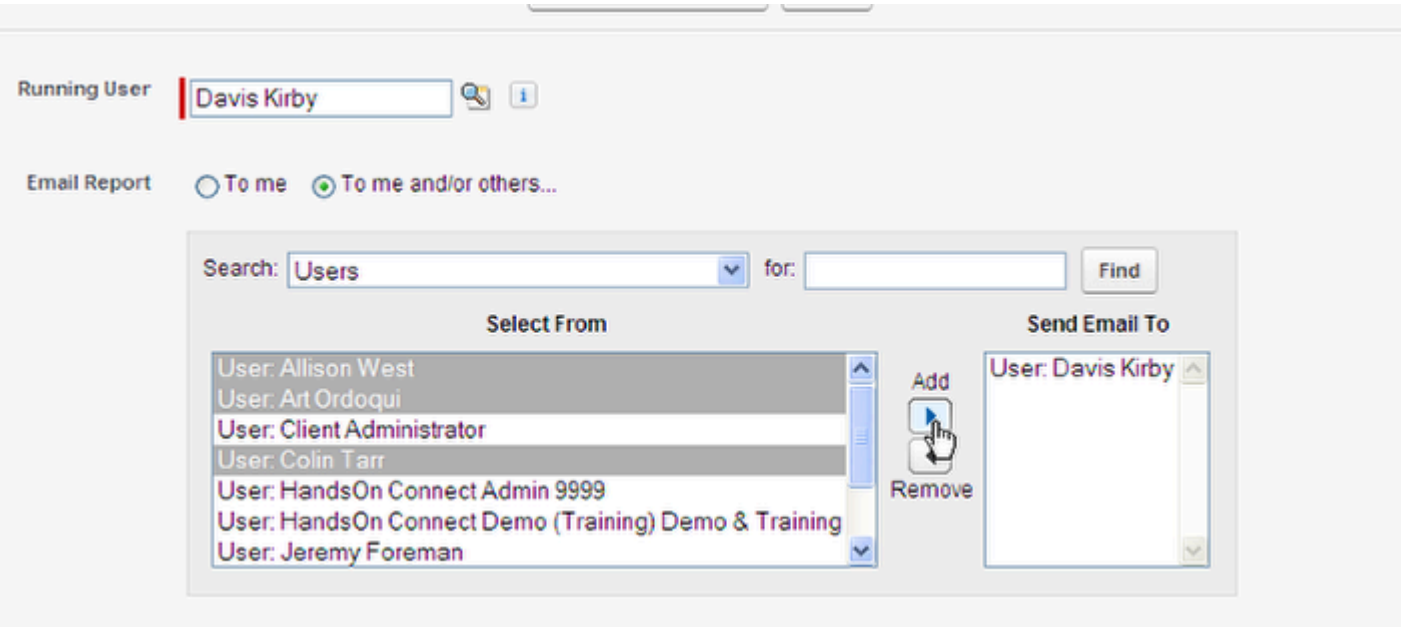
Choose the User



This would be important if the report had View options like "Only my Users" or "Only my Organization.' But here you specify who the report should be run as (which determines what data will appear in the report). For a system admin or staff member -- it will report on ALL records per the filter.... but if you make the Running User one of your partner staff for example - it will only return data that they would see in their portal based on the records they have access to.

We suggest you use the Lookup magnifying glass to ensure you have spelled and spaced a User's name correctly.

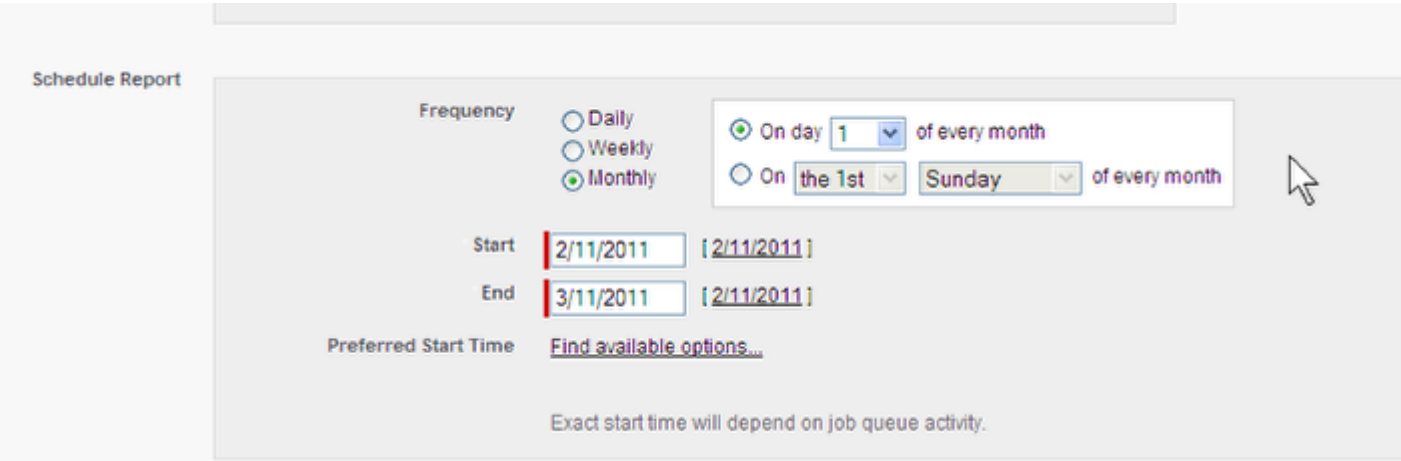
Determine Email



Who do you want the report mailed to?

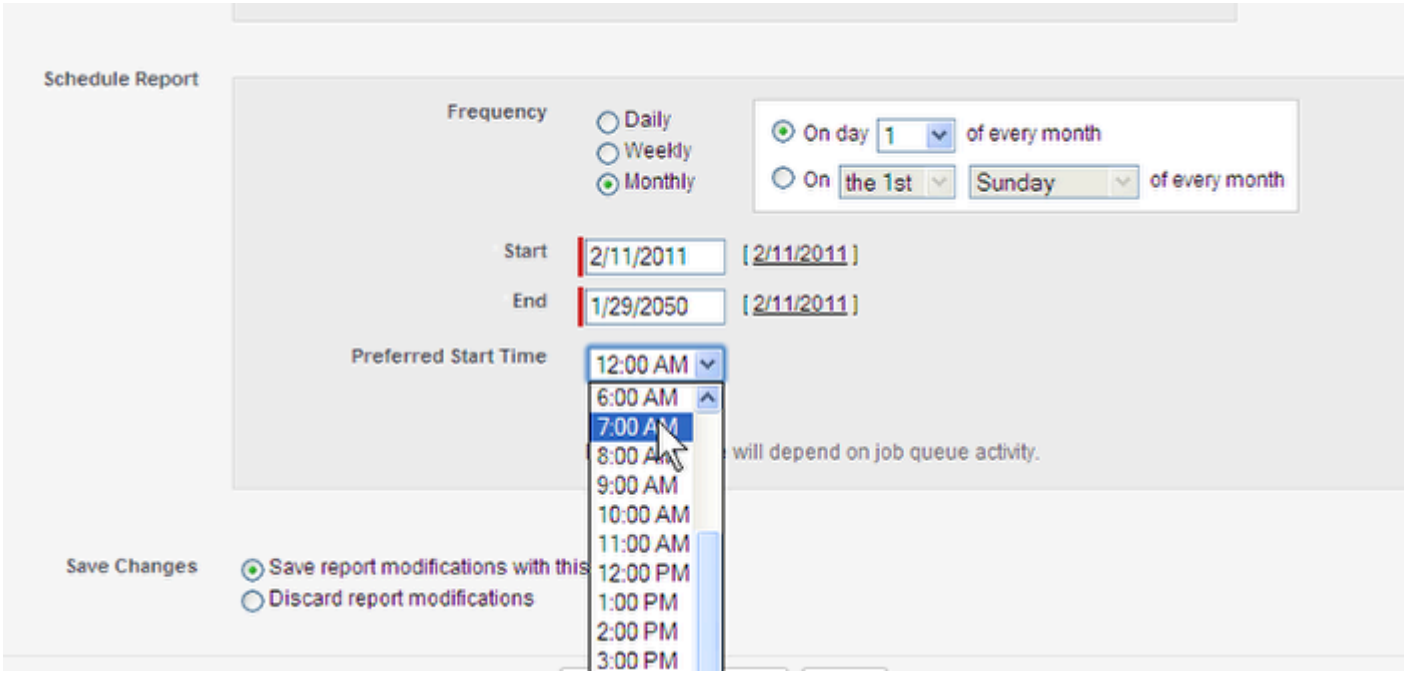
The "me" here is the you, the Logged in User. You can confirm this when you choose the To me and/or other option. With this option, you can choose to schedule to send this report to several different users. This is an interface you should be pretty familiar with. Use the Add and Remove button to define the recipient list.

Choose the frequency with which the report is run



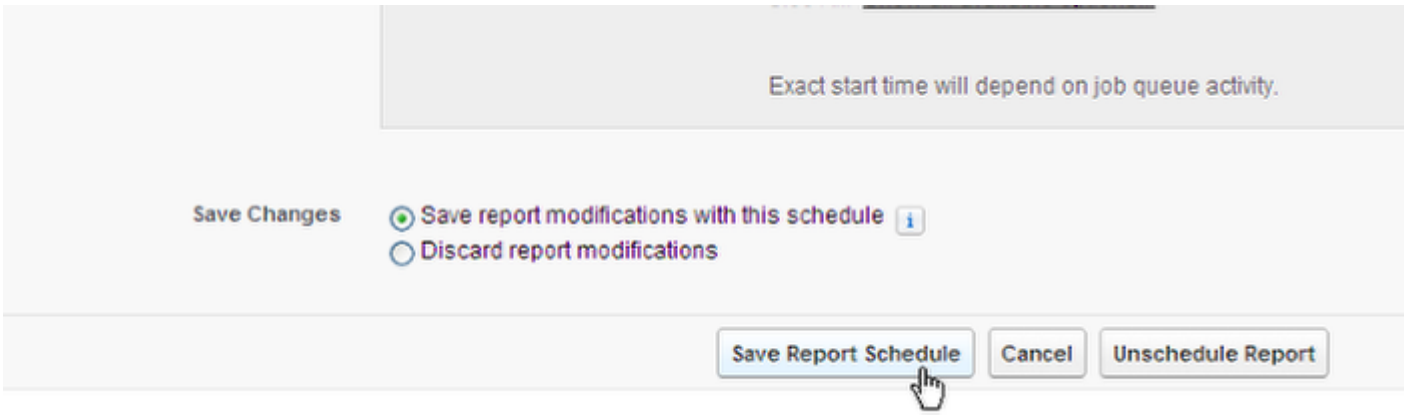
By indicating the frequency, further choices appear in the box beside it. If you so choose, you can have reports run on the first Monday of every month. The frequency would be monthly and the additional parameter would read: On the 1st Monday of every month.

Choose the run period



Do you need this report only during a certain campaign or is it something you will need continually? Also, what time, on the day of the report run, do you want to gather the data? Its best to run it in the wee hours of the morning when the site isn't busy.

Save Changes



If you have made modifications to the report before you started the process to create an AutoRun, this is the option that will save your filters, options, and report layout. This will overwrite the existing file. If you choose "Discard report modifications" the scheduled report will revert back to the most recently saved file. Now you can hit Save Report Schedule.

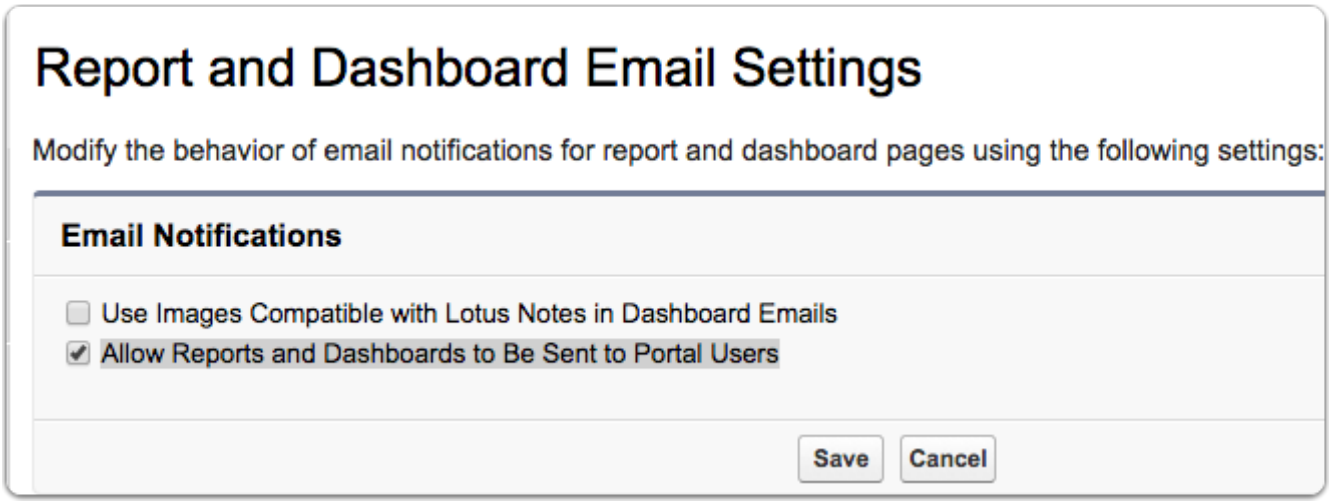
Scheduling Reports to be sent to customer portal users

It's also possible to have reports automatically sent to some of your customer portal users, but to do this there are two things you need to do to make this happen:

1. Make sure your system administrator has granted access to scheduled reports for portal users:

Go to Setup / Customize / Reports & Dashboards / Email Notifications

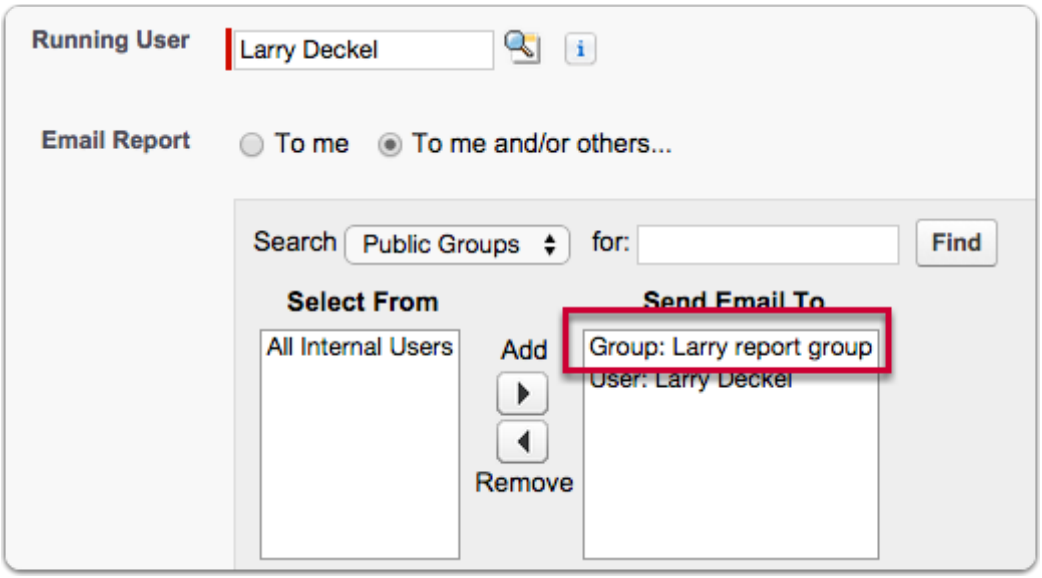
Check the box "Allow Reports and Dashboards to Be Sent to Portal Users"



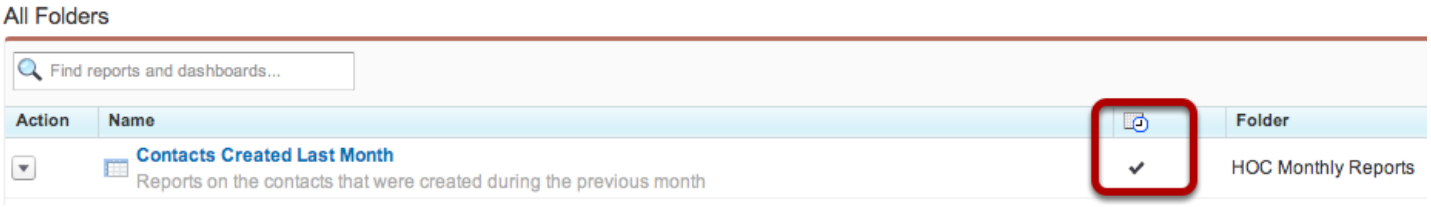
2. Create a public group of the customer portal users you wish to schedule the report to:

You'll need to find your customer portal users as part of a public group. Click here for info on how to create a public group.

(Use Search / Public Groups) and search for the group you've created (in this case "Larry report group"



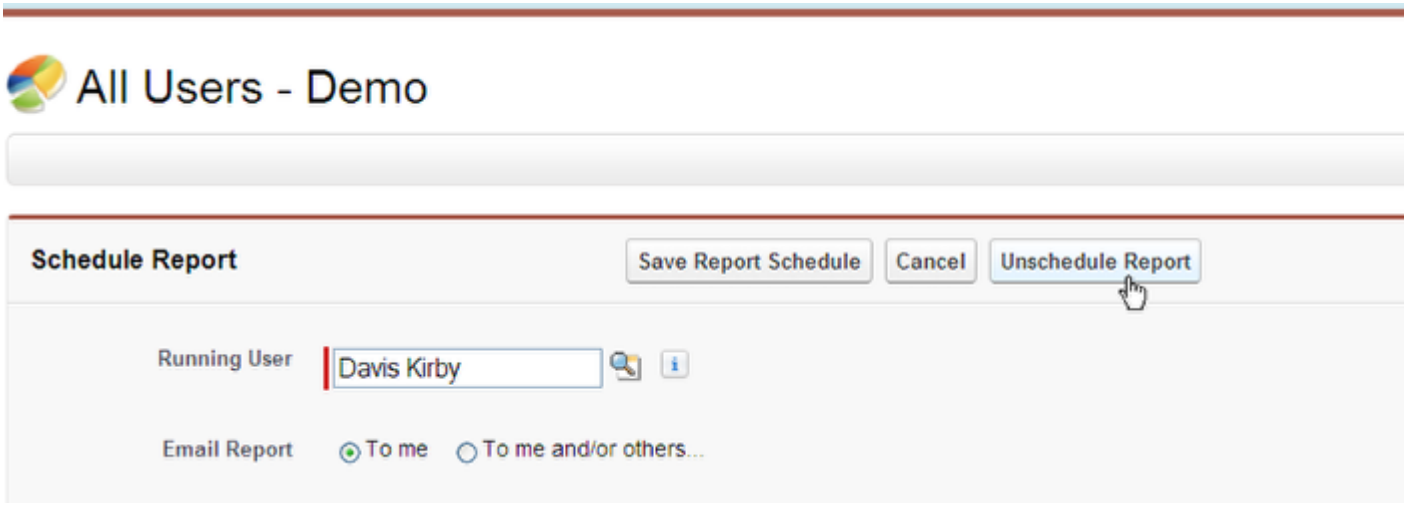
Edit Schedules



You will notice now that a schedule icon appears next to the scheduled report. You can hover over it to get information about the schedule.

To change or delete the schedule, run the report again, choose "Schedule Future Runs" from the Run Report button, and click on the Unschedule Report button or change the details of the scheduling.

Cancel or Delete a Scheduling

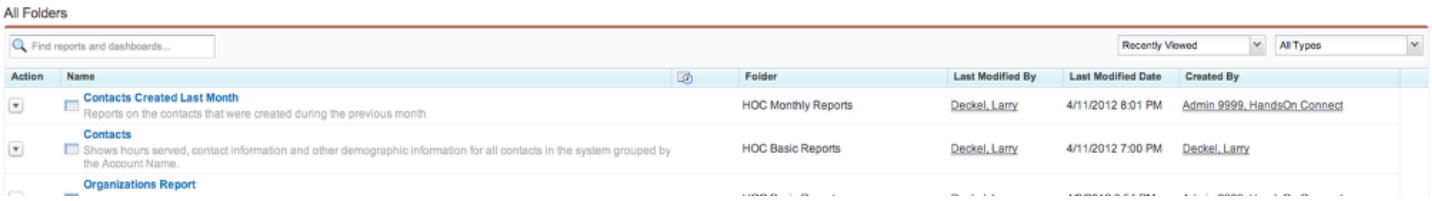


Navigate using the schedule icon shown above to the Schedule Screen for a particular report. One of the options is to unschedule a Report. This delete all scheduling associated with this report.

Exporting a Report

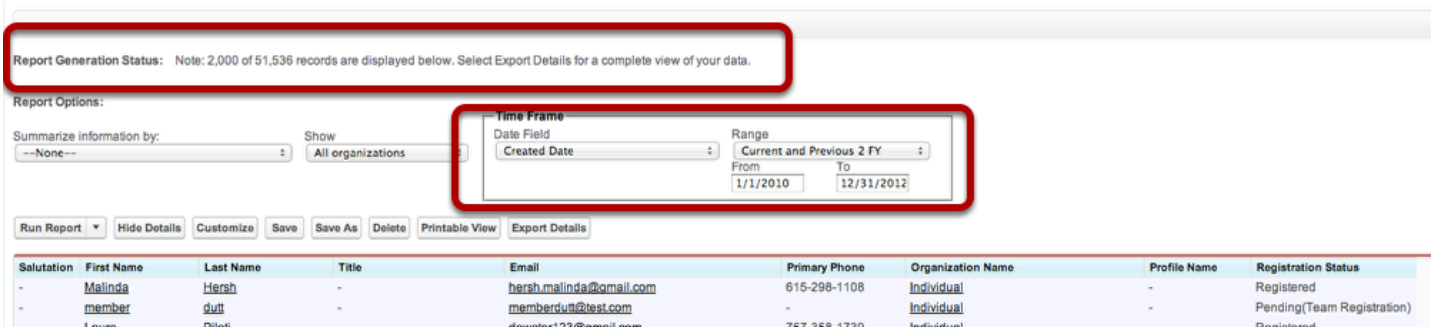
While somewhat robust, the Reporting tool in HOC is not as powerful as Crystal Reports, or Excel when it comes to analyzing your data. To do Pivot Tables, grouping, and major analytics, you will need to export a file out of HOC, and in to one of these analytic tools. Remember, you can't view more than 2000 records at once in Salesforce itself.

Navigate to the Report you would like to export



In the Reports Tab, you can find the report by changing the View Folders Options, Searching in the folders below, using a keyword search, of it it something that you have worked on recently, it will appear in the recent reports tab. Use the hyperlink of the report name to open that report.

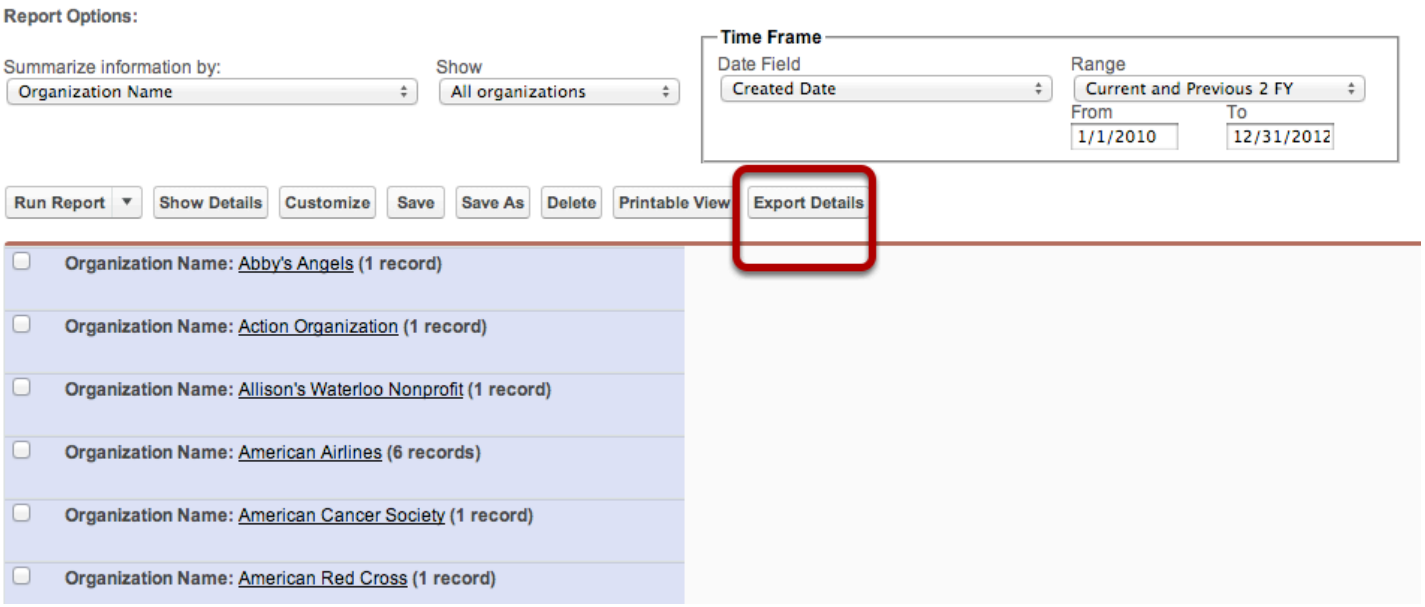
Make sure you have your parameters set correctly



Make sure you have the right options, views, and time frames set to gather the correct information for your report.

You will notice in this report that we are getting all contacts created for this year and the last 2 years. This produces 51,536 records, which we won't be able to view in Salesforce. So we'll want to export this data.

If I were summarizing



In this example, I am summarizing by organization, and I have hidden the detail.

Notice however, hat that export Details button still says "Detail".

The export function only exports details, and does not export your summaries or groupings. You can regroup in excel after the data has been exported.

Click the Export Button, and a new window appears.

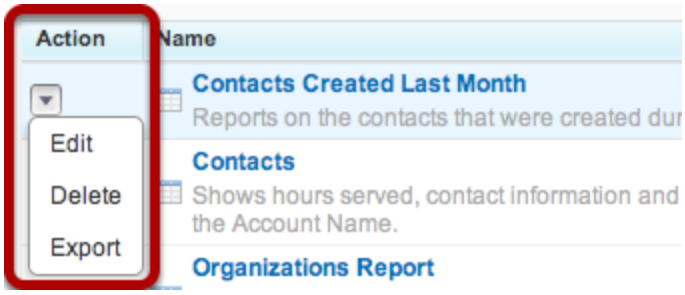
You will be taken to the Export Report Screen

Always choose the ISO-8859-1 (General US & Western Europe...etc) as the Export File Encoding. This is the most commonly used coding. If, however, your analytic software needs another coding, this is where you choose that option.

Generally, we use the file format CSV. This is so that it will work with the APEX Data Loader, and other software programs. If, however, you are only using Excel, you can choose that here, as well.

When you hit Export, a screen will pop up asking you where to save this file.

Quick Export



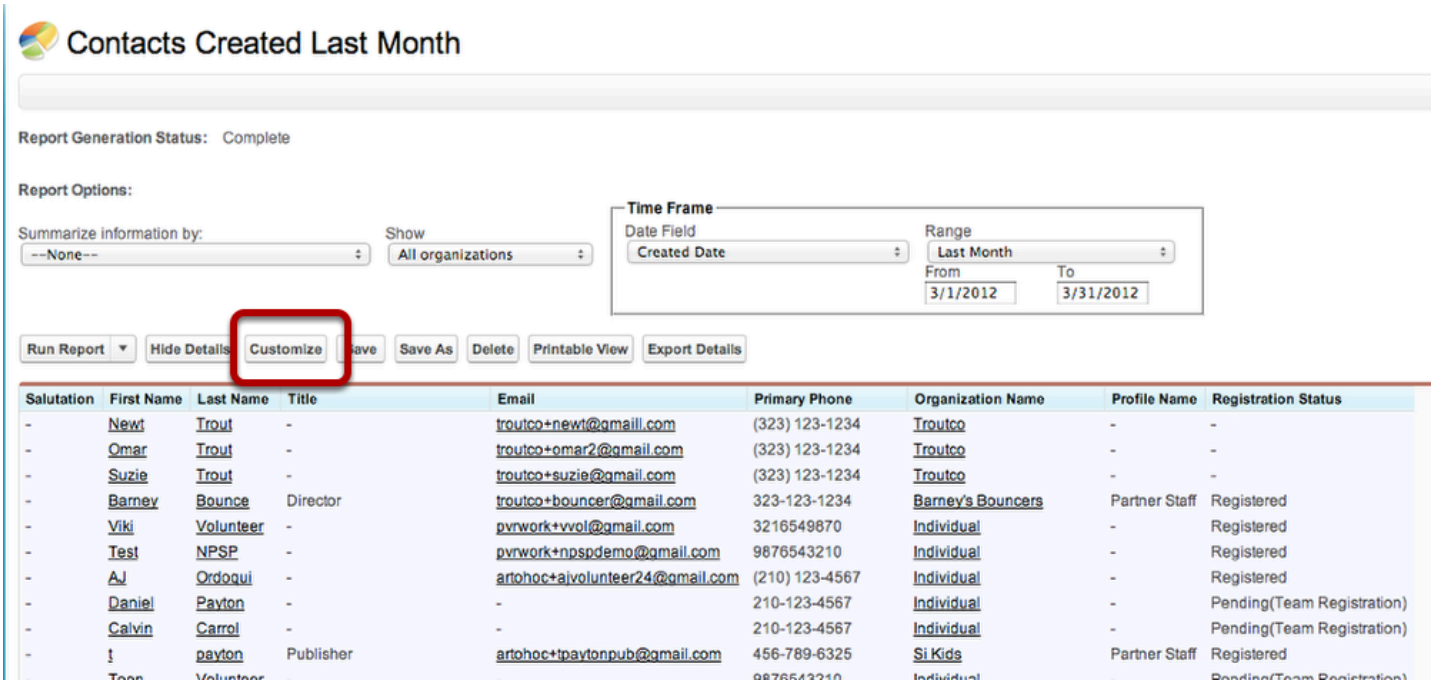
If you already have all the settings you require and you just quickly want to export a file, you can do so from the Main Reports window by clicking on the Export link next to the name of the report you want to work on. This will take you right to the export report window.

Customizing Reports

Introduction to the Customizing Report Window

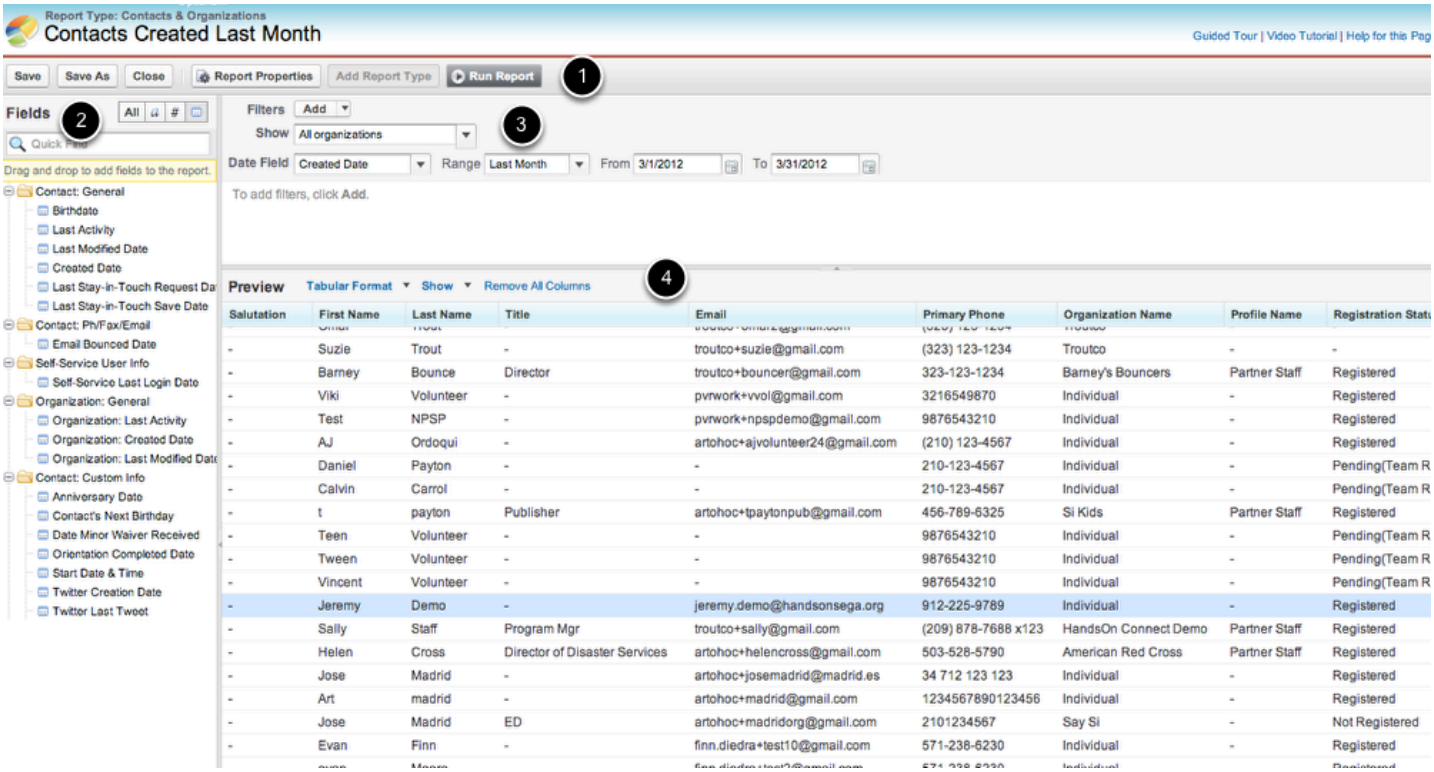
When you are creating a report, you don't need to re-invent the wheel. Often, the general set up of an existing report is a good one. The objects that the report is pulling from are the right objects, but the existing report is missing fields or is not set up the way you want it. Sometimes you need to filter out certain information. This lesson will introduce you to the Customize Report Window.

Find a report that has the basic information you want



In this case, I want to use the All Users - Demo report that we have been using throughout this lesson. I am going to open this report and then click the Customize Button.

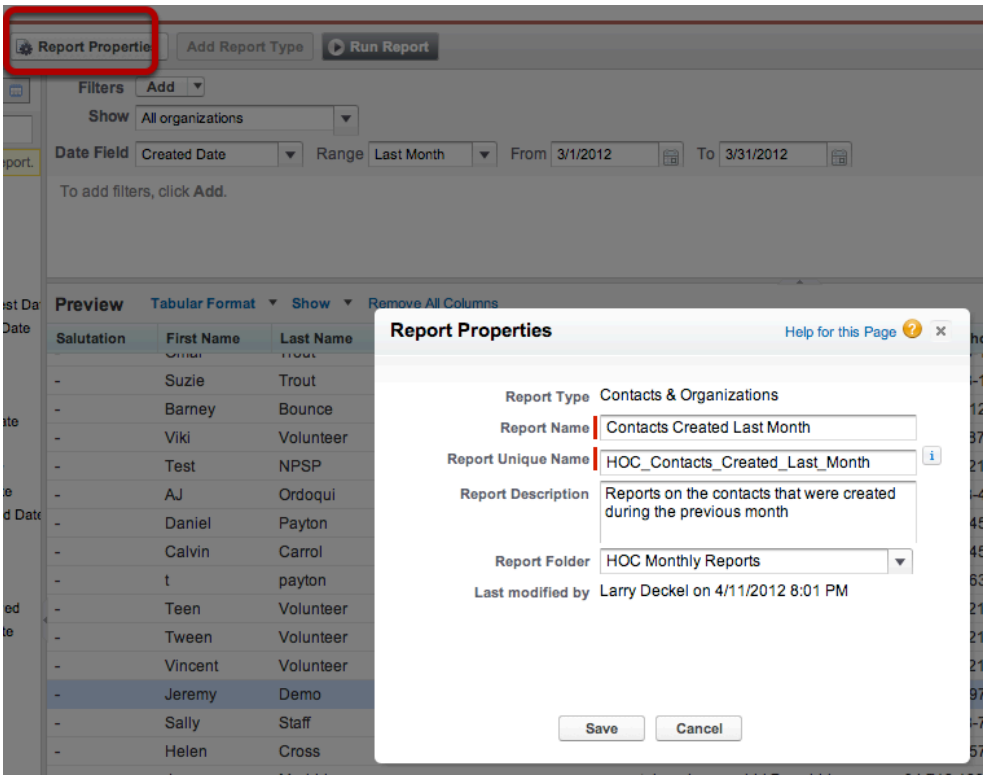
Navigating the Customize window



The Customize Report window is made up of four sections.

1. Customize Menu Bar
2. Fields Menu
3. Filters
4. Preview of Sample Data

Customize Menu Bar



Save: Saves the current options, filters, fields, and other settings and overwrites current file name.

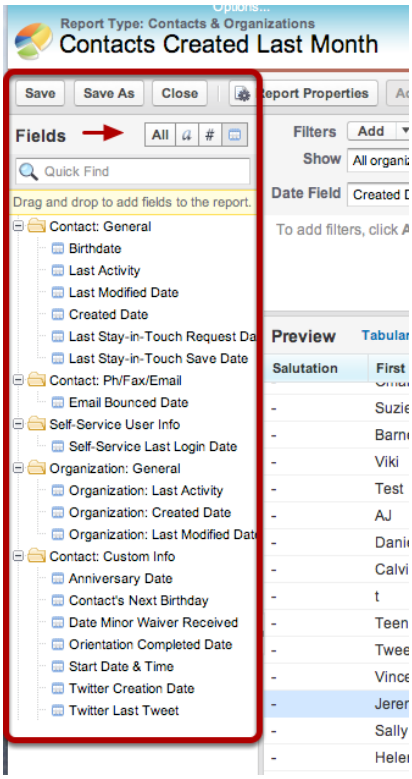
Save As: Creates a new report with the options and settings you have customized. You will prompted as you would with create new report window. Name of file, unique name, and folder you want it placed in...

Close: Takes you back to the Main Reports Tab. You will get a warning that all changes made to the report will be lost if you have not saved your work.

Report Properties: (See above) This is where you can move an existing file to another folder, you can change the name (don't change the unique name), the report description as well.

Run Report: This will run the report with the current customizations and take you back to the Run Report Window.

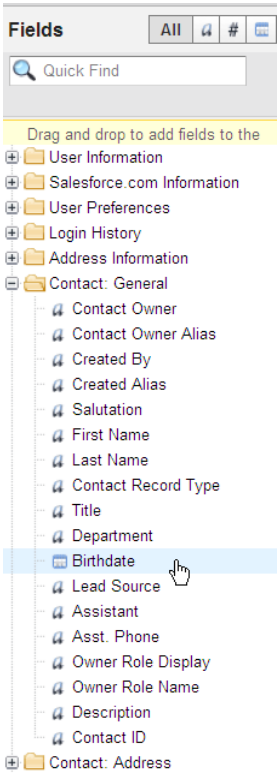
Field Menu



The Field Menu will show you all available fields that can be brought in to these reports. These are the fields that come from the objects that the report is built upon. (Later in the training we'll show you how to create a report from scratch and define which objects are part of the report). Here we have Contact Fields and Organization Fields available.

You can choose which fields you want to see using the option buttons (1) at the top. The first options is All fields, the second is only alpha and alphanumeric fields, the 3rd option is on numeric fields, and the last is only date and datetime fields. In the example above, we are only viewing date and datetime fields.

Getting to know your fields

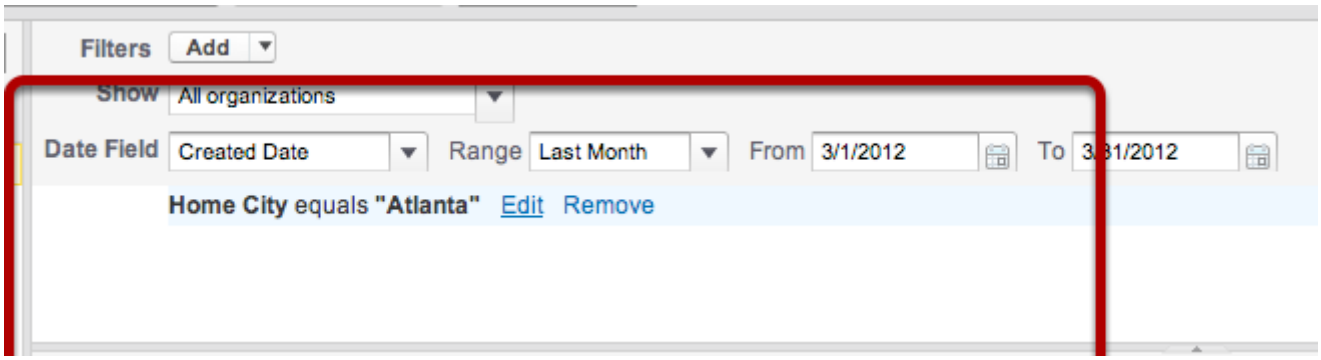


The Field Menu can tell you a lot of information. Let's look at an example. The Folder title tells you the Object where the field is located. The icon next to it tells you what type of field it is, and then you have the name of the field itself. Get to know what fields are located in what objects. It will make creating reports much easier.

The best way to get to know the fields is to look at the objects the fields live in - and learn the NAME of each field that has the relevant info you want in the report. (Many HandsOn Connect fields have similar field names so it helps to write down which field you are looking for)

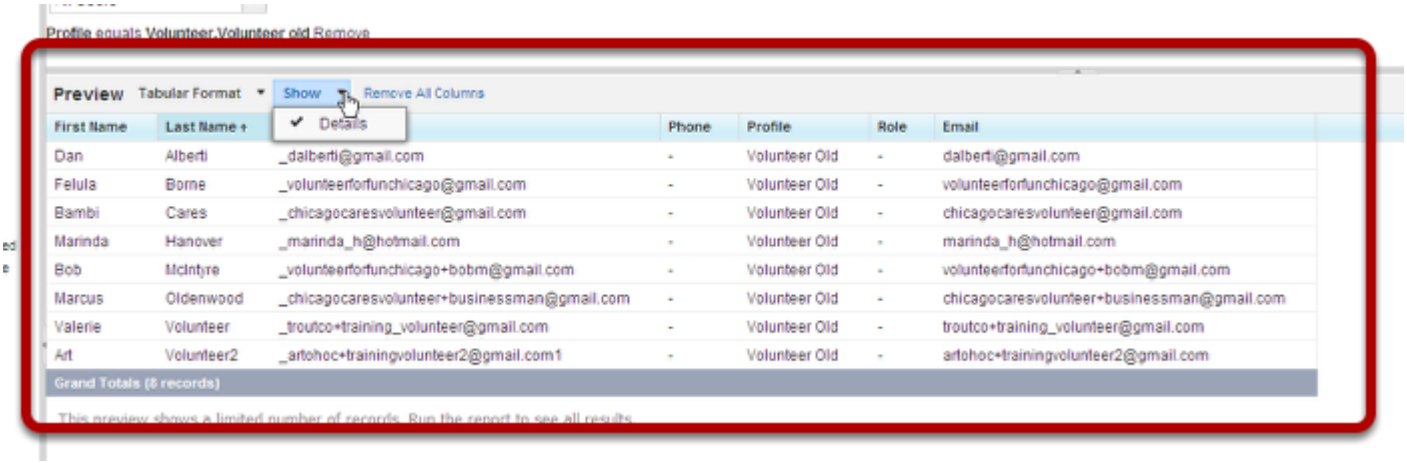
We have highlighted the Birthdate. We know that this in the Object: Contact (Folder name), it is a date or datetime (Icon beside name) and the name of the field.

The Filters Menu



This is a much more robust feature than on the Run Report Window. ADD FILTERS allows us to create complex parameters, which we will learn about in the Creating Filters section. Note that, like the Run Report Window, you have Time Frame parameters, and View Parameters as well. You will note at the bottom of the Filters Menu, it shows you the current filters on the Report. You can choose to remove these from the link beside it, or through the Edit Custom Filters button.

Preview of Sample Data



Consider this section your workspace. It brings back sample data so you can begin to see what your report is going to look like. It is important to note that this is just a sample of the data, and not the complete set of records that match the options and parameters you have laid out in the report.

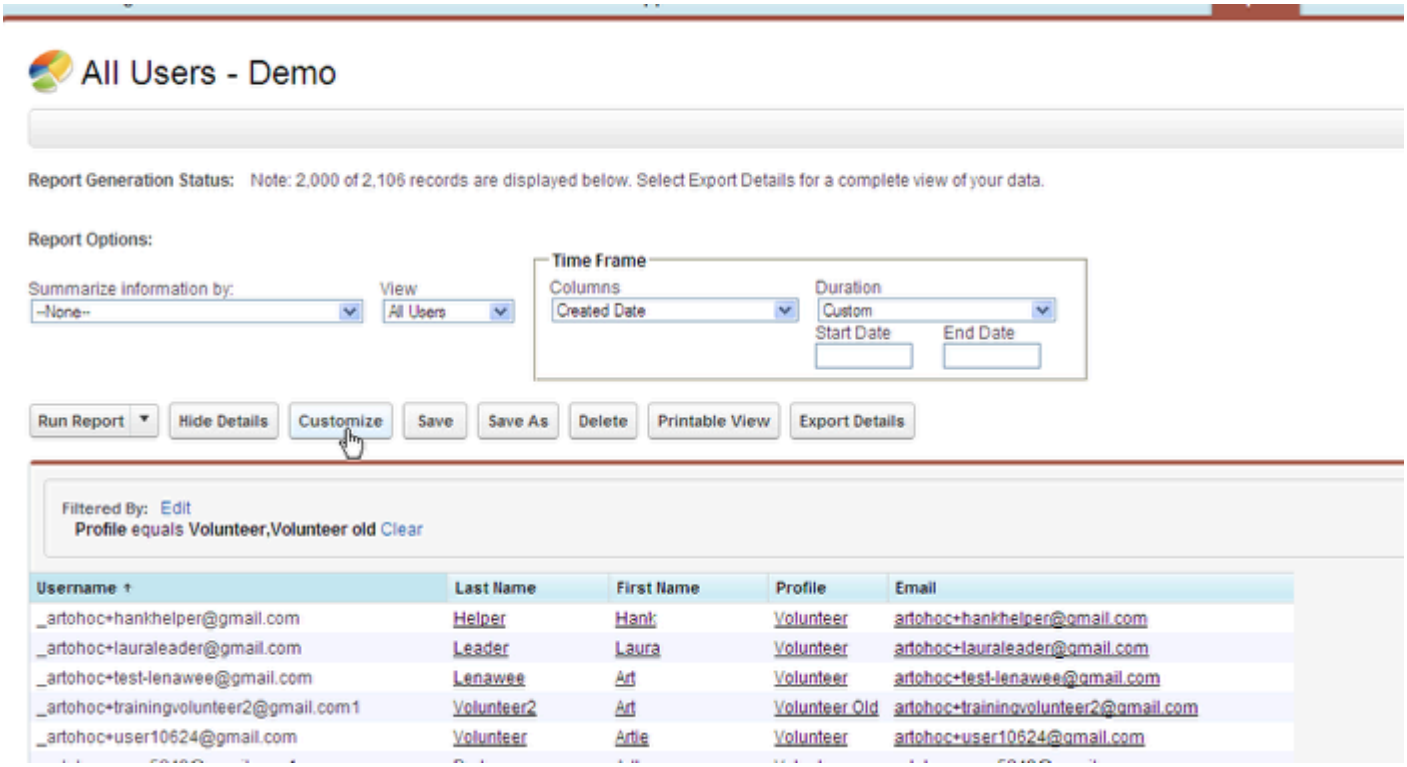
We will be going over how to use a lot of these buttons in other lesson (like Data Format / Summaries). Again, just like in the Run Report Window, we can show details or hide details. Since there is no summary in this report, our only option is show. You can also hit the field headers to sort the information. Remember, however, that this is not the complete list of records... and the results listed here are not links to the records. Later we will go into the different Formats of a report: Tabular, Summary, and Matrix.

Now let's learn how to Add Fields to this report.

Editing Fields in a Report

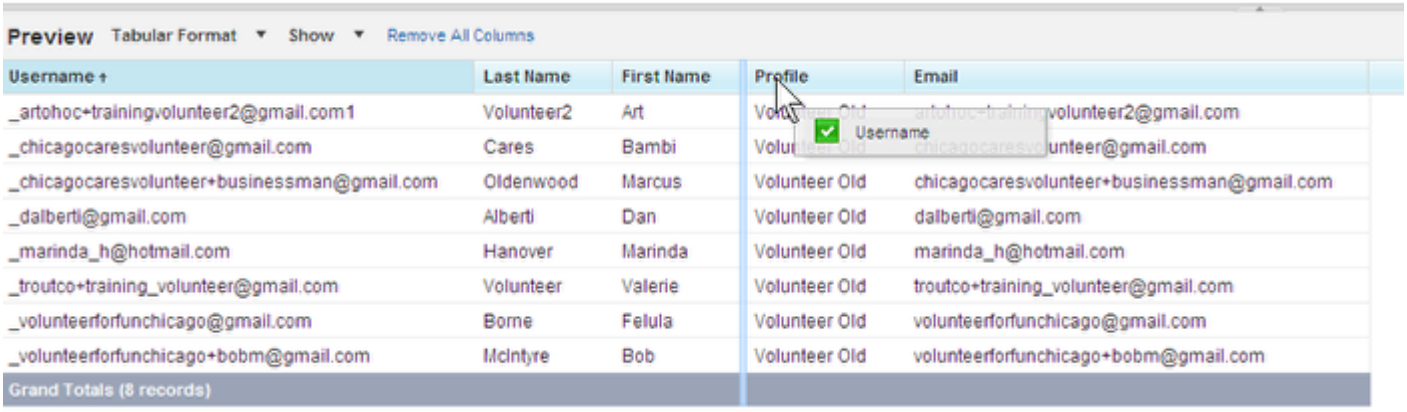
Sometimes a report that already exists that has ***almost*** everything you need in it. To get more information, all you have to do is add those fields to your report. You can do this through the Customize Reports Button. In this lesson, we will learn how to add fields, arrange fields, and remove fields.

Find the report that most closely resembles the information you want



Navigate to the reports Object/Tab and use the Search button to find the report you would like. If you know where the report is you can look in its folder, or if you used it recently, you can use the Recent Reports tab. Click on the report to take you to the Run Report WIndow. In this case we are going to use the All Users - Demo report. Then click customize.

Move column headers

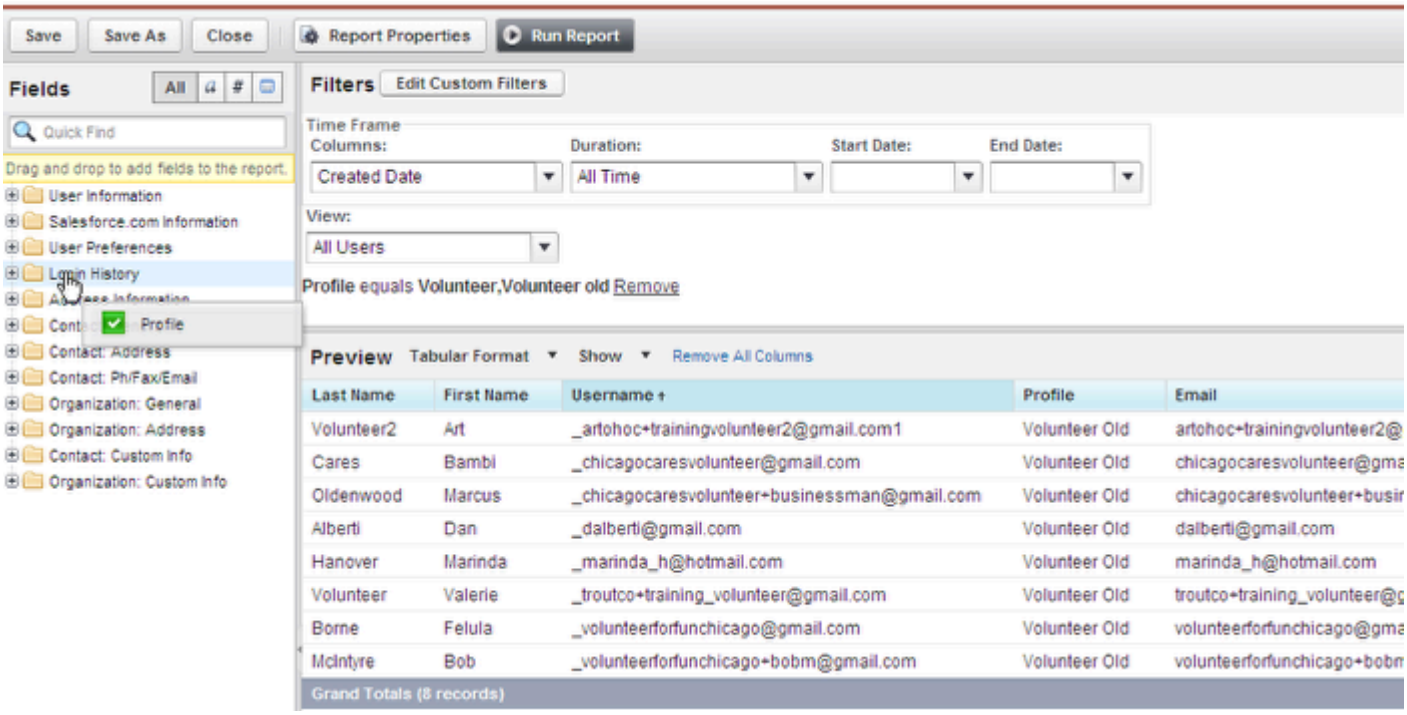


This report is a mess. I don't want Username listed first, I want last name, then first name, then Username and then email address.

To change the order the columns appear, we will just grab the column with our mouse and drop it where we want it. As we move the column, we see that a highlight appears where this new column is going and the box turns from a red X to a Green check. This means that I am allowed to move this field header here. In this example, I am moving Username to the other side of the First Name. When the column is where I want it, I just release the mouse and the report will adjust accordingly

You can also click on the column header to sort the report by one column or another.

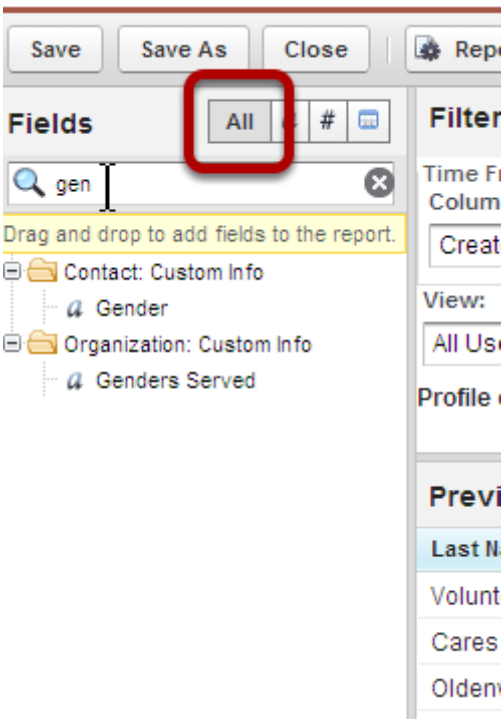
Removing a column



I am not particularly interested in the User's Profile, so I am going to remove this field. This is exactly like moving a column header as instructed above, but this time, I am going to grab it and place it back in the available fields menu. Basically, you are just grabbing it, and dragging it off your report.

It does not matter where it appears you are putting the field... HOC will put it in the right folder... this is just to drag it out of your report.

Adding a Field

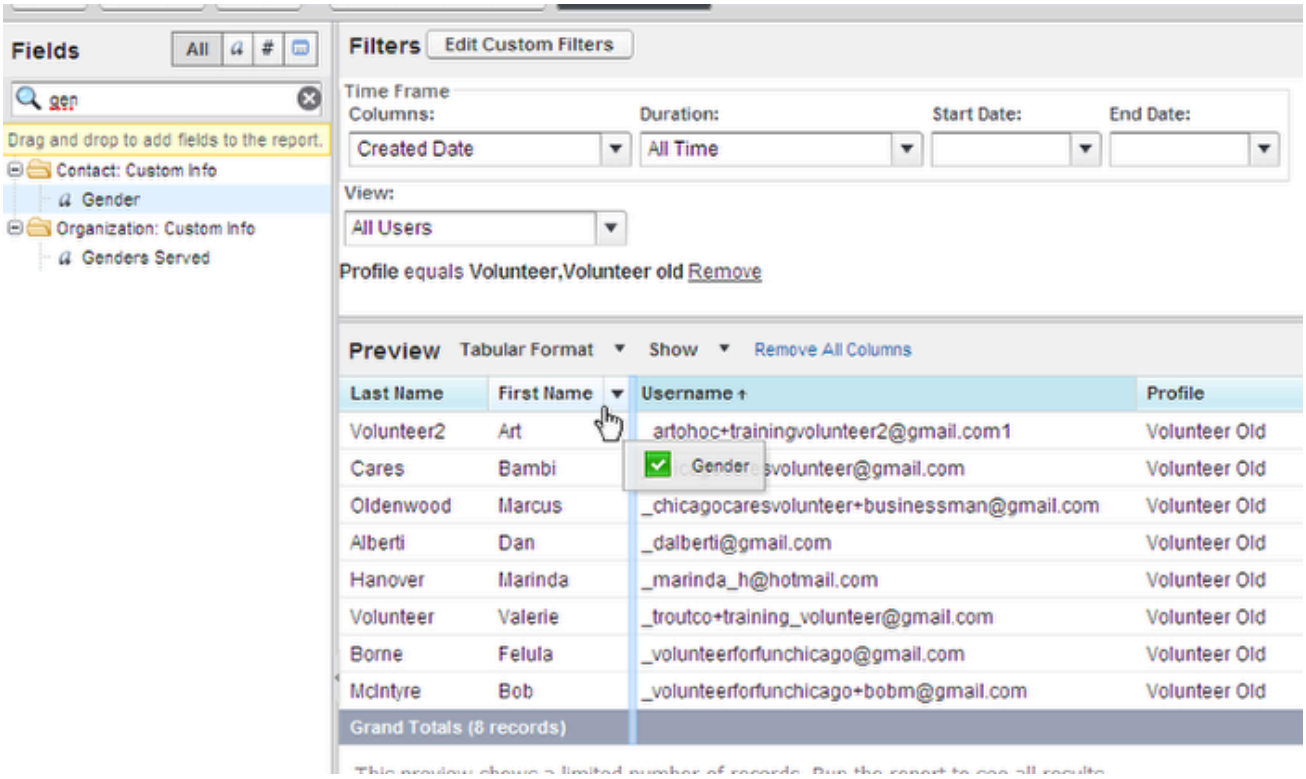


Adding a field is just as intuitive. First, we need to find the field we want to add to the report. The simplest and fastest approach is to search for that field in the Field Menu on the far left side4. I am looking for Gender, so in the search box, with ALL selected, I type in Gen

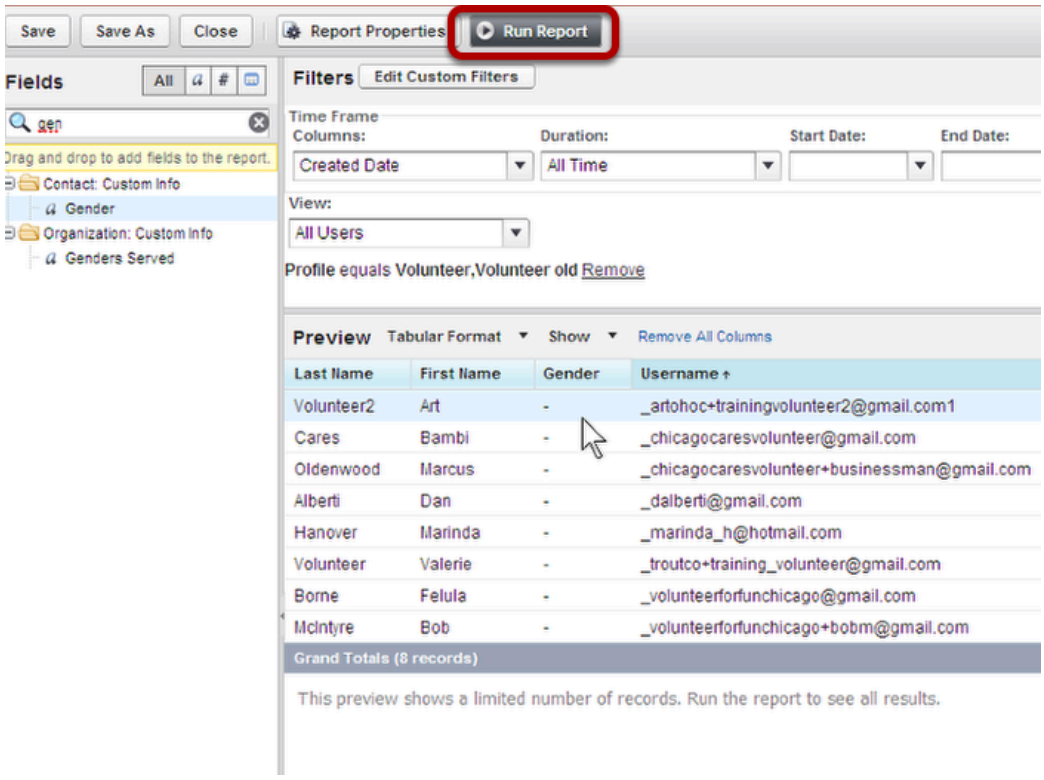
Notice the fields appearing below. I have now found all fields that have gen in the field header.

The folder name tells you the Object that the item comes from, and the list below tells you the name of the field, and what kind of field it is. In this case, because they both have the letter a next to them, they are both alpha or alphanumeric fields. I am looking for a Contact's gender in the Contact Object, and not the Genders Served in the Organization Object.

Drag the field header in to your report and place it where you want it.

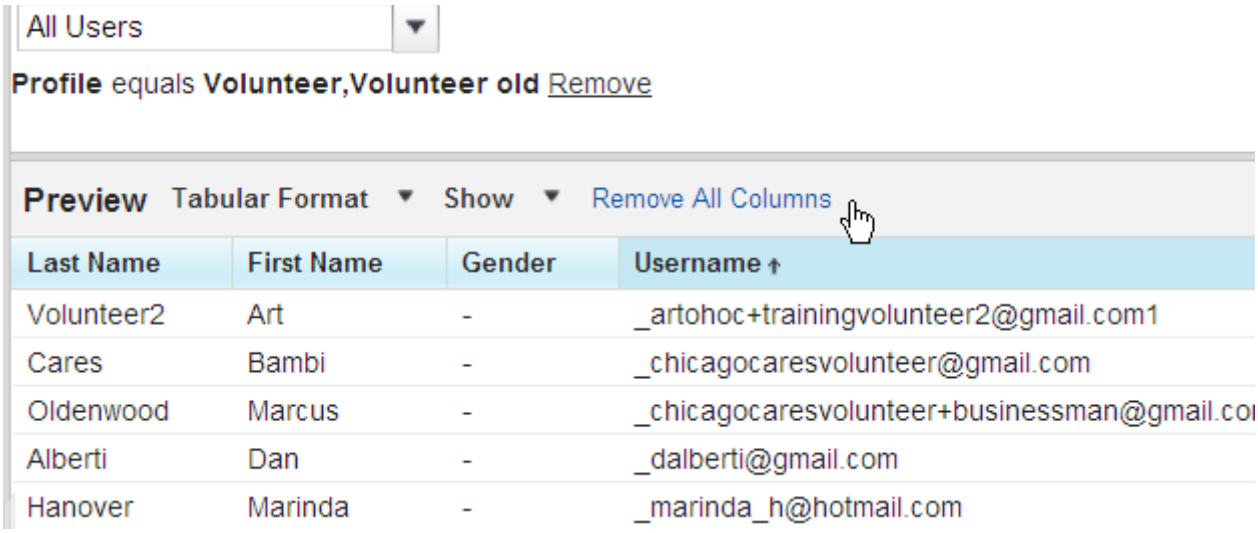


Release your mouse and drop the field between First Name and Username



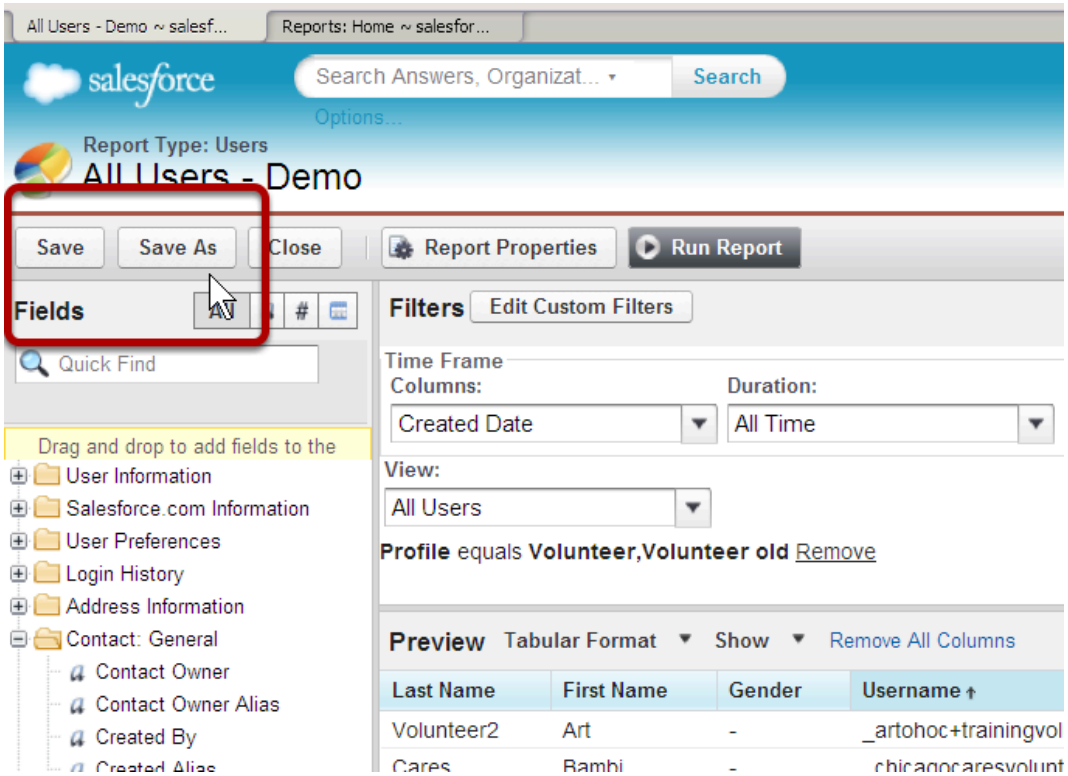
A new column will appear with the field you added. Remember, this is just a sample of the data you are looking for. To see all the records, hit the Run Report button at the top of the screen, which will take you back to the Run Report Window.

Starting from scratch



If you wanted to delete all the fields in a given report and start over from scratch, you can use the Remove All Columns link.

Your work in this Customization has not been saved.

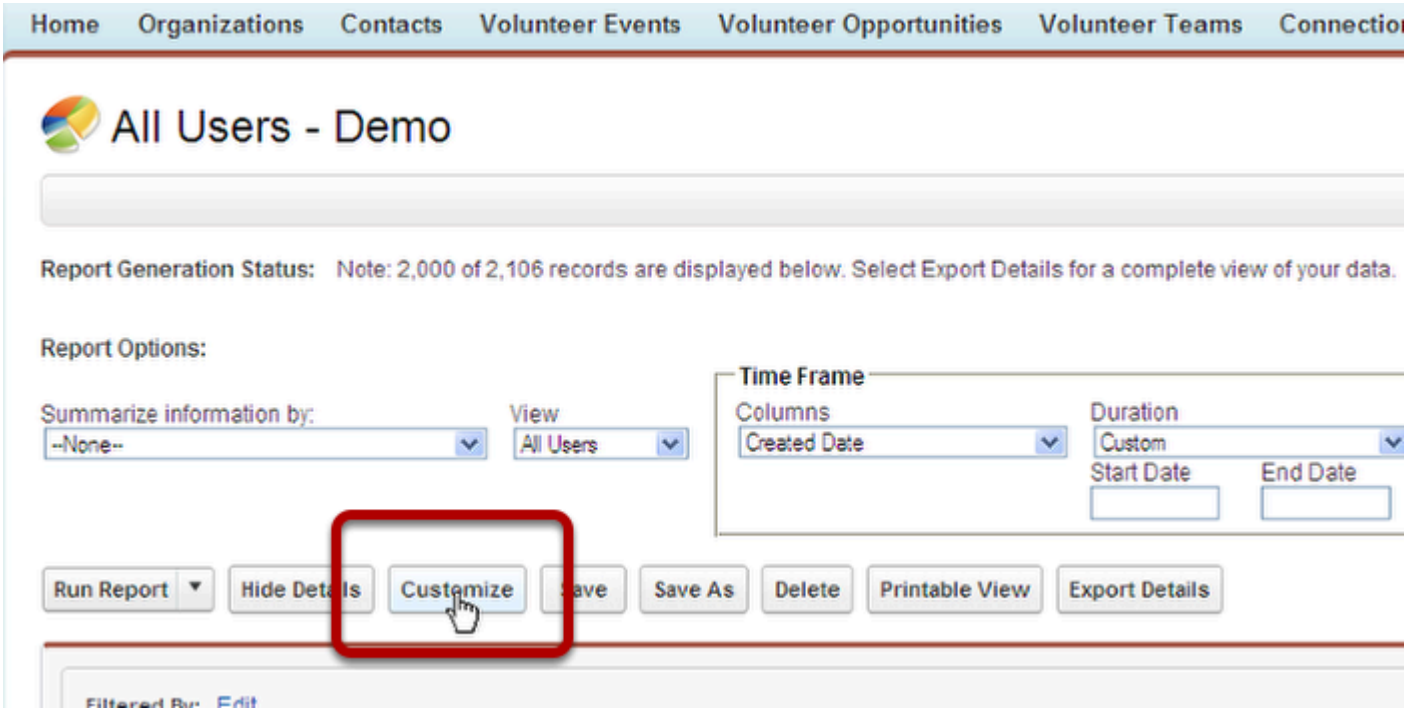


We don't recommend SAVING the report with the changes (as others in your organization may want the original template as it was), so use SAVE AS and save the report to a different folder.

Using Filters in a Report

Filters can allow you to customize a report so that you only have to see certain information without having to sort, then re-sort, then re-sort. In this lesson we will learn how to use these filters. You can have any number of filters on a report.

Choose the Report you want to start with.



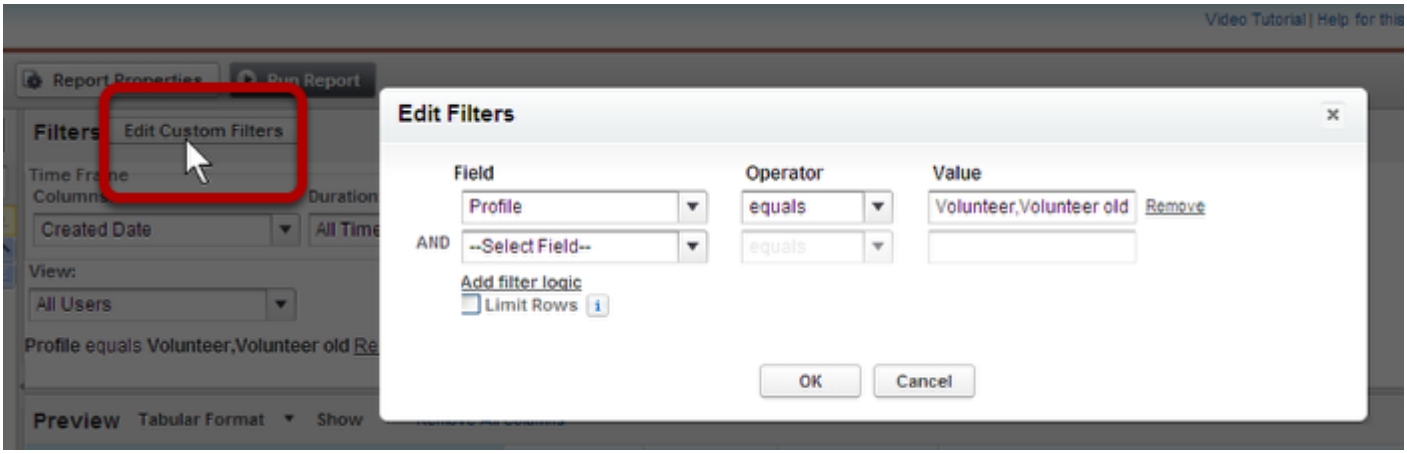
Navigate to the reports Object/Tab and use the Search button to find the report you would like. If you know where the report is you can look in its folder, or if you used it recently, you can use the Recent Reports tab. Click on the report to take you to the Run Report WIndow. In this case we are going to use the All Users - Demo report. Then click customize.

Advanced Users

Salesforce has wonderful training and lessons on how to use Operators, Fields, and Values when working with different types of Fields.

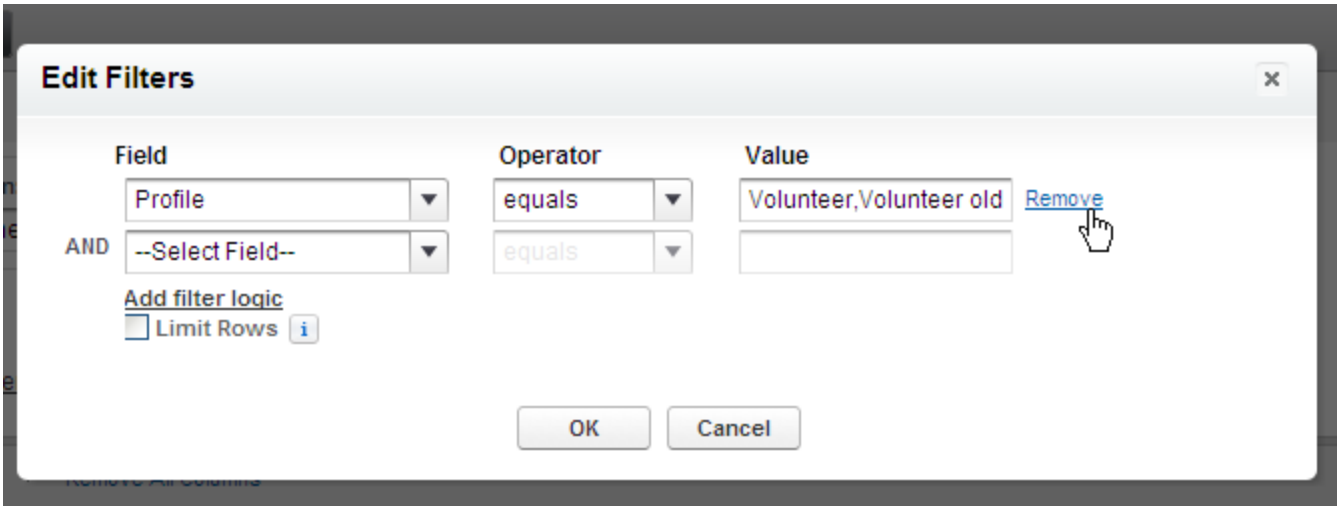
Find out more at : Salesforce Help and Training: Filters

Open the Filters Menu



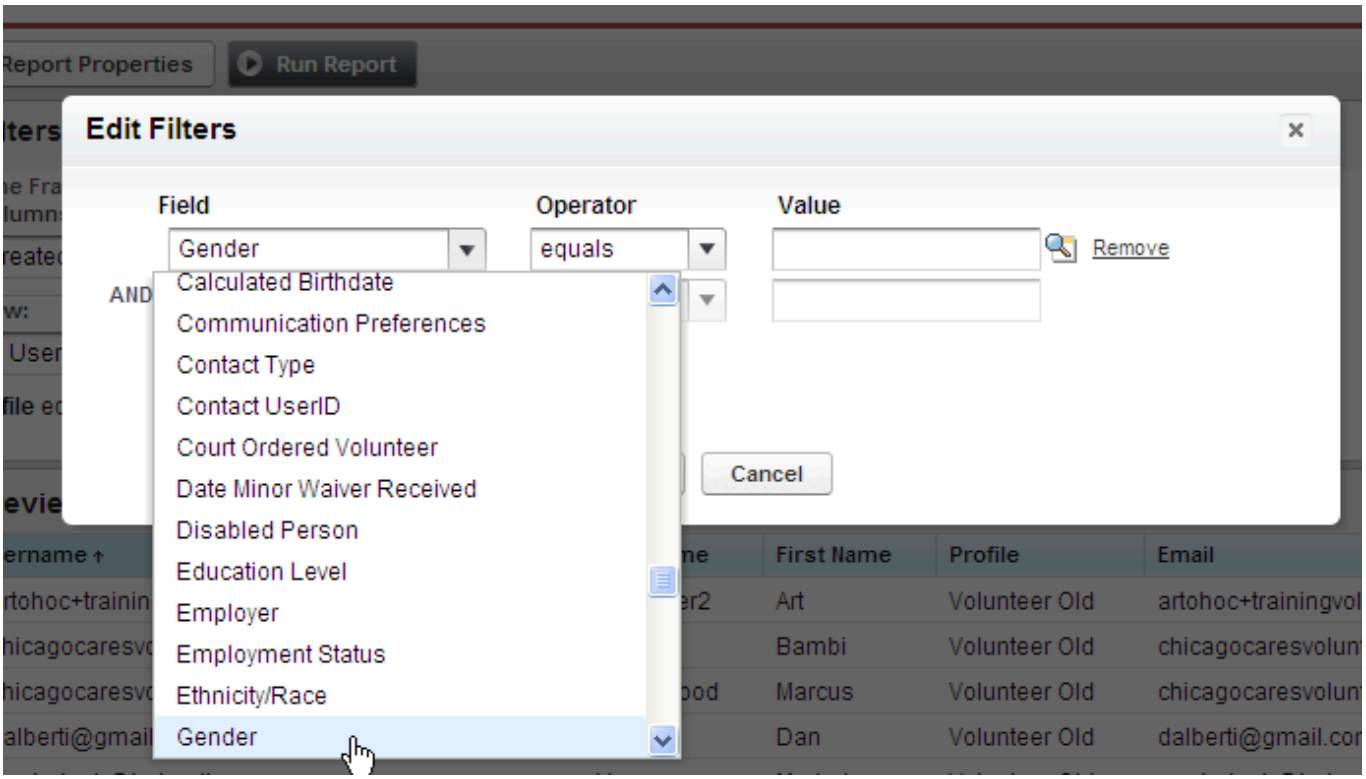
In the Filters Menu of the Customize Reports window, click on the Edit Custom Filters. This will open a new window.

If you would like, delete the current filters



I don't need the Profile to be limited to only Volunteer and Volunteer Old, so I am going to remove this filter by hitting the Remove button to the right of this filter

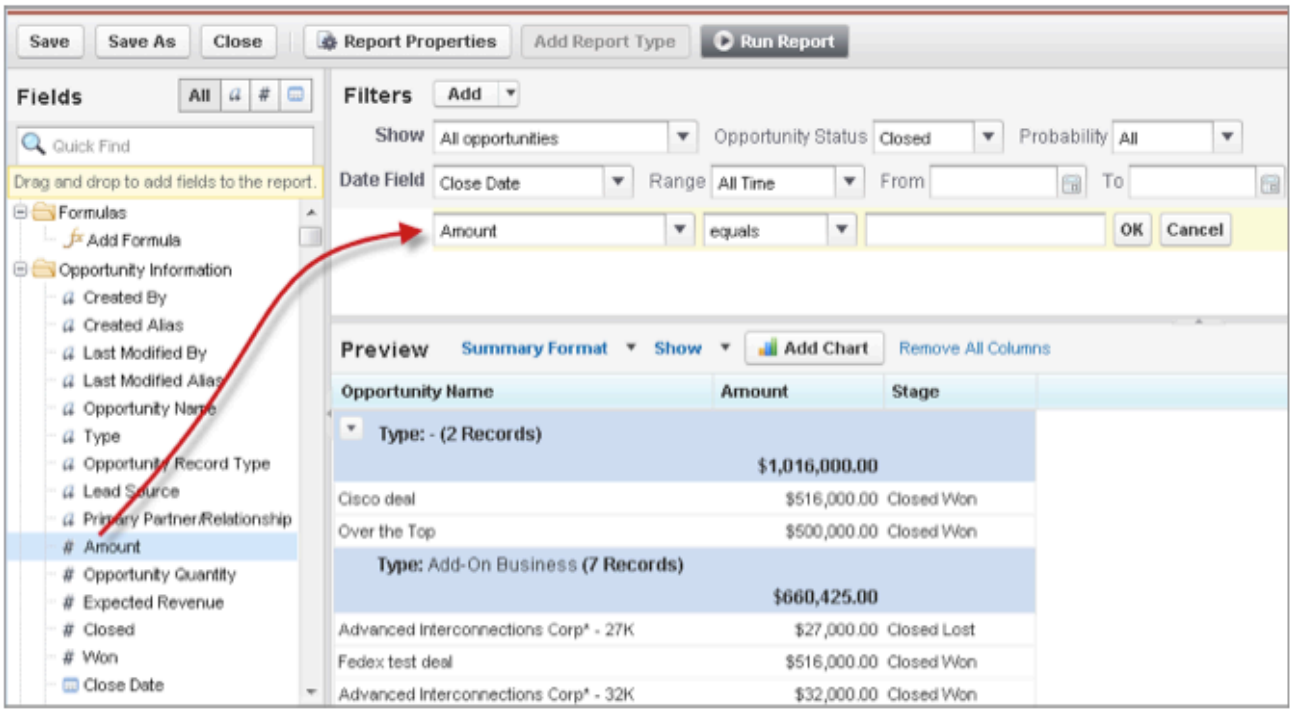
Add your filter Field



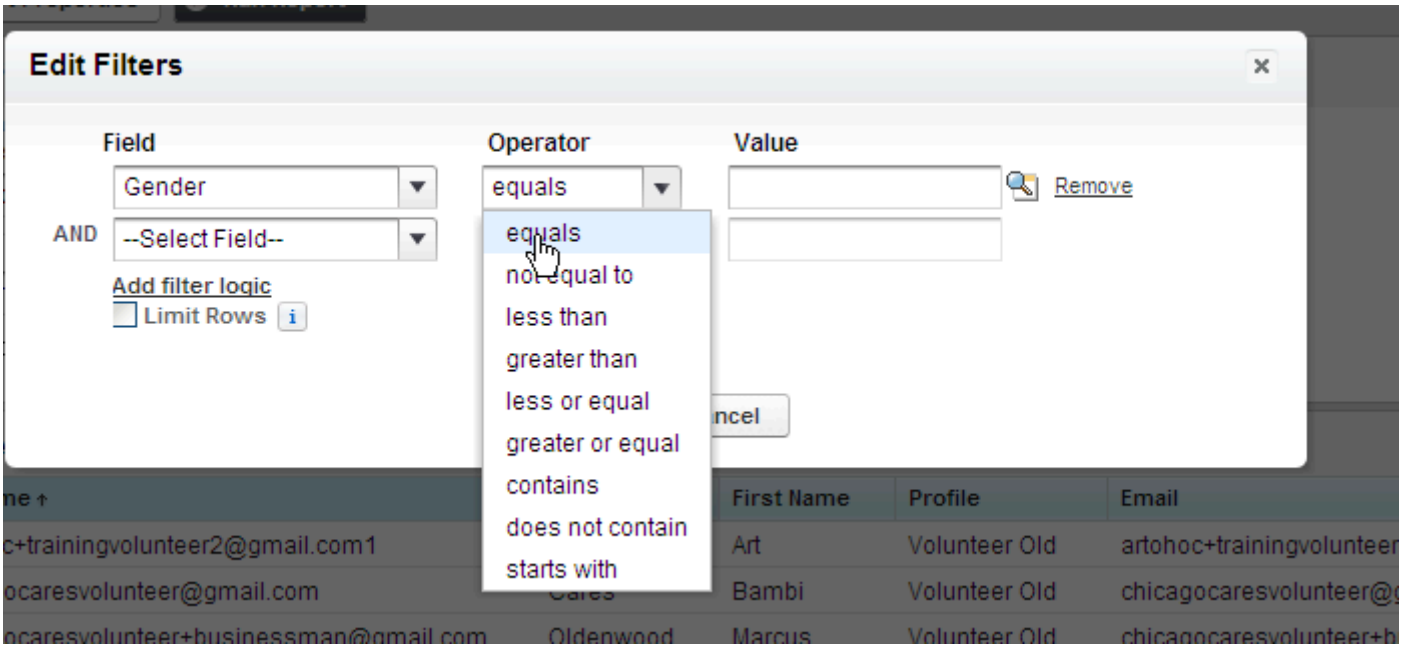
SO, for this report, I want men who are over the age of 55. That is going to be two filters. One on gender, and the other on age or birthdate. Let's add the Gender Filter.

From the Drop box, let's find Gender. It is in the Contacts Object and I just scroll through til I find it.

You can also drag and drop a filter from the field list if you don't want to scroll down the list looking for a filter!

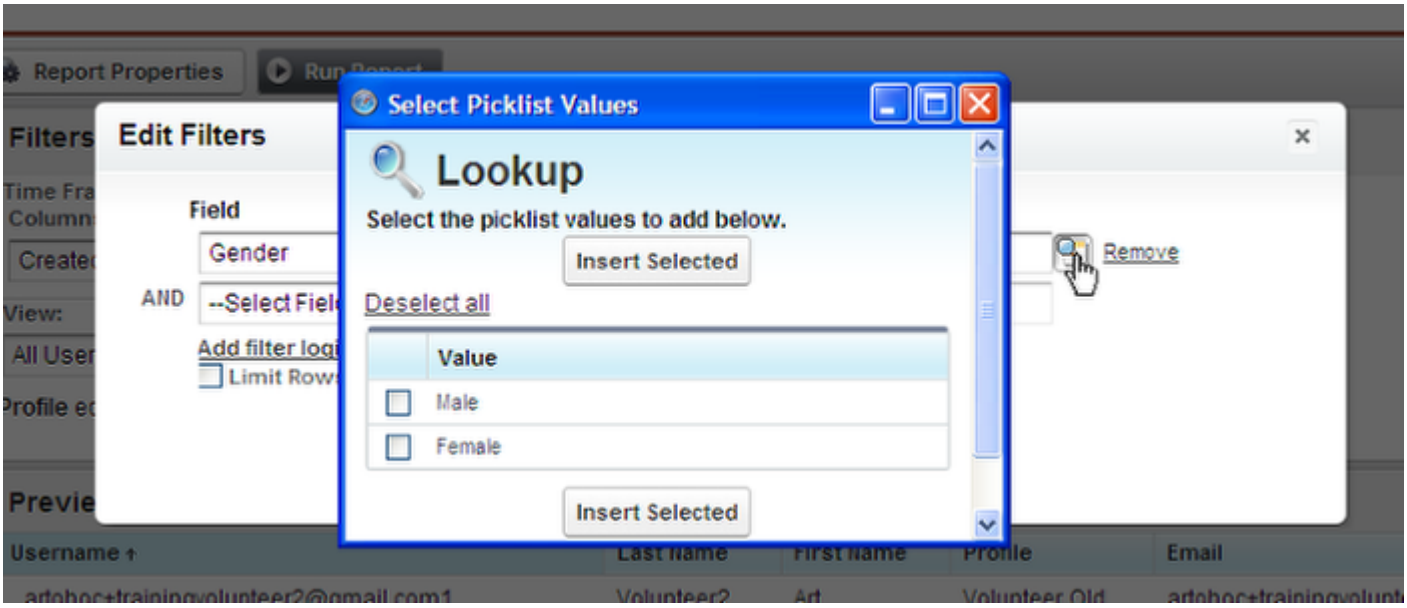


Tell it what you want that filter to do



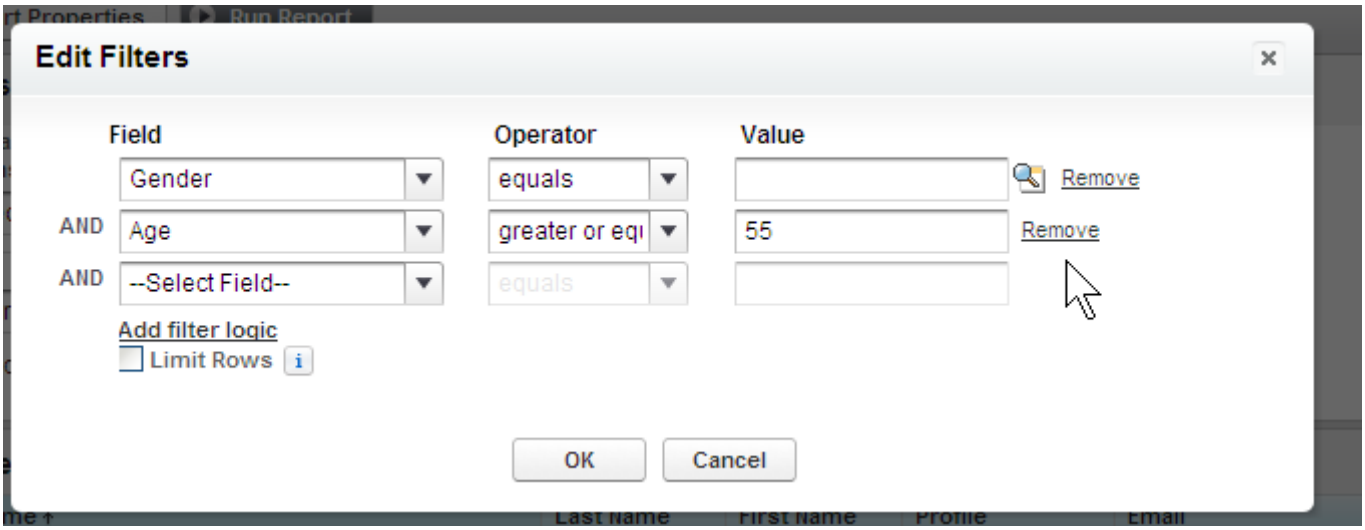
In this case, we only want to bring back records where the Gender is (or equals...) Male. You can see the choices we have here... (We will use greater than or equal in the next filter)

Choose the Value of the filter



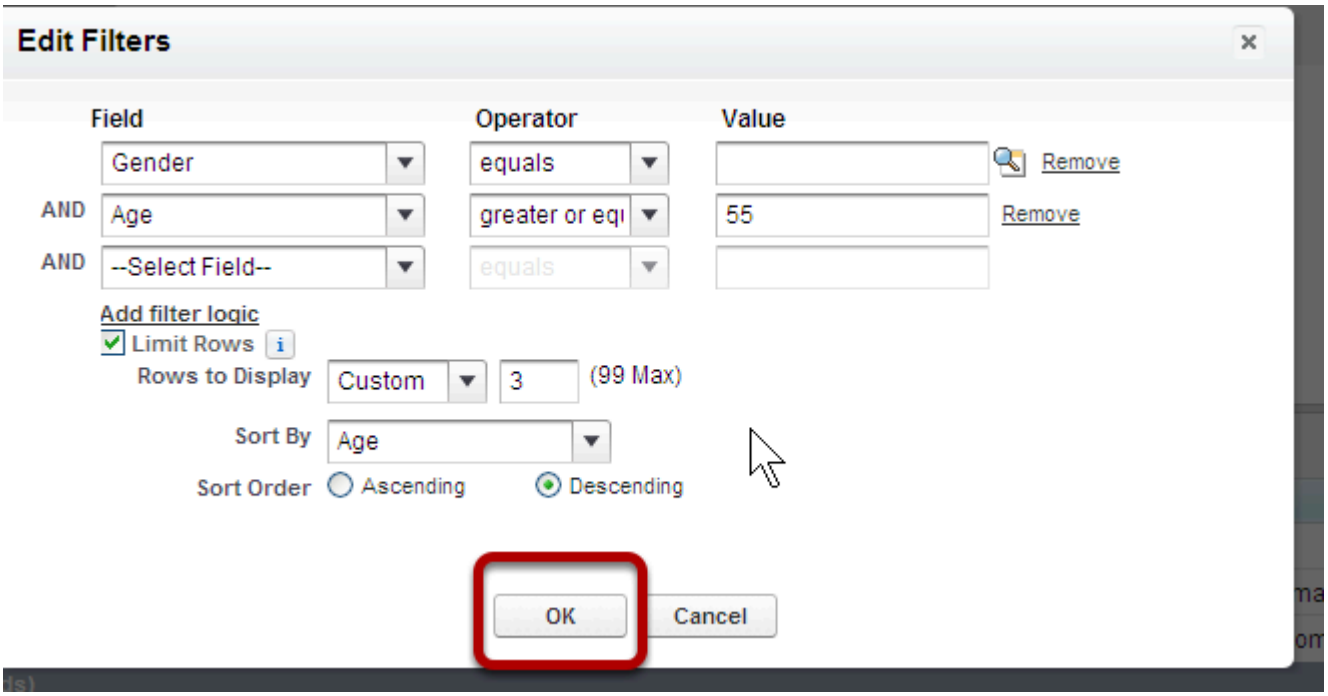
If the Field you are choosing to Filter by is a Picklist or Mulitpick list, you can use the Lookup Magnifying Glass. This is especially helpful when you want to filter by Organization Name. You can use the Lookup to find that field. If the option to use this Lookup is there, I suggest you always use it. We are going to put a check box next to Male and hit Insert Selected.

Add another filter



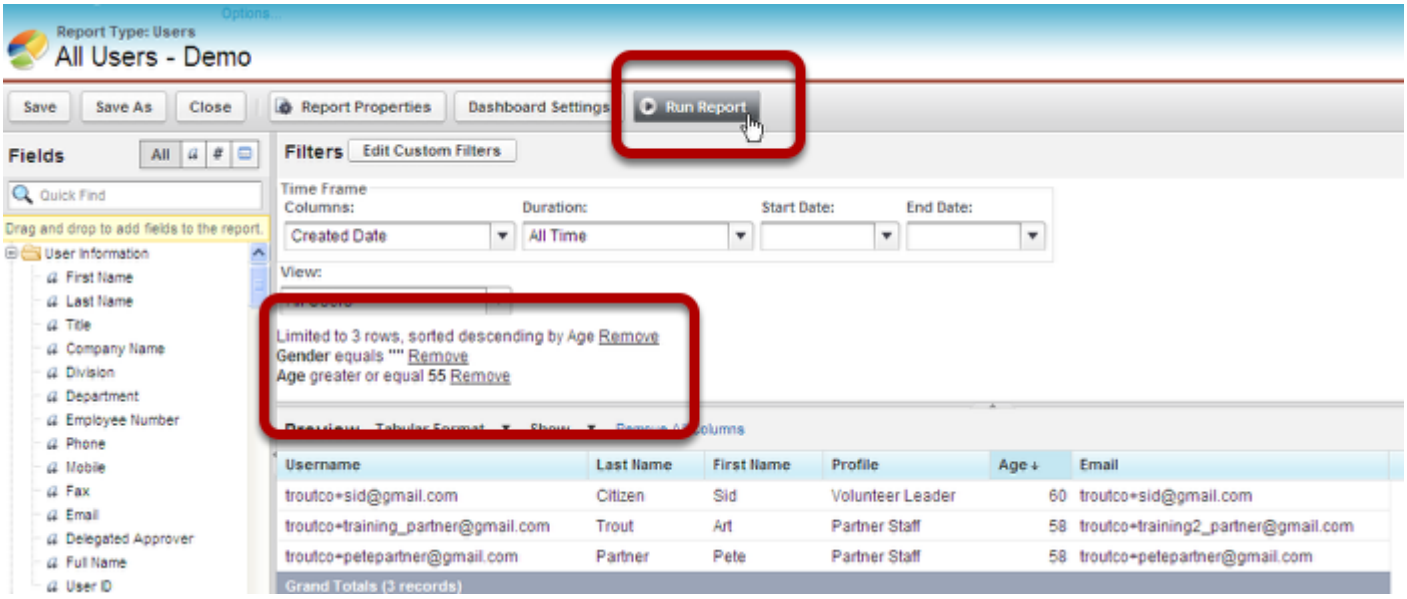
You will that once we start to add a filter, it adds an AND line. This is where you can add another filter. Filter order does not matter. I am not using the field Age so that it is greater than or equal to 55. I could have also used Birthday and said Less than or Equal to 55 years ago today. Age, however is a calculated field, and if I save this record, I would have to adjust this filter every time I ran it.

You can choose to limit the rows in the report



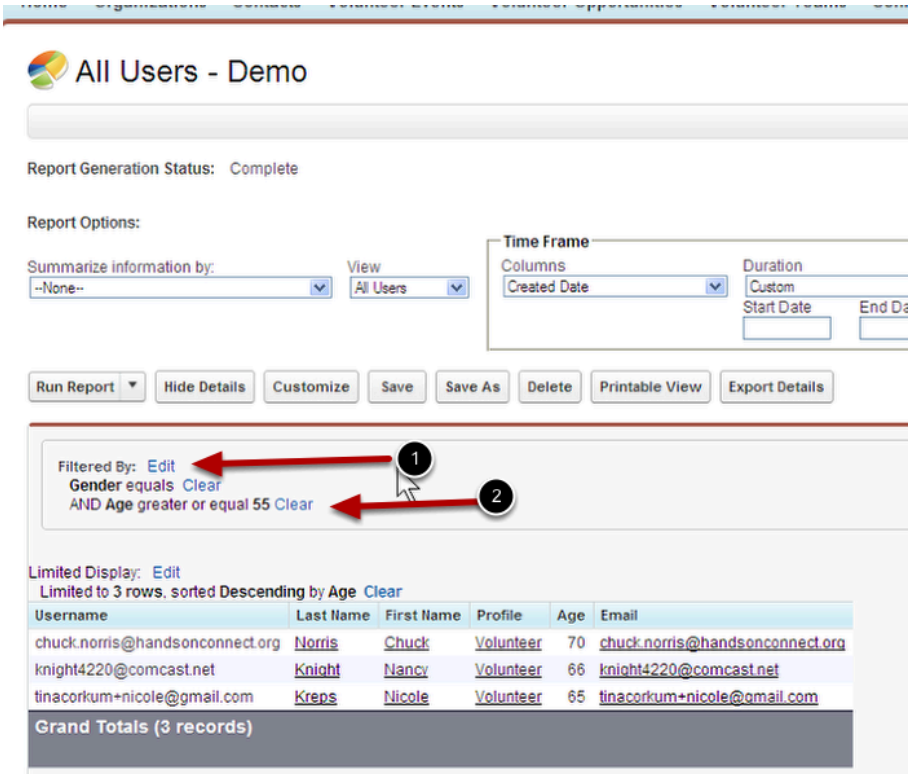
When you check the box next to limit rows, you will get other options. If I used these filter logic, it would bring me back the 3 oldest people in the report. Why? I have said I only want three rows, I want them sorted by Age, and I want them in descending order. NOTE: The Sort by picklist only lists the Fields that you have in the report. Back in the Customize Report Window I added the field Age. If you don't' see the field you want to sort by, you need to add it into your report. Now Hit OKAY

See your filters, run your report



Just above your sample data (remember, this is just a SAMPLE...not the records you are asking for...), you will see all the filters you have applied. Hit Run your report.

Get your requested records

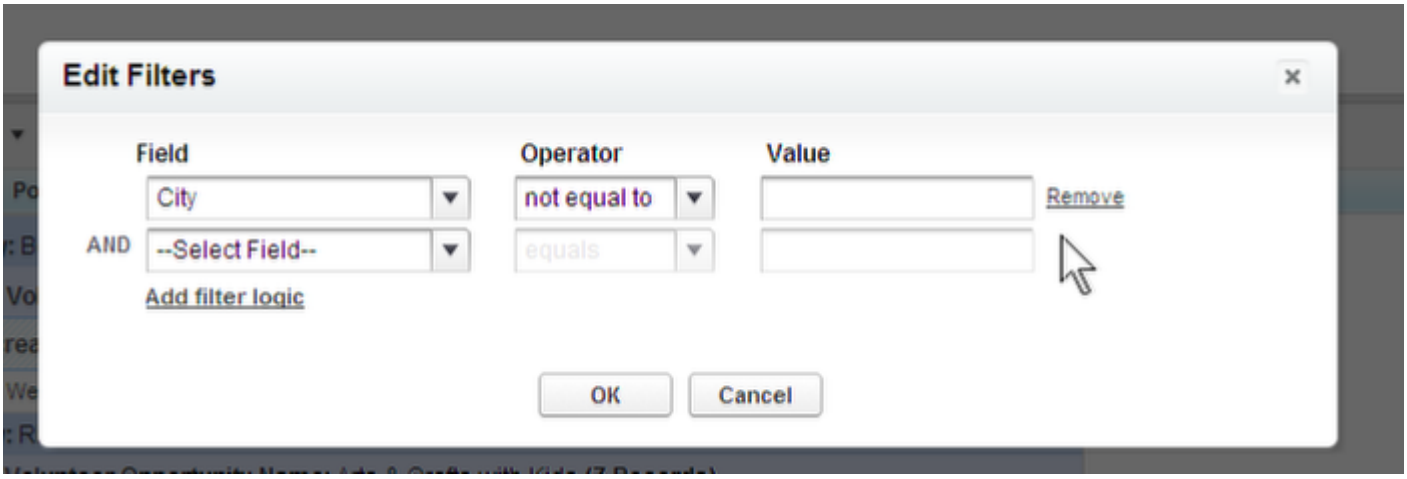


This will take you back to the run report with the records you have requested according to your filters. Note that your filters are listed here as well. You can always edit your filters through the Edit button (1) or remove filters (2)

If you are going to use this report with these filters again,

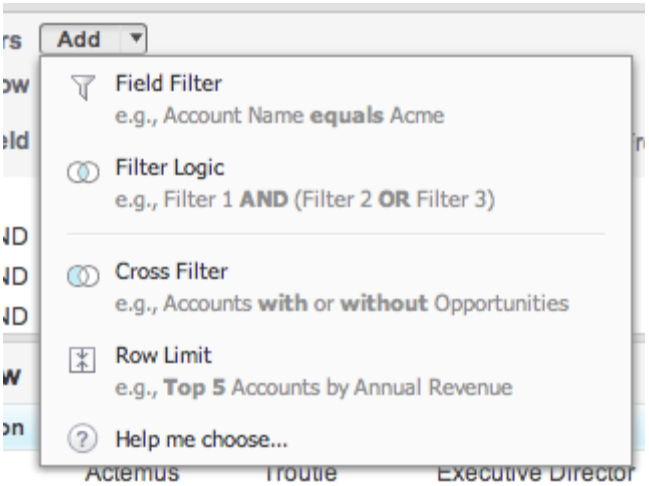
Use save to overwrite the existing file, or Save As to create a new report with the options, layout, and filters you have created.

Including or Excluding empty or NULL fields



In this example, I want my report to pull back information where the City field is not NULL. The inverse is true, as well. If I wanted to pull back information where the City is blank, I would create a filter where the Field is City, the Operator is equals and in the Value box, leave it blank. NULL means that there is no value in the field... that is very different than a field that is filled with the alpha value: None or No one.

(Advanced) It's also possible to build more complex filter logic.



You can create logic between your filters to create AND / OR logic, or limit the number of rows of information returned in the report.

See Salesforce Help for more details on advanced features.

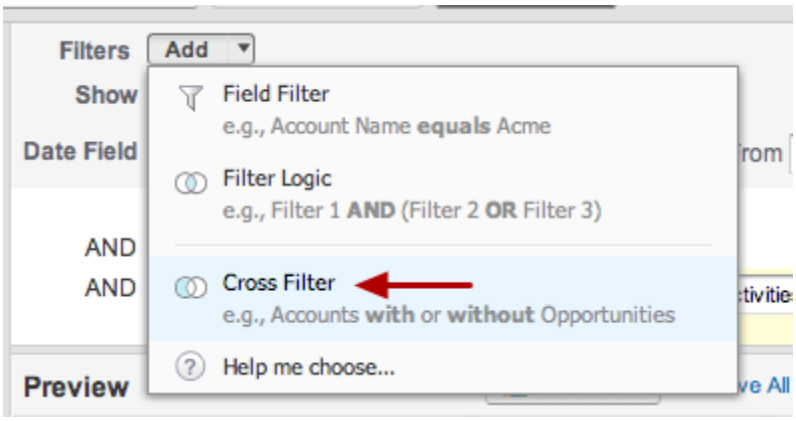
See the next post to learn about cross-filters

(Advanced) Using cross-filters in a report

Use cross filters to filter a report by an object's child objects using WITH or WITHOUT conditions. For example, filter a report to show just accounts with cases, or contacts without activities. You can apply cross filters by themselves, or in combination with field filters.

Note that filter logic applies only to field filters—not cross filters. You can create up to three cross filters per report.

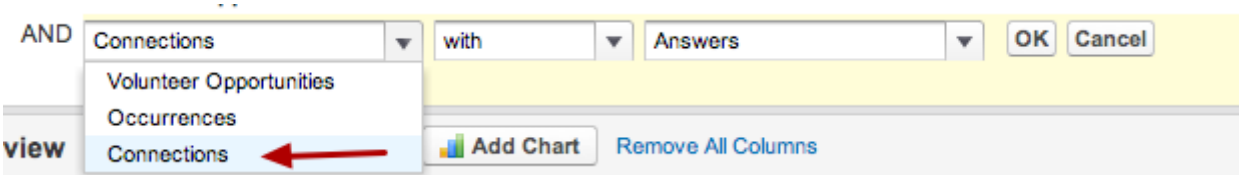
Add subfilters to further filter by fields on the child object. For example, if you have a cross filter of Accounts with Opportunities, click Add Opportunity Filter and create the Opportunity Name equals ACME subfilter to see just those opportunities. You can create up to five subfilters for each cross filter.



Use cross filters to include or exclude records in your report results based on related objects and their fields. To create a cross

filter for your report:

1. In the Filters pane of report builder, click Add > Cross Filter.

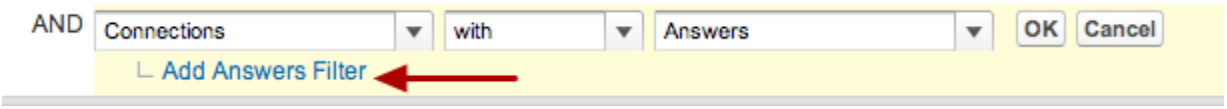


2. Select a parent object from the drop-down list. Your choice determines which related objects you see in the child object list.

3. Choose with or without.

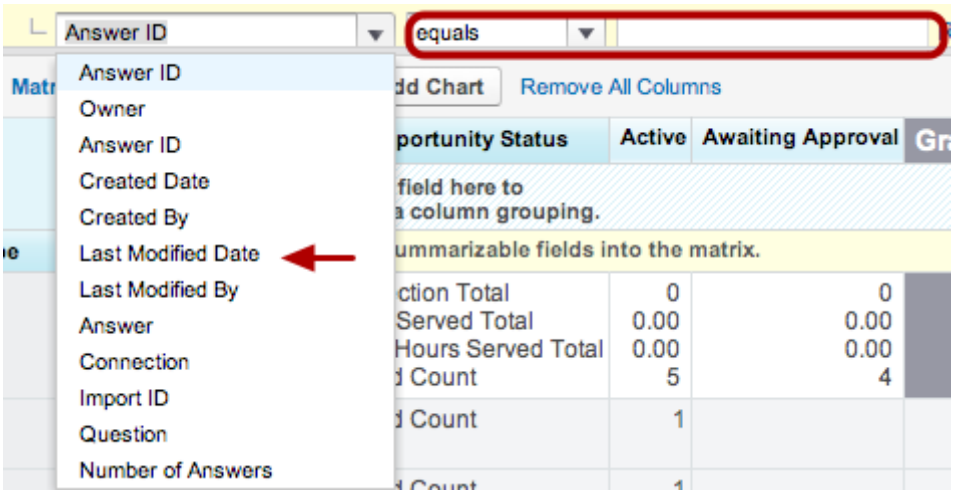
4. Select a child object from the drop-down or search by its name. This drop-down list contains all eligible child objects of

your selected parent object.



5. Optionally add subfilters:

a. Click Add ***Your Related Child Object*** Filter.



b. Select a field. The fields are determined by the child object in the cross filter. For example, if your cross filter is

Accounts with Cases, you can use case fields for your subfilter.

c. Choose a filter operator.

d. Enter a value.

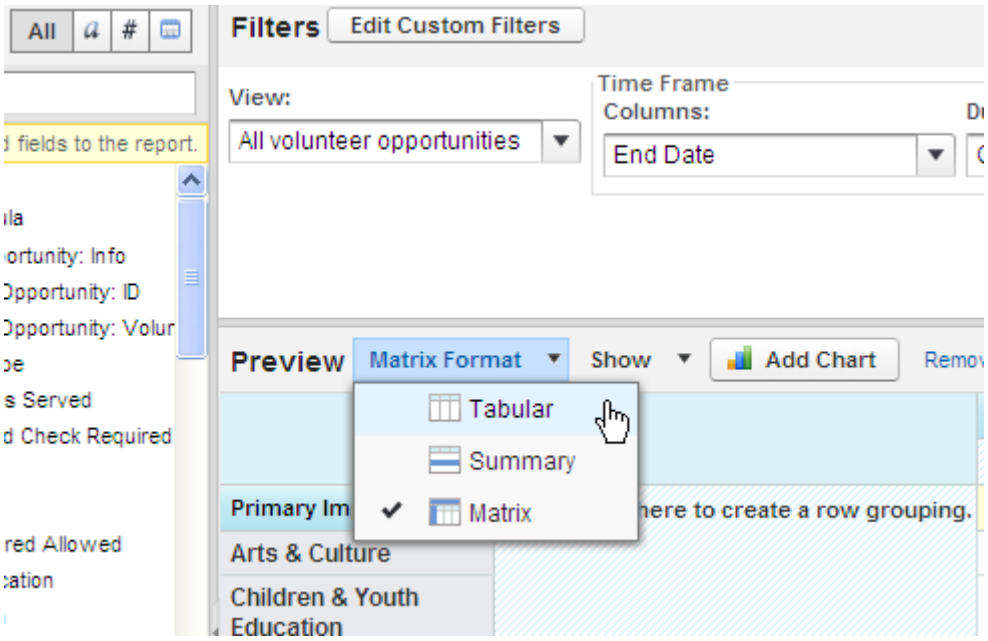
6. Click OK.

Summary & Matrix Reports

Summary Report Formats

Sometimes you are uninterested in the details of a report, and want summary information. This lesson will teach you the different summary formats.

The different Summary Formats



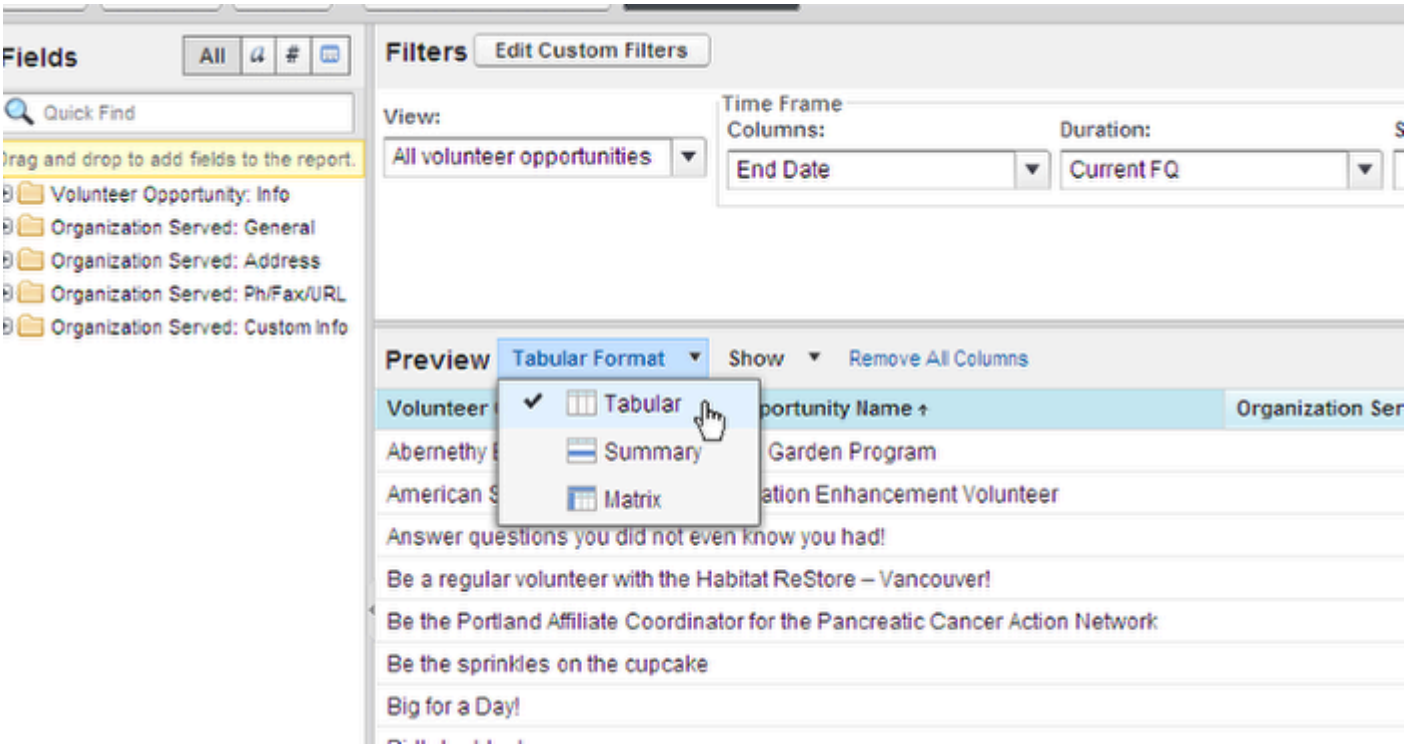
Choose the report you want to work with, and then hit Customize to get the Customize Report Window. From the Preview Menu with your sample data, you have three Report Formats to choose from.

- Tabular

- Summary

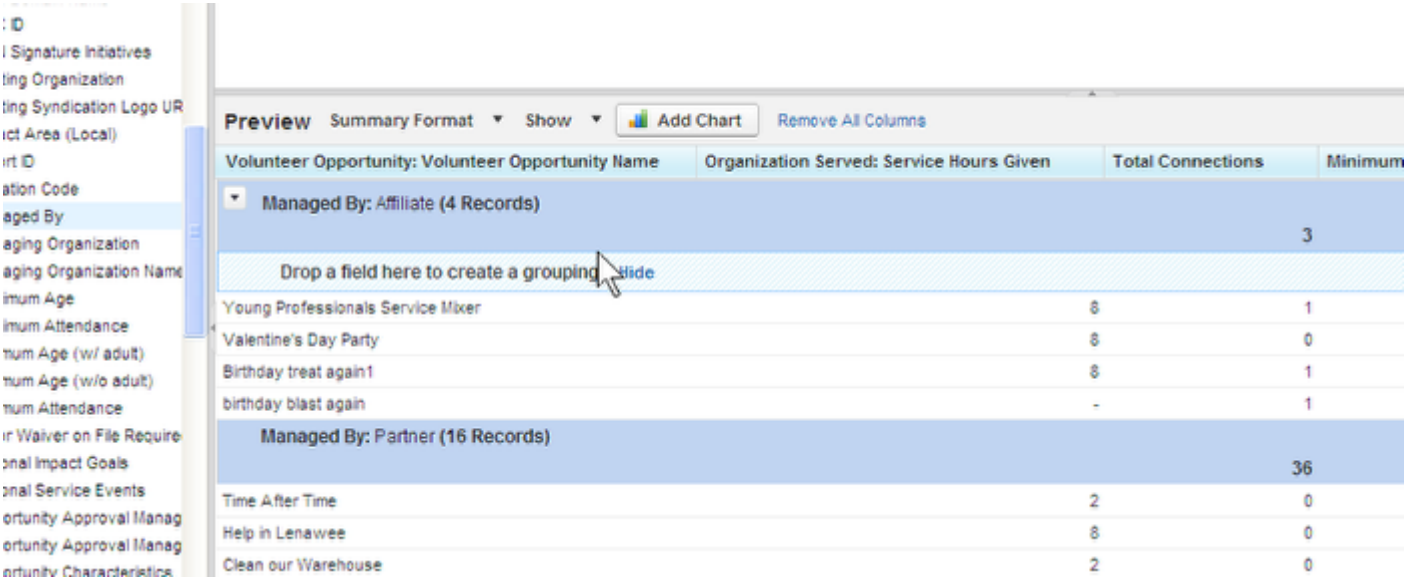
- Matrix

Tabular Format



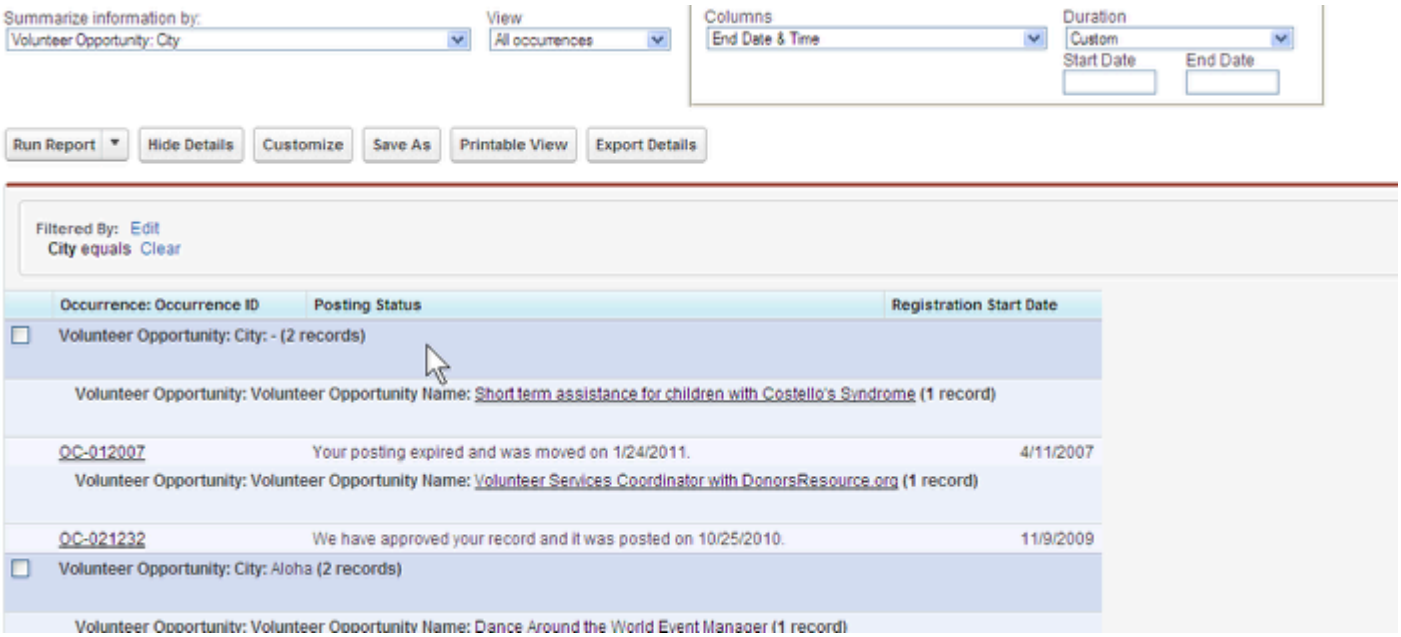
Tabular is all the details. This is the most comprehensive view of information. WHen you run the report, you get a row of information for every item in the report. If the report is volunteer opportunities, occurrences and connections, for example, you'll get a row for EACH connection. Which means the opportunities may show up many times in each row.

Summary Format



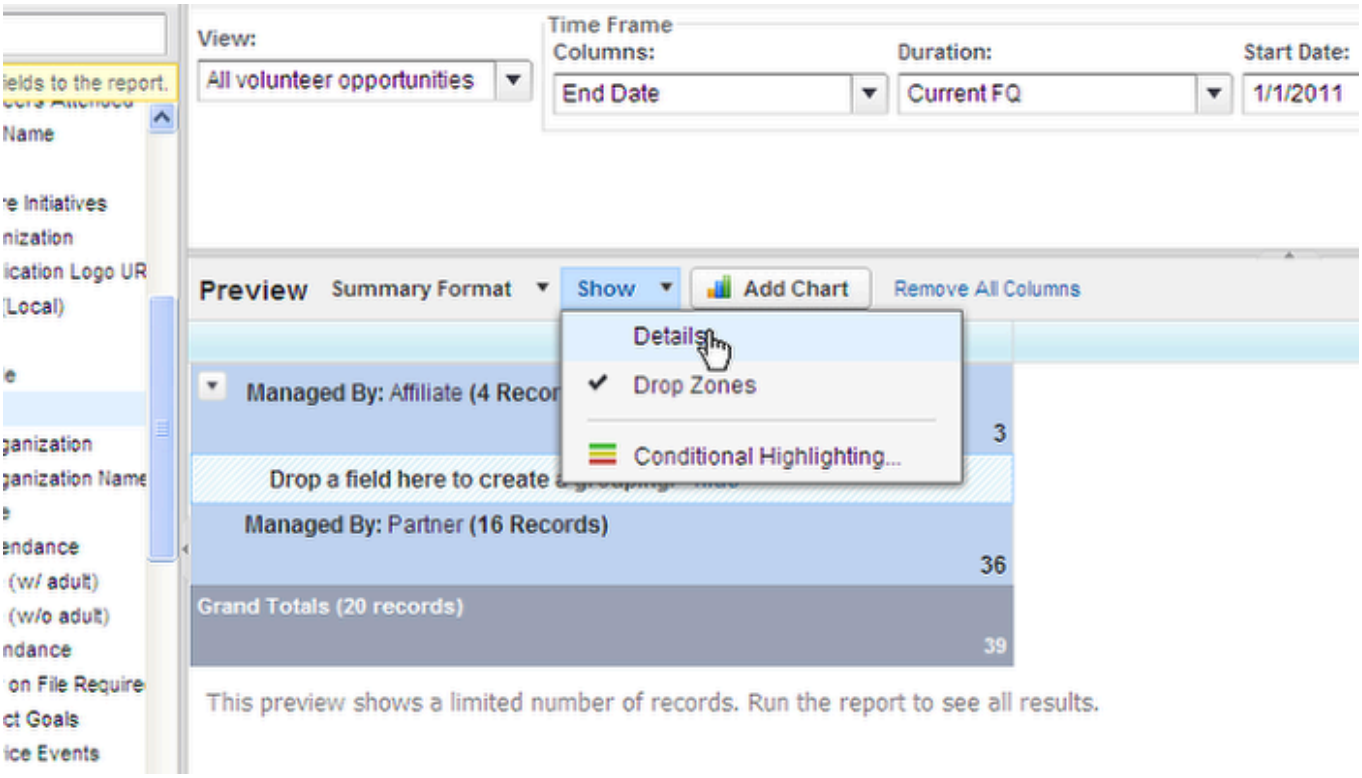
What if you would like to summarize information by a certain field, Let's say, we want to summarize these field by if they were managed by Affiliate or Managed by the Partner. I can do that with this format. We will show you HOW to do this in the Using Summaries Training.

Summary Format: Advanced



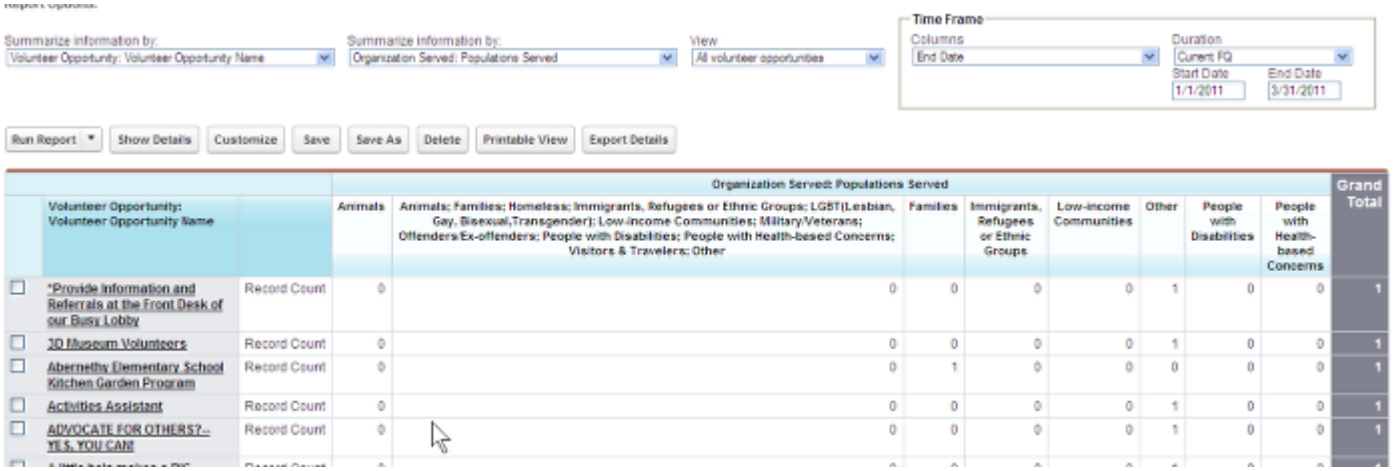
You can continue to Summarize information by adding Summaries IN summaries. In this case, I have a report that summaries the Opportunity City, then the Opportunity names, and has the Occurrence Detail below it.

I can hide the details of the Summary Report



If I am uninterested in the individual records, I can hide the details to get some basic information on the Summary of these field by using the Show Button and un-checking the Details. We will talk about Drop Zones Later

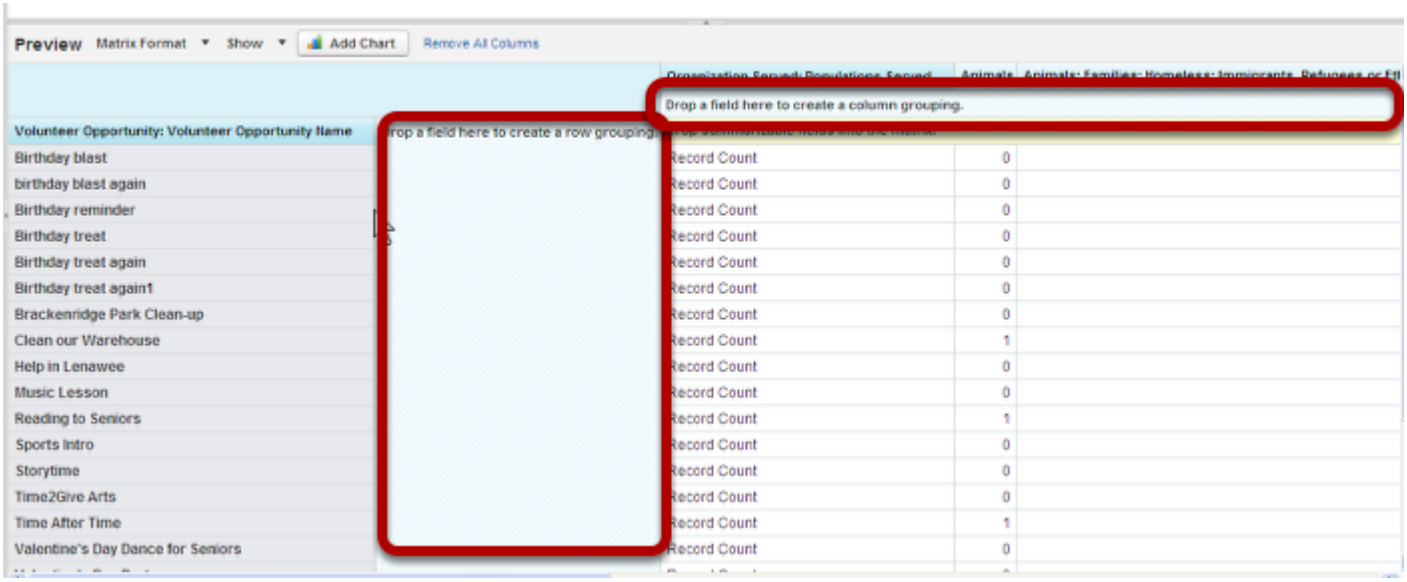
Matrix Format



You can use Matrix Format to see a Grid of Two or more Summaries. In this case, I am looking at the summaries of Volunteer Opportunity Names along the Y axis and the Populations served

along the top. Notice there are row Grand Totals, and at the bottom there is a Column Grand Total.

Matrix Format: Advanced



You can continue to add more summary rows and columns using the Customize Report Window

Advanced Users

Salesforce.com has wonderful training and support material that can help you find specific HOW TOs on some of the more advanced Summary and Filter functions.

Check it out here: [Reports in Salesforce: Summary Formats]

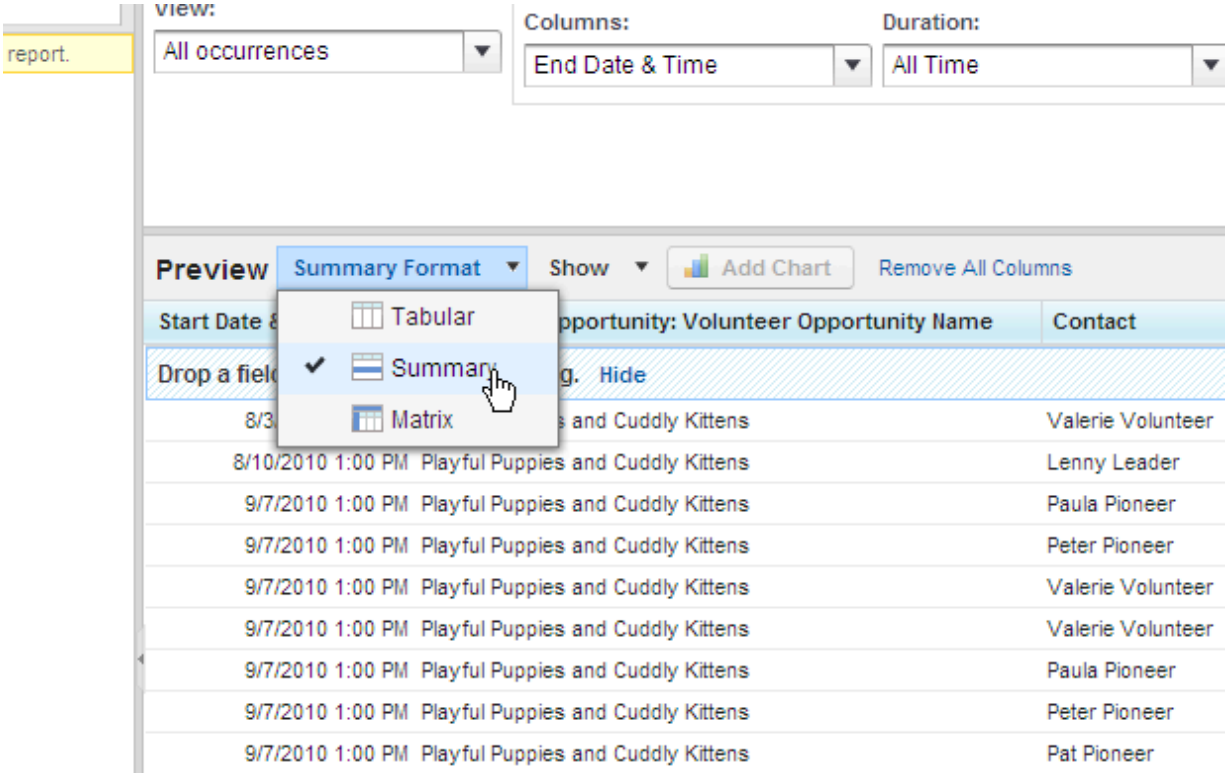
Using Summaries and Grouping Fields in a Report

In this lesson we will learn how to Summarize and Group information for a clearer report.

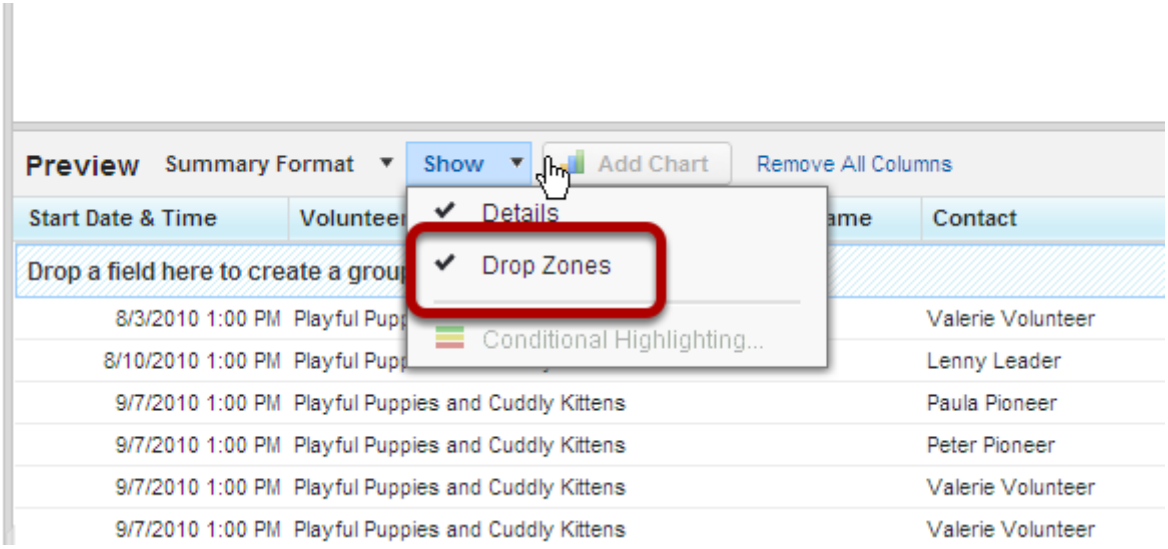
Navigate to the Report you want to work on, and open the Customize Report Window

I am working with a report that contains the objects: Connections, Occurrences, and Opportunities, where Connections is the most detailed information. Note the field that I have in the report.

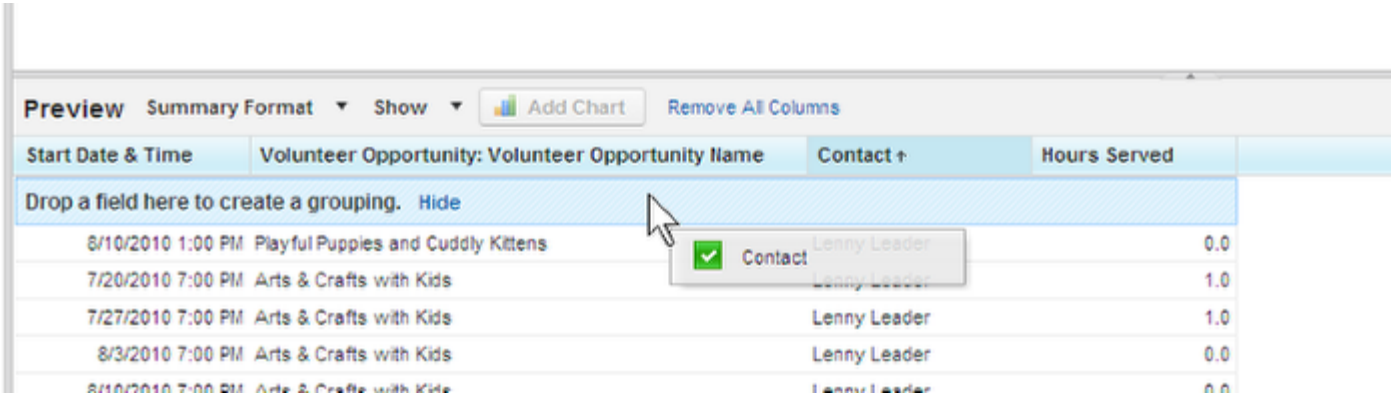
Change the Format Layout to Summary



Make sure the Drop Zone is showing

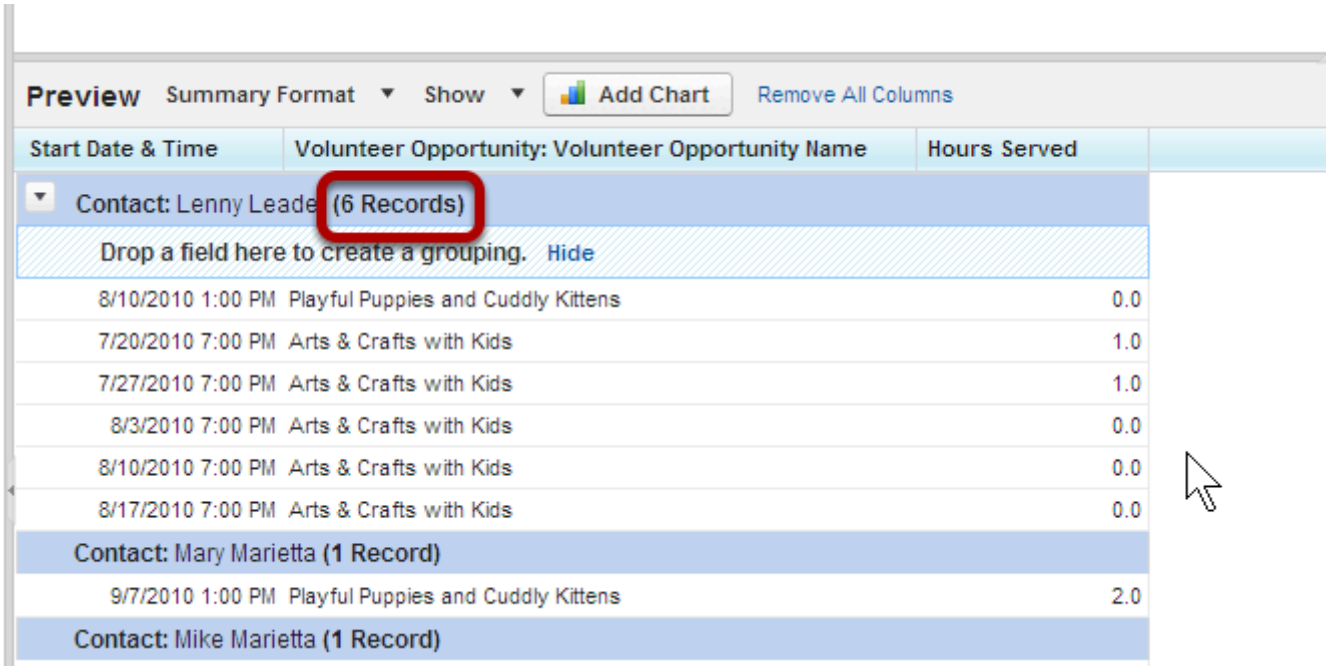


Getting to know Drop Zones



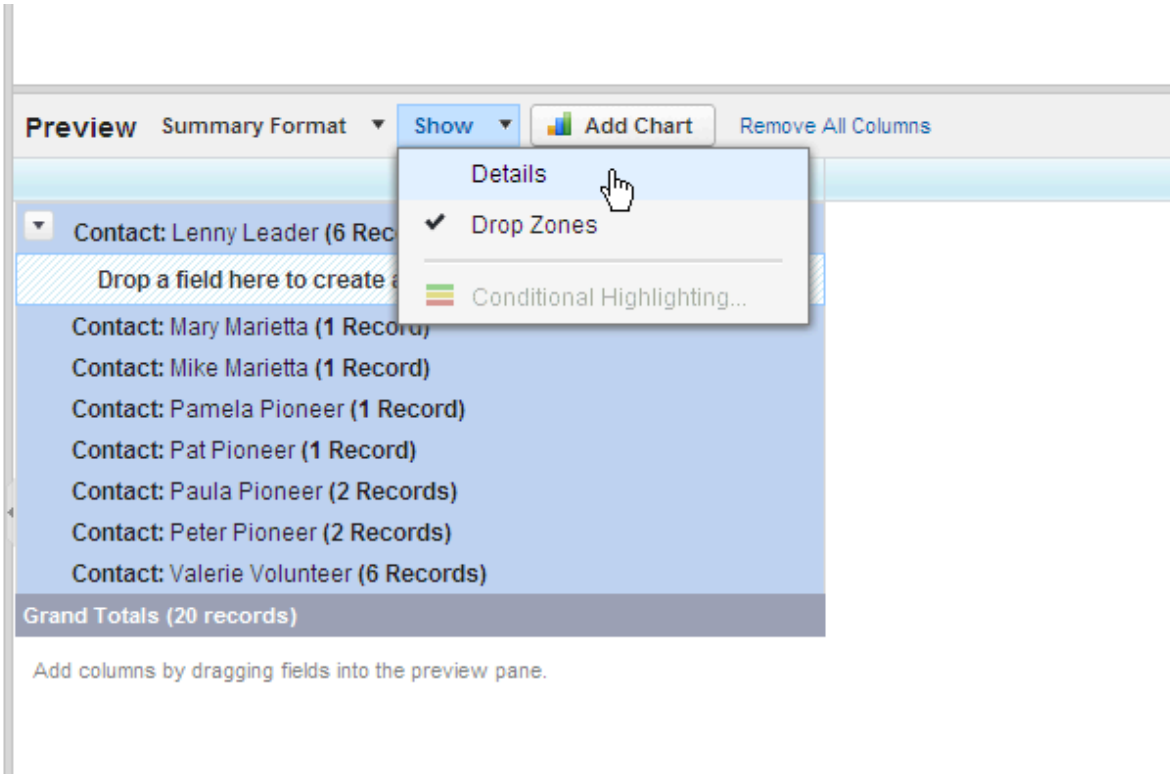
Do you remember how easy it was to add columns to a report? Summarizing uses the same drag and drop method. If you want to summarize by a field, you grab it and drop in the drop zone. In this case, I am going to grab the Field Header of Contact and drop it in the Drop Zone. Note that the Green Check Box appears when I am in the Drop zone. Release your mouse.

Note your new Summary



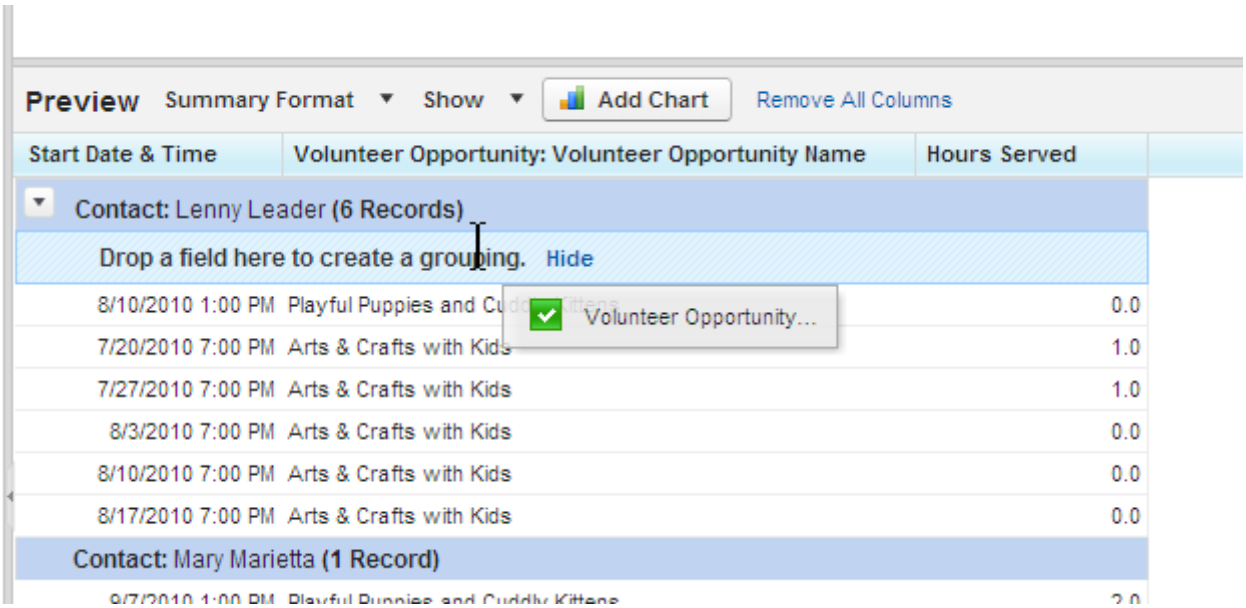
The blue bar shows that we are summarizing by the field Contact (from the Connections Object). The details show the Start and Date time of the Occurrences, and the Name of the Opportunity. Also note that a record count has been included in the Summary. The count is of the most detailed information... in this case, it would be Occurrences, and not Opportunities

Hide the Details of your Summary



If I am not interested in seeing the Details, I can always hide them by un-checking the box. REMEMBER: I am currently in the Customize Report Window and the Preview only shows me a portion of my records... if I wanted to see them all. I could run the report at this point.

Add Another Summary



Let's add another summary under each Contact of the Opportunity. You see, we have another drop zone which allows us to summarize further. Grab the Opportunity name and drop it here. When you have dragged the field to the right place, the drop box turns blue, and the Green Check Box appears for the field.

See two Summaries

Advanced Users

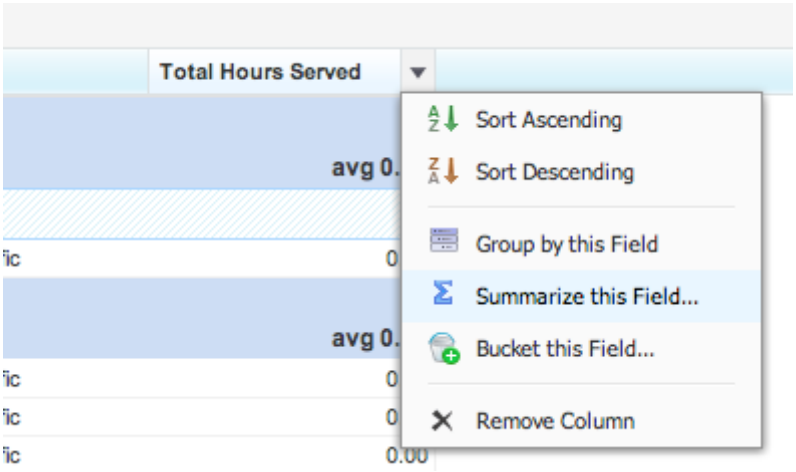
Salesforce has an extensive knowledge base for Reports and Reporting Summaries in their Help and Training Section.

For more information see: [Salesforce Help and Training: Summaries]

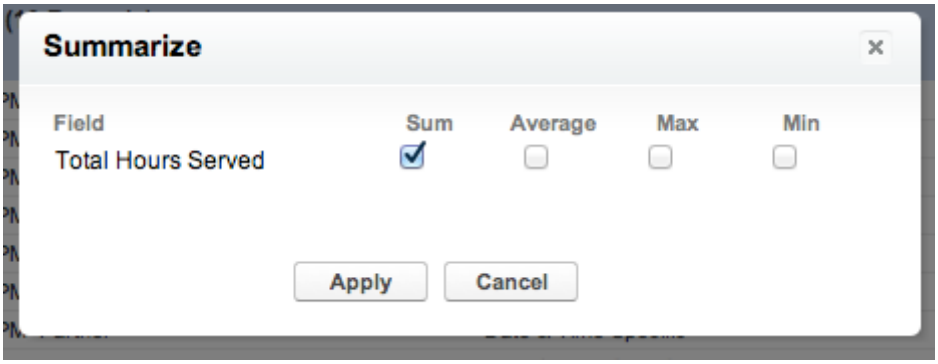
Working with Numbers - Sums, Averages, Min and Max

Number fields can be summarized so that you are able to see summaries of numeric information --

Summarizing on a numeric field



Click on the picklist arrow in any column with numeric data and select 'Summarize this Field"



You can create one or more summaries by selected Sum, Average, Max or Min.

	Volunteer Opportunity: Volunteer Opportunity Name: Wonder of Reading (15 records)					13.50
	OC-025571	1/16/2012 12:00 PM	1/16/2012 2:00 PM	Affiliate	Date & Time Specific	0.00
	OC-026298	1/10/2012 9:00 AM	1/10/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026299	1/24/2012 9:00 AM	1/24/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026300	2/7/2012 9:00 AM	2/7/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026301	2/21/2012 9:00 AM	2/21/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026302	3/6/2012 9:00 AM	3/6/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026303	3/20/2012 9:00 AM	3/20/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026304	4/3/2012 9:00 AM	4/3/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026313	1/14/2012 9:00 AM	1/14/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026314	1/28/2012 9:00 AM	1/28/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026315	2/11/2012 9:00 AM	2/11/2012 10:30 AM	Affiliate	Date & Time Specific	13.50
	OC-026316	2/25/2012 9:00 AM	2/25/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026317	3/10/2012 9:00 AM	3/10/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026318	3/24/2012 9:00 AM	3/24/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	OC-026319	4/7/2012 9:00 AM	4/7/2012 10:30 AM	Affiliate	Date & Time Specific	0.00
	Volunteer Opportunity: Volunteer Opportunity Name: Young Professionals Service Mixer (1 record)					0.00
	OC-023450	1/8/2011 12:00 AM	1/8/2011 12:00 AM	Affiliate	Date & Time Specific	0.00
	Grand Totals (1,267 records)					386.25

When you run the report you'll see the calculated sum of (in this case) the total hours, as well as a grand summary at the bottom of the report.

You can choose to 'hide details' if you just want to see the calculations.

Volunteer Opportunity: Volunteer Opportunity Name: Water the Gardens (19 records)	0.00
Volunteer Opportunity: Volunteer Opportunity Name: We need your Skills! (1 record)	0.00
Volunteer Opportunity: Volunteer Opportunity Name: Wonder of Reading (15 records)	13.50
Volunteer Opportunity: Volunteer Opportunity Name: Young Professionals Service Mixer (1 record)	0.00
Grand Totals (1,267 records)	386.25

The values of zero in this report just tell us that no hours of service were verified for those opportunities.

The number of records tells us how many occurrences are 'hidden' in the data.

Counting the number of object records in a report

HandsOn Connect has hidden fields that allow you to easily count the number of objects in a report.

There are "number of" fields for:

- Number of Contacts
- Number of Organizations
- Number of Connections
- Number of Occurrences
- Number of Volunteer Opportunities

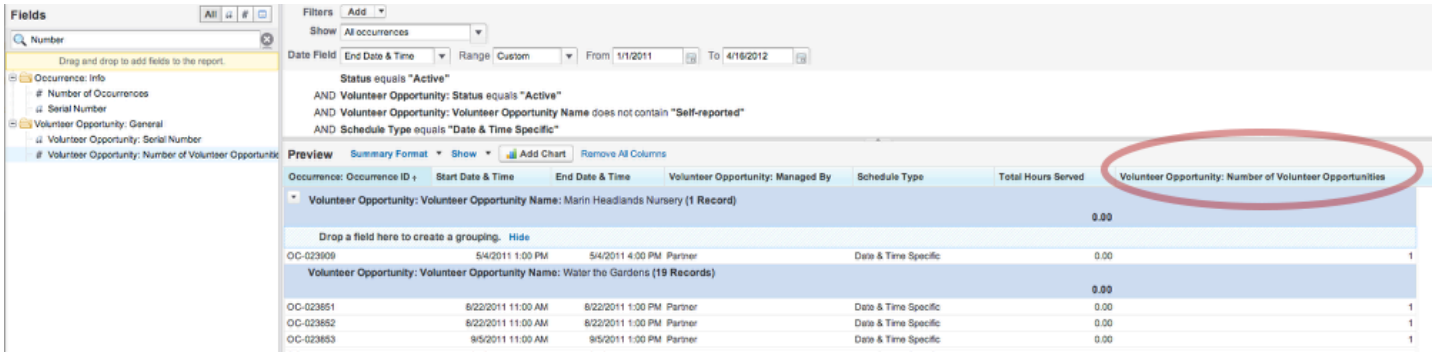
For example, in a report that shows all the occurrences that took place in a given time period, you could group the occurrences by the volunteer opportunity name -- but what if you wanted to know how many volunteer opportunities that represented?

In this report we have grouped based on Volunteer Opportunity Name -- but we want to know how many volunteer opportunities this represents - without manually counting them.

Filtered By: Edit
Status equals **Active** Clear
AND **Volunteer Opportunity: Status** equals **Active** Clear
AND **Volunteer Opportunity: Volunteer Opportunity Name** does not contain **Self-reported** Clear
AND **Schedule Type** equals **Date & Time Specific** Clear

	Total Hours Served
Volunteer Opportunity: Volunteer Opportunity Name: * Morning Restoration at Clatsop Butte (1 record)	22.00
Volunteer Opportunity: Volunteer Opportunity Name: 4th of July Clean-up crews (3 records)	0.00
Volunteer Opportunity: Volunteer Opportunity Name: Adult supervision required (1 record)	0.00
Volunteer Opportunity: Volunteer Opportunity Name: AFD Big Daddy Day (5 records)	0.00
Volunteer Opportunity: Volunteer Opportunity Name: Alternative Spring Break (29 records)	0.00
Volunteer Opportunity: Volunteer Opportunity Name: America's Sunday Supper (1 record)	4.00
Volunteer Opportunity: Volunteer Opportunity Name: American Airlines ReachOUT (1 record)	0.00

We are going to show details and add the field "Number of Volunteer Opportunities"



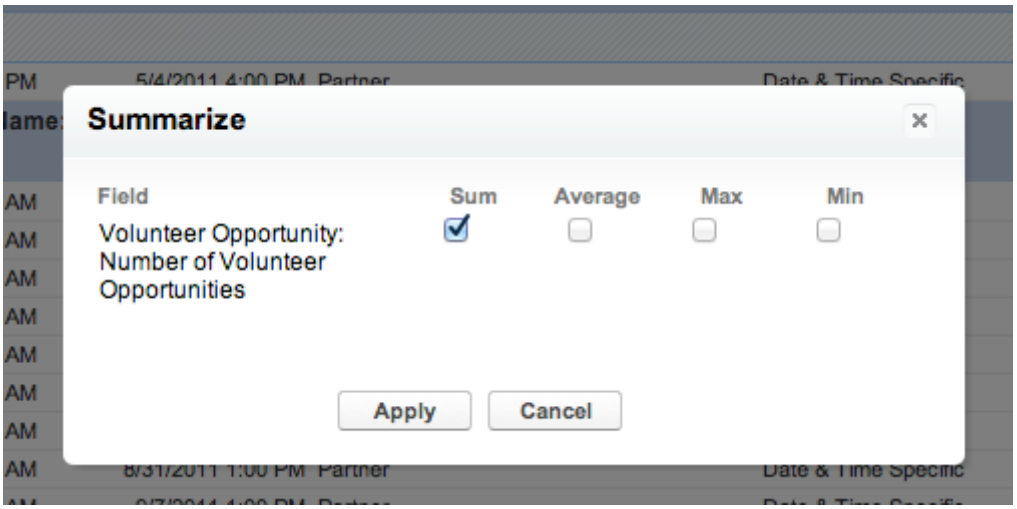
Each object in HandsOn Connect has a field called "Number of...." that has a value of 1 populated in it.

By summing these "Number of" numeric fields - we're able to get a count.

First -- add the field "Number of Volunteer Opportunities" to your report: (you can double click and add it to the end of the report)

You'll see it has a value of 1 (1 for each occurrence)

Summarize on this field and get the sum



At the bottom of the report, you'll get the sum of the number of volunteer opportunities

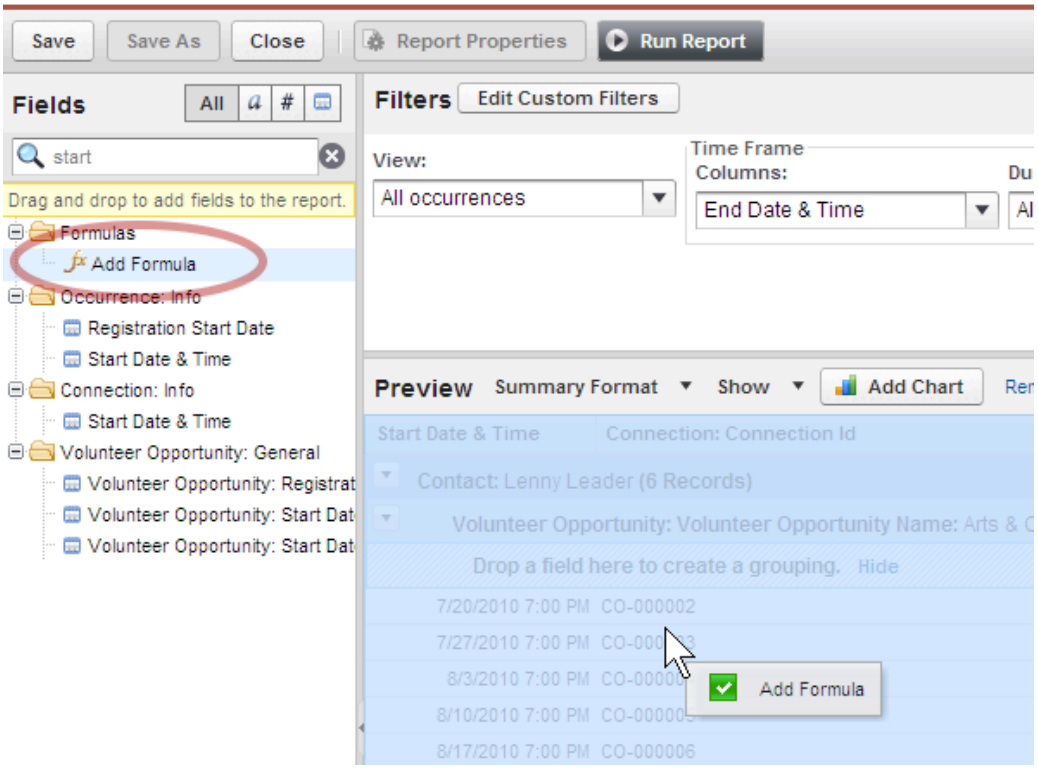
This report has 1267 Records (Occurrences), and 135 separate volunteer opportunities.

Using Formulas in a Report

Summarizing on a numeric field allows you to do simple sums, averages, etc. But what if you want a more complex calculation?

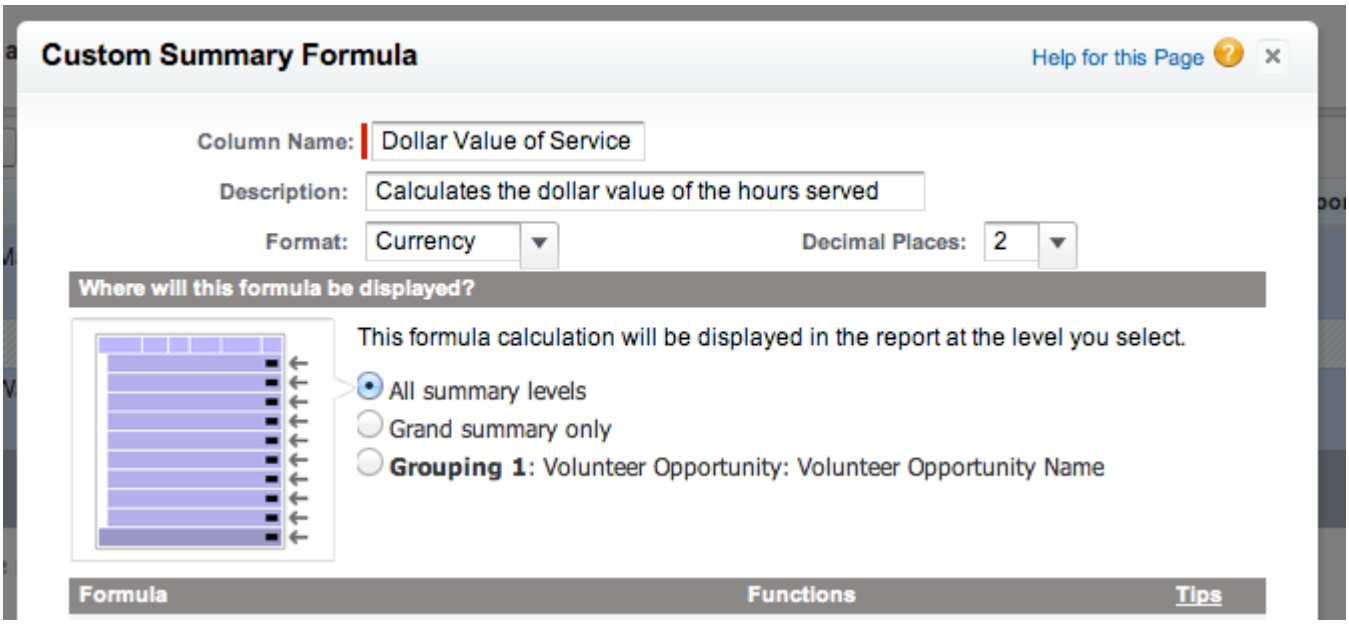
For any summary report - you have the option of adding more complex formulas

In Summary Formats - you'll see a folder in the field list called "Formulas" double click on Add Formula to create a new formula field



Let's say we wanted an idea of the value of all the service hours associated with each volunteer opportunity. Let's say that we value each hour at $21.79.

This opens a layout to create a custom summary formula

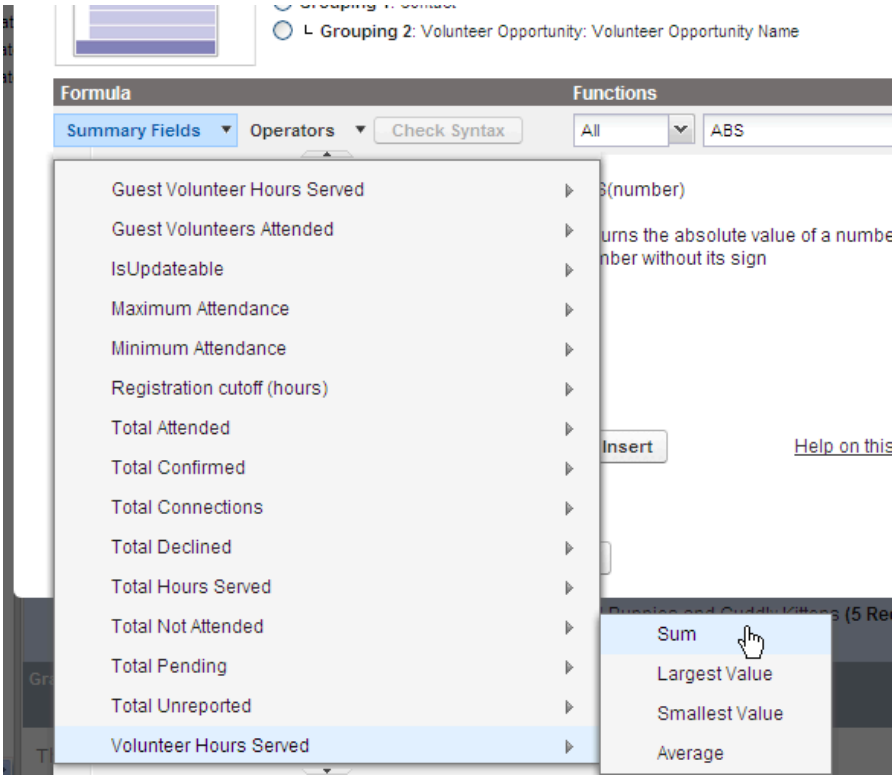


I have given this a specific name and description

The Format is Currency and I have two decimal places to it.

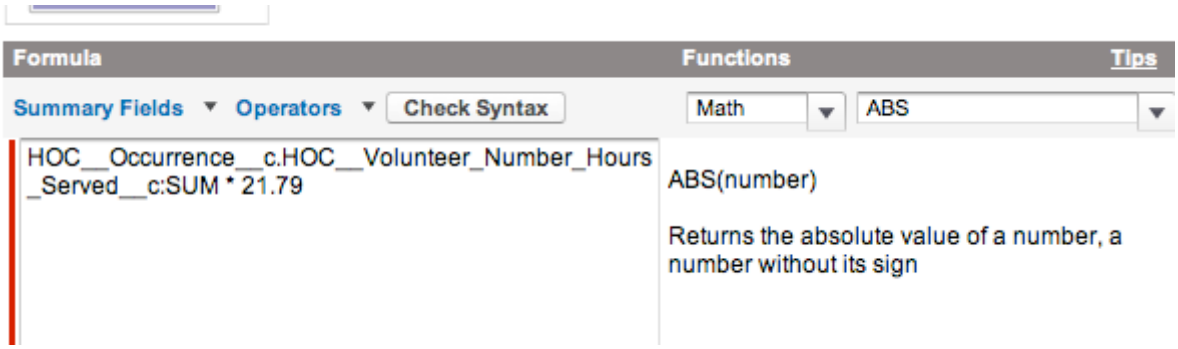
I want to see this $ total at all Summary Levels

Create the Formula



First we want to take the SUM of the Volunteer Hours Served (a field that exists in the occurrence record).

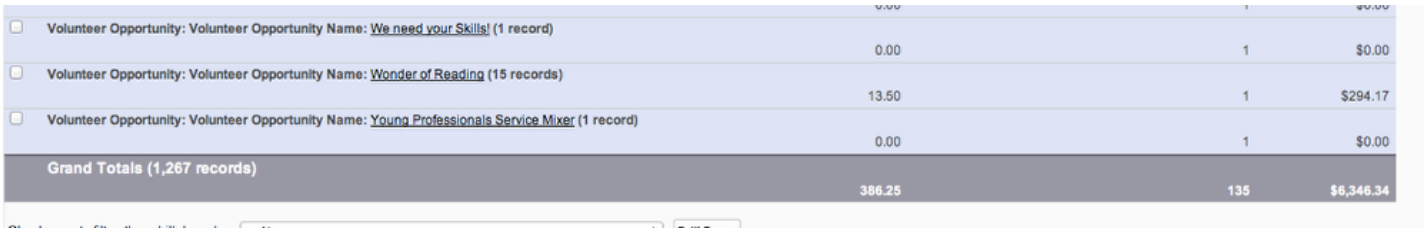
Add Operator and Number



I can drop down the operators picklist to get the multiplication symbol. I am saying multiply the hours by 21.79. And wind up with this formula. I can then hit OK.

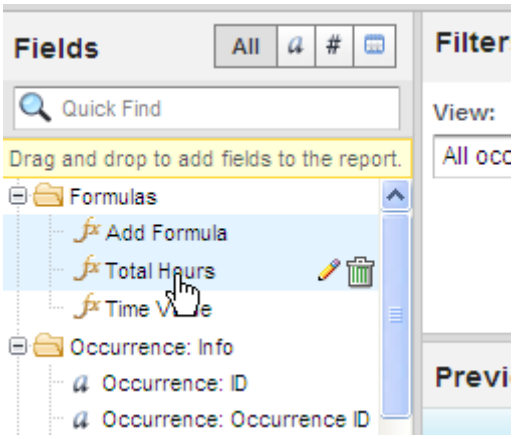
(For complex formulas - use the "Check SYntax" box to make sure everything is OK.

See your Results



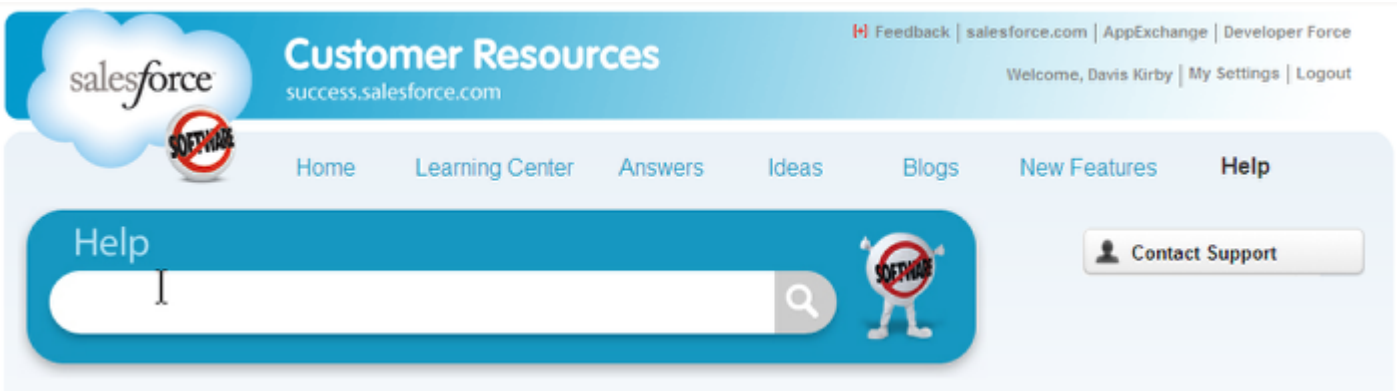
At first you'll just see the summary. But hit RUN report and you'll see the dollar value of service summarized for each opportunity and a grand total at the bottom!

Edit existing Formulas



To Edit (or Delete) an existing formula, just hover over that formula and two icons will appear to the right. The pencil icon will open the edit screen, and the trash can will delete it.

Advanced Users



There is a lot you can do with Summary Formulas and Salesforce has all the help you could possibly need. To learn more about operators, formulas, and functions, Log into your Salesforce instance and visit Salesforce Help: Building Custom Report Formulas

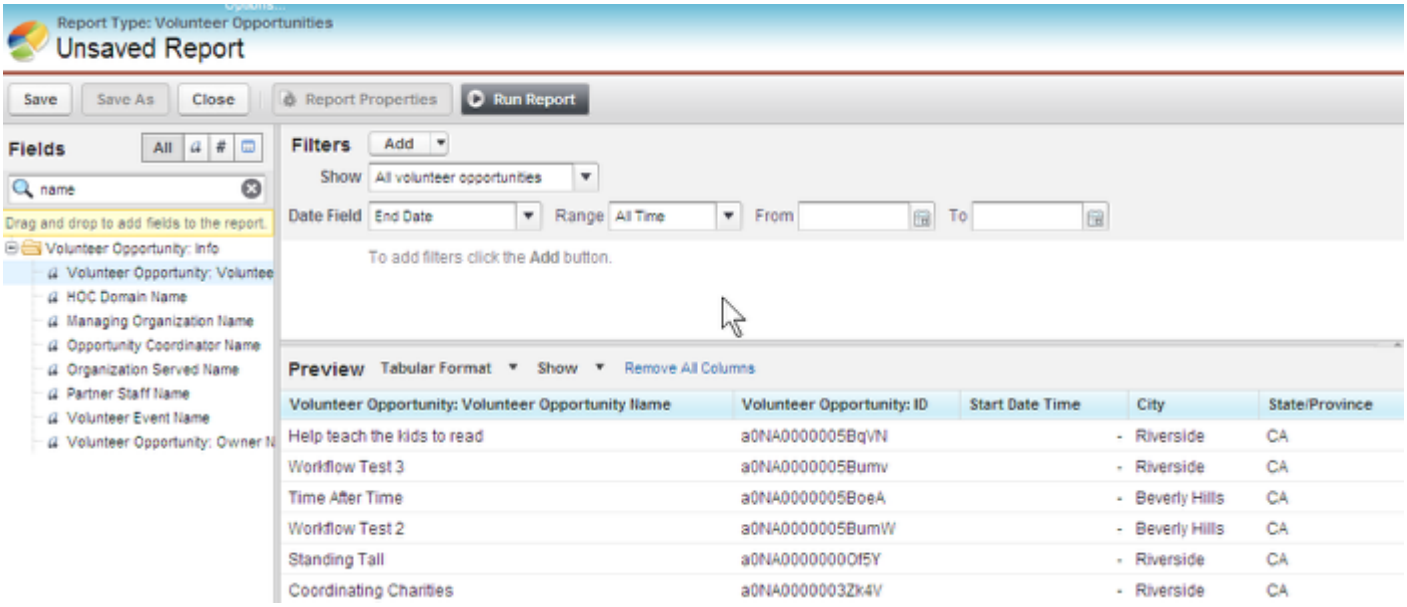
Using the Drill Down Feature

How to Drill Down to Specific Information

The Drill Down feature gives the User a better understanding of their data and can be used as an analysis tool. For summary and matrix reports, filter selected rows by a particular field. Select the rows you want to view, choose a field to group by, then click Drill Down. In this lesson we will learn to drill down to get more specific information. Using the Drill Down Feature allows you to get more specific information.

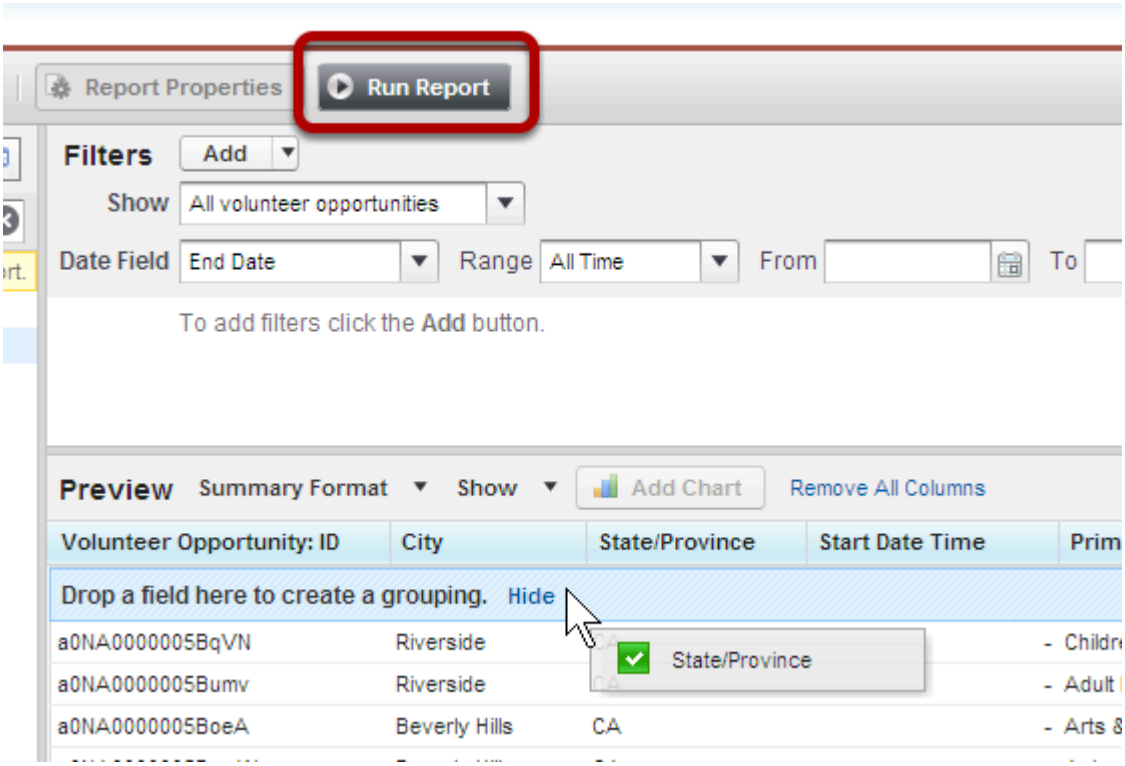
This allows you to use one stock report that has the fields you are interested in, and get a lot of different answers from it - without creating and saving a seperate report.

Find a report you want to work with.



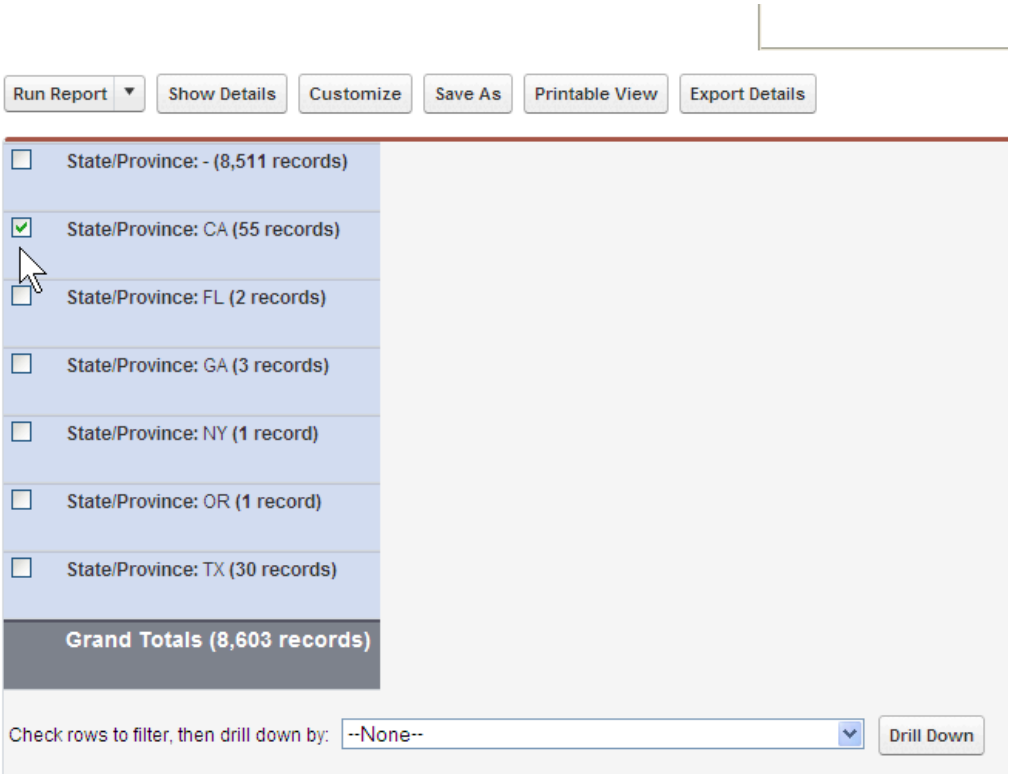
In the Customize Report WIndow, I am using a report that only contains the Object Volunteer Opportunities. I dragged in Opportunity Name, Start Date, City, State and Primary Impact Area in to the report. I am viewing all Opportunities and there are currently no filters on this report

Group the Report



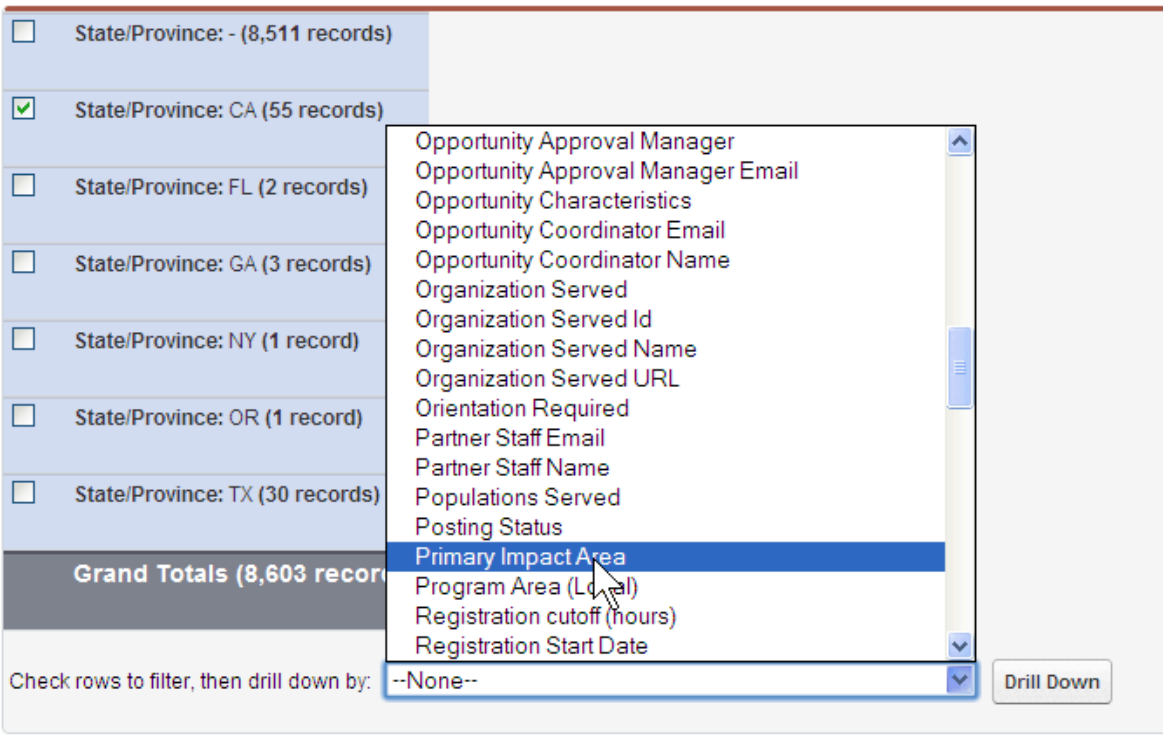
In my case, I am going to Group by state, because I know that is how I want to eliminate records I don't want to see. Change the Format from Tabular to Summary, and drop in State, hide the details and then run your report

Choose the summary fields you want to work with.



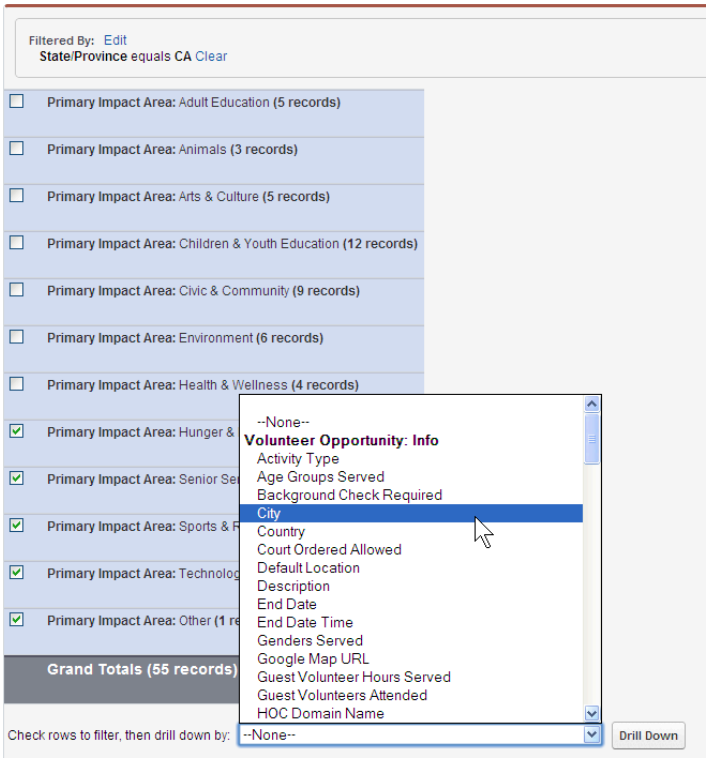
Using the check box next to the grouped field, check the states where you want to see the information. I am only interested in the 55 records in California. This basically creates a filter that says: "State equals "CA"

Choose your Drill Down Field



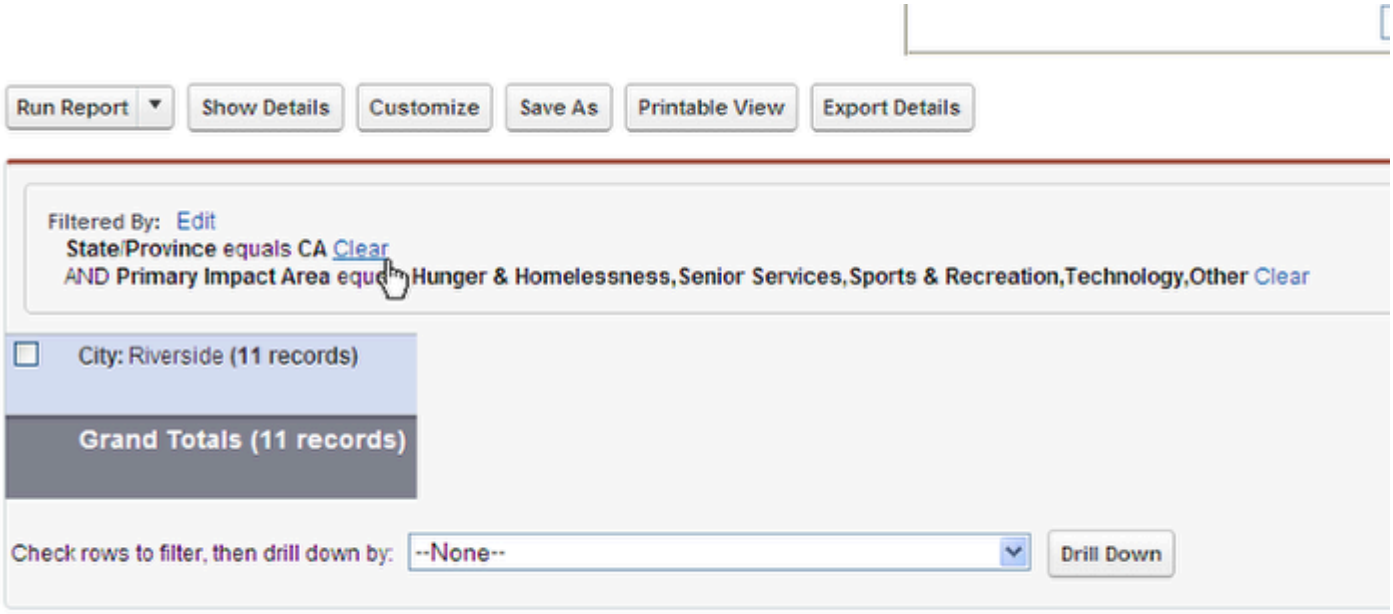
At the bottom of the list, there is a dropbox populated with all the fields available in your report. I am going to choose to drill down by Primary Impact Area. The results should be all CA opportunities and their respective Primary Impact Area.

Check your results



The Drill down created a filter for the State = CA (See the Filtered By: at the top of the Data) and then grouped by the Drill down. I know this is working because the total number of records is 55. I can now choose to show the detail, or I can drill down further by checking the rows I want to see and creating another drill down. I want the bottom 5 Impact Areas and I want to see What cities they are in.

See your results



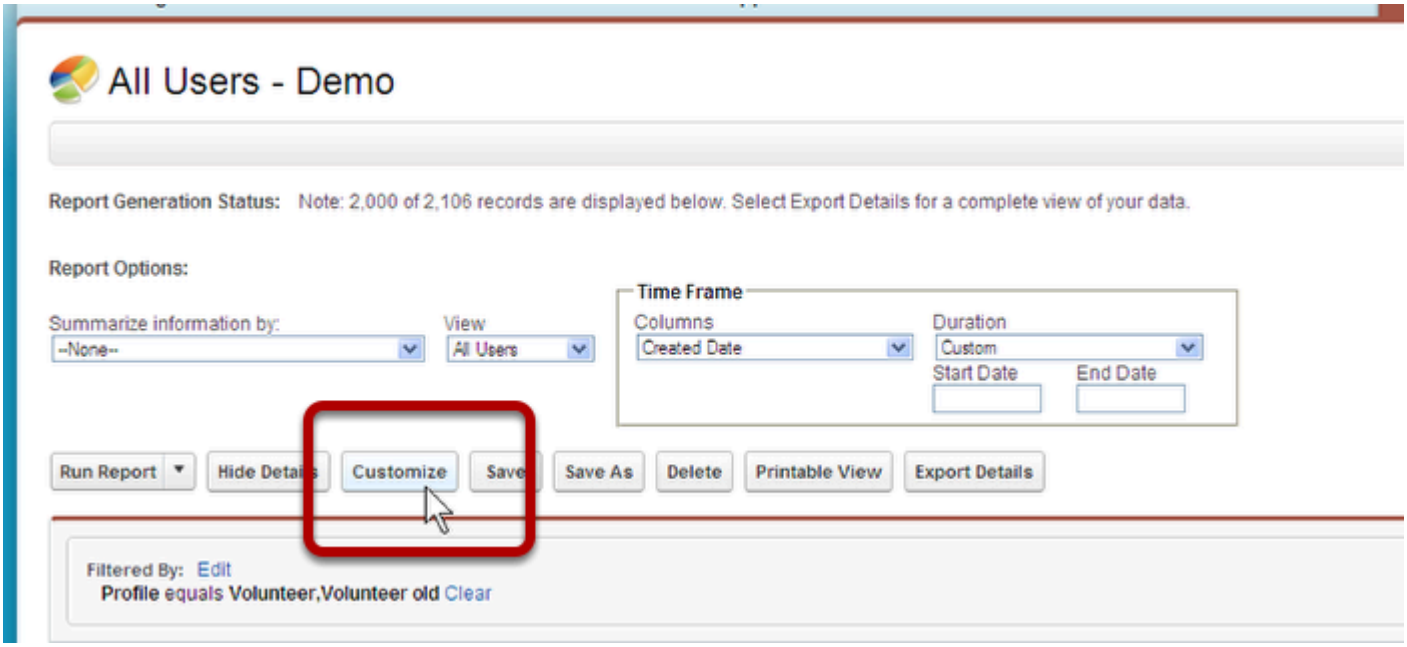
Hmmmmmmmmm... they are all in Riverside. Interesting. I can also remove these filters and drill downs by using the "CLEAR" and Edit buttons at the top. You can also do this in the Customize Report Window.

Adding Charts and Graphs

Inserting Charts and Graphs in your Reports

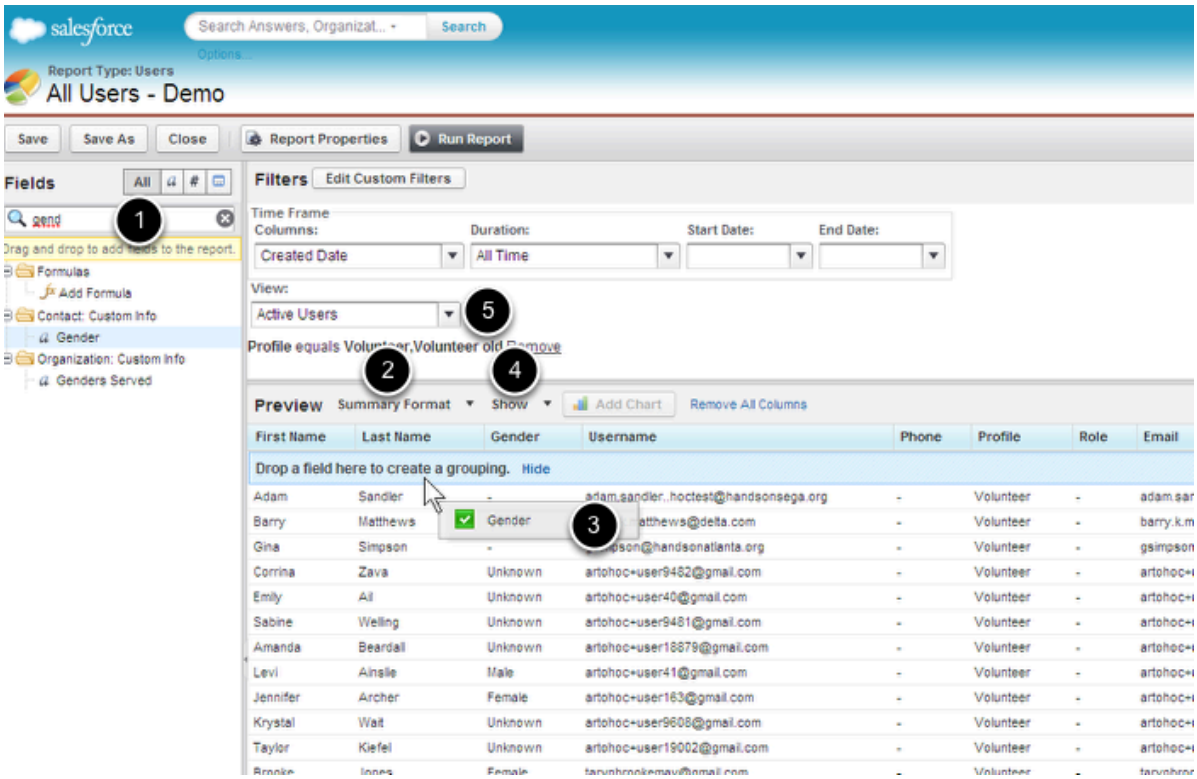
You can use charts and graphics to make colorful and easy to understand representations of the reports you have created.

Choose the report you want to work with and hit the Customize Button.



I want a gender breakdown on all Active Users of the System. I am using the All User - Demo Report.

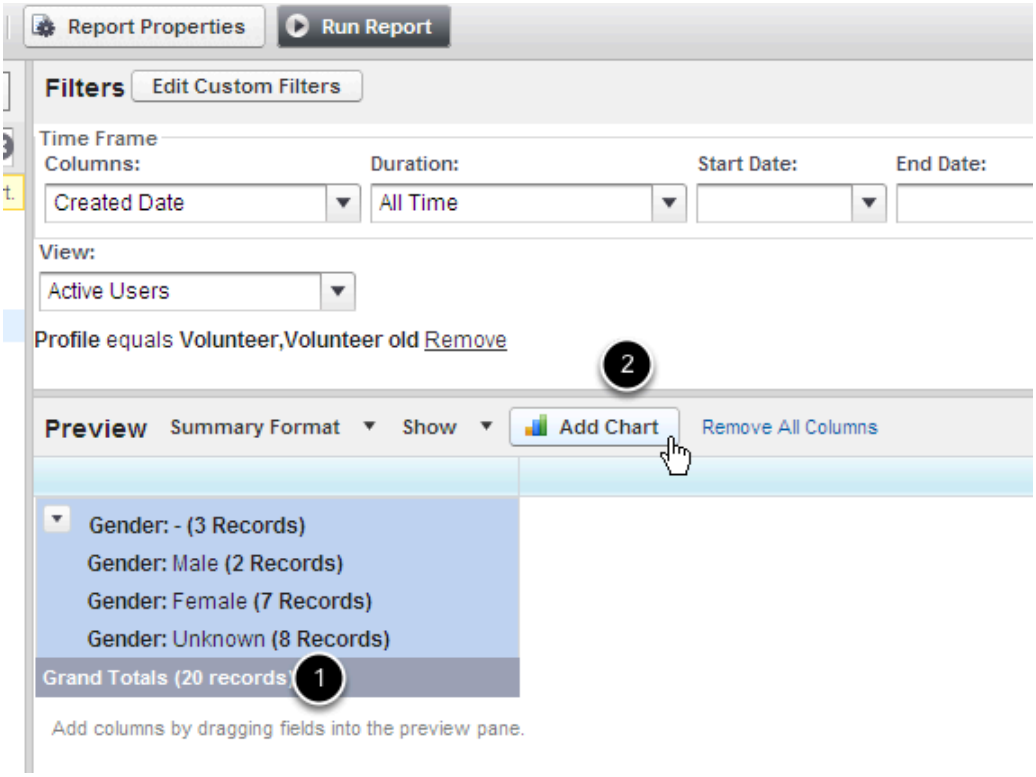
Now I need to prep the report.



You can only use graphs on Summary Reports.

1. I need to add Gender to the Report.
2. I need to change the Format from Tabular to Summary
3. I need to summarize by Gender
4. I am going to hide the details.
5. I need to view only Active Users

Look at my report now



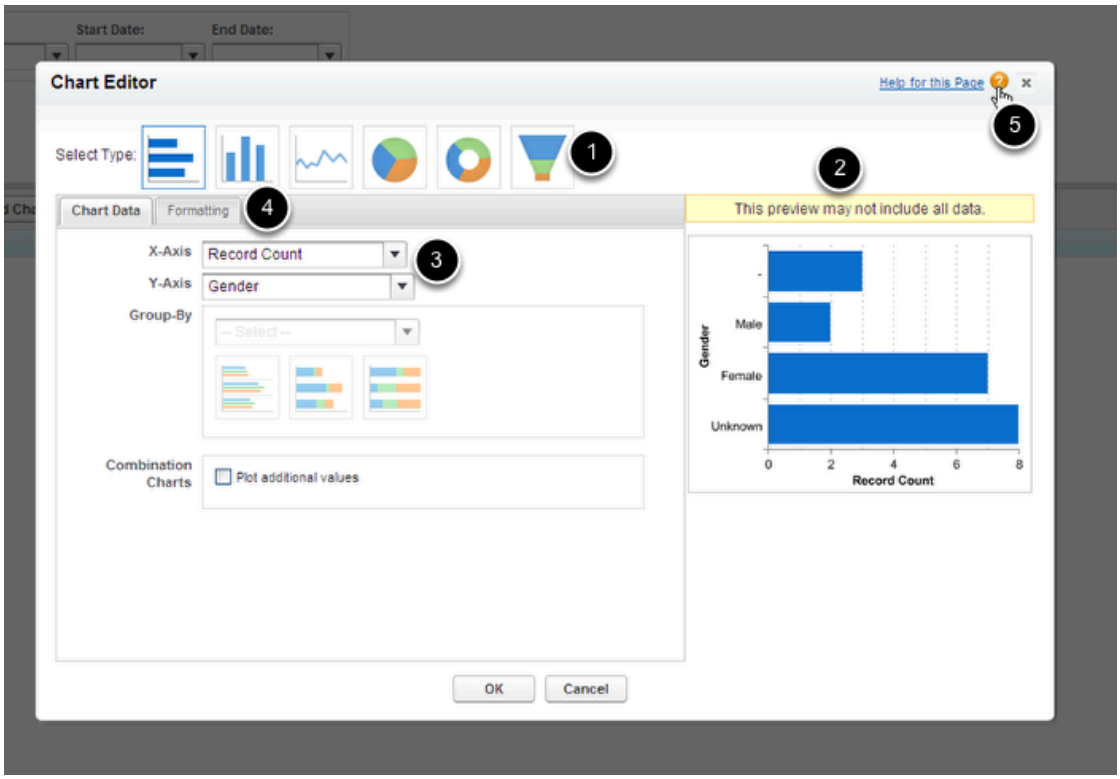
Notice a few things:

1. This is only sample data, not all my records

2. The Add Chart Button is now available.

Click on the Add Chart Button and the Chart Editor will appear in a new window.

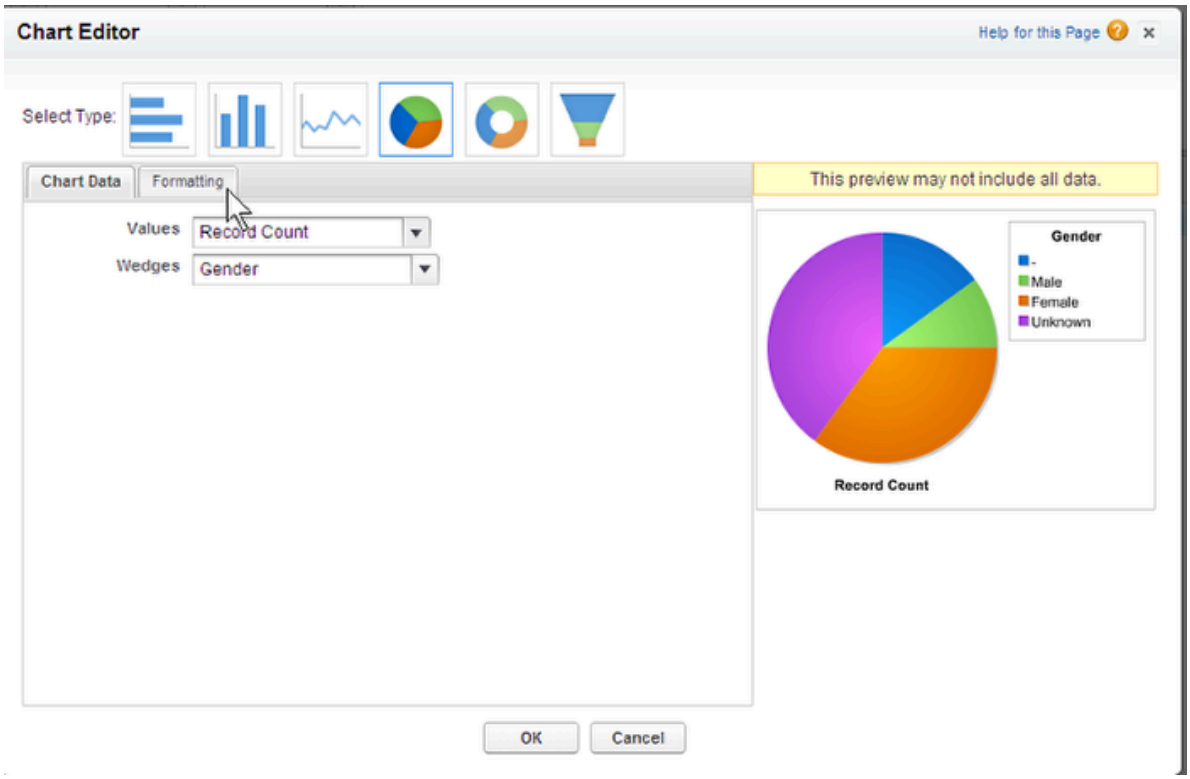
Introduction to Add Chart Window



1. Choose the Type of Chart you want.
2. A Preview of what your chart may look like
3. The Chart Data layout will change depending on the type of chart you use.
4. Additional Tab to format the chart
5. The Help button

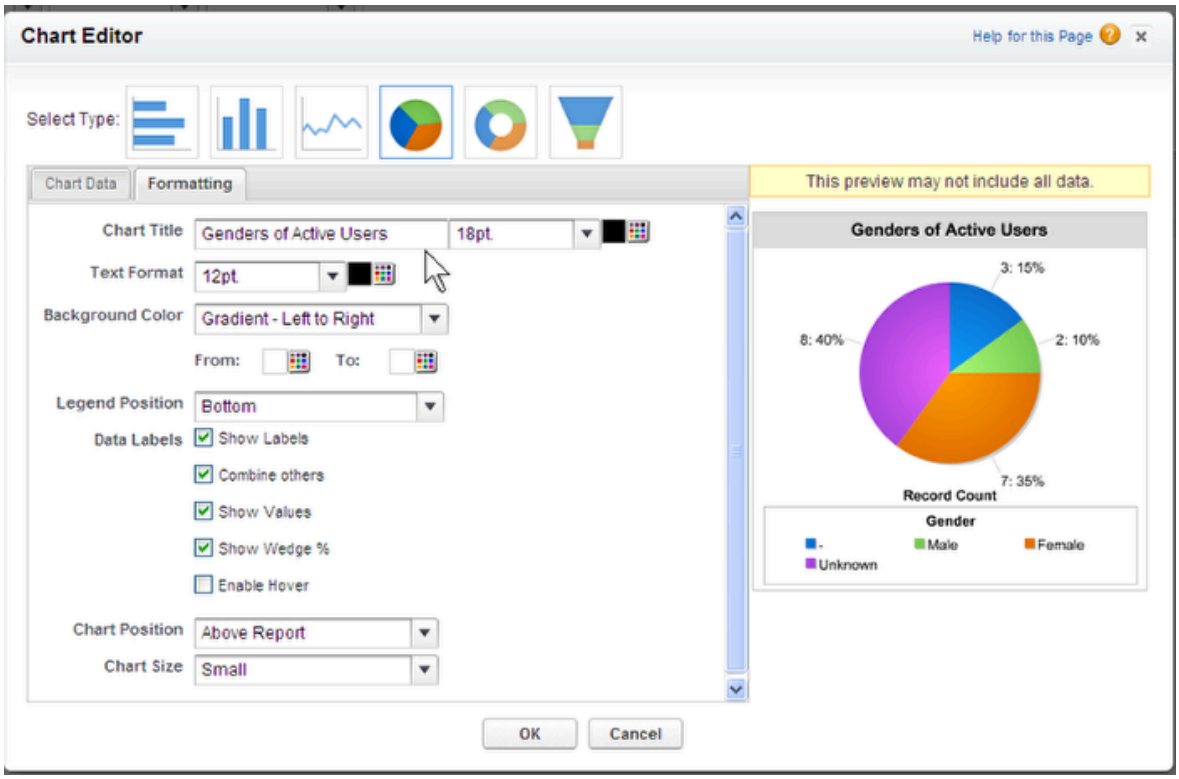
In this case, we want a Pie Chart

Chart Type and Data



When I choose the Pie Chart as the Type, the Chart Data changes. I want each slice to represent the number (or Count) of fields in each summary. See the preview in the right column has changed? Now I am going to click on Formatting.

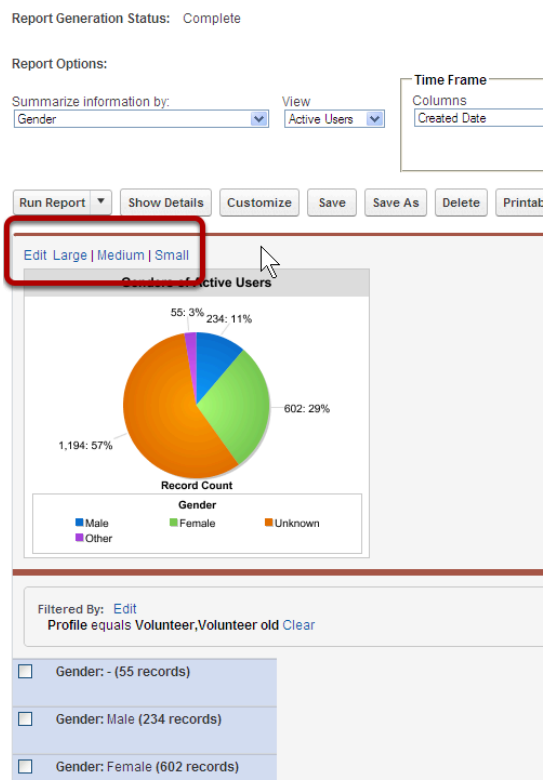
Format your Chart



Here I can add a Title, I can change the formatting, I can align the legend and add data labels. You can experiment here to find the most logical and easiest to comprehend representation of your data and records.

Hit Okay.

Back to the Customize Window



Remember, this is only a sampling of your data. To get a true presentation, you need to hit RUN the Report. When we do, we get back to the Run Report Window, and it looks like above. The chart appears above your data. Note the ability to change the size and to get back to the Chart Editor by hitting the Edit button. You can also choose the Edit button above the chart in the Customize Report Window

For Advanced Users

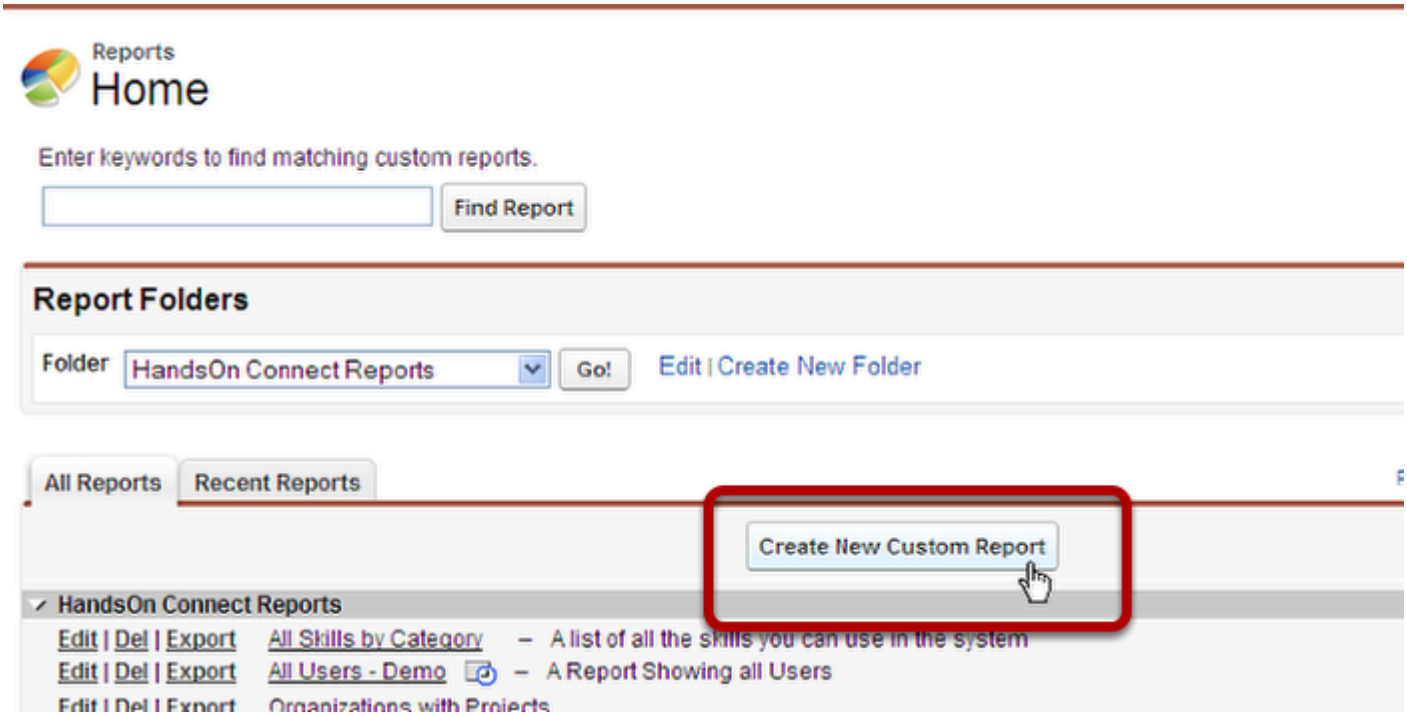
For those of you who would like more advance training on these Charts, you can check out: SF: Help and Training: Customizing Charts

Creating a New Report

Using the "Create New Custom Report" Feature

Sometimes, when you cannot find the report you are looking for or the report you want to use is missing fields, it is easier to just start from the beginning and create a custom report. This lesson will show you how to do that.

Navigate to the Reports Tab/Object



Just above the Folder List, you will see a button called Create a New Custom Report.

That's nice... but... what does that mean?

Well, we want to tell the Report Builder what Objects we want to use in the Report.

Maybe we want Opportunities and Occurrences.

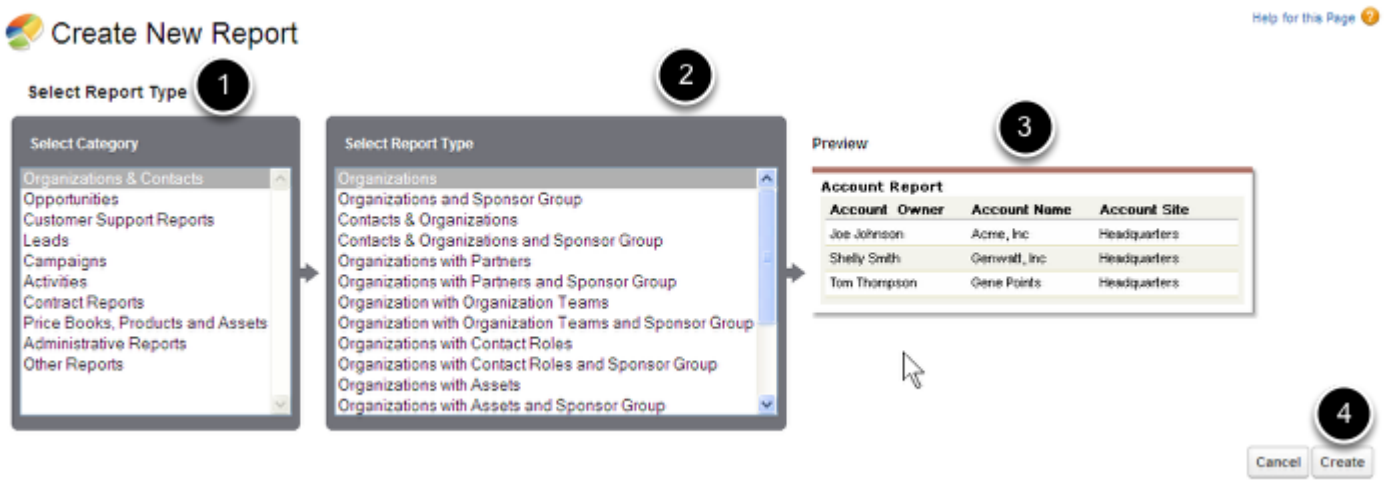
Maybe Opportunities, Occurrences, and Connections

Maybe Events, Opportunities, Occurrences, and Connections.

Instead of spending time trying to find a report that has everything we need, we can start here.

Click the Create a New Custom Report button

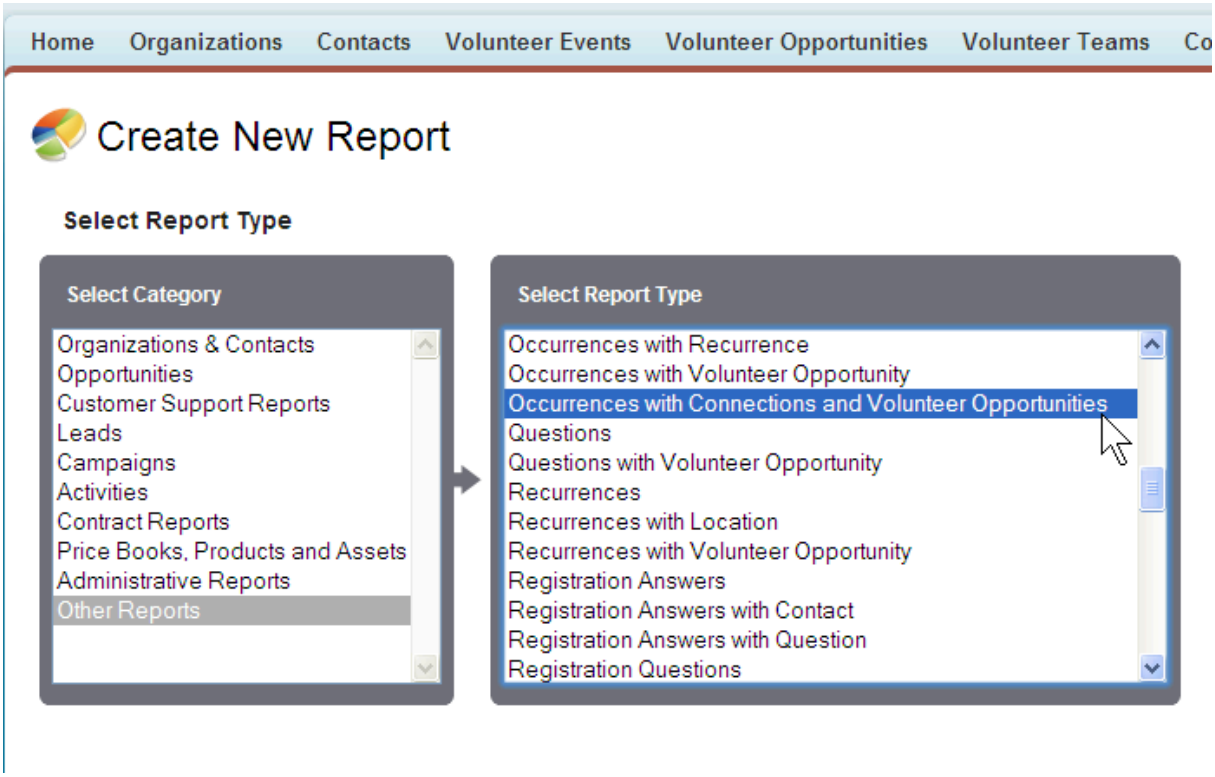
Get to know Custom Report Window



(PS. Different than the CustomIZE Report Window...)

1. Select the Category.(This is called Report category)
2. Select the Objects you want (This is called REPORT TYPE)
3. Preview what your new report might look like
4. Create the Report

For the most part…



Remember, these Report categories are built for SALESFORCE and are not specific to HandOn connect. The Opportunities category? Remember: That is different from Volunteer Opportunity… The Opportunity Category is a Salesforce object…

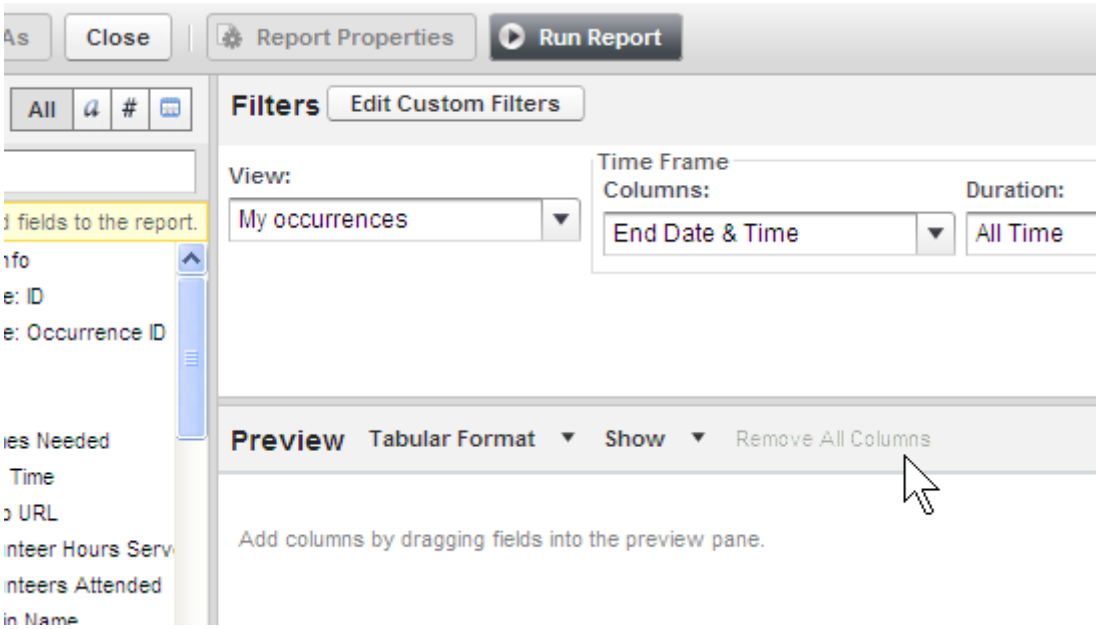
As a general rule: Go to the Category: Other Reports.

HOC has populated this with many of the Report Types you will probably need.

In this case, we want Occurrence, Opportunities, and Connections

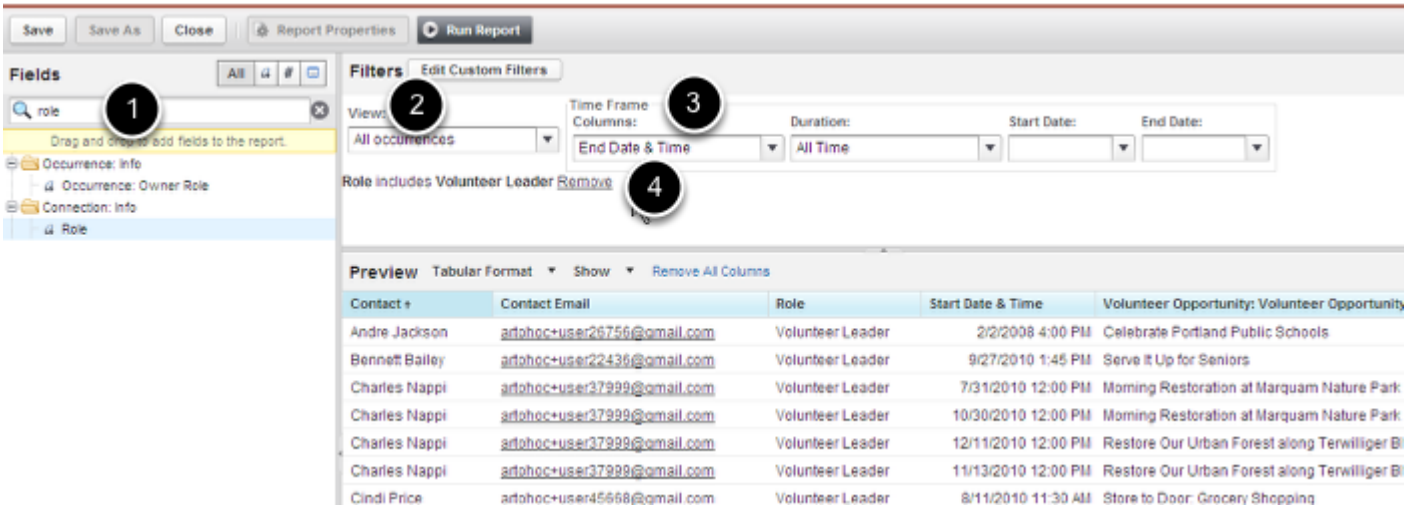
Hit Create which will take us to the Customize WIndow.

Start with a clean slate



You don't have to, but I like to start with a CLEAN SLATE, so I Remove All Columns

Build out your report



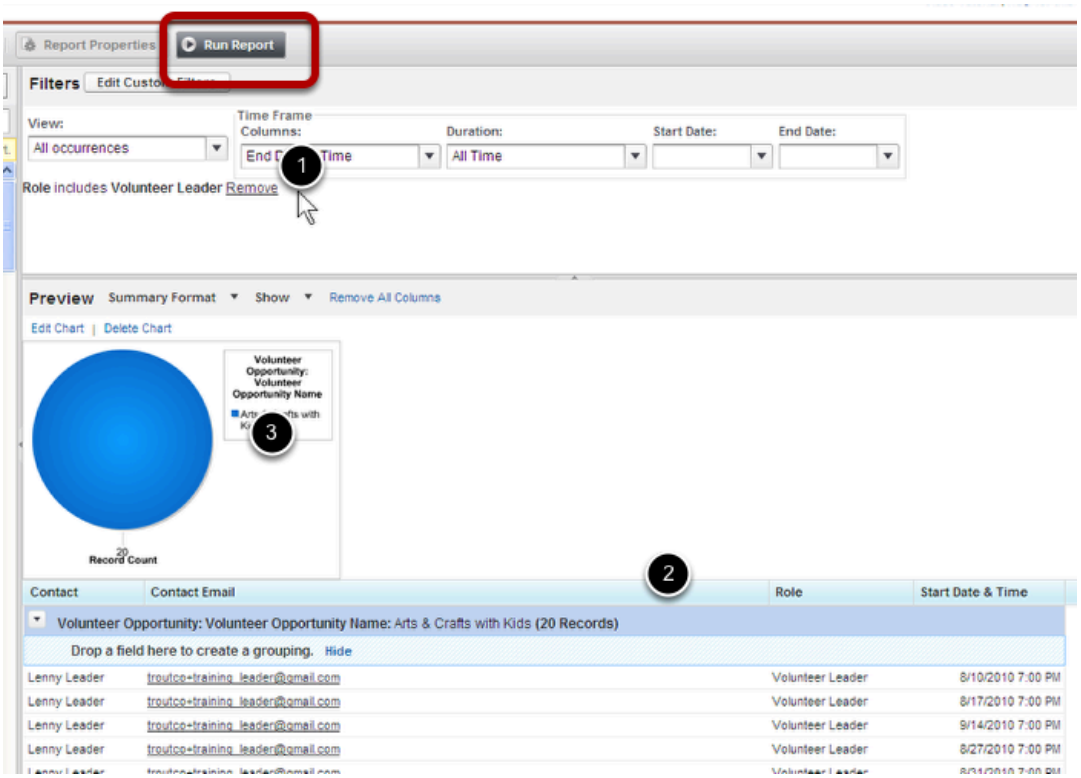
1. Using the Field Menu and its Search function, find the fields you want to add and drag them in.

2. Choose what types of Fields you want View... I want them All

3. Create your time Frame... no Time Frame

4. Add Filters (I only want connections who have the role of Volunteer Leader)

Add Summaries and Charts

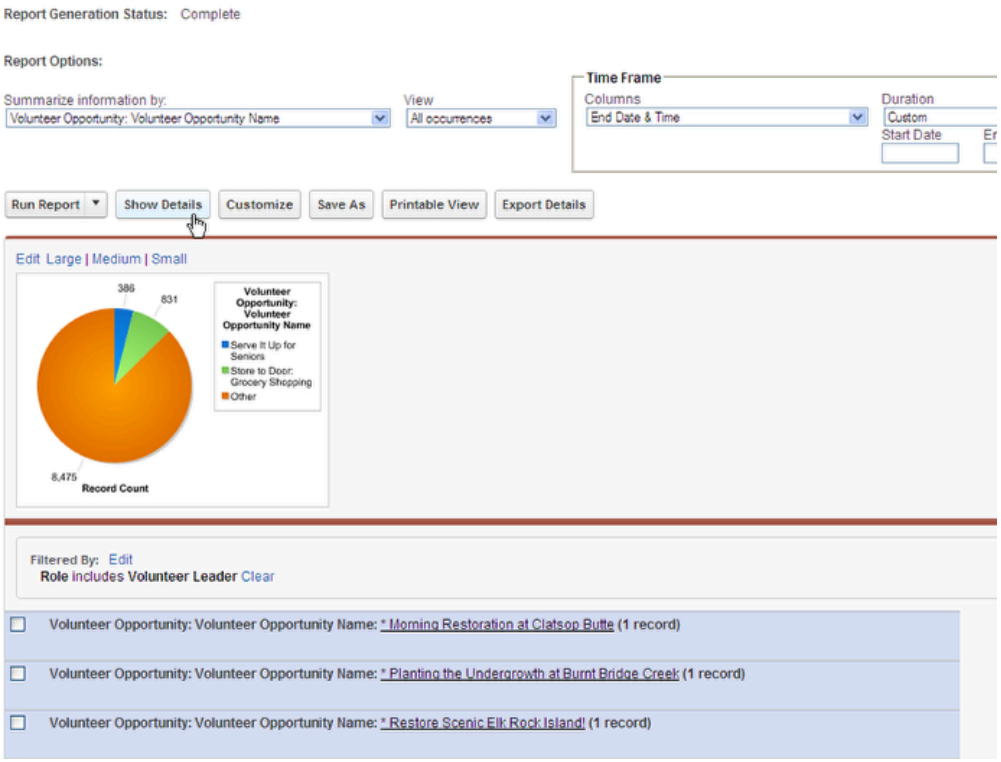


1. I changed my mind about the Volunteer Leaders, so I REMOVED that filter

2. I am summarizing by Opportunity Name

3. I am inserting a chart to see how many people were involved in Each Opportunity.

Remember: Sample Data... You need to Run Report to see all your records



Our New Custom Report is complete. Note that I hid the details (1) and because there were so many Opportunities, it combined the smaller pieces into on singe Other pie piece. That was a Formatting Option my Chart Editor.

(Advanced) Report Types recommended for use in your reports

When selecting report types - you can choose from standard report types created by Salesforce, custom report types you create on your own, or these special report types we've created for maximum flexibility with HandsOn Connect.

Standard Salesforce Report Types

Salesforce provides a number of reports that combine related objects. These 'standard' report types are fine if all the info you want to get are contained in the objects named in the reports. You cannot however, modify these report types or customize them by adding lookups to other fields, etc. For maximum flexibility in your reporting, you should work with custom report types:

Custom Report Types

These report types have been added as unmanaged so that you can add custom fields, change field labels, and make other edits as needed. System Administrators can edit and modify these unmanaged report types as needed. See post on managing Report types.

HOC Connections and Contacts- This allows you to build reports off of connections that includes information from the related Volunteer Opportunity, Occurrence, and Contact.

HOC Contacts with/without connections- This allows you to build reports off of contacts with or without connections

HOC Organizations with Primary Contact Information- Allows you to report on Organizations and their Primary Contacts.

HOC Organizations, Contacts, and Connections- Used to get information based on contacts with connection records.

HOC Vol Opps and Occurrences with/without connections- Used to build reports for all Volunteer Opportunities and Occurrences in the system regardless of volunteer connections. You can always add a cross filter to a report of this type if you're only interested in those volunteer opportunities that are WITH connections.

HOC Volunteer Teams, Members, and Contacts- Allows you to report on information from the Volunteer Team, Team Members and pull in the volunteer's contact information.

We recommend working with these report types (rather than the standard ones that Salesforce creates from the objects), as they provide more flexibility for customizing your reports going forward.

Dashboards

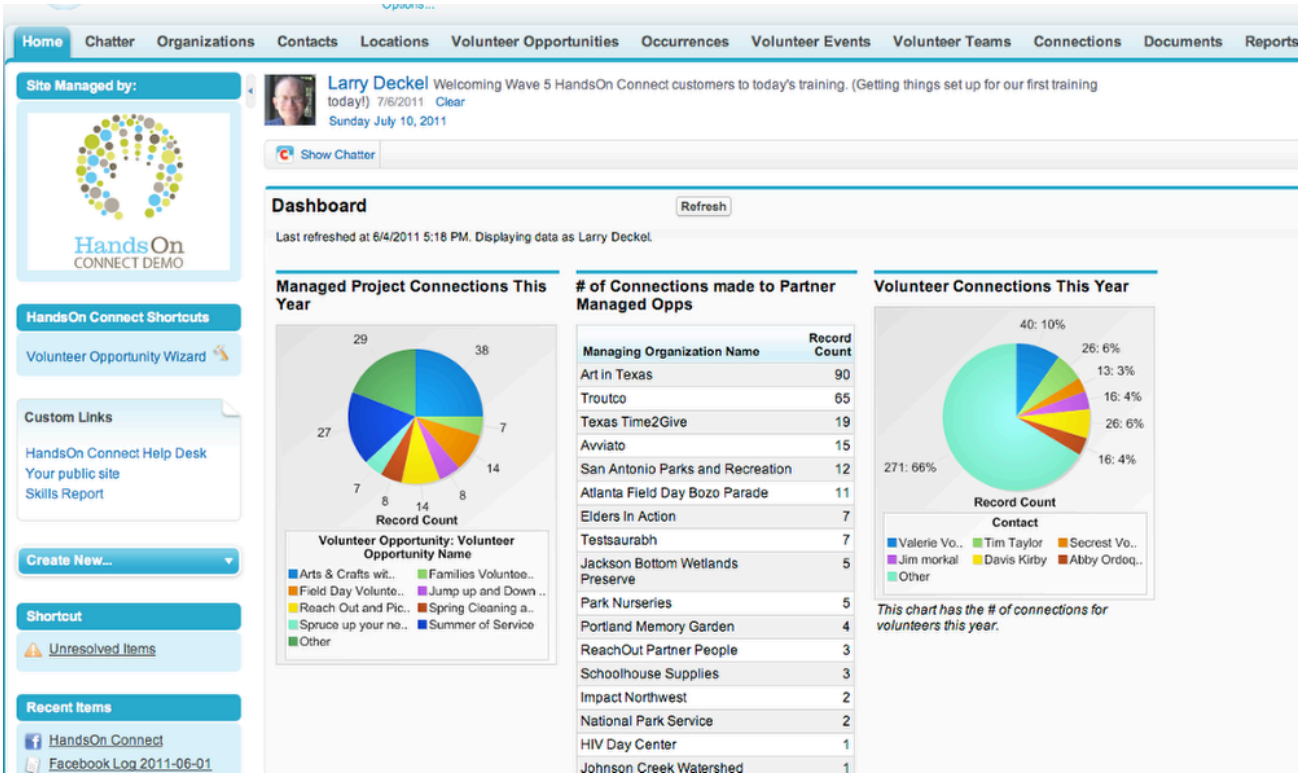
Dashboard Overview

Dashboards provide a quick, graphical view of statistical information from a number of different reports. It allows you to quickly see relevant and related information 'at a glance' -- which can be much more convenient that running and reviewing multiple reports.

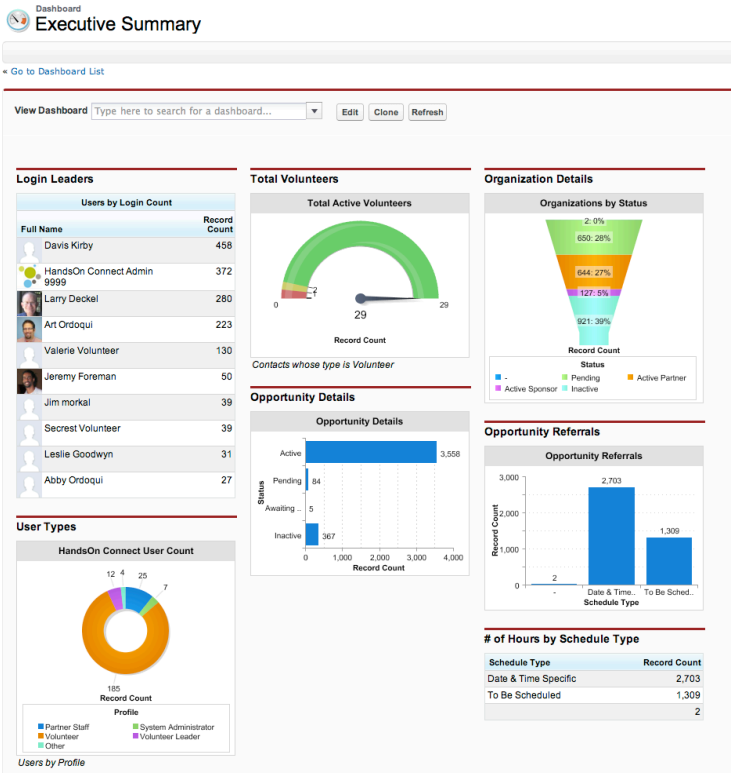
The place you're most likely to have seen a dashboard is on your home page. The home page allows you to pick one of your dashboards and display the top three items on it on the homepage so you always have an 'at a glance' view of the statistics that are most important to you.

You can create as many dashboards as you like - so that you can organize certain types of information in one dashboard. For example, you could have a dashboard that contains all the information on your service hours, # of connections, types of volunteer opportunities etc, as a "Volunteer Opportunity Overview" dashboard. You might have another dashboard focused solely on organizations (sponsors vs non--profits, etc) and another just on your volunteers (demographic information, level of activity, % of Volunteer Leaders, etc)

The homepage view of part of a dashboard



A full dashboard (as seen in the Dashboards tab) can contain as many different 'components' as you like.



A dashboard is made up of a number of 'components' (individual visual summaries of an existing report.

Components can be of a number of different types including charts, graphs, gauges, tables, metrics or even custom VisualForce pages.

Dashboards are grouped by folders, which can have variable visibility settings depending on who can view them.

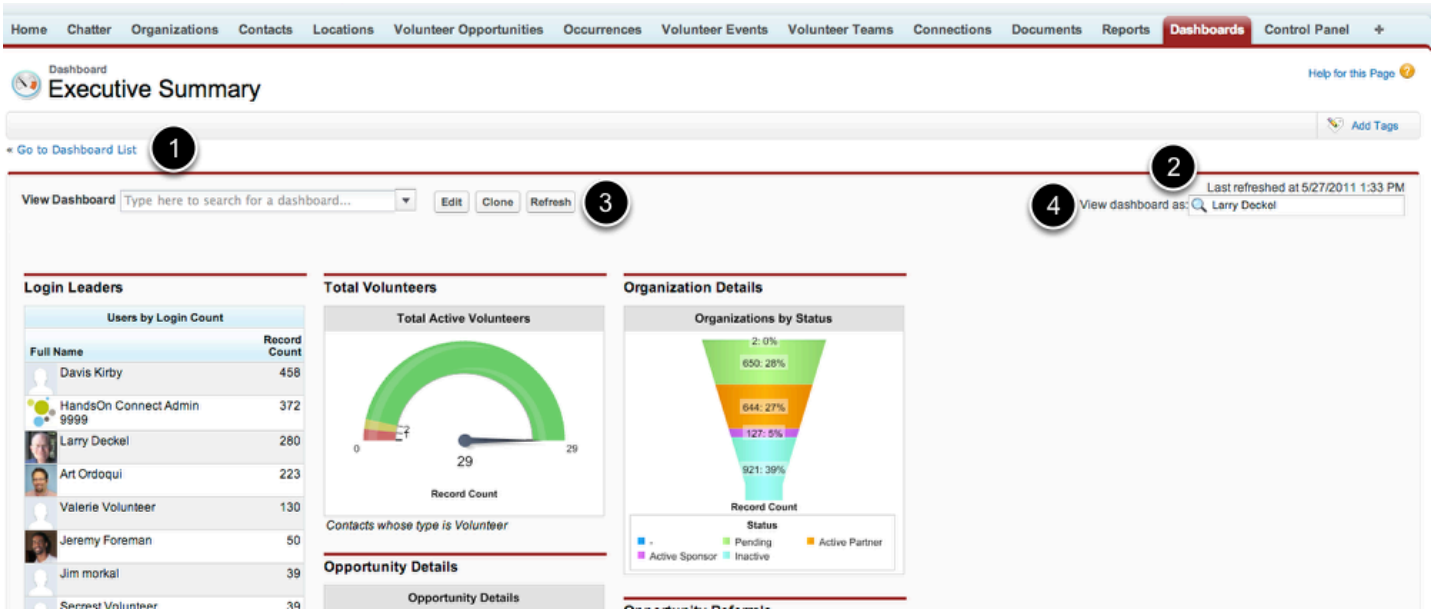
In order to view a component -- a user must have access to the folder which contains the report the dashboard is based upon.

Viewing Dashboards

Dashboards are accessed through the Dashboard Tab, and organized into folders.

When you click on the Dashboard Tab you will brought to the last dashboard you had viewed.

View Dashboard picklist



Click on the "View Dashboard" picklist to see the various dashboards accessible to you. If you have a LOT of dashboards, you can also type into the search box at the top of the picklist to search for a dashboard by name. When you select a dashboard's name -- you'll be moved to a view of that dashboard.

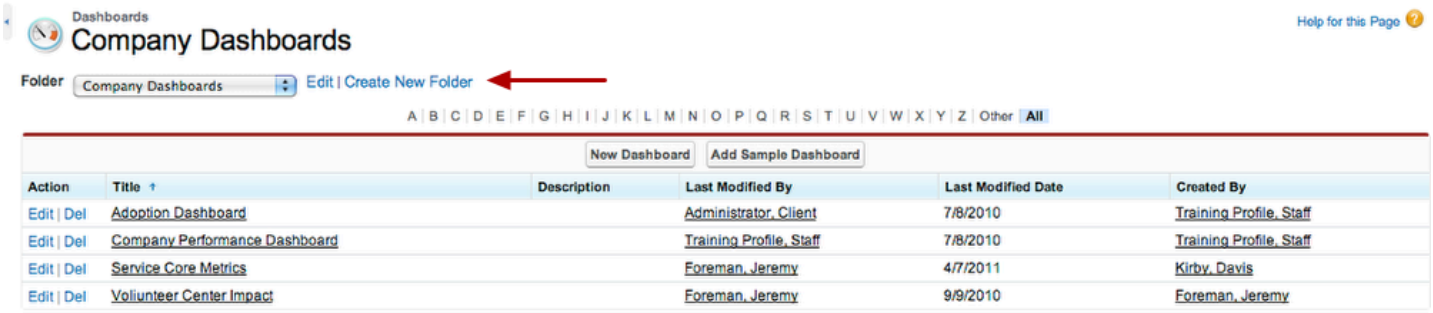
1. To see ALL dashboards, click on the 'Go to Dashboard List" link just above the 'view dashboard' filter on the page.

2. Because updating dashboards requires ALL reports used to be run, the dashboards don't automatically refresh. You can see the last time they were refreshed in the "Last Refreshed at..." text in the upper right.

3. To refresh the dashboard and view stats as they exist right now -- click on the Refresh Button.

4. You can also view the dashboard as it would appear to a specific user. (So if you want to see the data a customer portal user would see if you made the dashboard object, and a dashboard folder accessible to them, you can search for that user -- and see exactly how the dashboard would look to them!)

The Dashboard List (Dashboard Home Page)

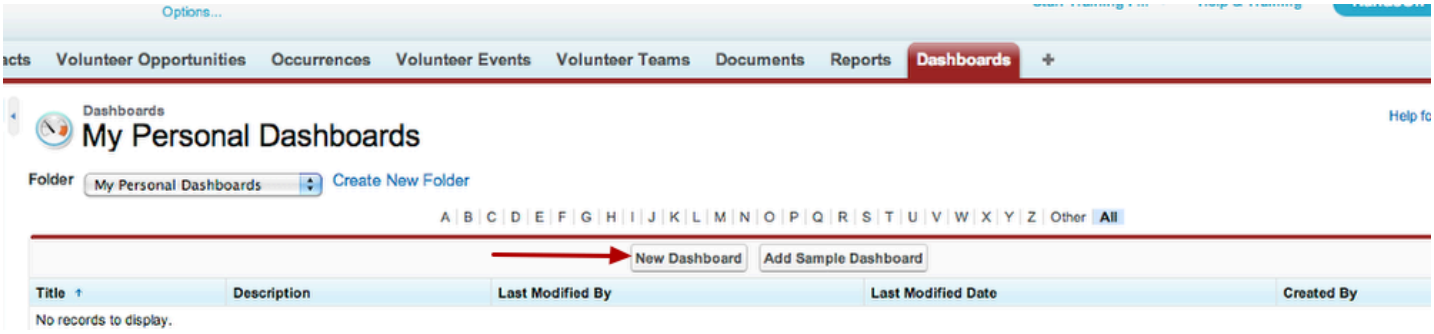


Here, like on other home pages, you can set views for your dashboards.

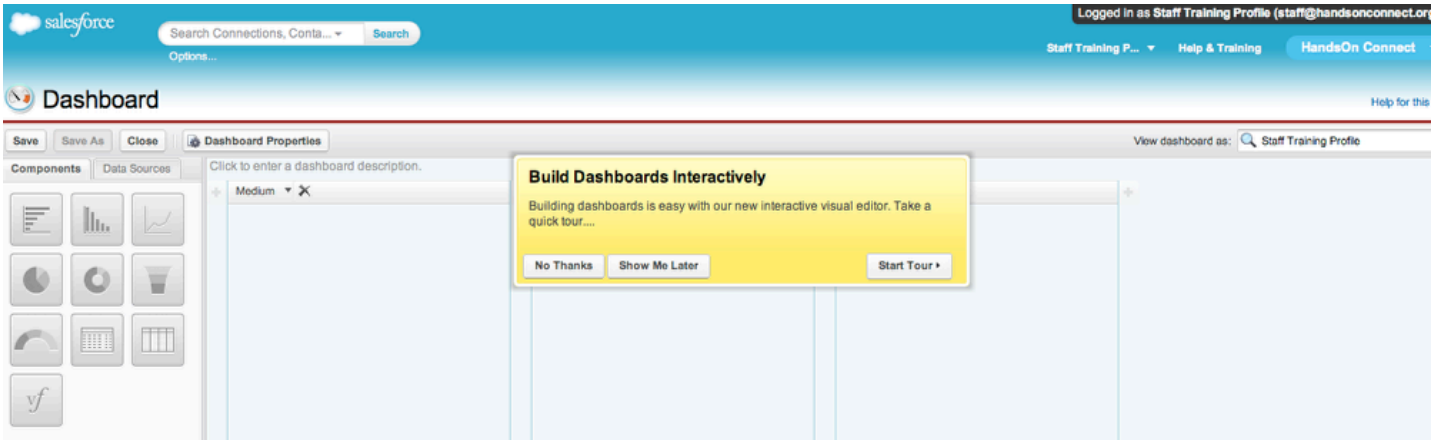
Click on Create New Folder to create a new folder to group your dashboards and control who can see dashboards in a given folder.

Creating Dashboards

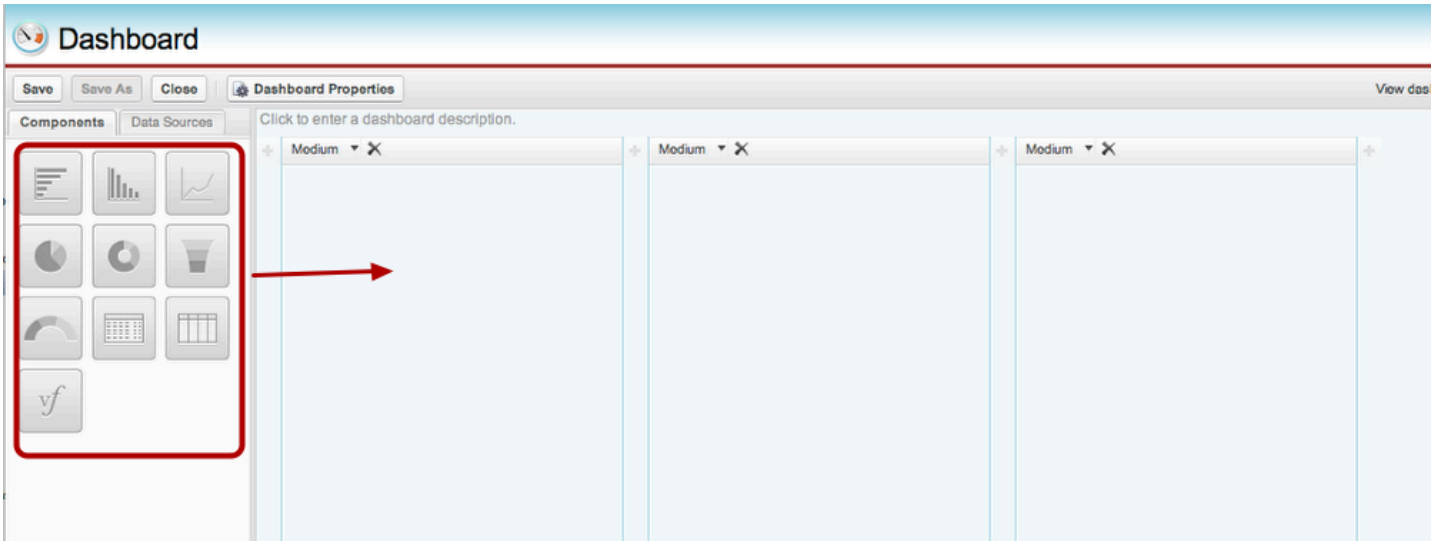
From the folder view for dashboards - click on the "New Dashboard" button



Salesforce provides an quick tour that explains the process of building a dashboard



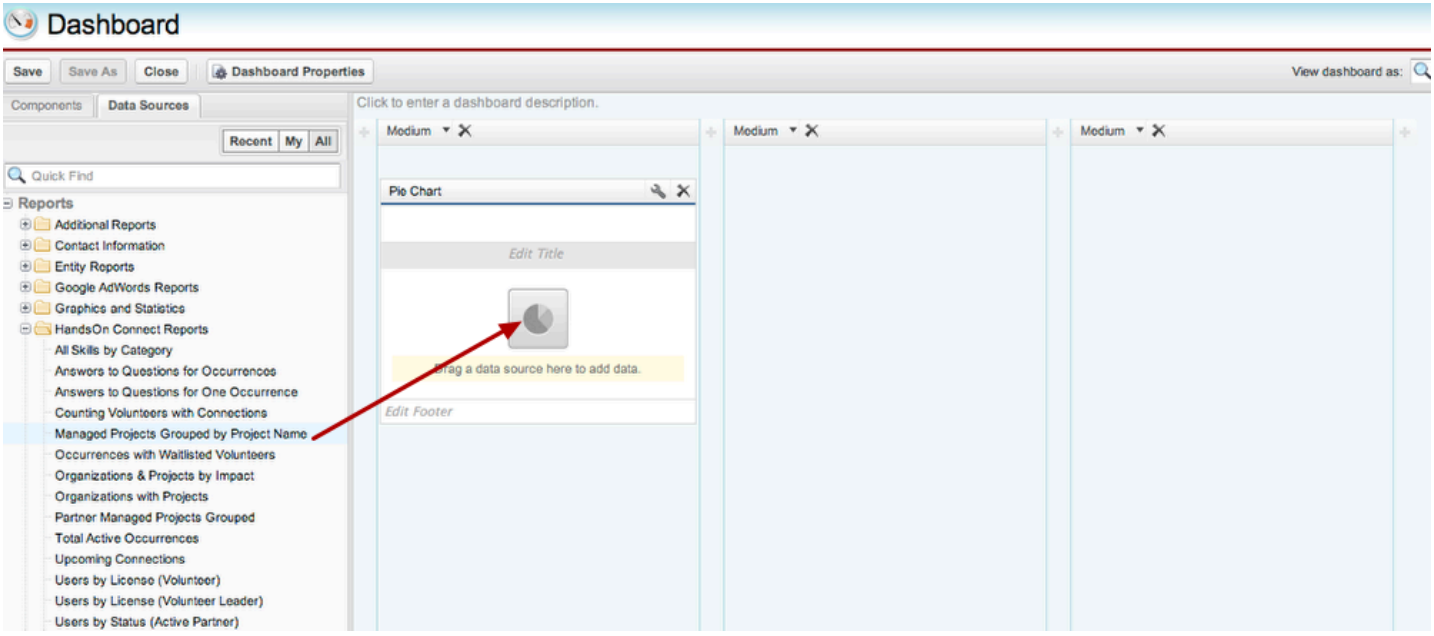
Add Components to Your Dashboard



Select a component 'type' from the Component tray on the left of the page -- and then just drag and drop it to the position on your dashboard on the right.

There are three columns you can place your component in. And you can place as many components as you like in each column.

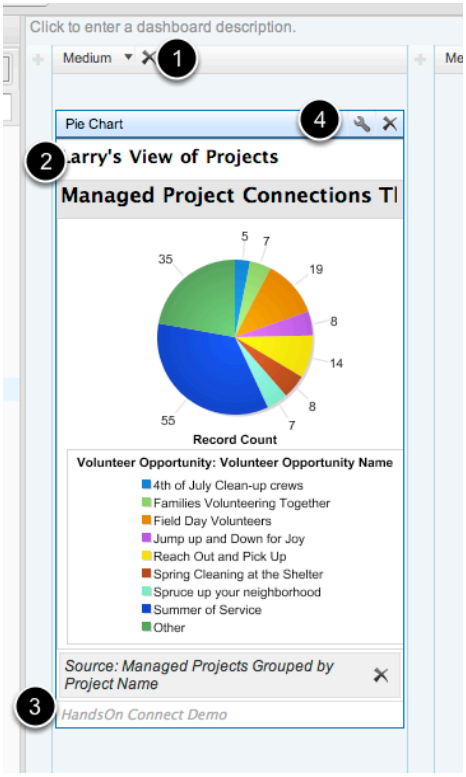
Choose the Data Source for your Component



Click on the Data Sources Tab in the left Tray.

Choose a report from one of your report folders, to use as the source of the data. (You can only make dashboard components from reports that are in summary or matrix format)

Add Title, Footer and adjust display of data as desired



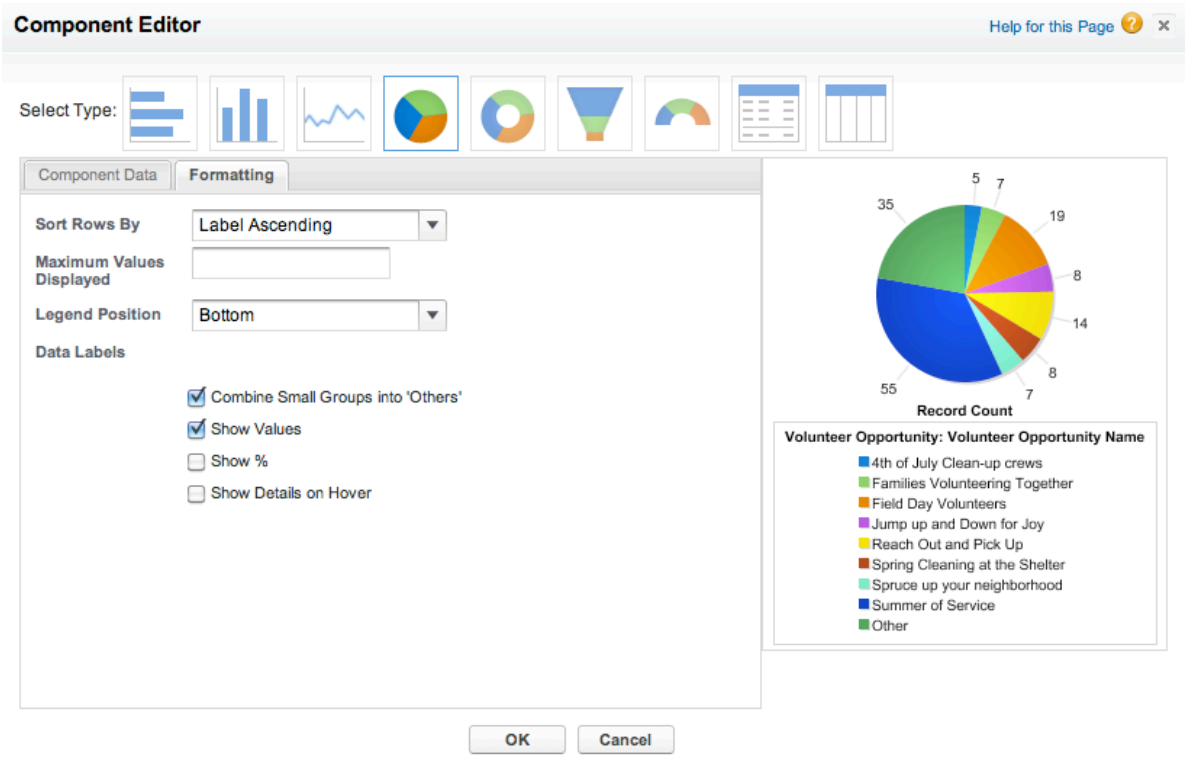
1. You can control the width of the component here.

2. You can add a Title here

3. You can add a footer here

4. You can edit the component further by clicking on the wrench which opens the Component Editor

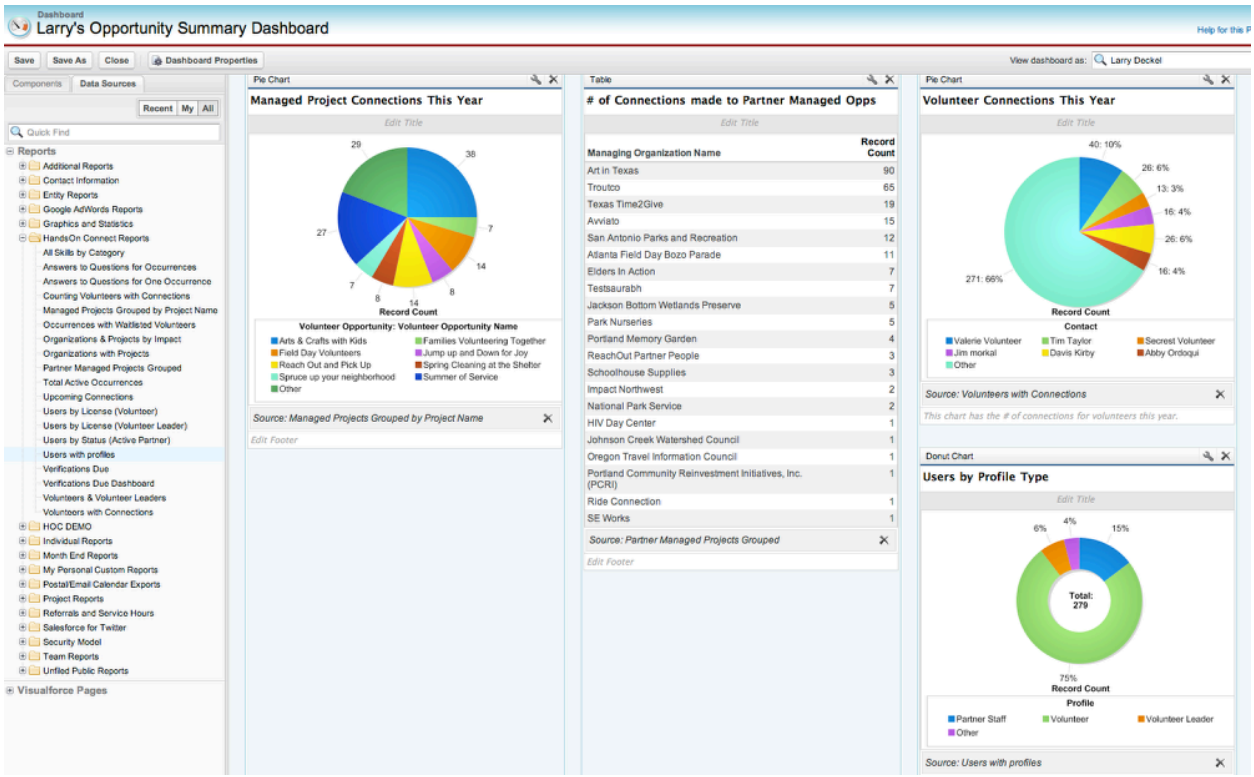
Component Editor



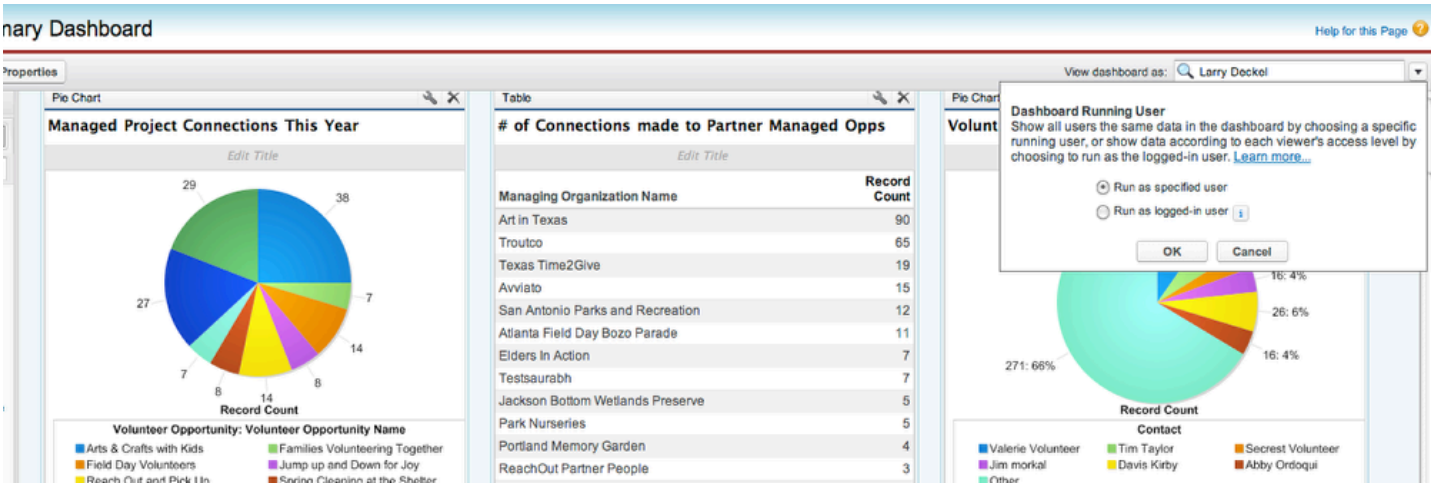
Here you can change the component type, and control the formatting and sorting of the graph or chart.

Click on HELP for this page in the upper right for more details on ways you can control the display of the component.

You can add as many components as you like in this way.

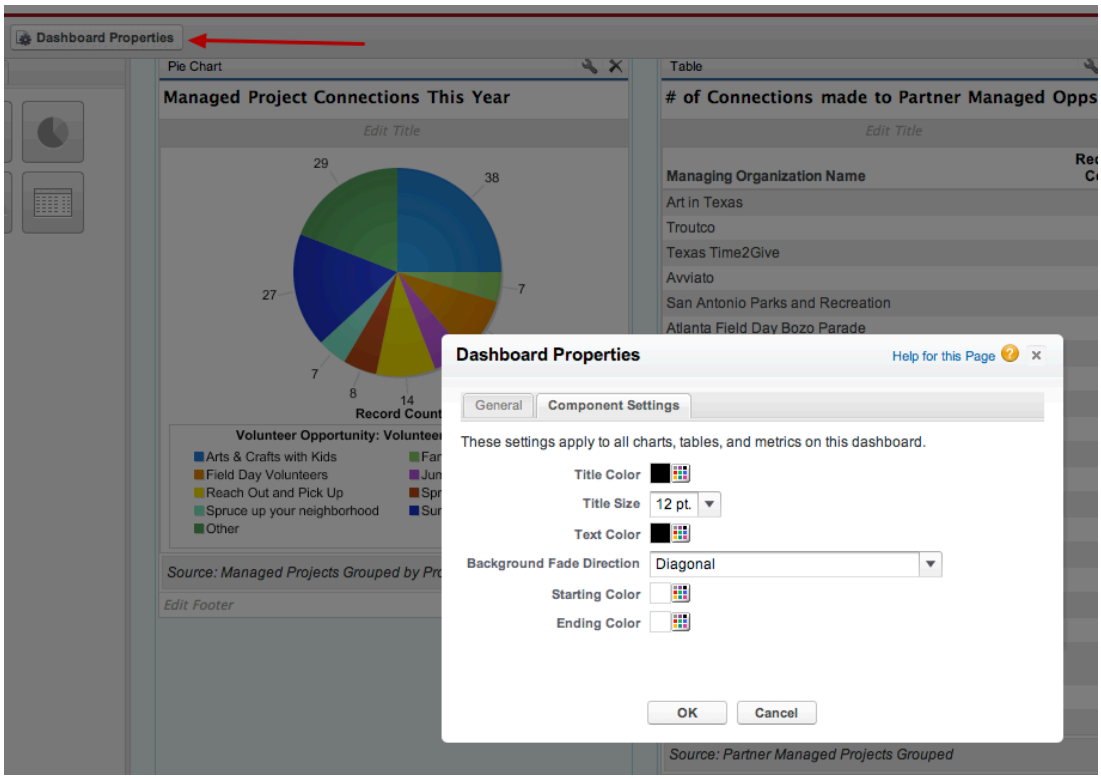


You set the data that will be viewed in the component by clicking on the "View Dashboard As" lookup in the upper right.



You can either run dashboards so that everyone will see data according to a specific user (such as yourself) -- or to run as logged-in user (meaning they will only see the data they have access to seeing. This way the same dashboard can be used to give access to each individual partner organization to see a summary of THEIR opportunities, for example.)

You can further customize the Dashboards look and feel



Clicking on the Dashboard Properties button allows you to customize the colors and type size of all the components together to get a unified look and feel.

You can also drag and drop dashboard components from one location to another on the page -- allowing you to customize the layout exactly as you wish it to appear.

(Advanced) Chatter allows you a way to share static shots of dashboards with non-salesforce users

Share dashboards with your board (if you grant them chatter licenses). For more details on integrating dashboards with chatter, see these posts in Salesforce Help.

https://help.salesforce.com/HTViewHelpDoc?id=enable_dashboard_component_snapshots.htm

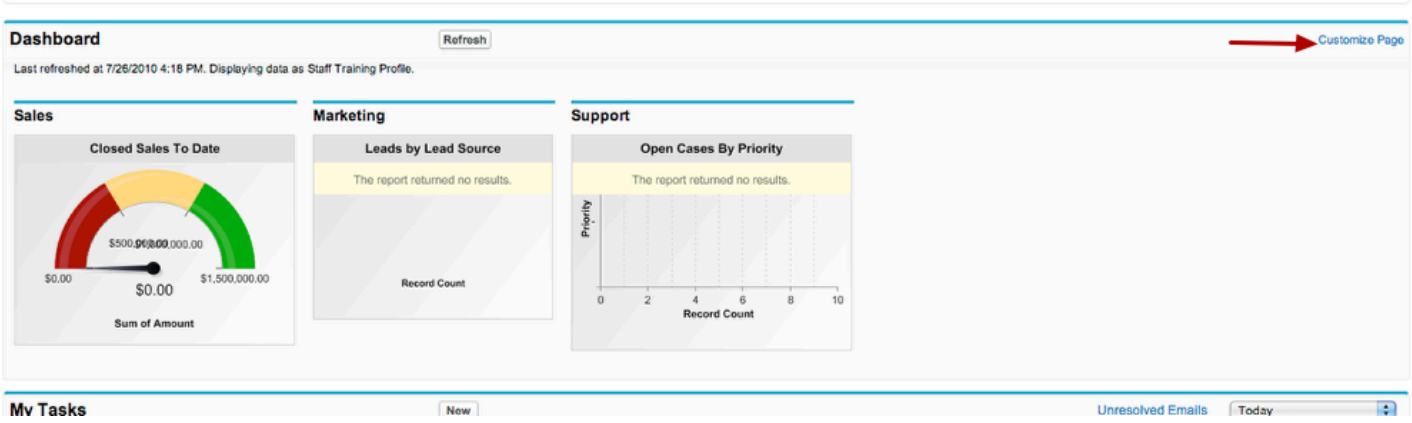
https://help.salesforce.com/HTViewHelpDoc?id=dashboards_post_to_dashboard_feed.htm

Setting the Dashboard for the Home Tab

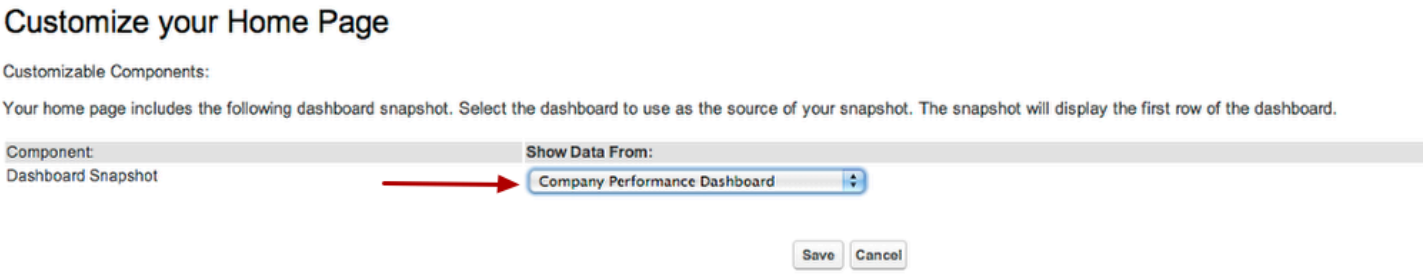
You can choose any dashboard you have access to as the one that appears on your HOME tab.

Only the top three components of the dashboard are visible on the Home Tab.

Click on "Customize Page" to change the dashboard that appears on the Home Tab



You can then choose to show data from any dashboard you have access to:



Click on the picklist and pick the dashboard you wish to have appear on your home page. It will replace the one that was there by default.

You can change the dashboard you're monitoring on your homepage as often as you like!

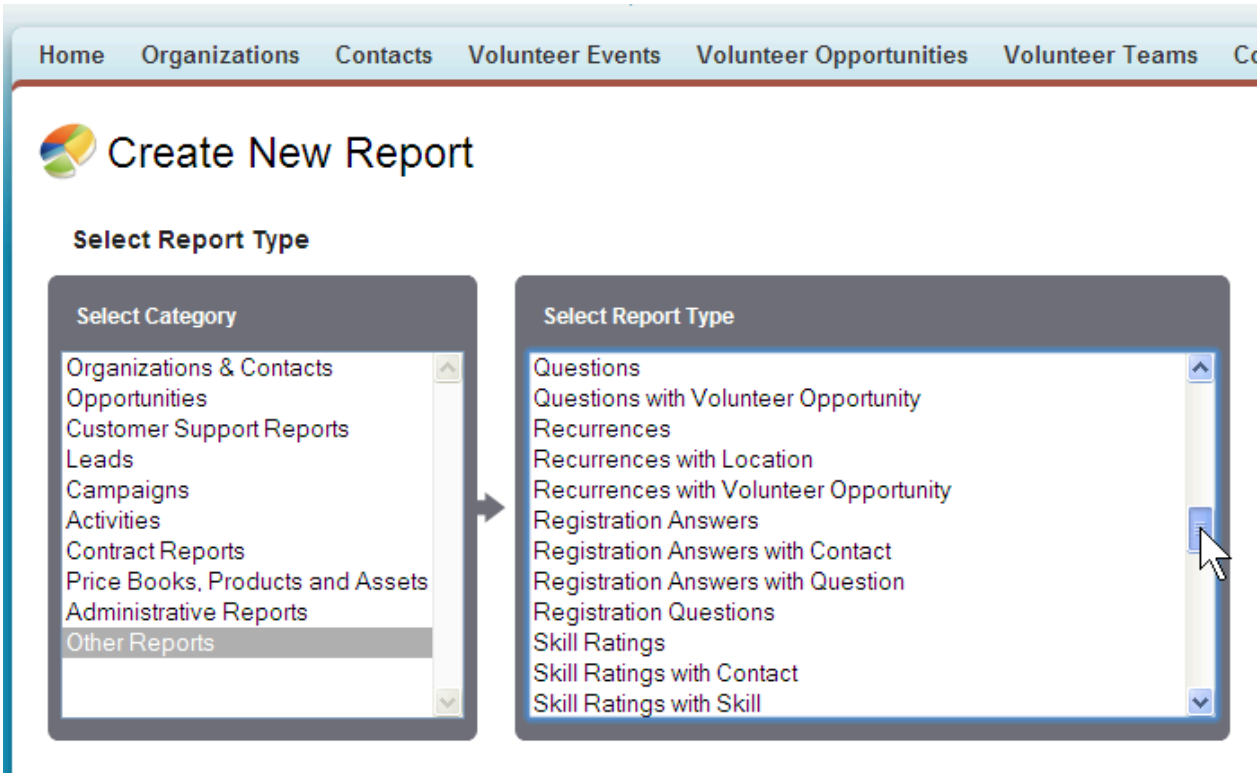
Don't forget to hit REFRESH to get the latests dashboard data.

Advanced: Creating a New Report Type

Creating a new Report Type

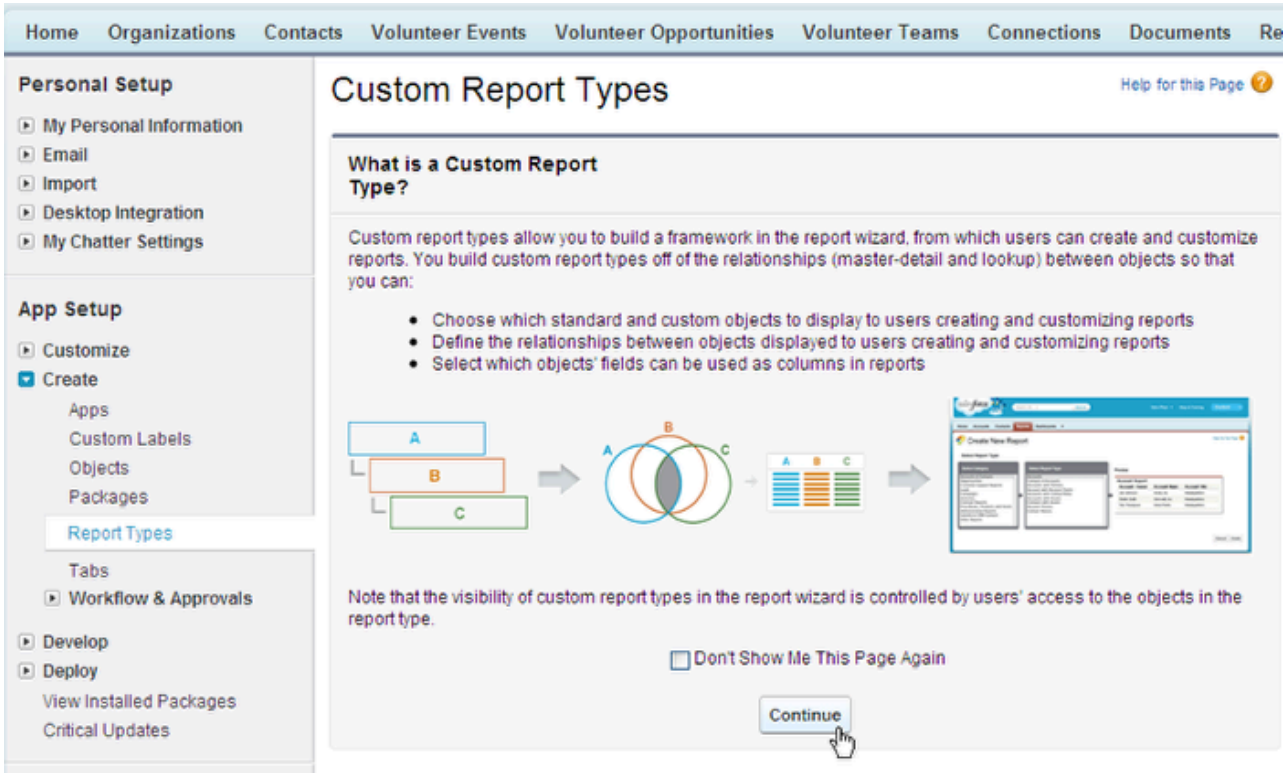
When you start a report from scratch using the New Custom Report Feature, you get to choose what report type you would like to start with. What if you don't see a report type that has all the objects you need in it? HOC allows you to create report types and will automatically link the objects you need together. In this lesson, we will learn how to create a brand new report type.

Look for what you want first...



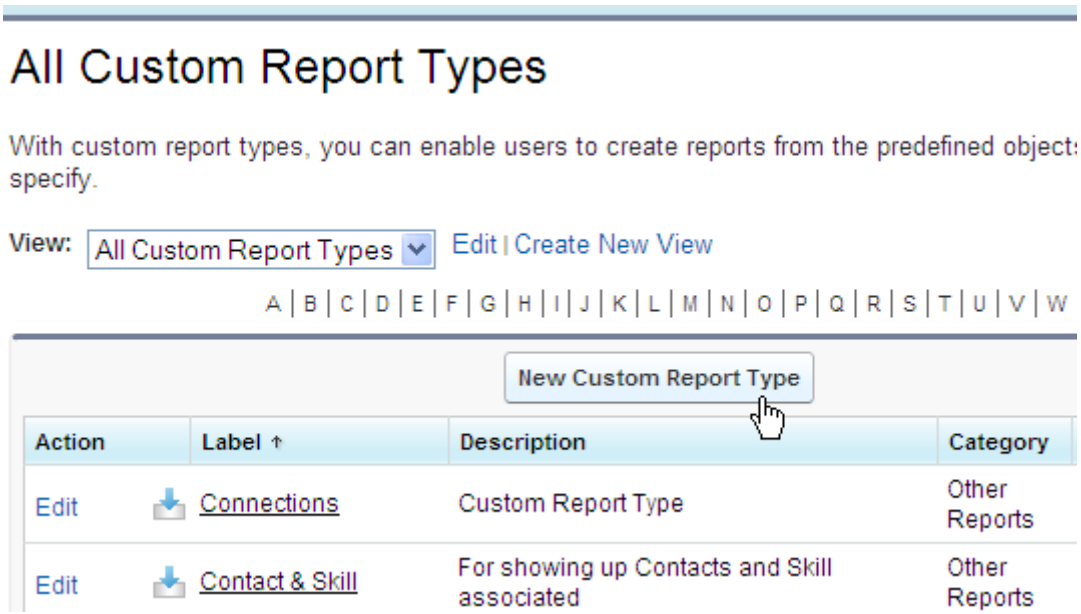
Make sure you use the Create a New Custom Report, choose the folder: Other, and look for a Report Type that already has the Objects you are looking for. HOC has populated the Category: Other with many common report types. If, however, it is not there, we will learn how to create one from scratch!

Navigate to Custom Report Types

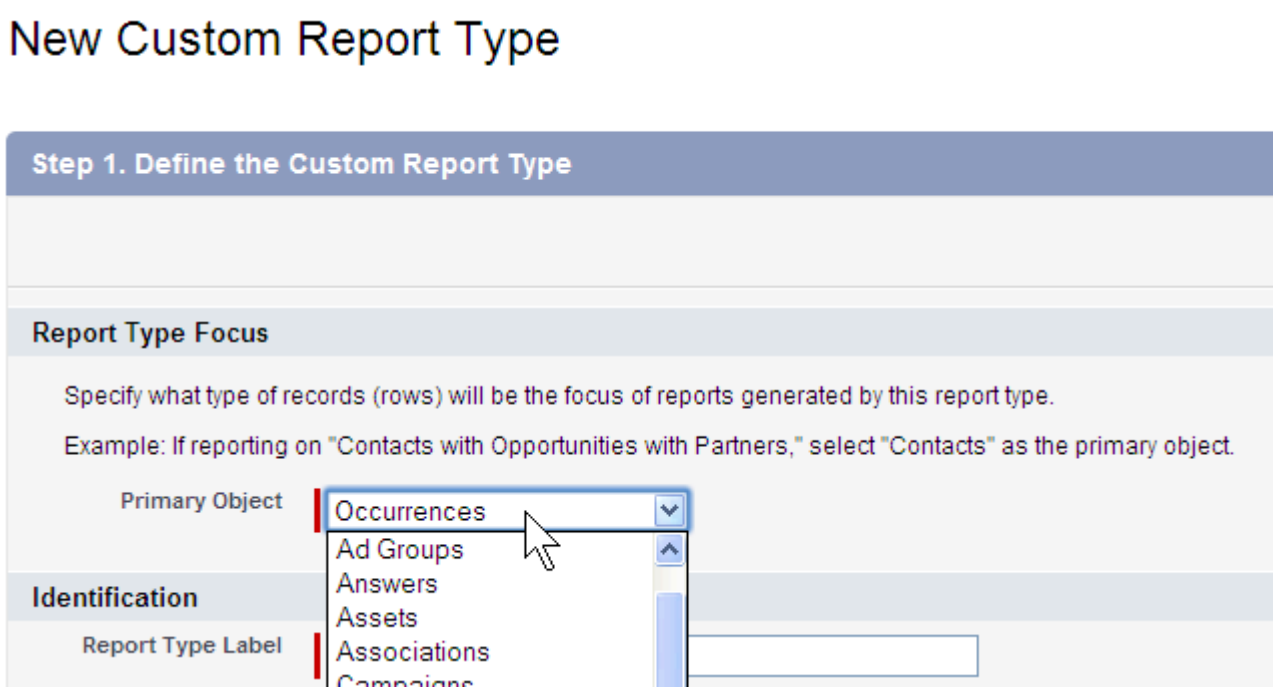


Go to Setup / App Setup / Create / Customize Report Type. You will be given a welcome screen there with general information about this process. It is always good to read this information. Hit Continue.

Click "New Custom Report Type"

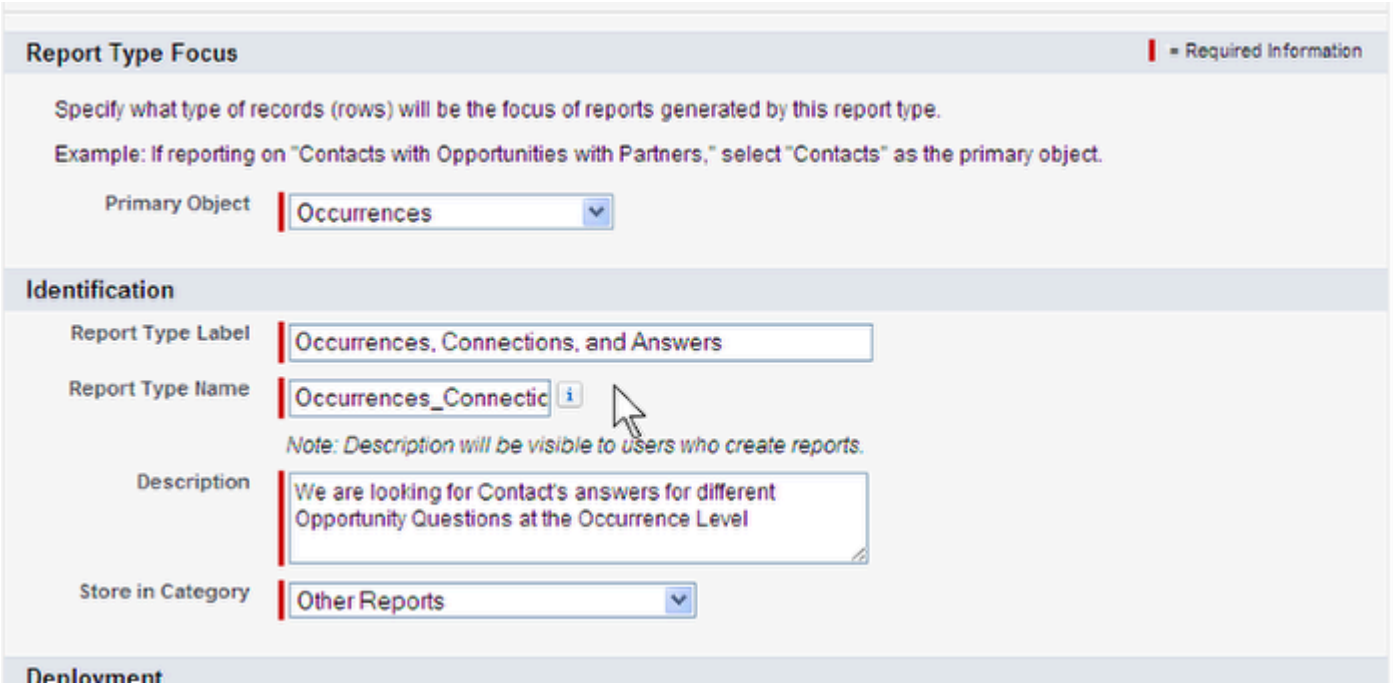


Choose the focus of your report



What do you want the rows (details) of the report to focus on? What is your primary goal of this report? This first dropbox allows you to set the primary object and from there, you can bring in other related objects. With this example, we want to find out how different contacts answered our opportunity questions for different occurrences. Our primary, in this case is Occurrences.

Name your Report Type



It is a good idea to name your report type with the objects that you plan to have associated. In this case, It is going to be Occurrences, Connections, and Answers. Make sure to tab through to the next box, and HOC will auto-populate it for you.

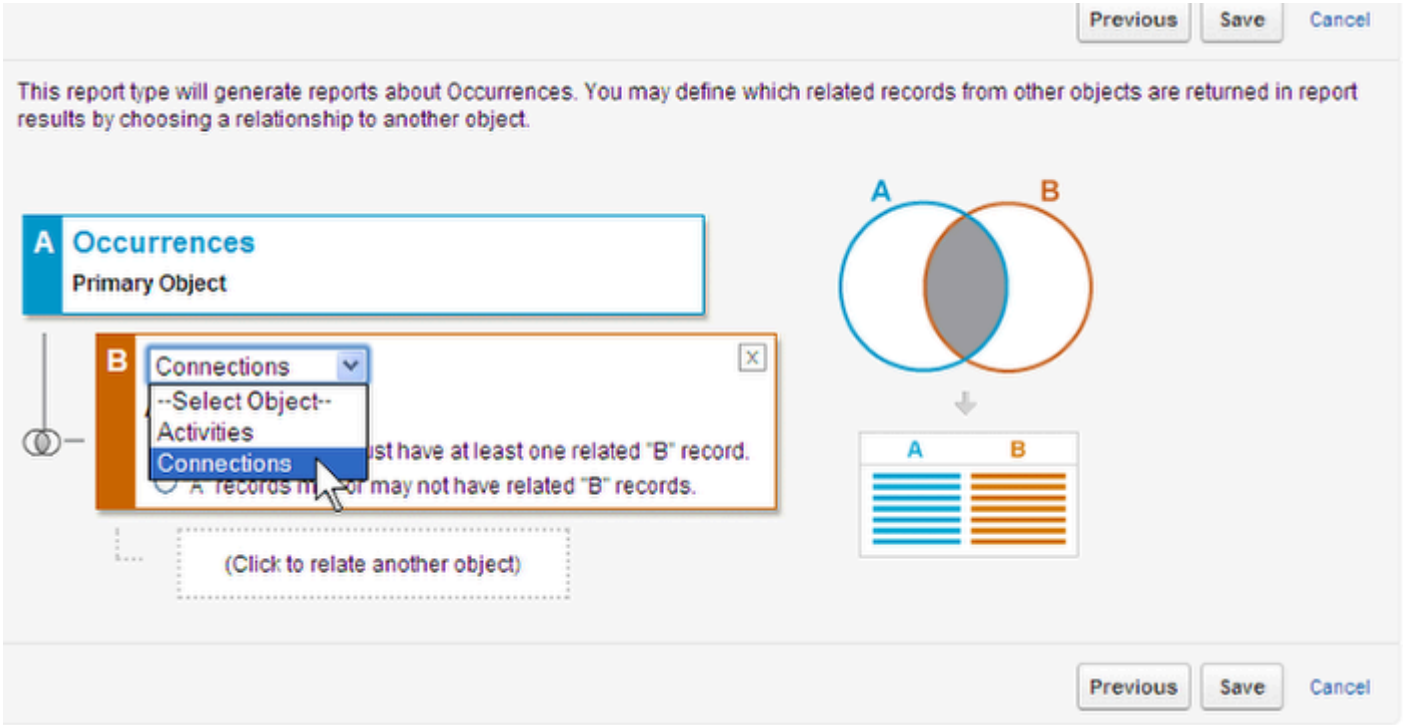
Give the Report Type a description. Clear and concise.

Store your new Report Type in the Other Reports Folder. (At this time, we do not have the option of creating a new Report Type Folder). By putting the report Type in this Other Reports Folder, you will always know to go to that folder to see HOC or you have created what you need.

Choose the Development Status

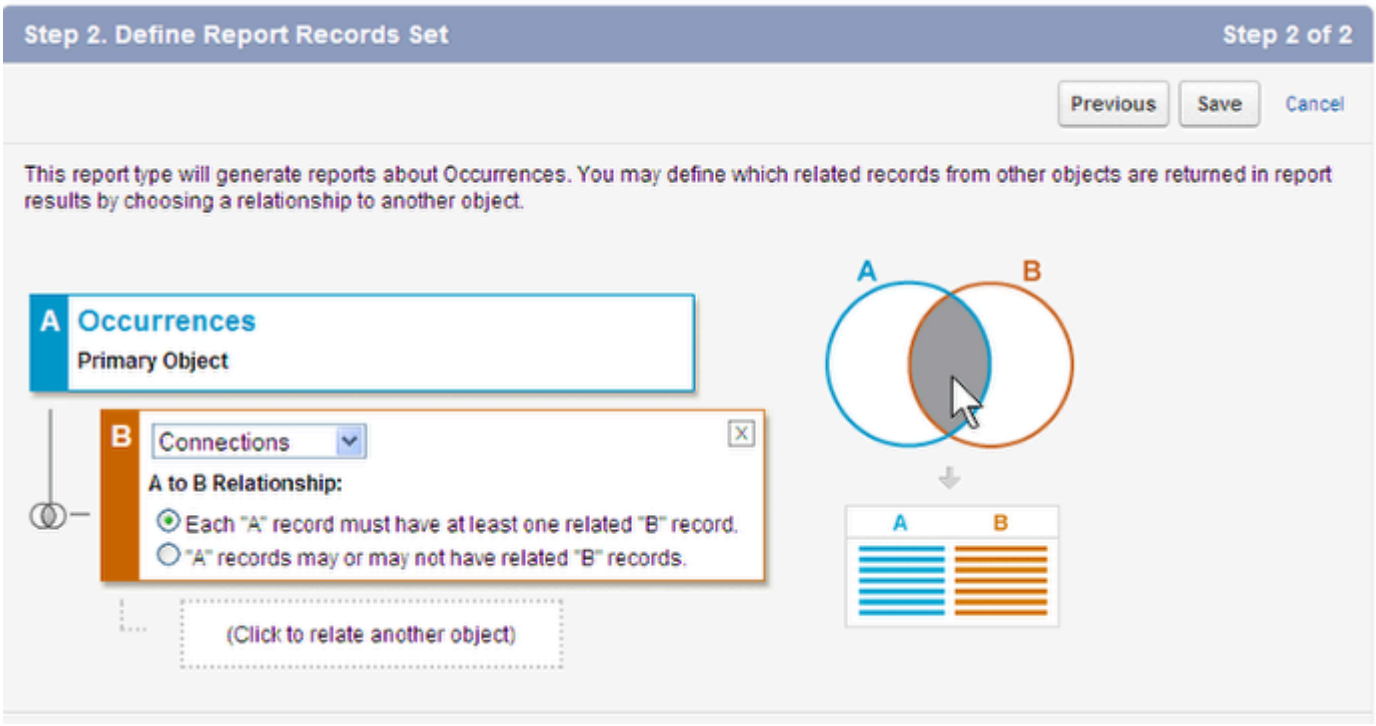
You can choose, at this point, to publish or keep this Report Type in Development. I know that I am about to use this report, so I am going to choose "Deployed" and hit Next.

Create the linking of the Objects



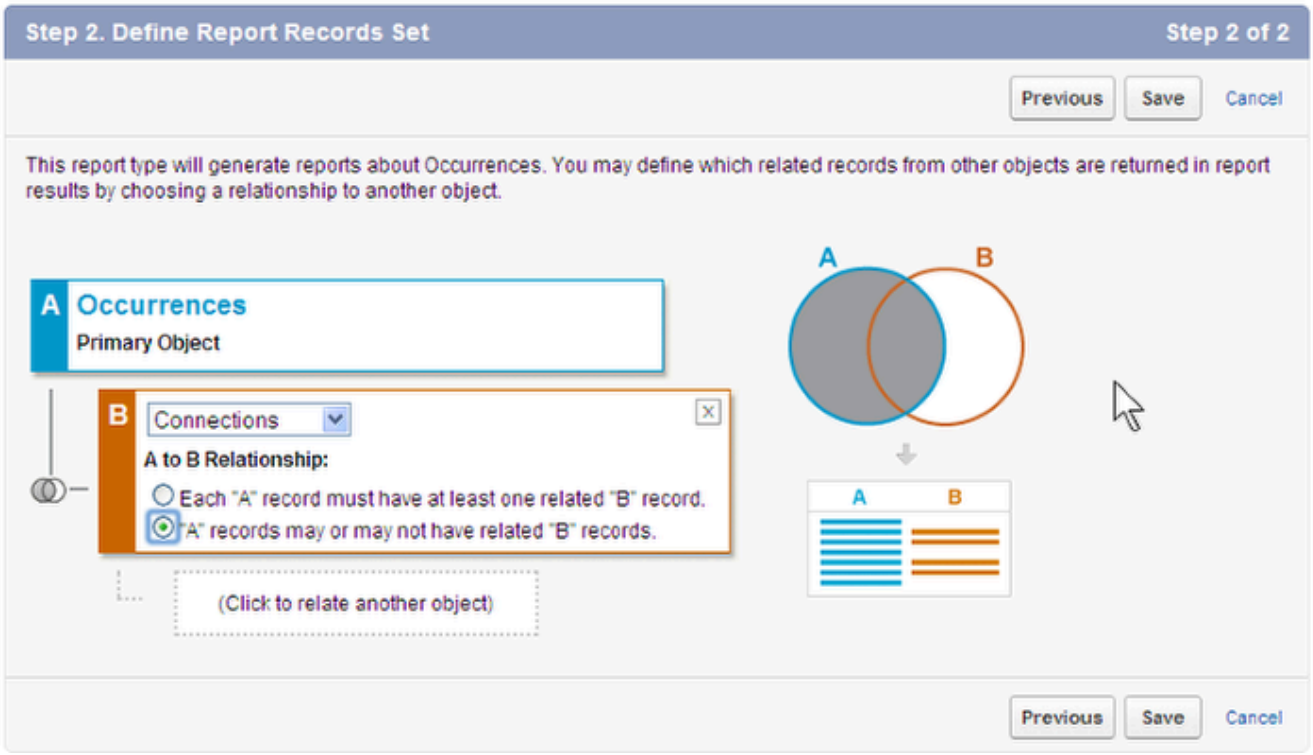
HOC gives you a visual representation of your data structure in this window. These are called JOINS, where you are joining one object with another. You are finding information that is common in all the objects you are choosing. The dropbox shows you related Objects that you can bring in to this report. Our next Object is Connections

Join Types



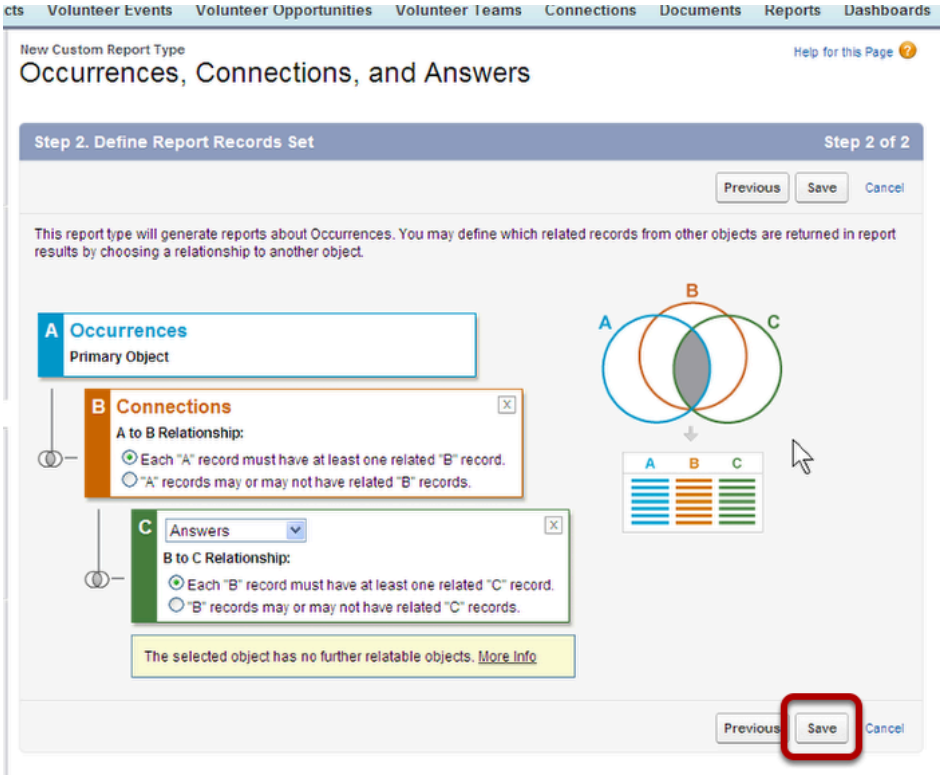
You have two options. The first option is to pull in data that is contained in both A and B (see the visual representation to the right). This is called an INNER JOIN. In basic language this says: Pull in information only when it is part of both A and B.

Left Outer Join



The second option is called a LEFT OUTER JOIN. In basic language this says: Bring in information about A and B, even if there is no information in B. See the grayed circle and note the data below it. Some of the A records do not have B data. In our report, we only want data that is in both sets, so I am going to change it back to an INNER JOIN.

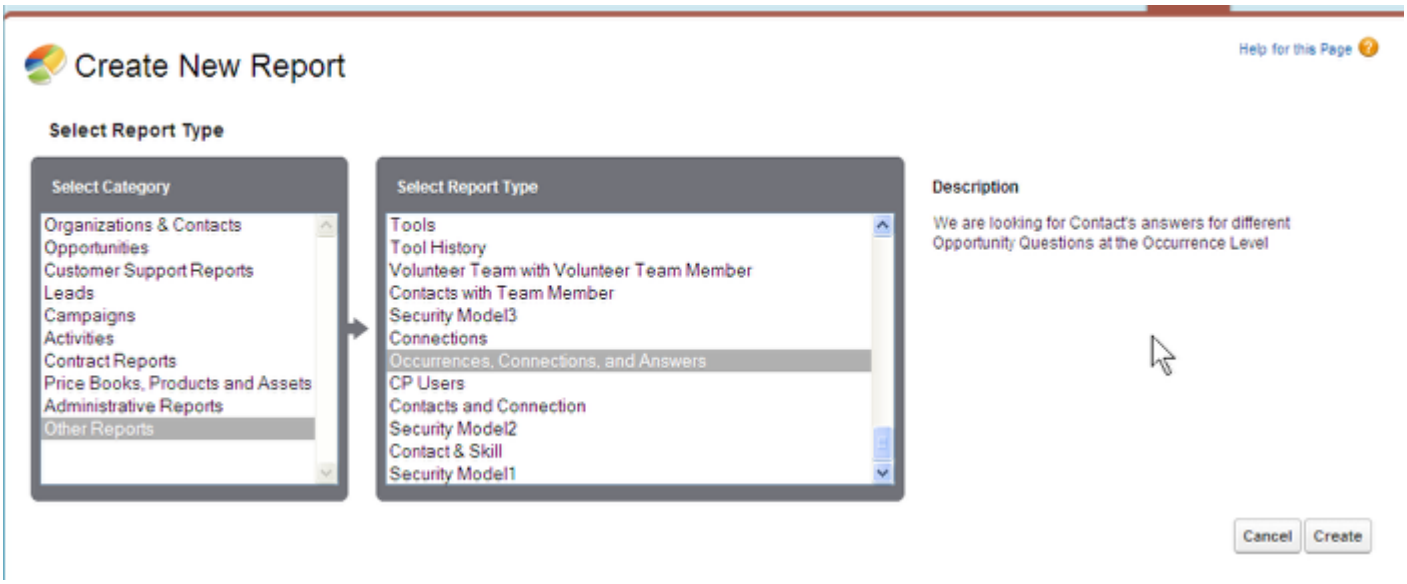
Bring in another Object



We need to bring in the Answers associated with these connections, so I click box below B and add another related Object. I choose Answers and I want another INNER JOIN. What does this say? Bring in Occurrence information when there is a Connection and that Connection has Answers... Note both the venn diagram and the data structure below it.

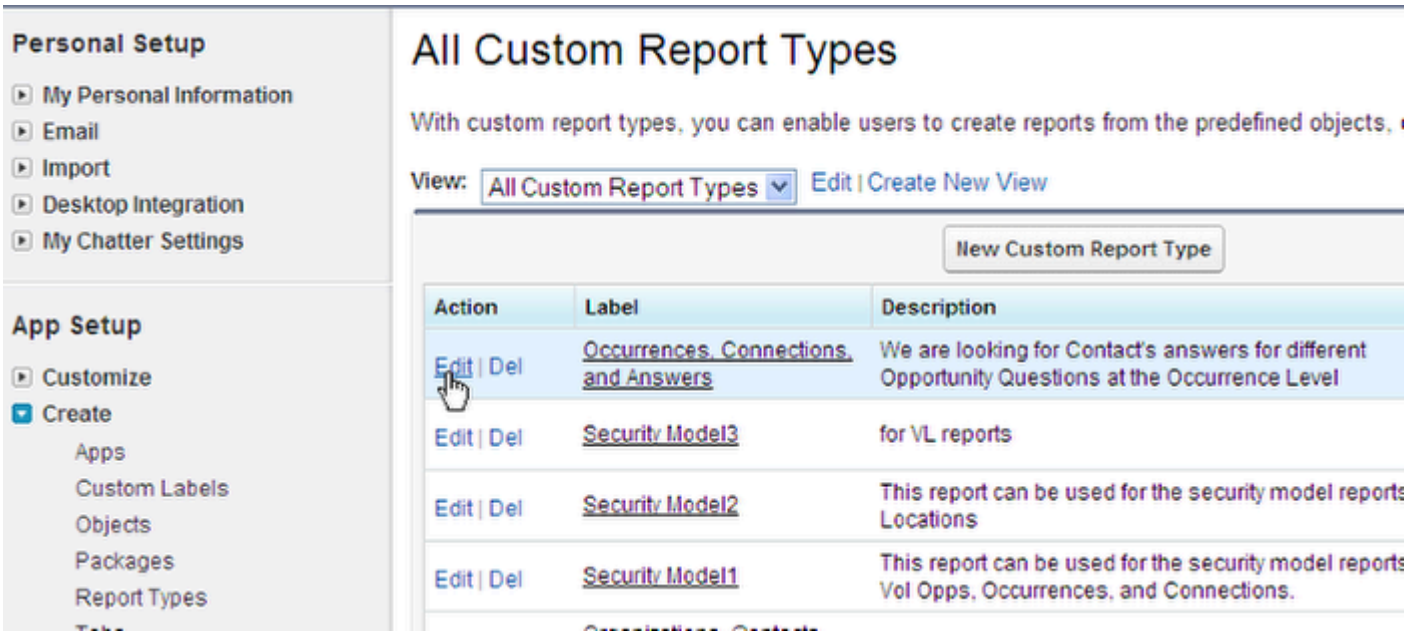
Hit Save

Now create a report using your new Report type.



Assuming you chose to Deploy your report type, you can now find your new Report Type in the folder: Other Reports in the Build a New Custom Report Window. Even my Description appeared!

Edit your Custom Report Type



Navigate back to Setup / App Setup / Create / Report Type and choose the ALL view. You should see your report listed. Use the edit button to change the joins, description, or related objects.

Advanced User

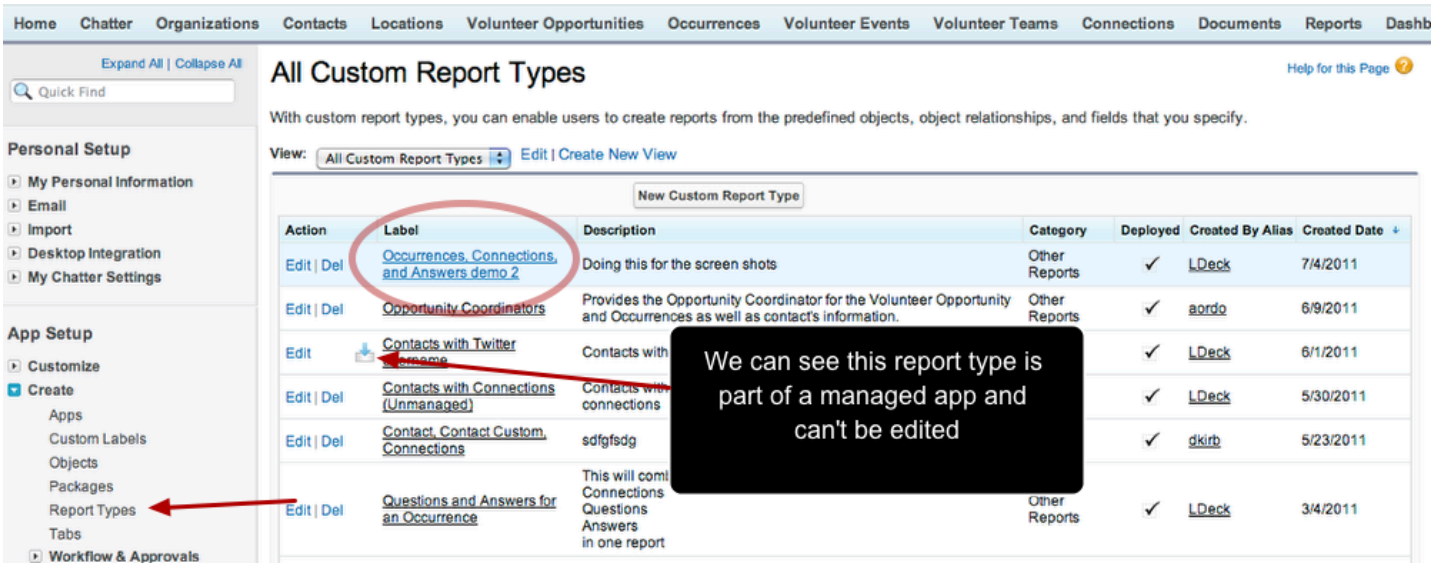
For more information on Custom Report Types, see: SF Help & Training: Custom Report Types.

Controlling the Fields that are Available for Report Types - "Why are fields not available for my report?"

When a New Custom Report Type is created, The fields of the various objects available to the report are made accessible when you create reports of that type. However, custom fields that you add to objects AFTER the custom report type was defined, will not automatically be present. That's because you can control what fields are available in a report. You can remove fields that make a report too difficult to work with, or add fields that are missing.

You can also add fields that are related to objects by lookups, instead of adding yet another object to the field!

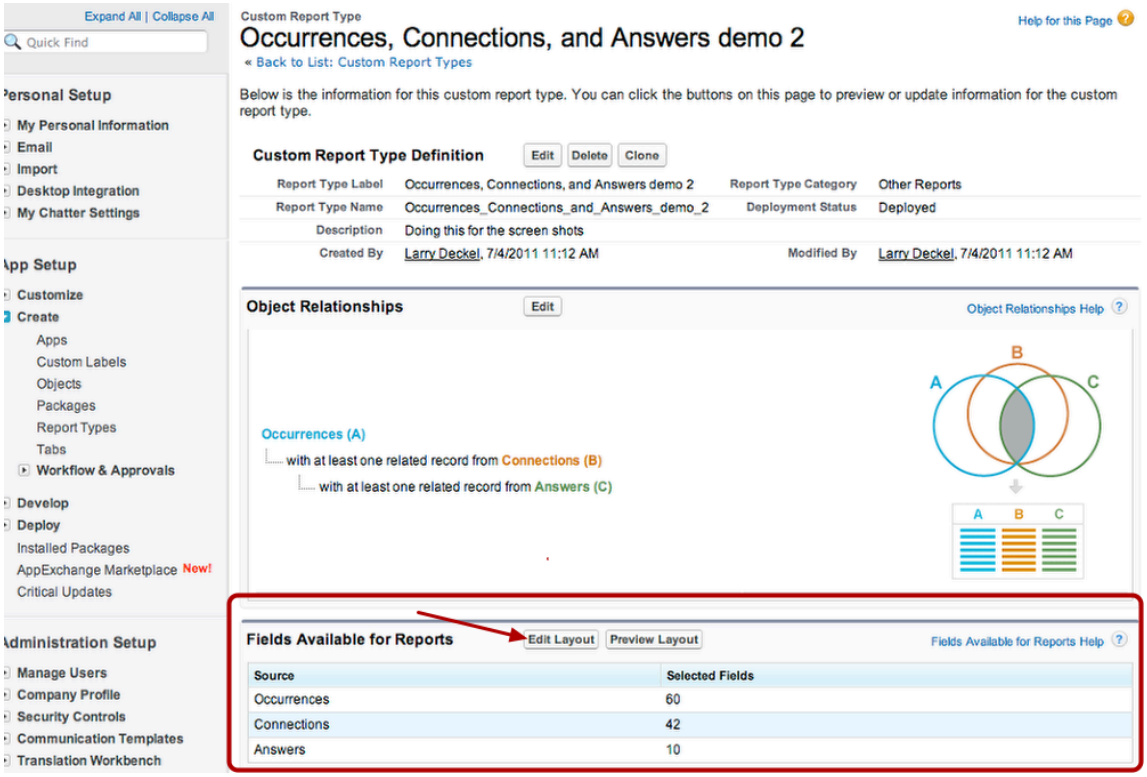
Edit the fields available to a report by going to Setup / App Setup / Create /



Click on the name of a custom report that you wish to edit.

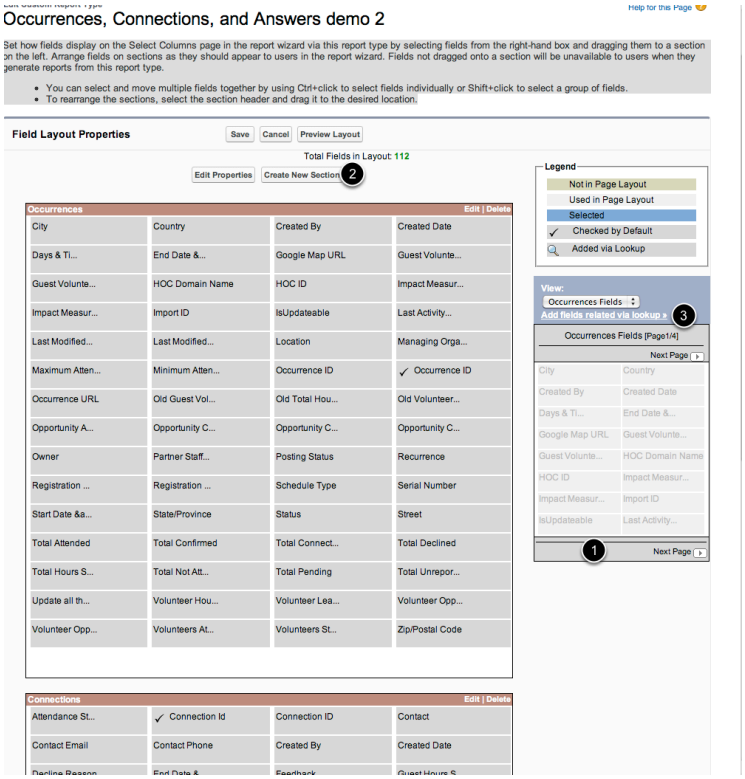
Note: You won't be able to edit reports that are part of managed applications. To work around this, click on the managed report type and CLONE it, creating a report type that you CAN edit and use to meet your needs.

Fields Available for Reports are defined in the second section of the object record



Click on Edit Layout.

Field Layout Properties screen



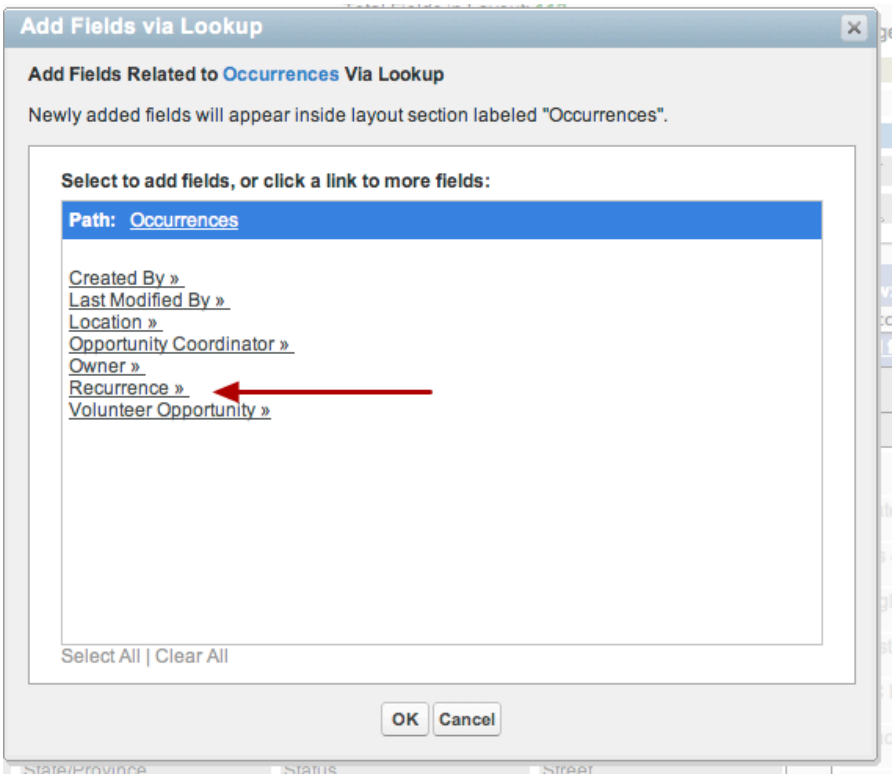
Here you can see a summary of the available fields for each object type, and if you like, remove fields (by dragging them into the tray of available fields), or create new sections to organize the fields in a way that is easier for your users to navigate.

1. Tray of available fields (use the picklist to choose from the different objects in the report). Click on Next Page to see more Fields

2. If you do like the organization of the fields by object name, you can organize the fields any way you like by creating a new section and reorganizing the way the fields are grouped.

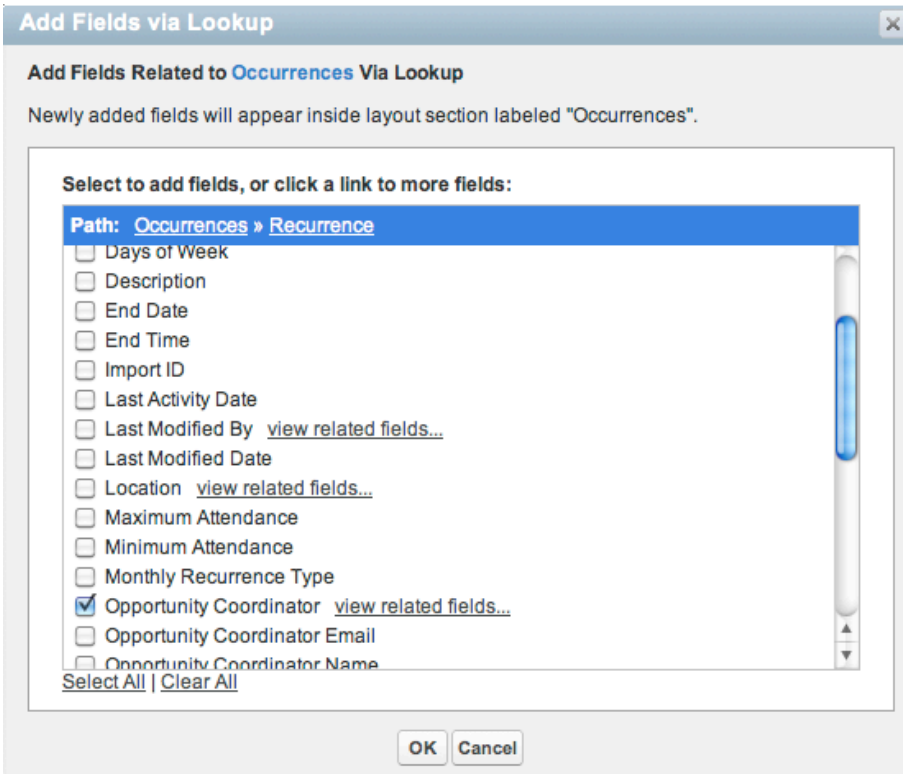
3. You can add fields that are not in an object but are in another object, IF there is a field that performs a **Lookup** to a related object. To do this click on the "Add fields related via lookup" link.

Add fields via lookup

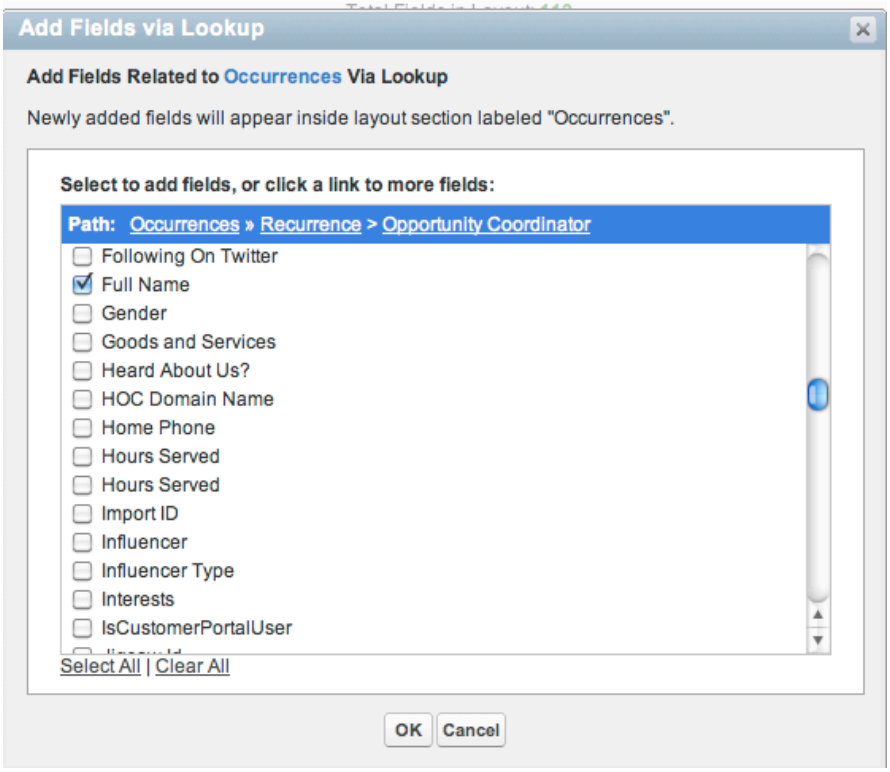


This window pops up to show you fields you can add to the layout through their relationship via lookup. You can next deeply into other objects through their related lookups to other objects. For example, we can find fields in the Recurrence object, even though its not one of the objects contained in this report type. To do so, click on Recurrence

We now can see the fields in the Recurrence Object - because it has a relationship to the Occurrence Object



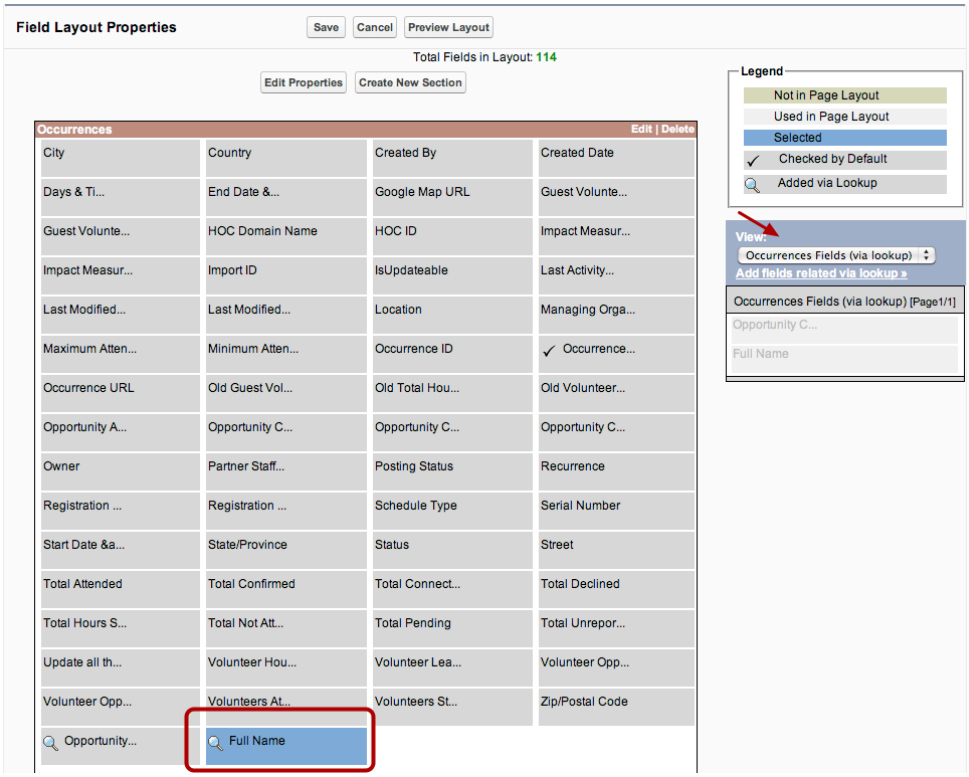
So I could use this relationship to find out who the default opportunity coordinator is in an occurrences related recurrence object. And drill down further to get info about THAT Opportunity Coordinator by clicking on "view related fields"



This way I can drill down to the field "Full Name" of the Opportunity Coordinator listed in the Recurrence Record -- WITHOUT adding the Recurrence record as an object in the custom report type!

This is a great way to get to one or two fields in a related object without complicating the Report Type.

Click on OK, and the field is added as a 'lookup field"



The field has now been added, and the magnifying glass tells us its not actually a field in the Occurrence Record, but related to it via lookup.

The view of "Occurrence Fields (via lookup) allows me to see which fields I've related via lookup

Save the additions (or reorganization of) the report type by clicking Save.

Next time you create a custom report using this report type - your new field will be included.

Note: To edit or change a custom report type after it has been deployed and used, you must change its deployment status back to 'In Development".

For more info on best practices on Custom Report Types - see Setting Up Custom Report Types in Salesforce Help.

Building reports around the connection record using related lookup fields

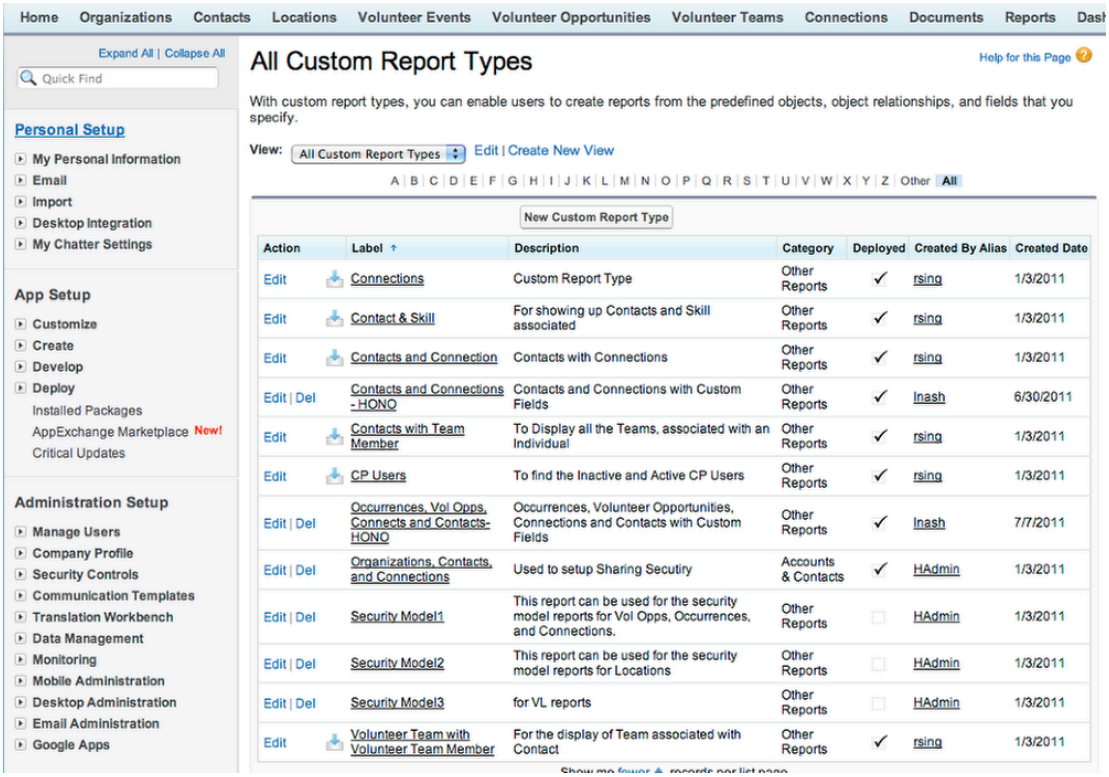
A lot of the information you will want to get out of your data is about people who have volunteered. And that information will be found in the Connection Record.

You will want your primary object for certain kinds of reports to be the **Connection** object -- however when you go create the custom report type - you'll find the secondary objects aren't there! You COULD choose to build the report around the **Contact** object - but there's a better way.

You can get to fields you might not otherwise access, through the lookup fields that are in an object. And the Connections record is FILLED with lookups!

Let's say we wanted to get a report on all connections, that included the Volunteer Type, the Location name, and other fields from other objects.

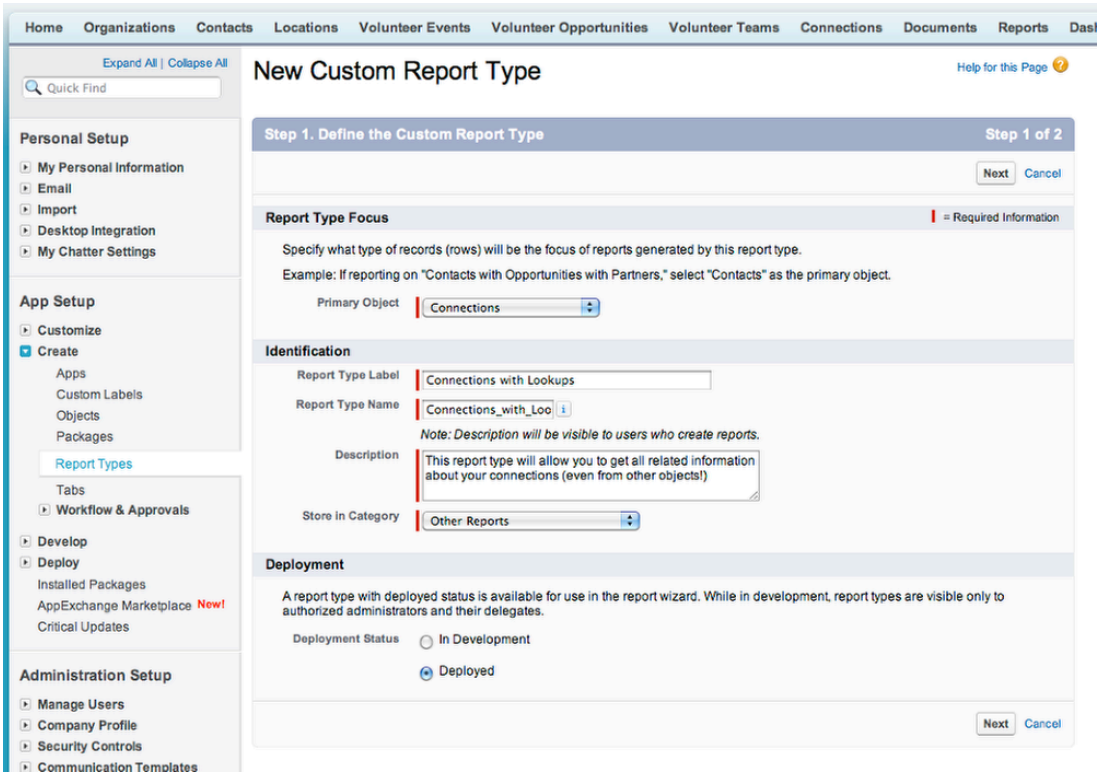
Go to setup / app setup / Create / Report Types



Here you'll see all your existing report types - and be able to create a New Custom Report Type.

Click on New

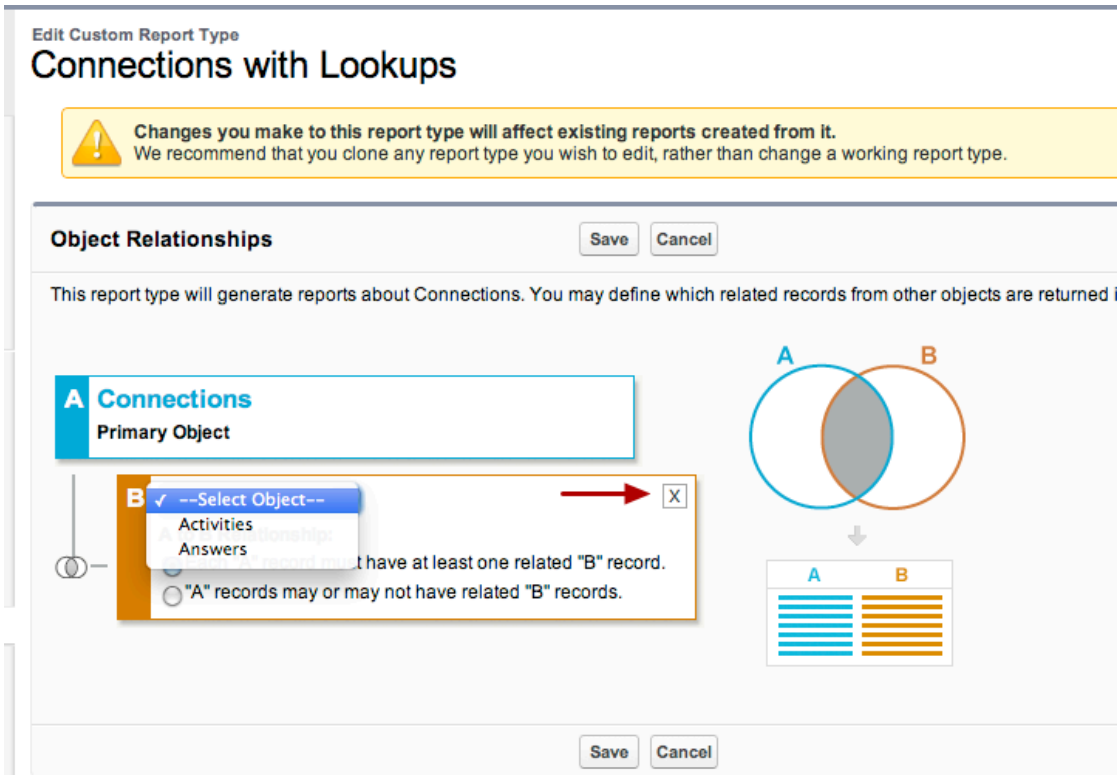
We are going to create a New Custom Report Type based on the Connections Record as the Primary Object



Name this report "Connections with Lookups".

Make other settings as shown above.

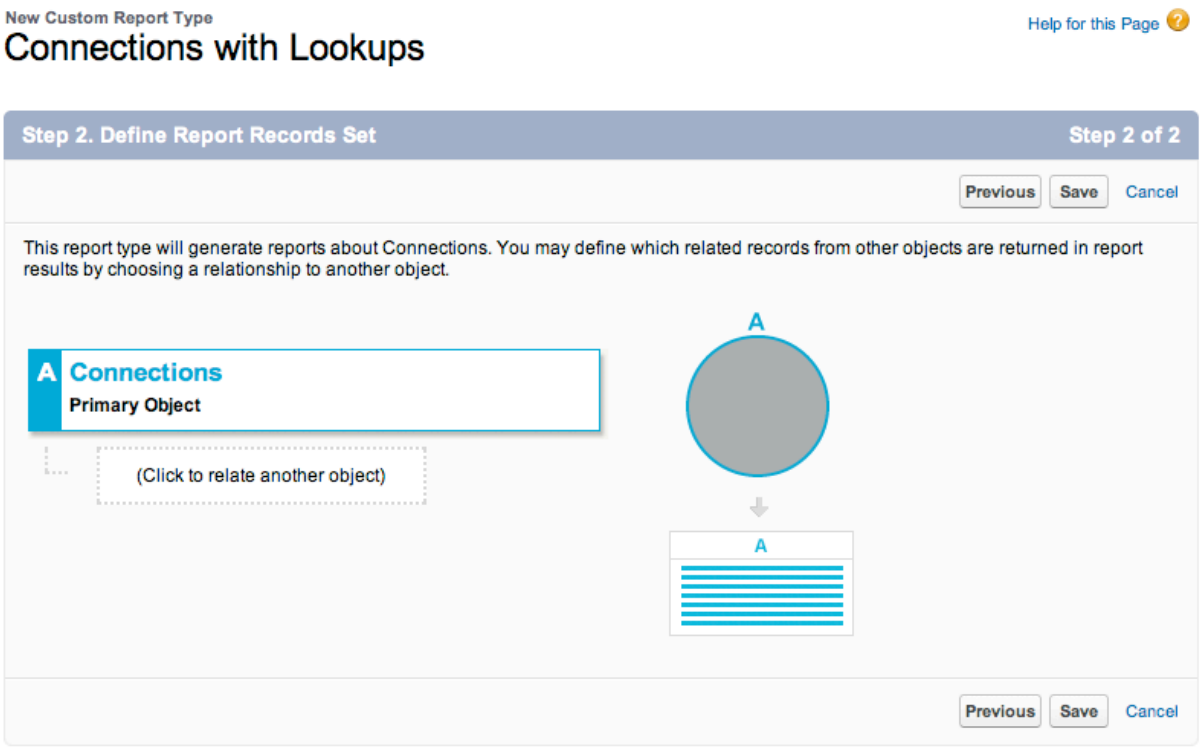
We run into a problem however when we look for a secondary object to use with connections



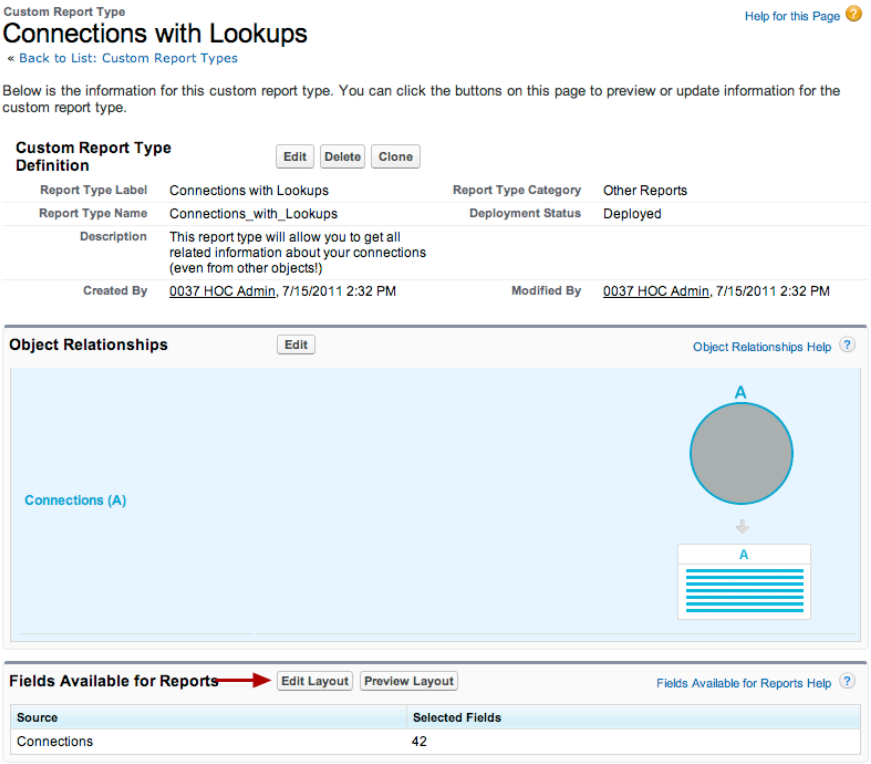
Oh oh -- there are only two related secondary objects available. How are we going to get the location name? The occurrence start date? The Age of the volunteer?

Let's click on the X and go back to just one primary object: Connections.

Save the report type. We are not going to add any other objects. We'll use lookups to get the other fields we need!

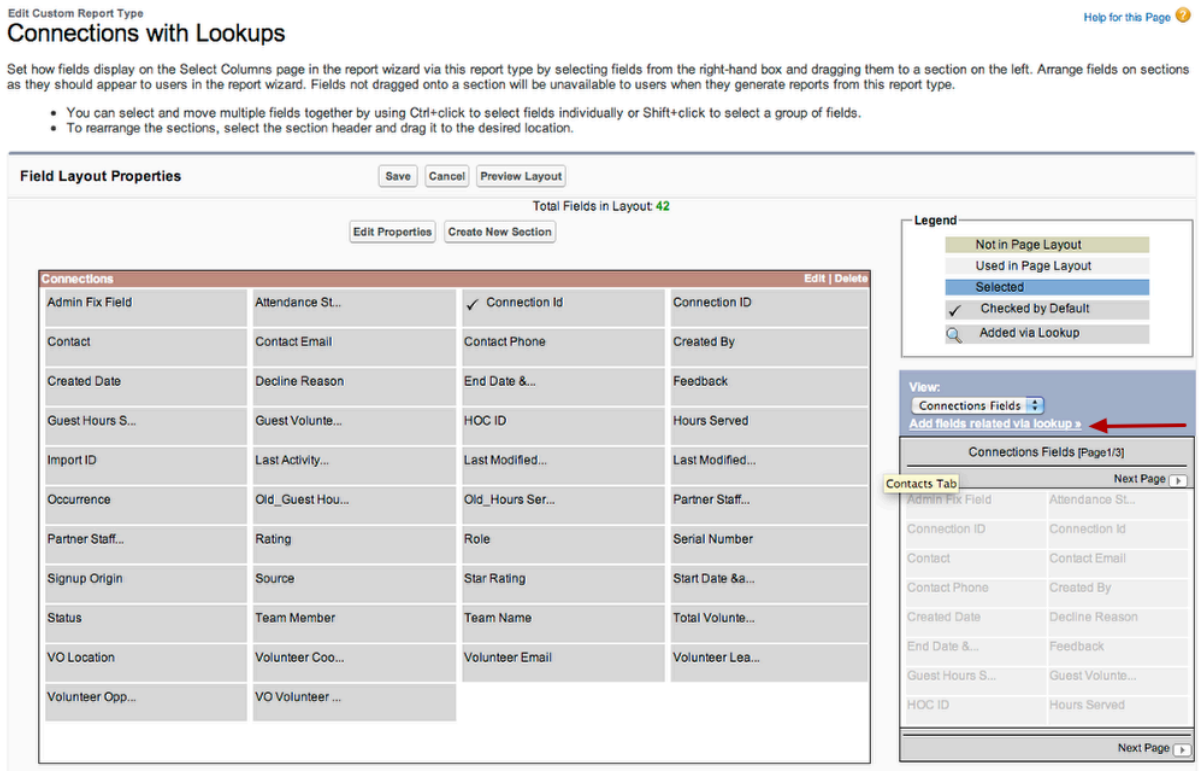


Begin by editing the "Fields Available for Reports" section of the custom report type



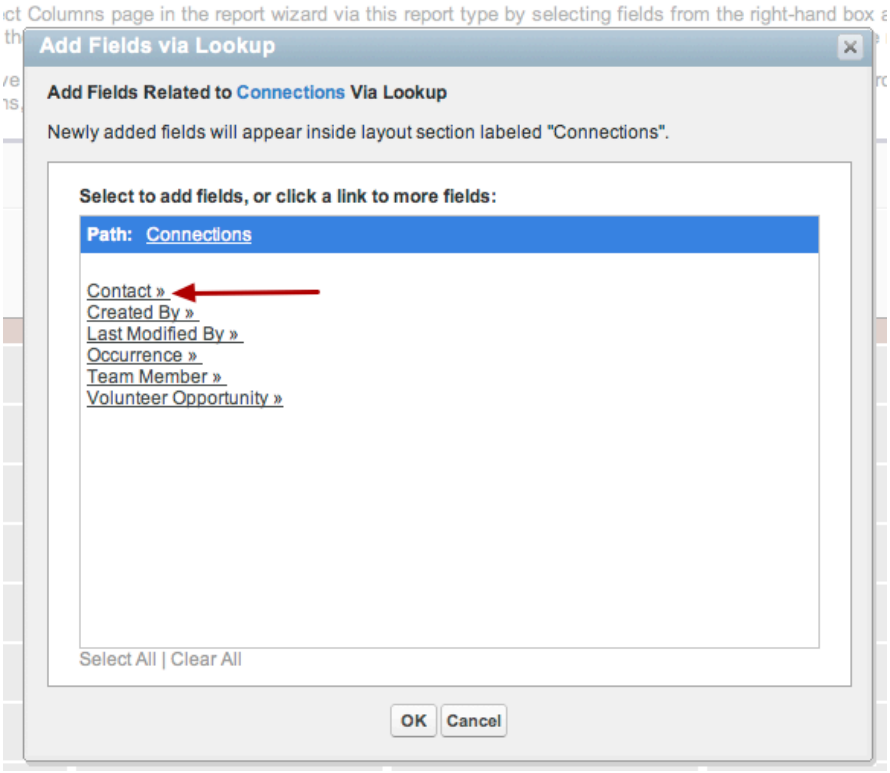
Click on Edit Layout

The 43 fields that are part of a connections record are already in the layout



We can however also add fields that are accessible to the Connections record via **lookups**. To do this we click on the link that says "**Add fields related via lookup**"

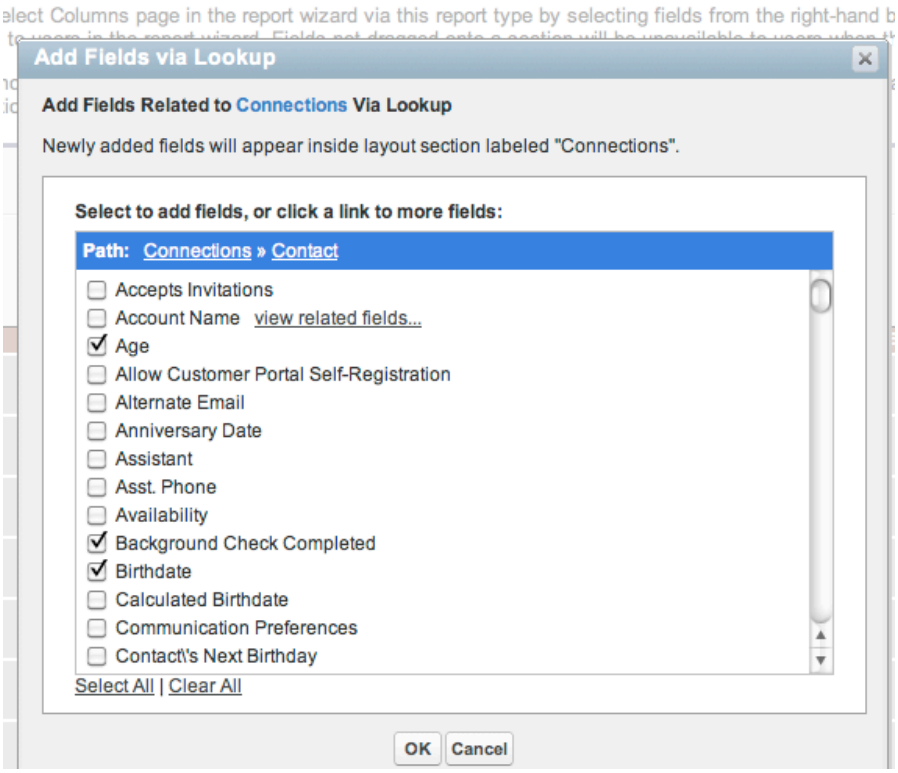
Here we get a list of all the fields that have a 'lookup' connection to the connections object



So.... let's say we want to add fields that are on the **Contact** record to this report type.

Click on the link for the **Contact** object

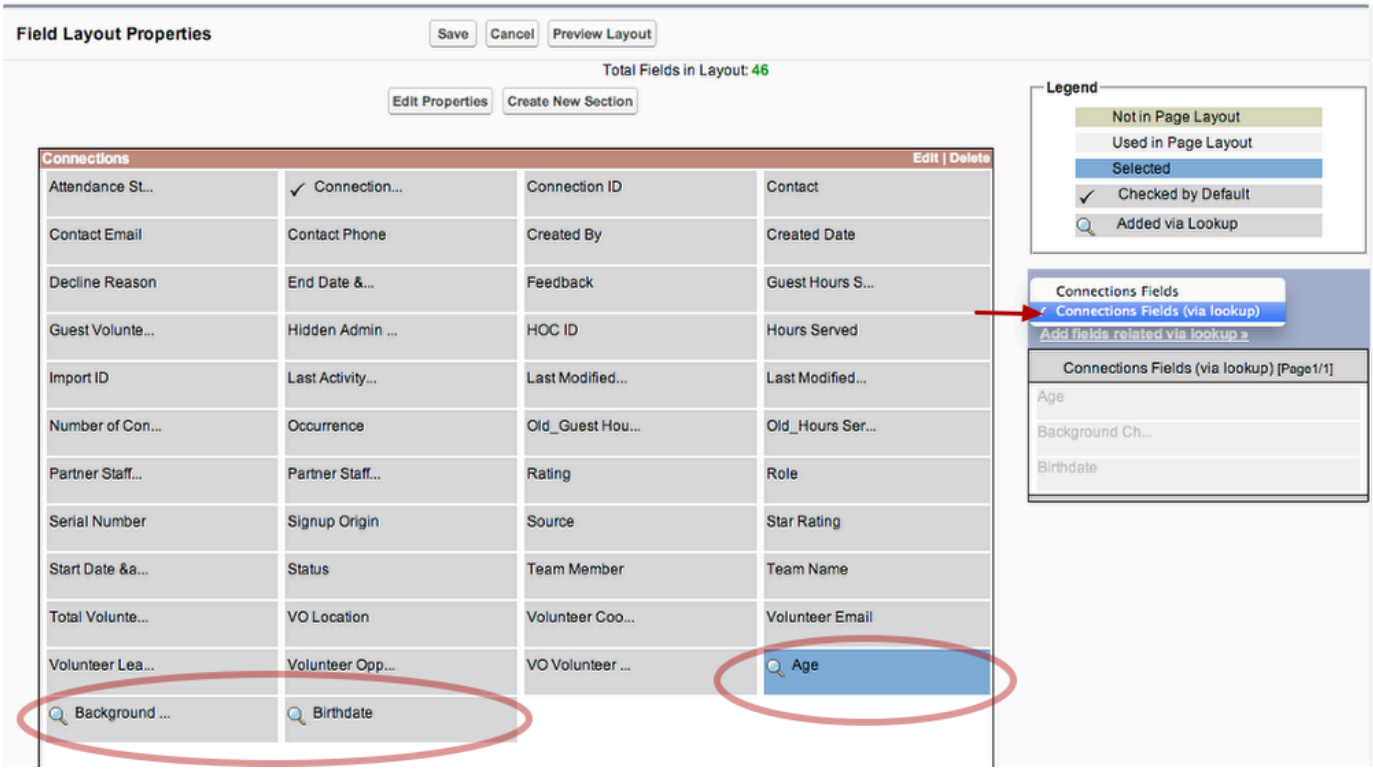
Now select the fields in the contact record



You now can put check-marks next to any fields in the contact record that you want to bring into this report! Let's add Age, Background check completed and birthdate.

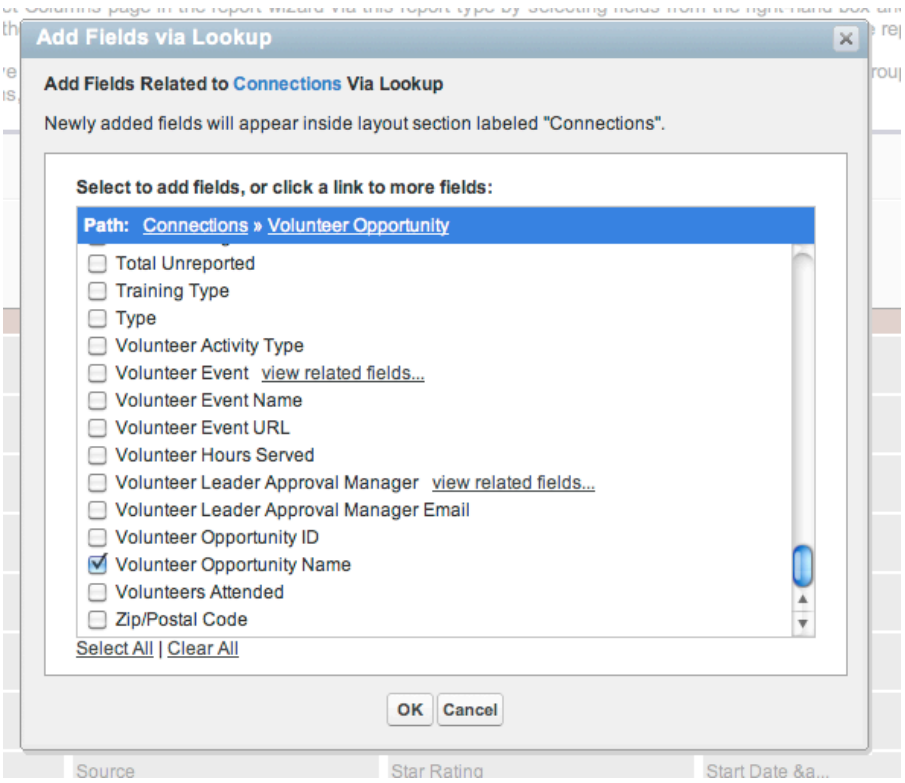
Click OK

The new fields appear in the available fields list and are marked with a looking glass symbol



The view list to the right now has views for "Connection Fields" and "Connection Fields (via lookup)

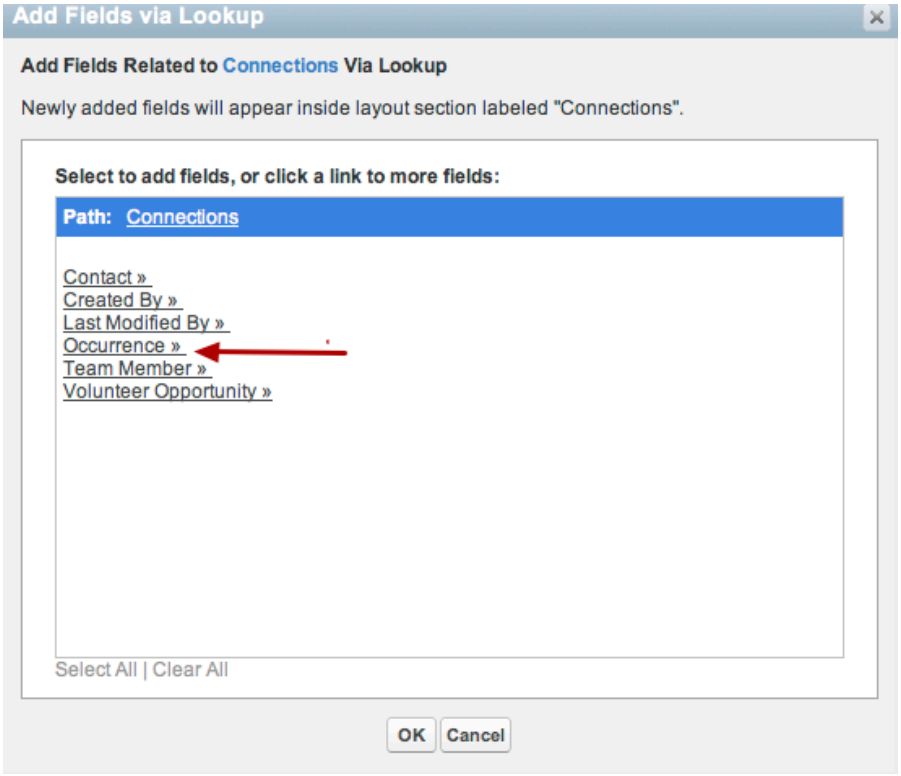
Select lookup again - and this time lookup items available through the Volunteer Opportunity Record



We can repeat the process grabbing other fields from other lookup objects.

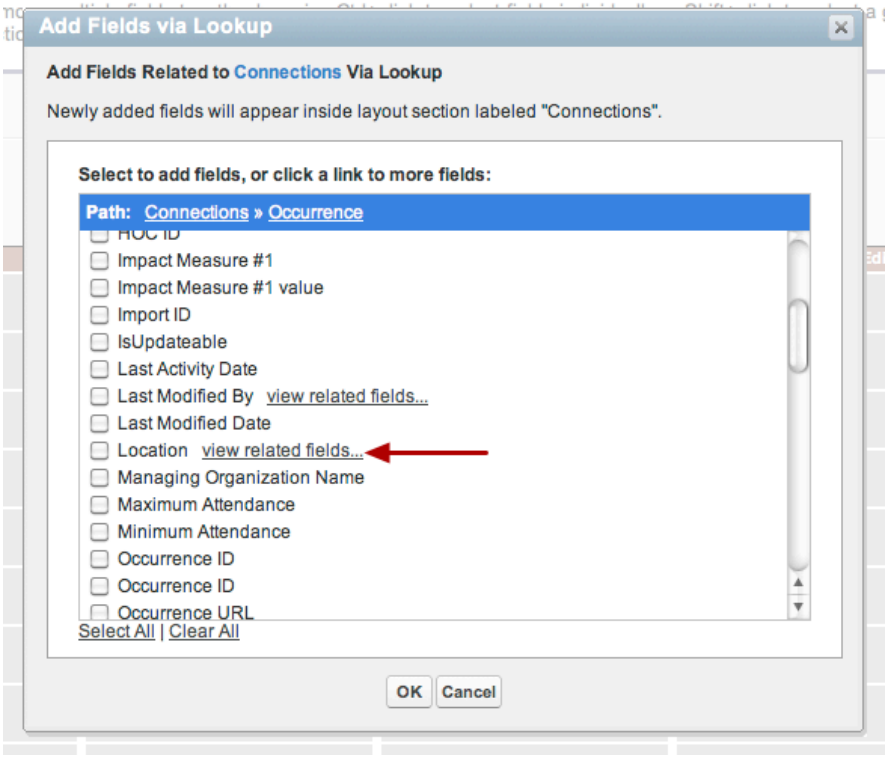
Let's grab the Volunteer Opportunity name from the Volunteer Opportunity record.

Let's grab one from the locations record as well. But how can we get to that?



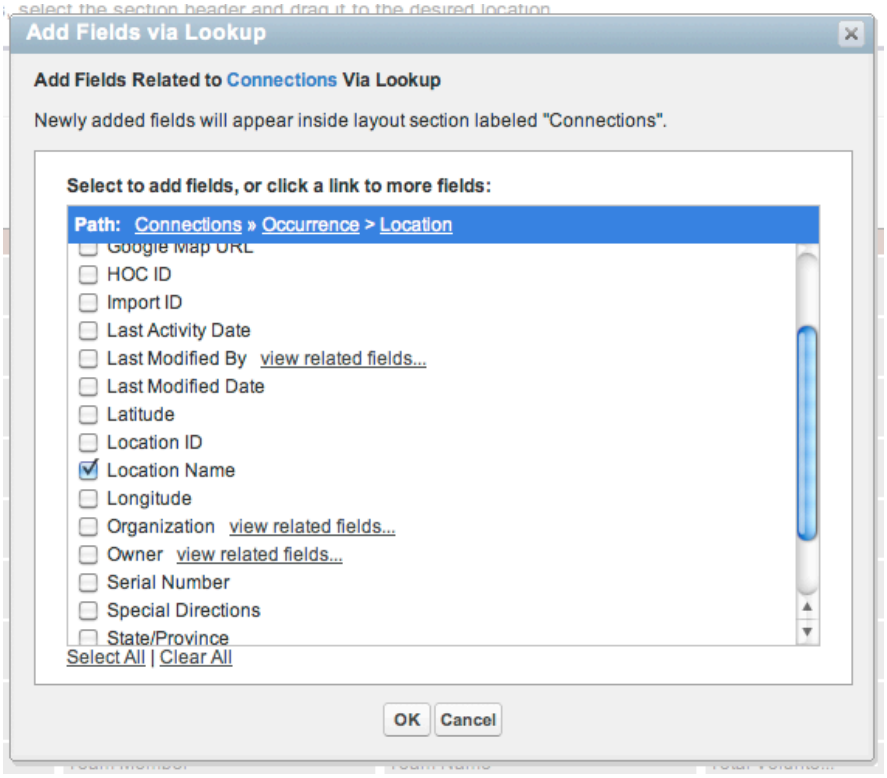
To do this we first select Occurrence (as that's what Locations are related to)

From Occurrence we select location (which is a lookup from Occurrence) by clicking on "view related fields"



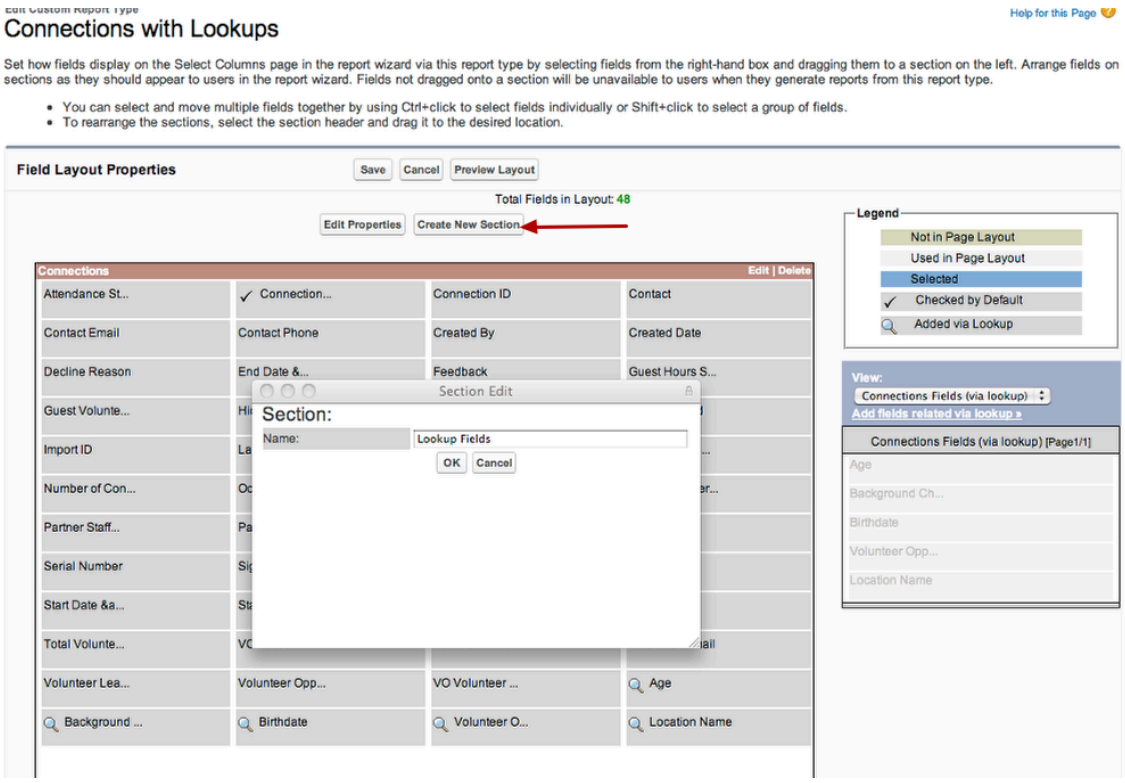
I don't want the Location field (its just an ID), but I want the related fields in the Location record. So we click on the hyperlink to "view related fields" in the Location record!

And now we can select "Location Name"



Continue until you have all the fields you'll need for the report.

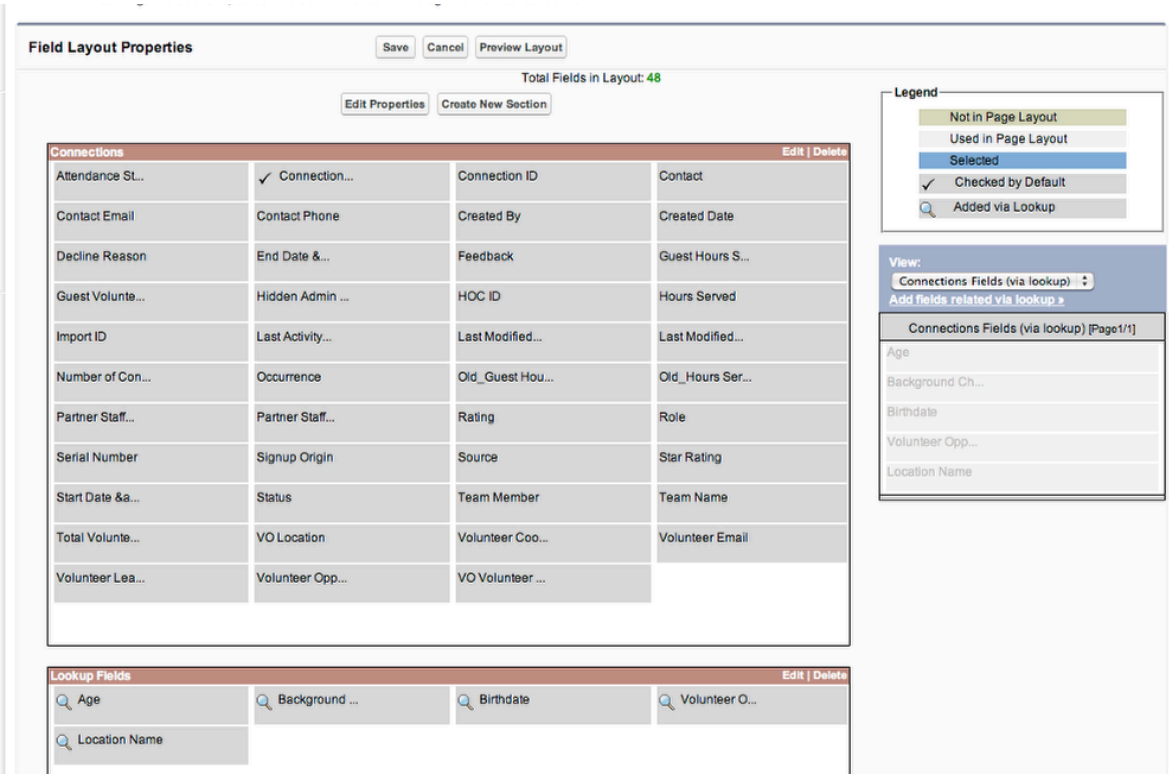
Optionally - you might organize the field layout by creating a new section for all your 'lookup fields"



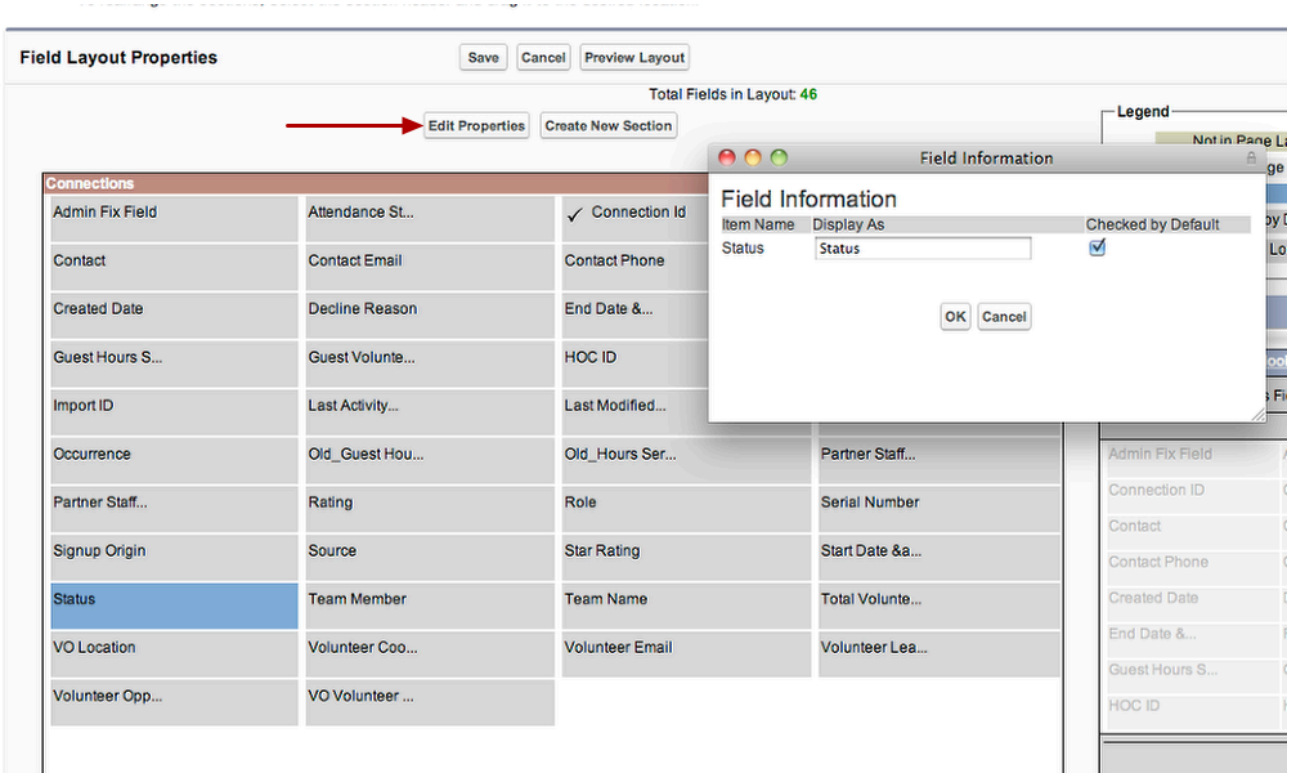
Clicking on the new section button allows you to name a new section of the layout.

(This will determine where the fields appear in the 'field tray' when creating or customizing a report.

You can drag and drop fields and determine where they show up, and in which order.



You can also optionally click Edit Properties and determine which fields you want to have automatically on the report layout to begin with.

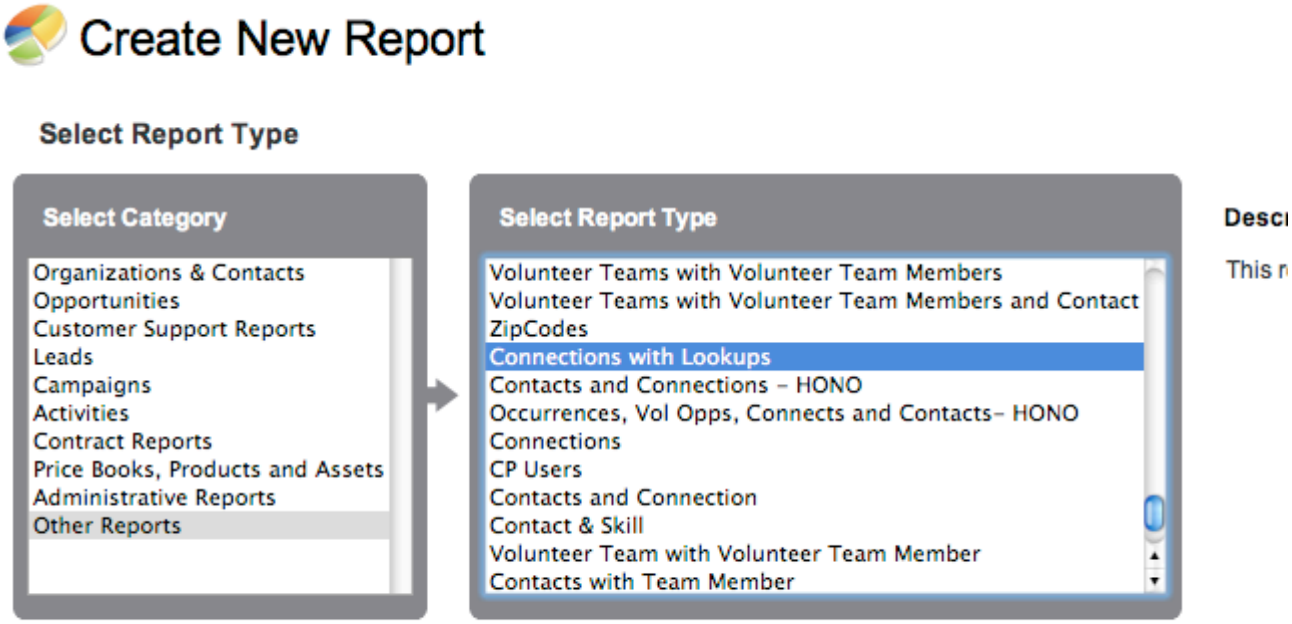


By checking this, the field **STATUS** will automatically appear on the layout when you create a new report.

You can set as many as you want as 'checked by default".

Click Save after you have completed customizing your report layout.

Now, your new report type is available when you create a new report!



Note: Rather than creating a lot of different variations on the Connections with Lookups report type, you can always edit this one and add additional fields via lookup.

This **Connections with Lookup** report type that you can create, is potentially your most powerful and useful report type!

Advanced Report Examples and Techniques

Filtering on Dates - and how to deal with "Individually Scheduled Opportunities"

Getting the right date filters so that you get the right information in a report can be tricky business. Here's a few tips:

1) **Decide exactly what the question is.**

For example: When you say you want to know about the # of connections in 2011, what exactly are you asking?

- How many connections were made during 2011?
- How many connections took place during 2011?

Notice those are very different questions. If someone signed up for an occurrence that takes place in January 2011, but they signed up in December 2010 then you're going to get different answers depending on the date you filter by.

- If you want to know how many people signed up (made a connection) in 2011, then the Connection Created Date is what to filter on.
- If you want to know how many connections took place during 2011, then the Connection "Start Date and Time" is the relevant date.

2) **Decide which object really has the dates you want to use.**

The most reliable record types for date information are either Connections or Occurrences. There are a lot of date fields in the volunteer opportunity record, but its when the OCCURRENCE took place that's probably relevant. And for individuals (volunteers), the Connection record is the right place to go. Be careful that you select the right date field that most clearly answers the question you want to answer in the report.

What's the right field to use for Date & Time Specific Opportunities

If you want information on all the occurrences and connections that took place during the year 2011 -- then filter on the Occurrence Start Date and End Date:

Filter:

Occurrence Start Date and Time > or equal to 1/1/2011

Occurrence End Date and Time < or equal to 12.31/2011

This will only return occurrences that took place during 2011.

Individually Scheduled Opportunities present a challenge however!

Individually Scheduled opportunities only have one occurrence, and the start date might have been years ago -- and it might not end until some date in the future. So how do you filter to find Volunteer Opportunities that are Individually Scheduled -- that appeared on your site (and have connections to them), that took place in 2011?

Filter:

Occurrence End Date & Time greater than or equal to 1/1/2011 (This will rule out any Individually Scheduled Opportunities that ended BEFORE 2011)

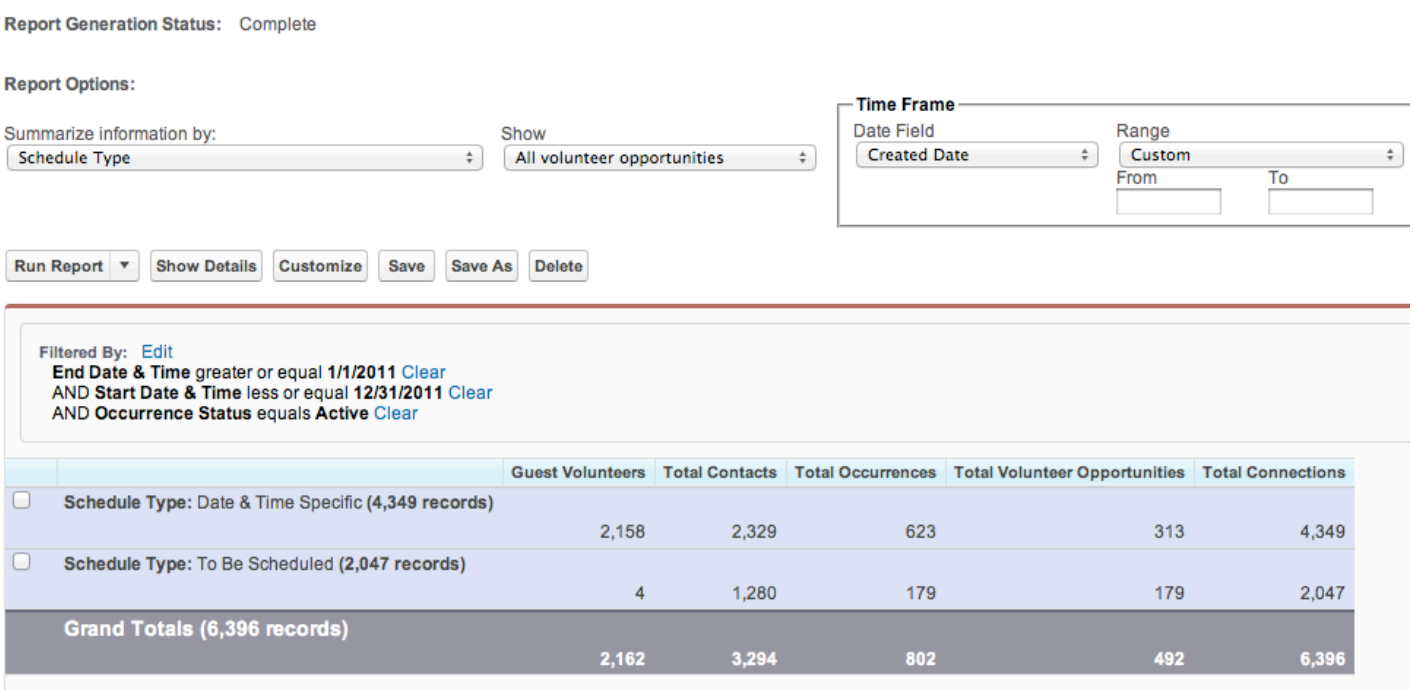
Occurrence Start Date and Time less than or equal to 12/31/2011 (This will rule out any Individually Scheduled Opportunities that started AFTER 2011)

Note: This particular filter will work for Date & Time Specific Opportunities to. So we recommend using this filter whenever trying to pin down the number of occurrences that appeared during a certain time interval.

One Caveat: filtering Individually Scheduled Opportunities in this way, will cause connections made to Individually Scheduled Opportunities in 2010 and after 2011 also appear in the report. Because if you allow this one ISO occurrence into the report, ALL its connections will be listed as well. You probably want to filter further based on the Connection Start Date / End Date (if you are capturing this information).

Here's a report that uses that filter

Note: The illustration below was created when we still used "To Be Scheduled" opportunity type -- it has since been replaced by the "Individually Scheduled Opportunity Type"



This report is using a custom report type that includes Volunteer Opportunity, Occurrences, and Connections fields.

It has some lookup fields to the Contact Record so we can count the Number of unique volunteers. (A contact with a connection is a volunteer, right?)

Notice that the filter is looking at all occurrences that ENDED AFTER 2010, and Started BEFORE 2012.

We also filtered on only ACTIVE occurrences in this case.

The details are hidden, so we just see the calculated field showing us the number of guest volunteers (A sum of all the number of the guest volunteer field in the contact record), and the unique number of contacts, occurrences, volunteer opportunities and connections.

Those unique counts are made by creating a formula to count the "Number of" fields as explained in this post.

Direct access to a useful report from an object layout. Example: Questions / Answers report from the Occurrence Record Layout

Here's a customer report type and a great way to make reports more accessible when they are needed - that stemmed from some problem-solving between a HandsOn Connect client and our support team. Its presented here as an example of a 'power-use' of reporting!

Melia Tichenor from HandsOn Portland had opened a support ticket asking how she could get contents from one object type to appear in another object type. She was trying to somehow get the custom questions (that are related to the Volunteer Opportunity object), to display the Answers to those questions (which are associated with the Connections records that are connected to each occurrence).

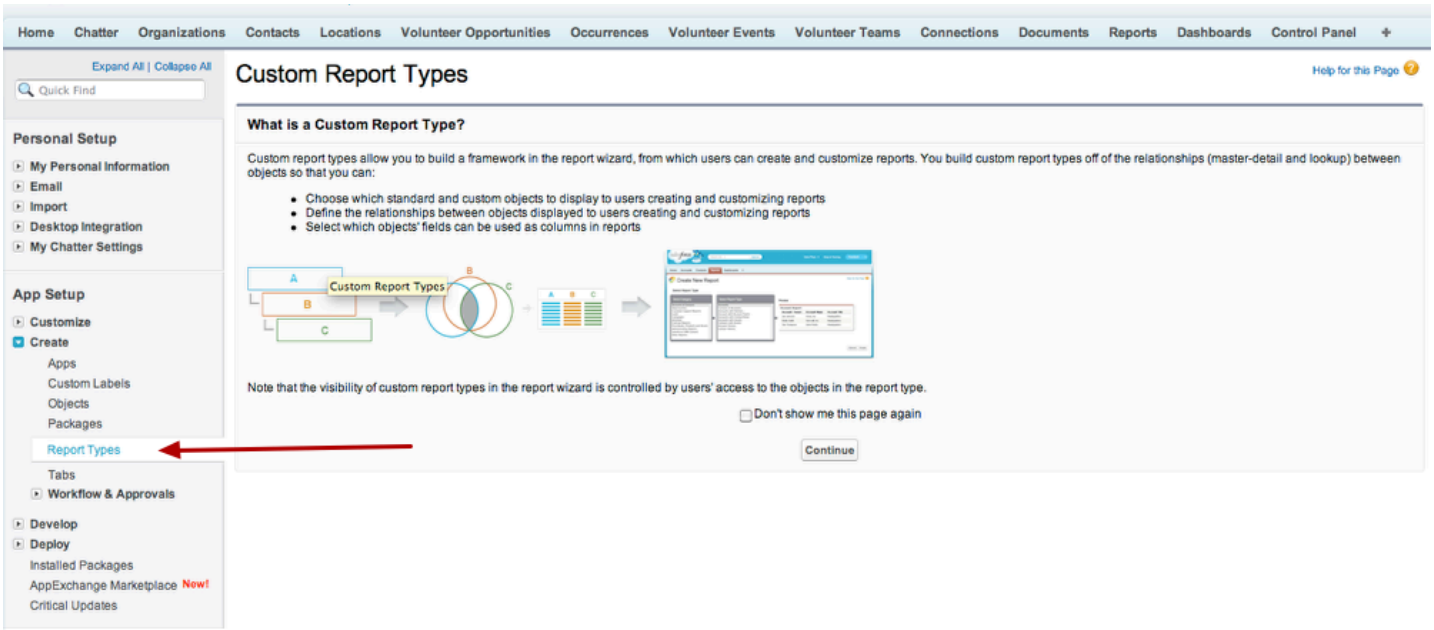
While it IS possible to use formula fields to get items from one object into another - that didn't seem the right way to go about this.

Duplicating fields from one record to the next isn't a best practice in a relational database.

After mulling her goals -- we worked together on finding a more elegant approach. The solution we came up with combines three interesting functionalities and creates a dandy little custom feature that anyone can create!

Cool Beans! Here's how this was done!

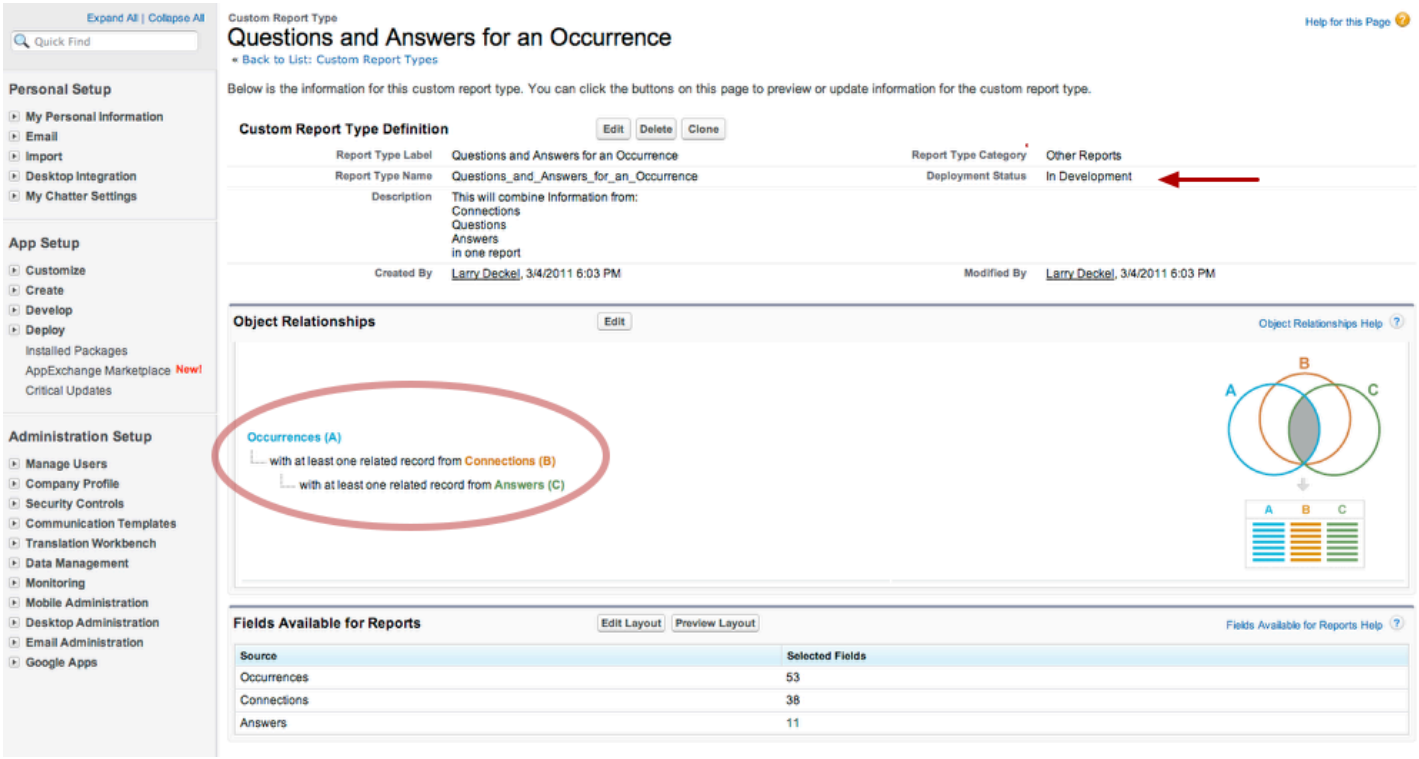
Part 1: Creating a custom report type



The best way to combine information from multiple objects is through a report. However since the report type we needed didn't already exist, we created a new report type that combined Occurrences, Connections and Answers. We needed occurrences (so we could specify the occurrence(s) we wanted to draw from), Connections (so we knew who gave the answers, and Answers (where the answers to the questions submitted by the volunteers during signup are stored).

Click on **Setup / Create / Report** types to create a new report type.

Defining the Custom Report Type

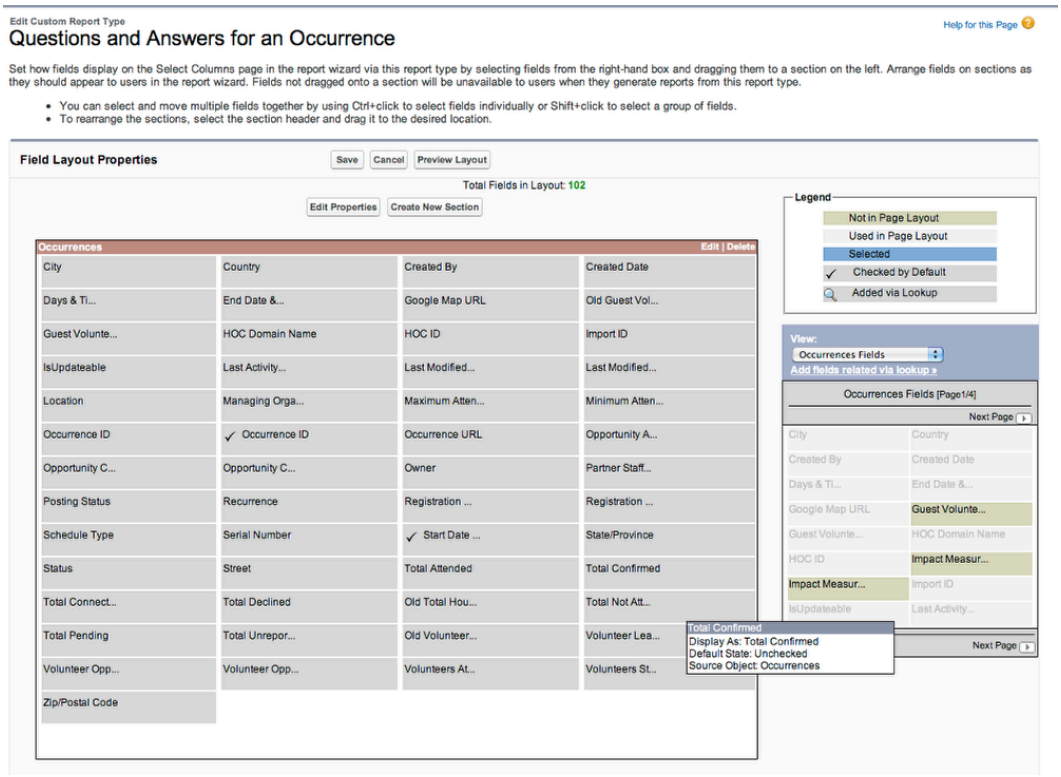


The first step is to set the object relationships. We made a report where the primary object was **Occurrences** and we only wanted to look at occurrences where there was at least one **Connection** and that the connection had an **Answer** associated with it. That way we wouldn't see any results in the report for occurrences that had no connections, or ones that were without custom questions and answers.

See this post for more detail on creating a new report type.

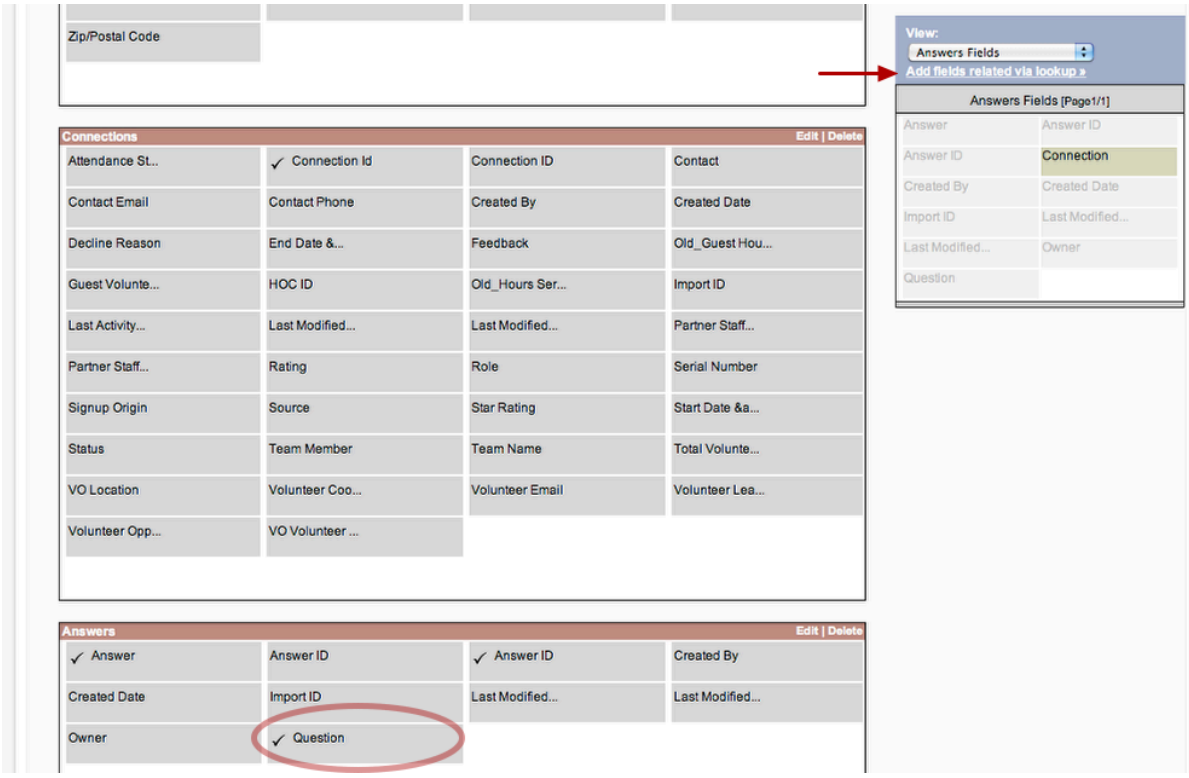
NOTE: When you are ready to make this report available to other profiles - remember to edit the custom report type and make it's Deployment Status "Deployed" rather than "In Development"

You then choose what fields you want to be available in the report



We certainly didn't need all the fields from each of the records, but its easier to just leave them in. We made sure the fields we needed for our report were present.

But oh oh --- the Answers Object has a field called Questions - but it only delivers the Question ID - not the text of the question itself!?!

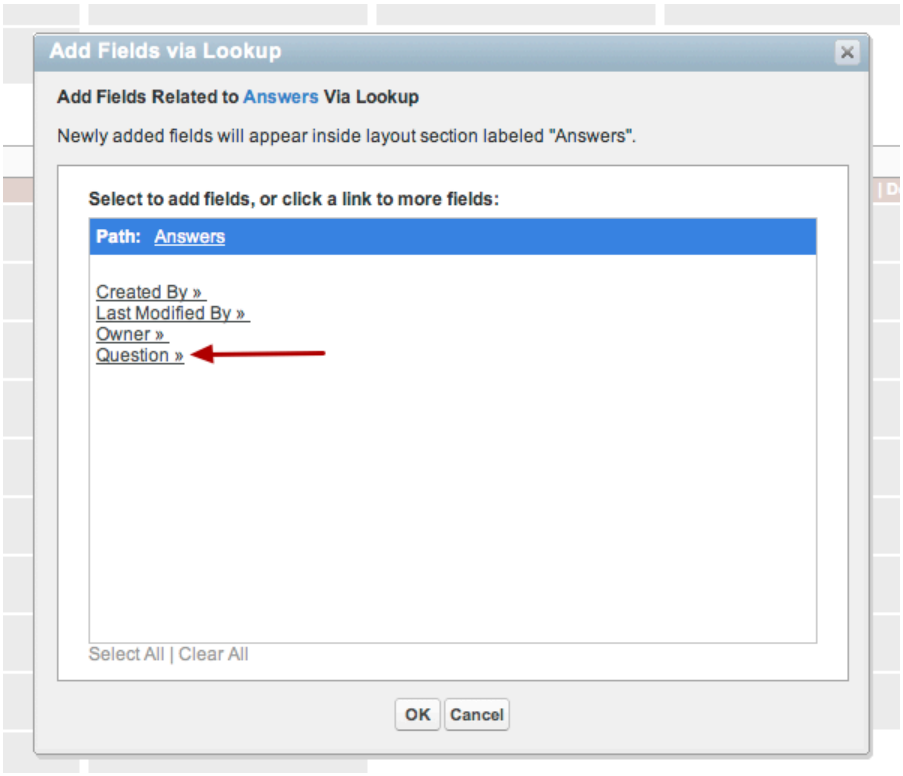


Unfortunately, the text of the question doesn't exist in the Answers object, only the ID. We want to see the question itself - and the text isn't on the Answers object. (This was why melia originally asked if there was a way to add that text as a custom field in the Answers object. There is of course -- but its not necessary!

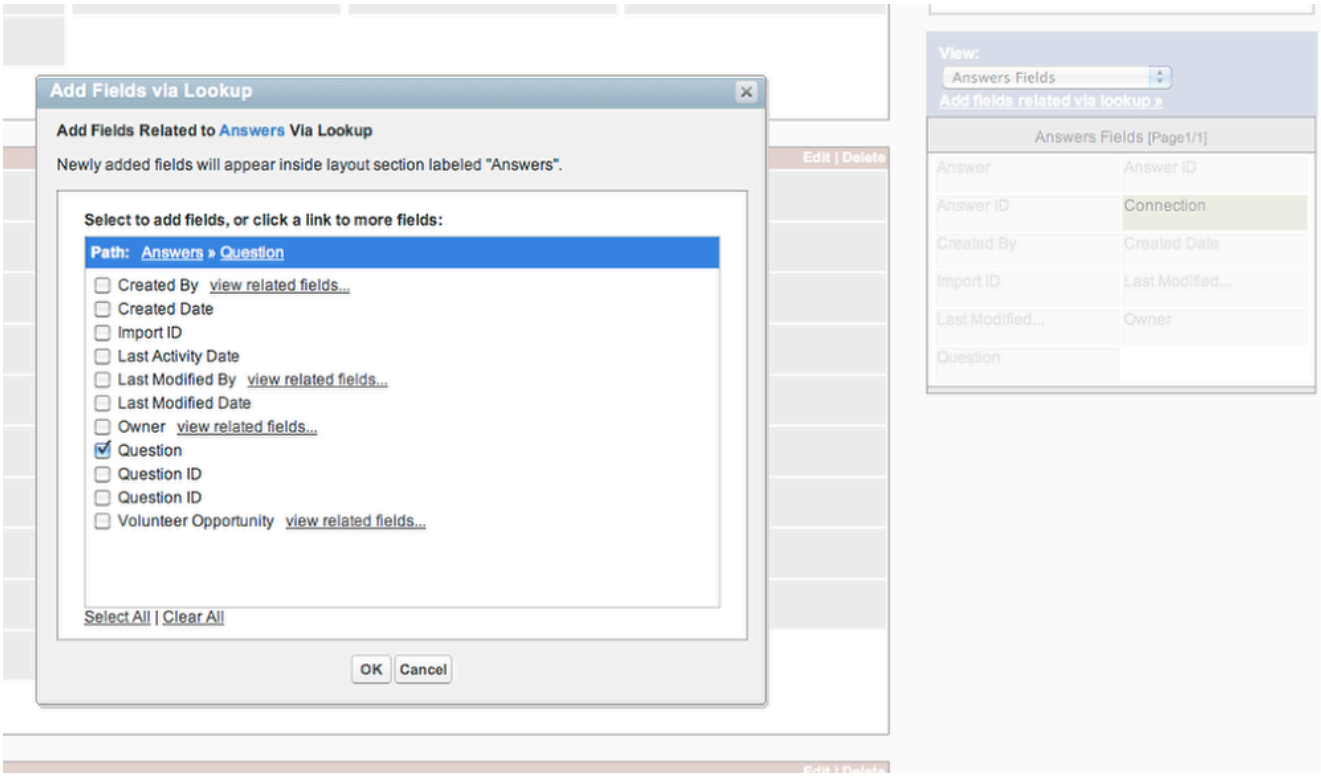
As recently pointed out by Chris Pokrana during a community lab session, you can Add fields to a report via lookup!

To do this just pick which object in the drop down list, and click on "Add fields related via lookup"

We are adding a lookup from the Answers Record, and we want it to look up data from the Question object - so we select question as our path:

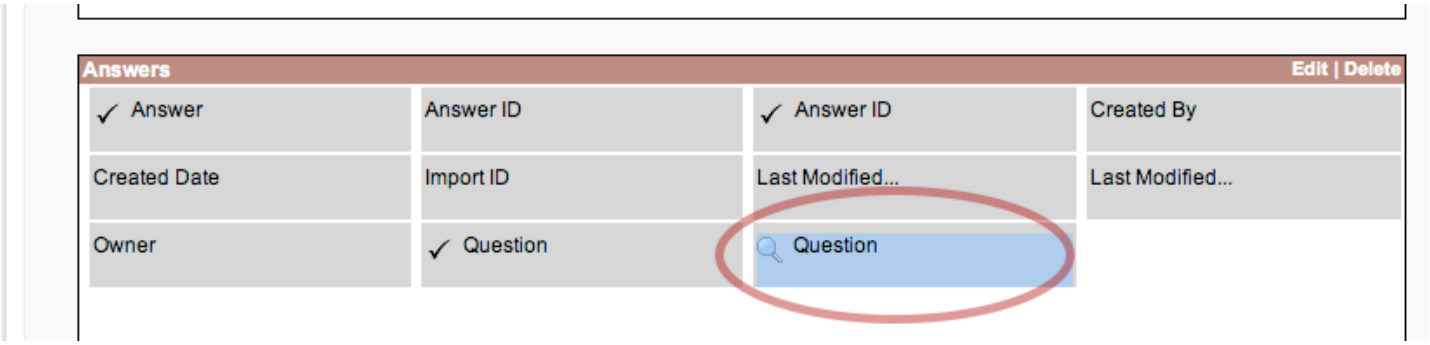


This pops up a window that shows you the related fields from the Question object that we can lookup from the relationship to answers.



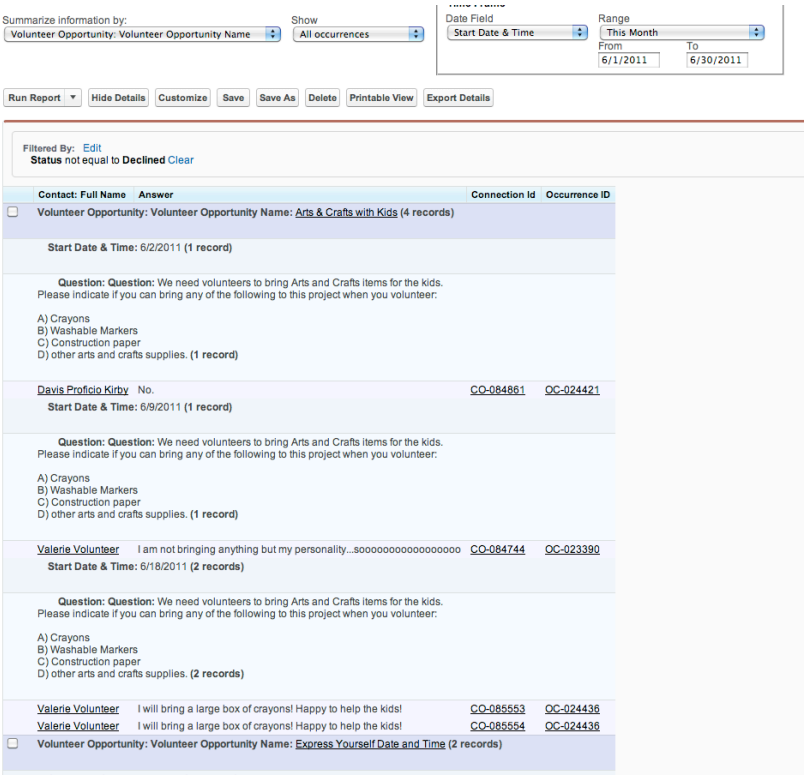
In this case -- we wanted to lookup the QUESTION field, which is related to the Answers object because of the Question ID. So we check that and click OK and the question text is now available info on our report!

This field will have what we need: The question text



The hourglass icon tells us this field is being accessed via a lookup.

Part 2: We're now ready to create our report based on this new report type

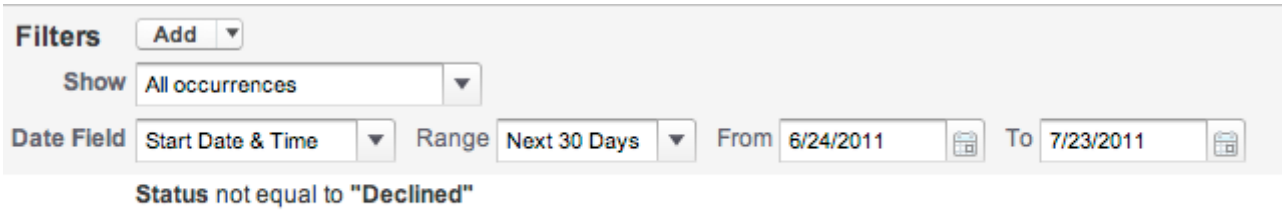


There are lots of ways you could create a report that uses these fields. In the illustration above I made a summary formatted report with a few fields.

It's summarized Based on the Volunteer Opportunity Name, Then the Occurrence start date, and then on each question.

Then for each volunteer we see their Answer.

Setting the Report Filters and Saving the Report



My original report was designed to list all the occurrences taking place in the next 30 days that had connections and answers. I also filtered out connections where the status was equal to

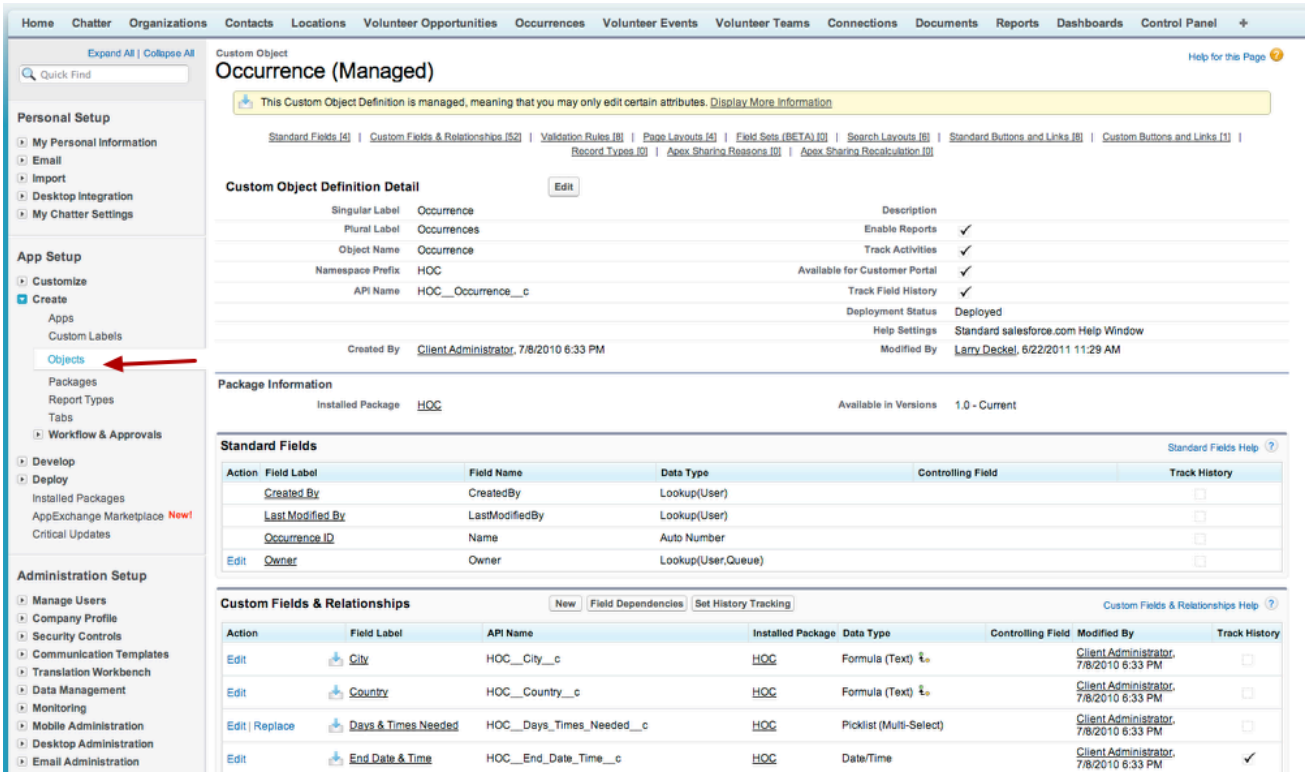
declined. We don't care about the answers for volunteers who are no longer attending or have removed themselves.

And this is now a handy report to have available in your report library.

Since we want to it to be available to our volunteer leaders and partner staff, we save the report in a folder that we have granted customer portal users access to.

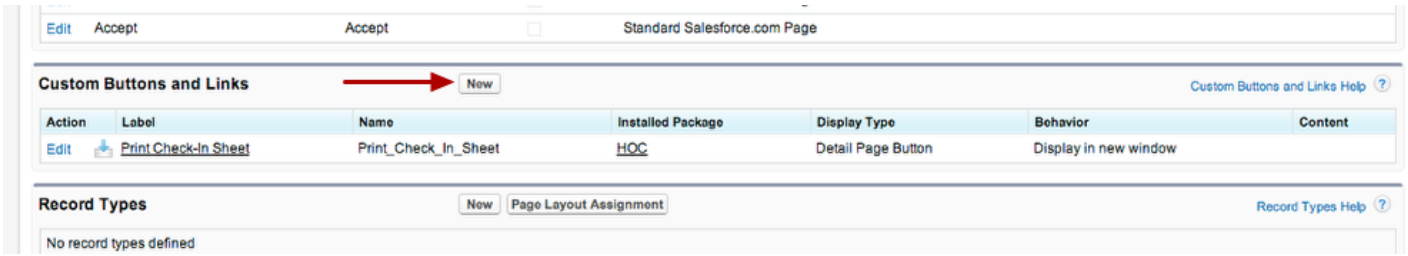
We'll come back to these filters in a bit -- when we talk about integrating this report with the occurrence record!

Part 3: Adding a custom button to the occurrence record to provide easy access to the report.

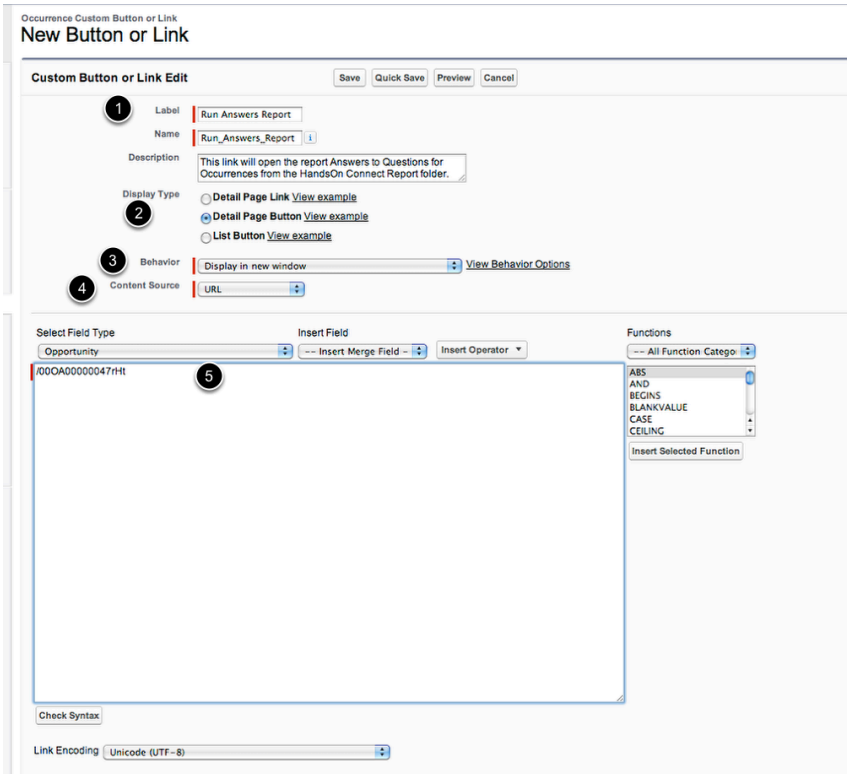


What we needed now was an easy way to give access to the report from the occurrence record! This involved creating a custom button to place on the occurrence page that would run the report and pop it up in a separate window. To create the button we go to **Setup / Create / Objects** and went to the occurrence object since that's where we want to add the button.

Scroll down the page to the Custom Buttons and Links section.



You'll see the HandsOn Connect button here that pops up the "Print Check-In Sheet". We are going to create a button that pops up our new report! So we click on NEW



1. We give our button a Label so people know what it's going to.

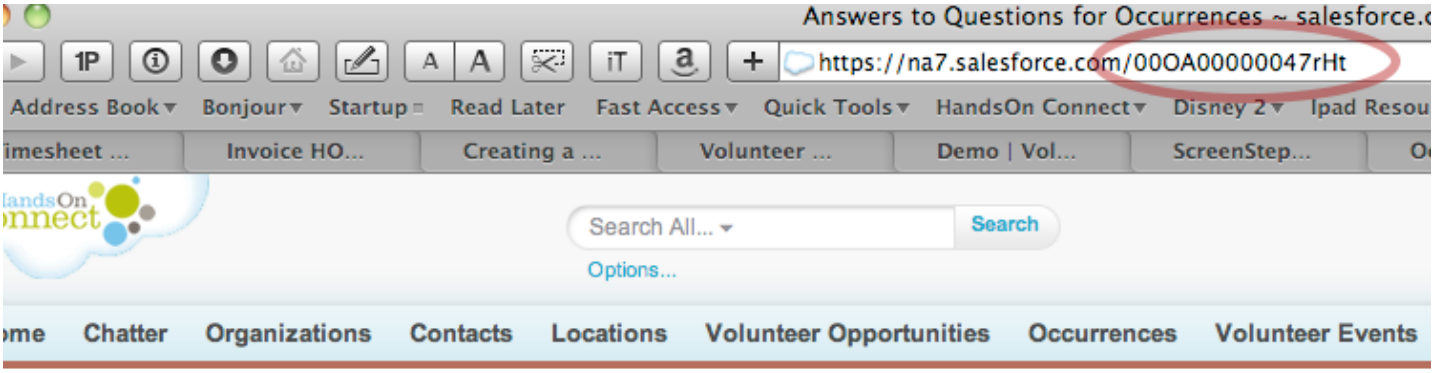
2. We choose the appropriate type of button to create. We chose a button rather than a link. (but we could have gone with a custom link instead of a button if we preferred).

3. We chose to have the report show up in a new window. (There are other behaviors available for different kinds of windows, or just going to a new location in the same window)

4. We chose as our Content Source **URL.** That means we just provide a link to the report itself since it has a URL. (You can also create buttons that execute Javascript or Visualforce)

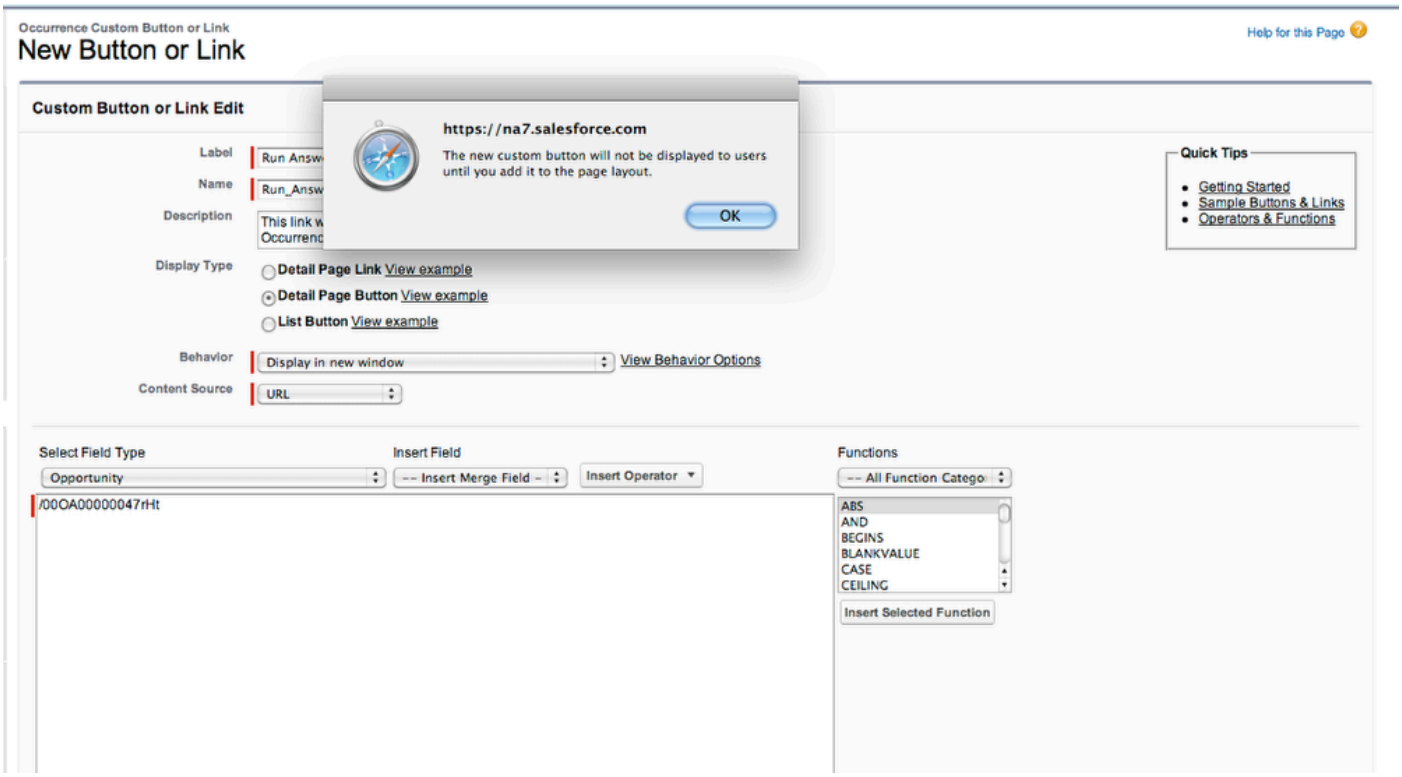
5. In this box we simply put in the URL for the report when it runs. We made it a relative link.

To get the URL you need - just RUN the report and copy the relative link portion of it.

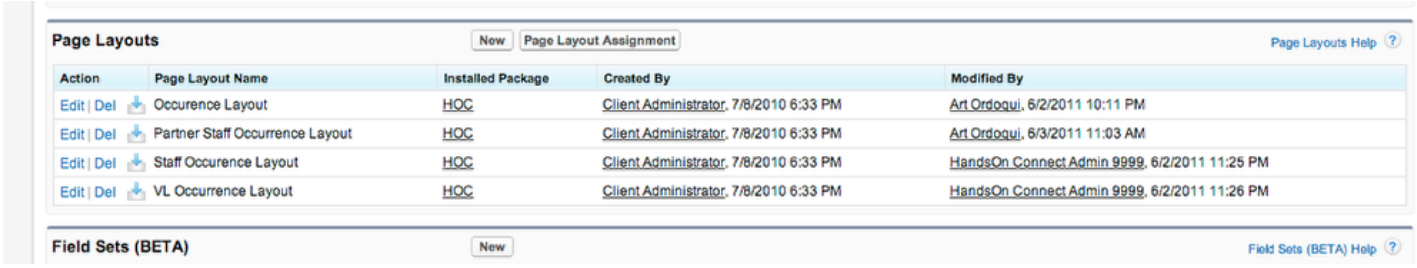


Answers to Questions for Occurrences

When we save the button we're reminded it must be placed in the page layout.

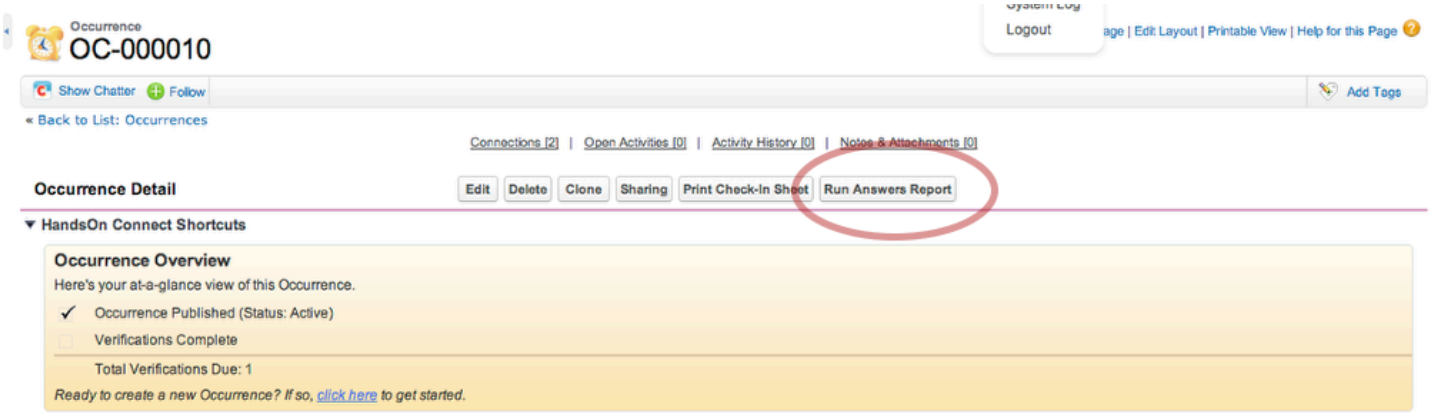


You'll need to put the button on each page layout that you want users to run the report.



Please see this post for detailed instructions on modifying page layouts. Click on buttons, and then drag the button to the top of the occurrence record.

Your layout will now look like this.



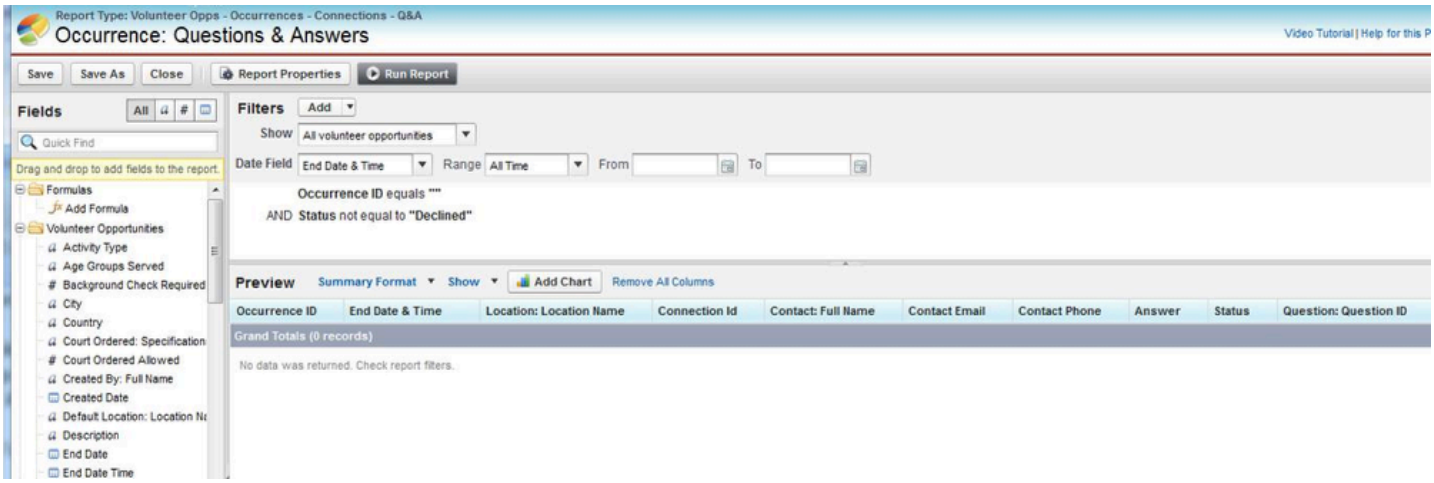
Clicking on this button will cause the report to pop up right from the occurrence record!

Part 4: But Wait! Here's the Cool Part!

Our report showed all occurrences that were coming up in the next 30 days. It would only show users the occurrences and answers that were appropriate data for them to see, but it still would have multiple occurrences in one report. What Melia wanted was a way to have the button produce ONLY the questions and answers for the one occurrence record you were viewing.

But how could you pass a merge field into a URL link and make this happen?!?

Melia searched the forums at success.salesforce.com and found info that gave her the answer!



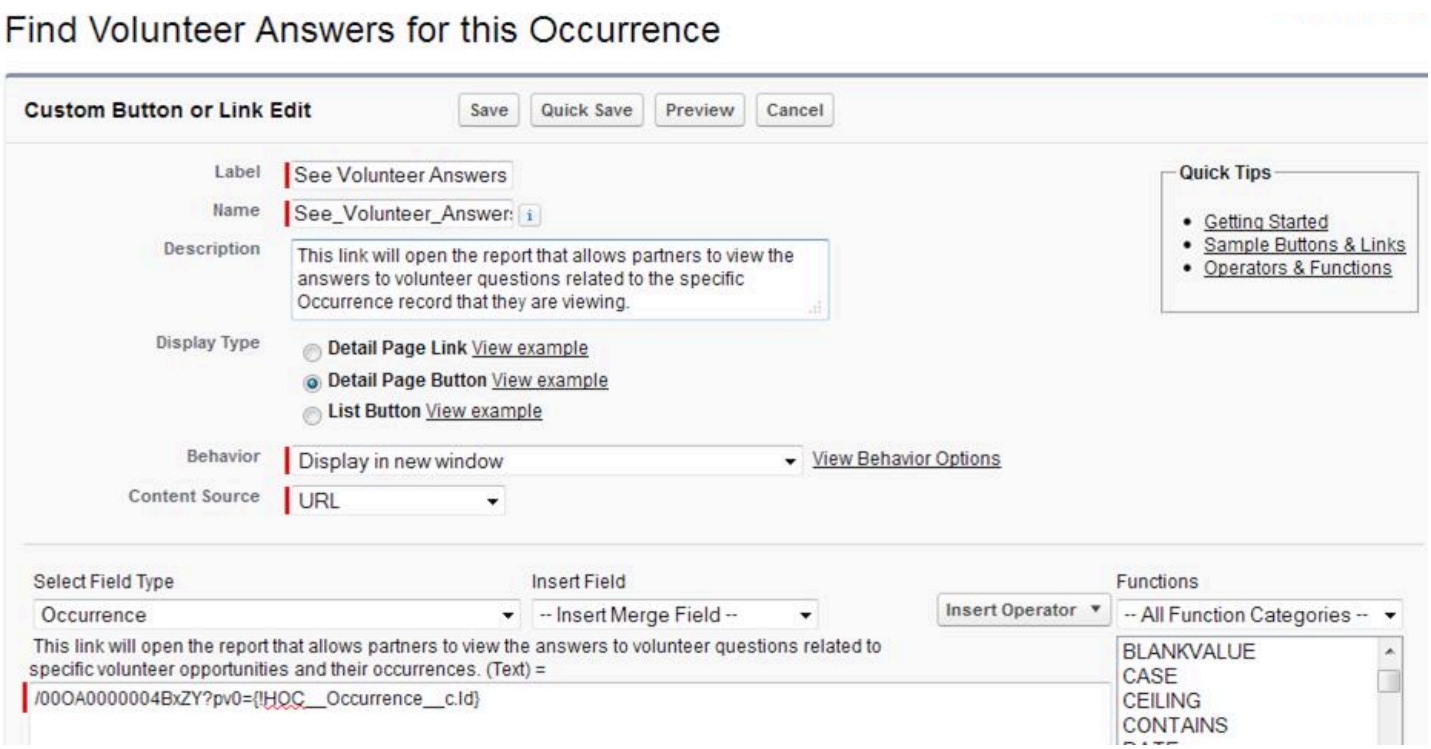
She modified the filters in her report and added, as the first filter **Occurrence ID equals""**

This version of the report will return no results at all since it only looks at Occurrences with no ID number !?!

Not a useful version of the report for most purposes, but watch what she was able to do with it.

She saved this new version of the report in a folder for reports that were accessible to customer portal users.

You then modify the URL for the button to include a call to merge a value into the report record



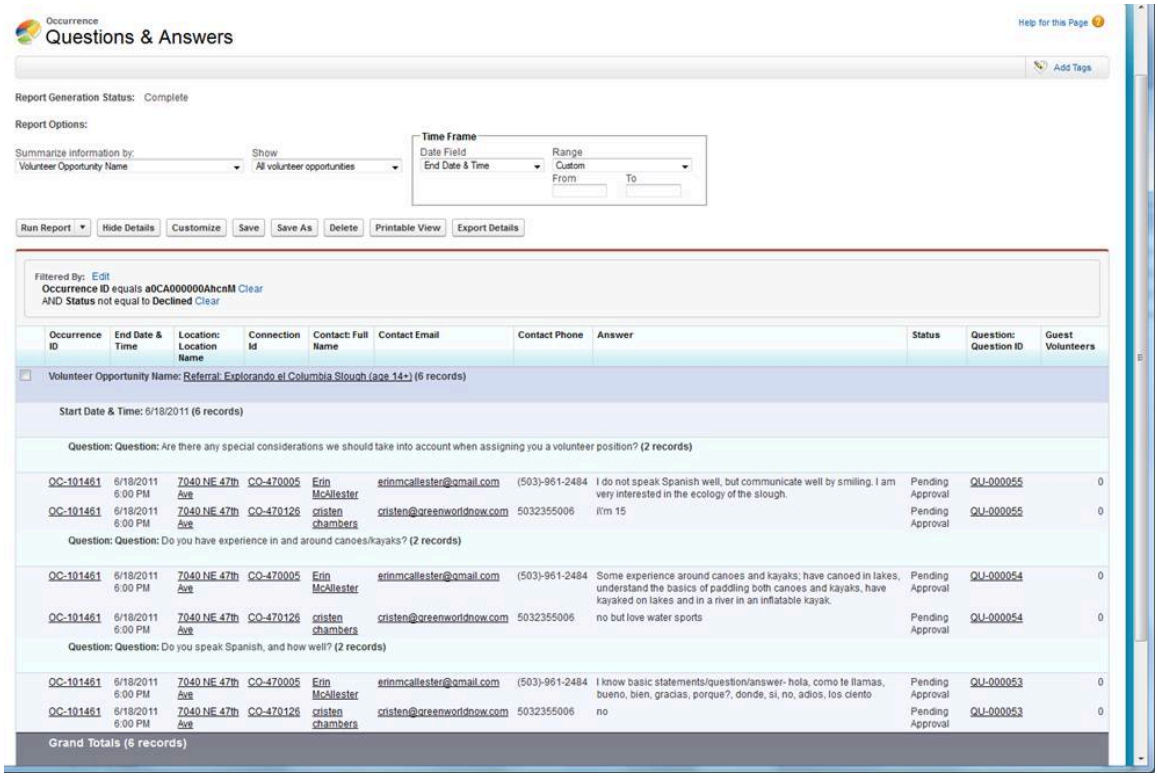
Adding ?pv0={!HOC__Occurrence__c.ID} does the following:

1) The first part of the URL specifies the report record to go to

2) the ?pv0= points to the first filter in the report (which was Occurrence ID equals ""

3) the merge field {!HOC__Occurrence__c.ID} says to take the ID number of the occurrence for the page the button is placed on, and merge it into the first filter value.

Bingo! The new button now pops open the report - with only the answers to the questions for that one Occurrence Record!



Here's Melia's version of the report - with a bit more detail that is useful for someone wanting a summary of questions and answers for an individual occurrence.

Notice that when the report is run from the button the formerly blank Occurrence ID filter is populated with the ID# of the occurrence record the button was located on. So we get the report with only the questions and answers for the one occurrence.

This report is now available at a click of a button in the occurrence record and can be exported to excel or .csv if desired.

Note: If you make this report accessible to partners and volunteer leaders, make sure you update their profile to grant them read access to the fields Questions and Answers, and that they have permission to access reports.

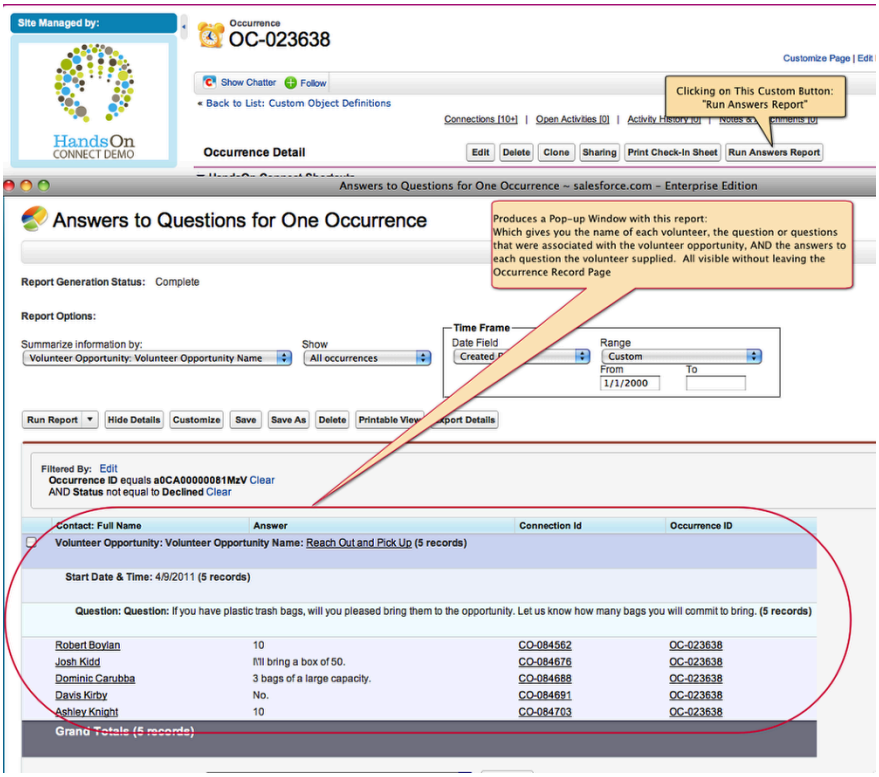
Thanks to Melia for digging down deeper and taking the original answers I came up with for creating the report and button to new levels!

This kind of "How can you add new functionality" thinking shows exactly how much power there is in HandsOn Connect and the extent to which a system administrator can figure out a way to do practically anything!

We expect many of our users will find ingenious solutions like this in the future and look forward to your sharing great custom features like this that you can build yourself!

Don't forget our community lab sessions each month are a great place to share your custom creations!

How it might look on your site as a custom button and report

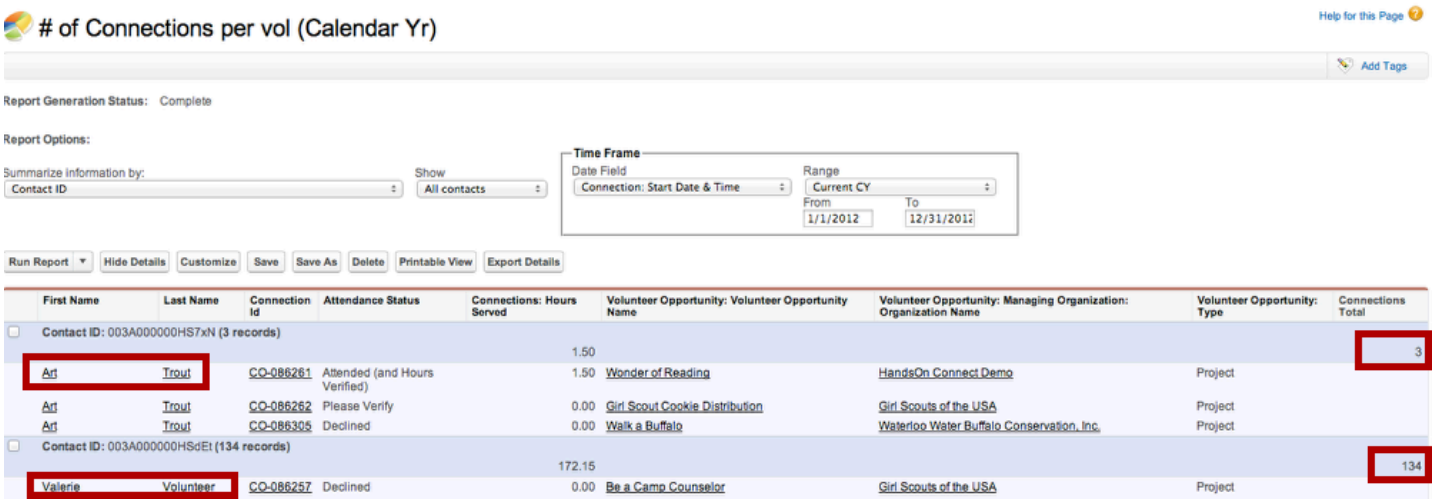


Using Conditional Highlighting and Drill Down to perform analysis on summary calculations

We often want to know how many connections a volunteer had in a given time period. And there is a stock report in HandsOn Connect that can answer that question for you:

You'll find it in the HOC Basic Reports Folder: "# of Connections per vol (Calendar Yr)

For each contact you'll see how many connections they had.



Because this report counts connections, the number of records equals the number of connections that contact had during the Current Calendar Year.

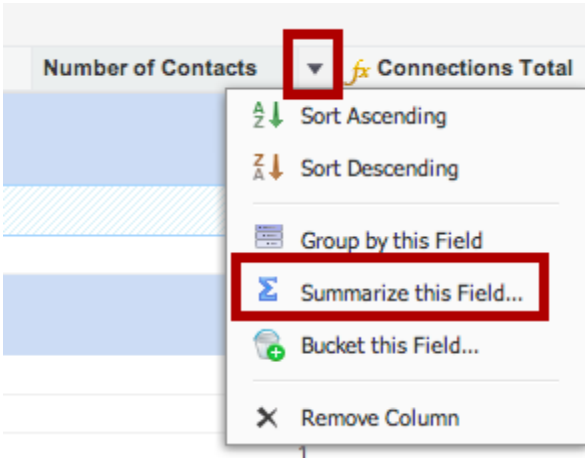
If desired, you could filter further and only show connections with an attendance status of "Attendance Verified" if, for example, you wanted to know how many times they'd actually volunteered. (screening out their 'not attended' or 'unverified' service.

But ultimately, its easy to get a count of the number of connections each contact (volunteer) has.

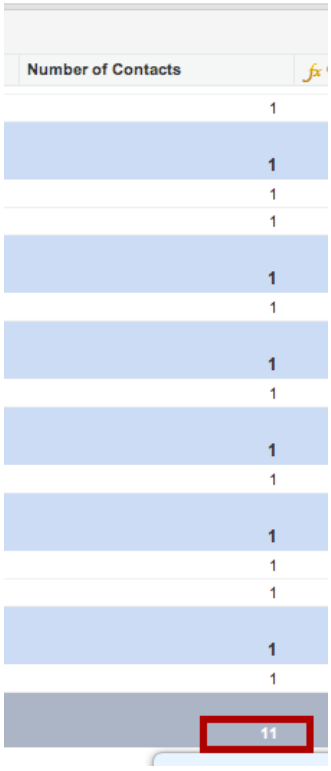
But -- what if you want the 'count' of the number of contacts who volunteered that year? That isn't in the report.

Add the field "Number of Contacts" to the report, and

summarize on it, and at the bottom of the report you'll know how many contacts.



The number of contacts appears at the bottom of the report.



It counts each individual contact and gives us a total.

We now know how many connections, and how many contacts. (Both are summarized at the bottom of the report)

But what if I'm only interested in volunteers (contacts) who have a certain number of connections in this time period.

A lot of folks contact us and ask how to create reports on "All volunteers who had 3 or more connections last year" - or "All volunteer who had 50 or more connections last year" and that's something you can't directly do within a report.

Here's why. You can't filter a report based on the calculated total of a summary field.

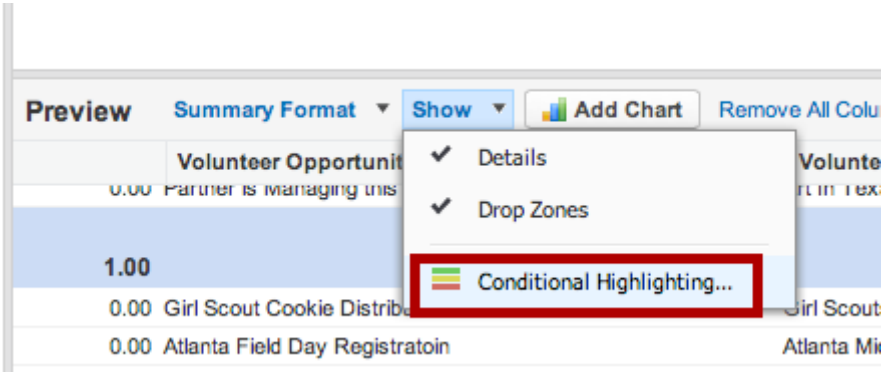
And the Number of Connections that appears in the report is a calculated total.

So you can't say can't ask for a report that only shows contacts with 3 or more connections in a calendar year, or contacts with 50 or more connections in a calendar year.

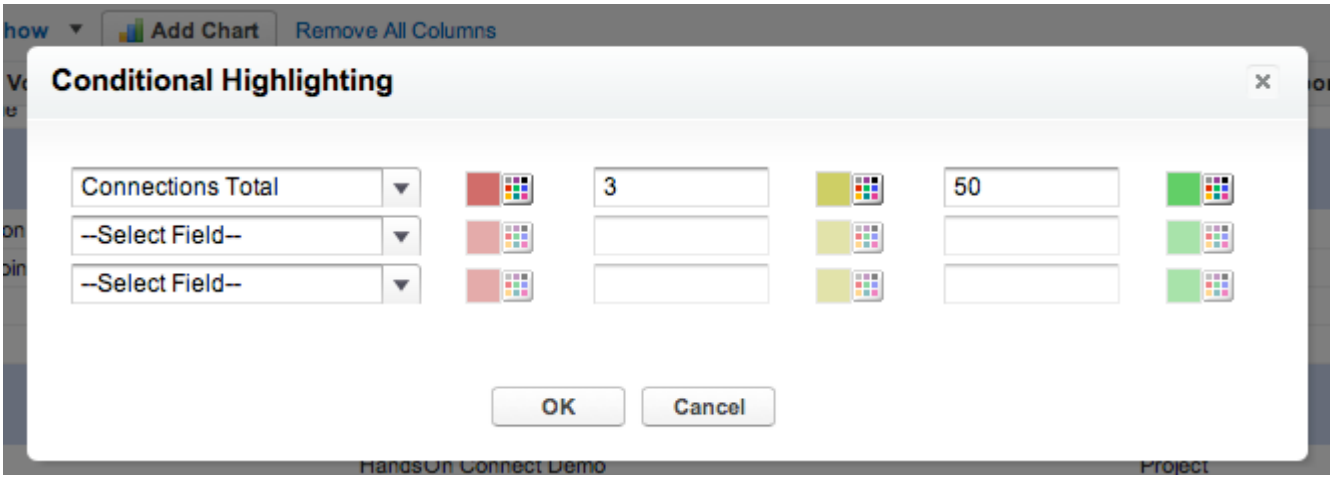
But by using an additional Salesforce report feature and the drill down functionality of reports -- we can analyze this report and get the answer we're looking for.

First we need to visually be able to see which contacts we're really interested in (based on the number of connections they have) - and to make these easy to spot, we're going to use **conditional highlighting.**

To add conditional Highlighting, use the show menu and select conditional highlighting.



Set conditional highlighting parameters

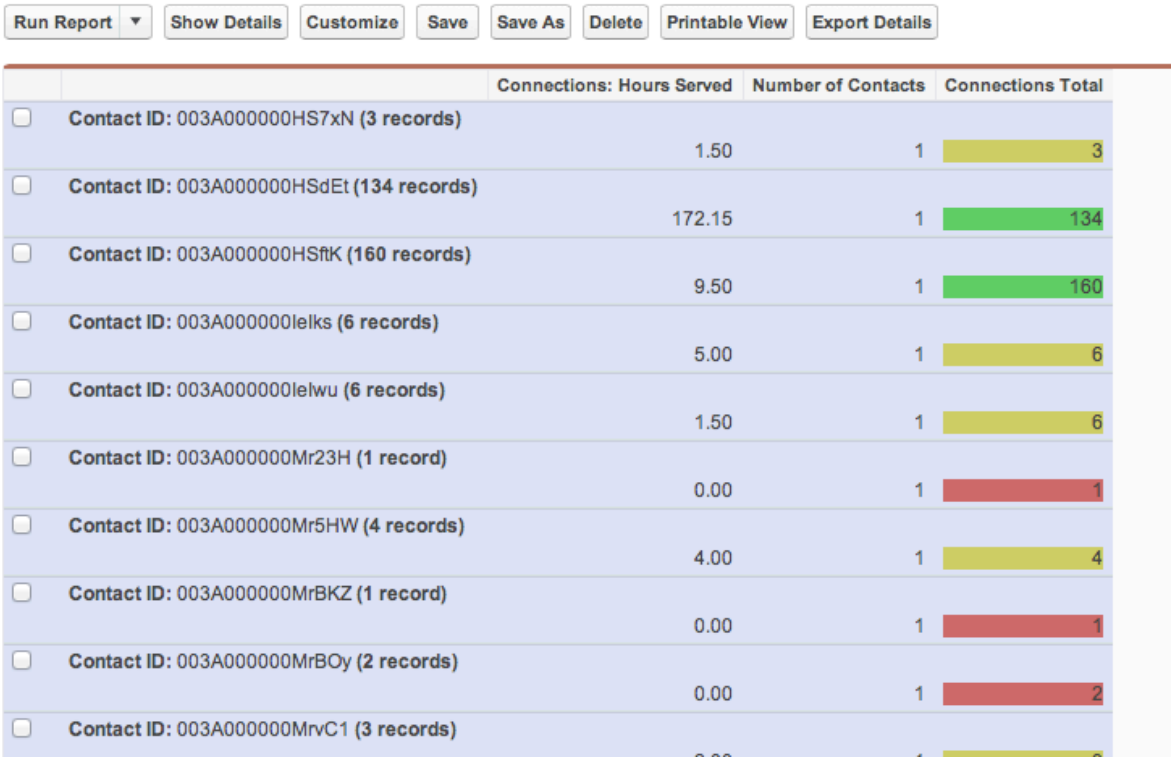


In the left picklist you can pick any of your calculated fields in the report. In this case I'm choosing "Connections Total" which is the total connections each volunteer has.

I've set parameters to conditionally highlight items as RED if they have less than 3 connections, and conditionally highlight them as green if they have 50 or more connections.

Click OK.

Now run the report and click on "Hide Details" so we're only seeing the contact records and their connection totals with our conditional highlighting. (It's easier to view this way).

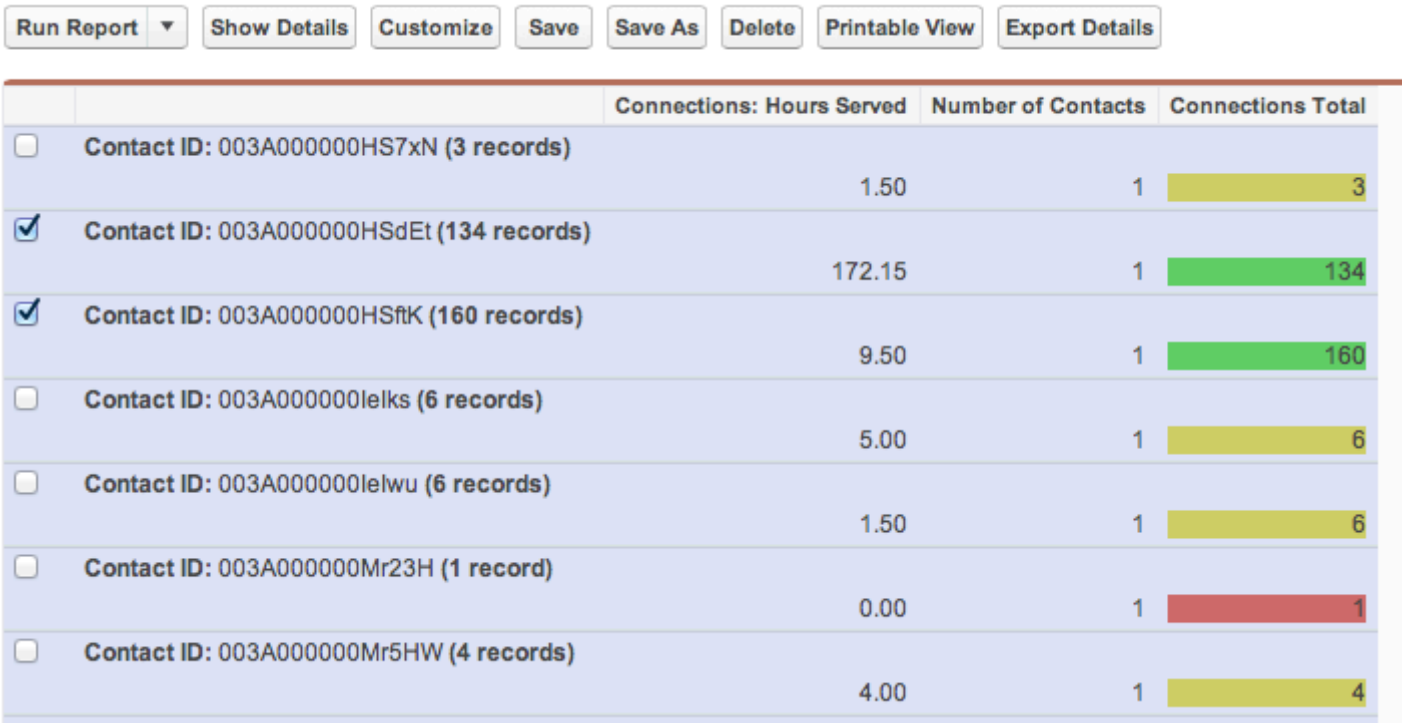


Now I can see at a glance which contacts had <3 and >50 connections.

If I want to get a count on just the contacts who had more than 50 -- I could visually scroll through the report and manually count how many GREEN 'connections totals' I had -- and I'd have the answer.

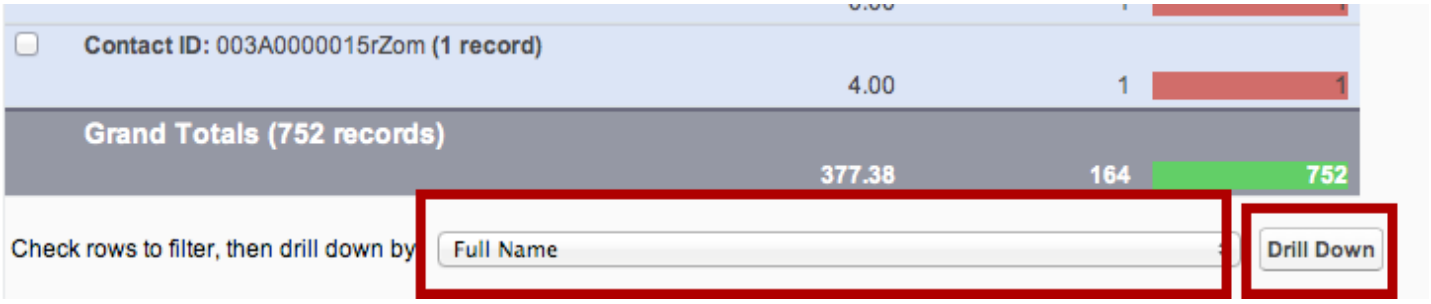
But wait -- Now that we can quickly see visually which contacts have more than 50 connections, let's use the Drill Down Feature to filter this report even further!

Use drill down to ONLY view the contacts who have > 50



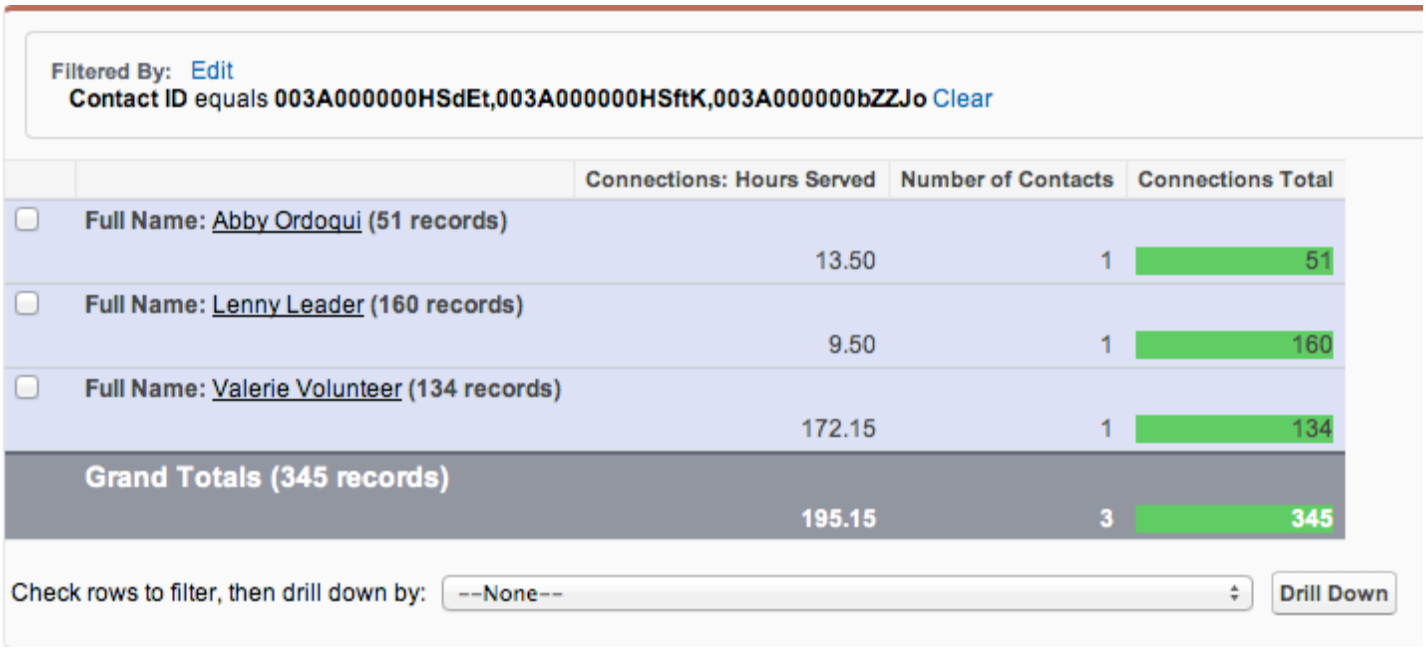
Put a check mark next to each contact that has a 'green' connections total and at the bottom of the report, drill down by any info you might want -- I'm going to select "Full Name". (The reprot was using 'contact ID" but I want to see the names now.

Click the drill down button at the bottom of the report.



When I do this -- a filter is added that only shows the contacts I've checked, (the ones with more than 50 connections!

Now my report only shows me the contacts I've selected, with >50 connections!



I can now see I have only 3 contacts who have >50 connections.

There's our answer!

Quick! Use "SAVE AS" and give the report a new name. (don't use 'save' or you'll overwrite the original report.

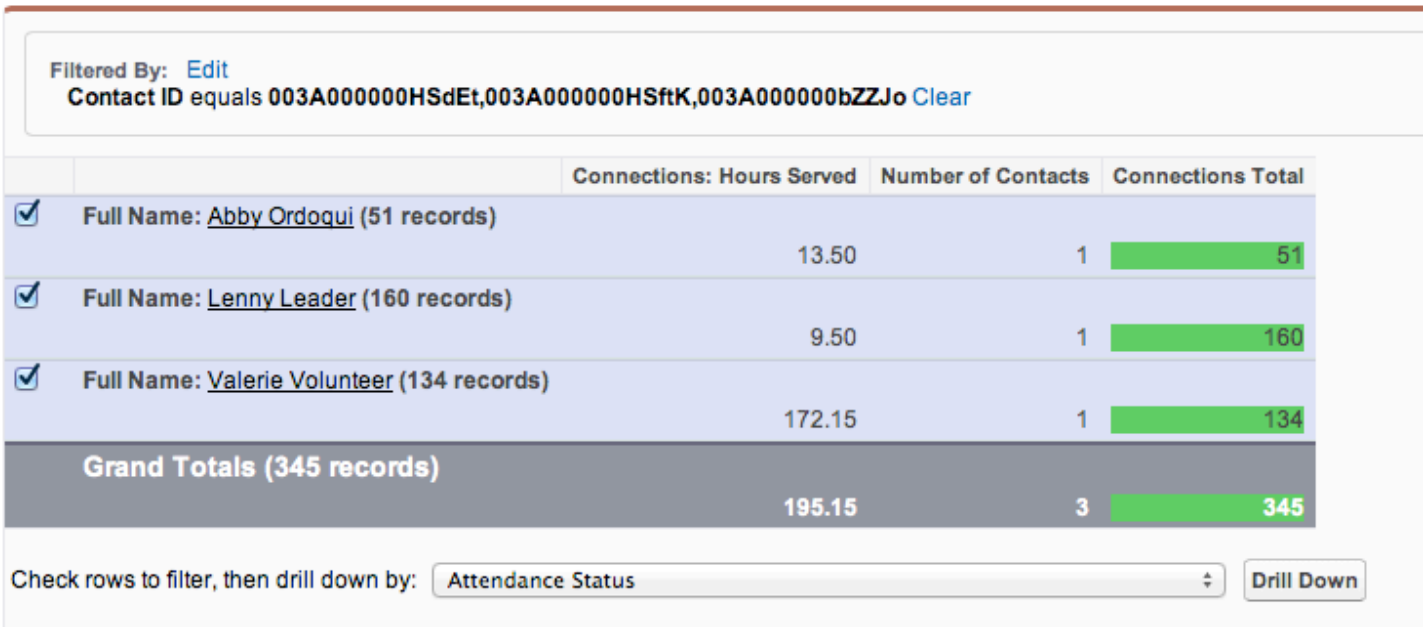
Let's call it "Volunteers with >50 connections current year"

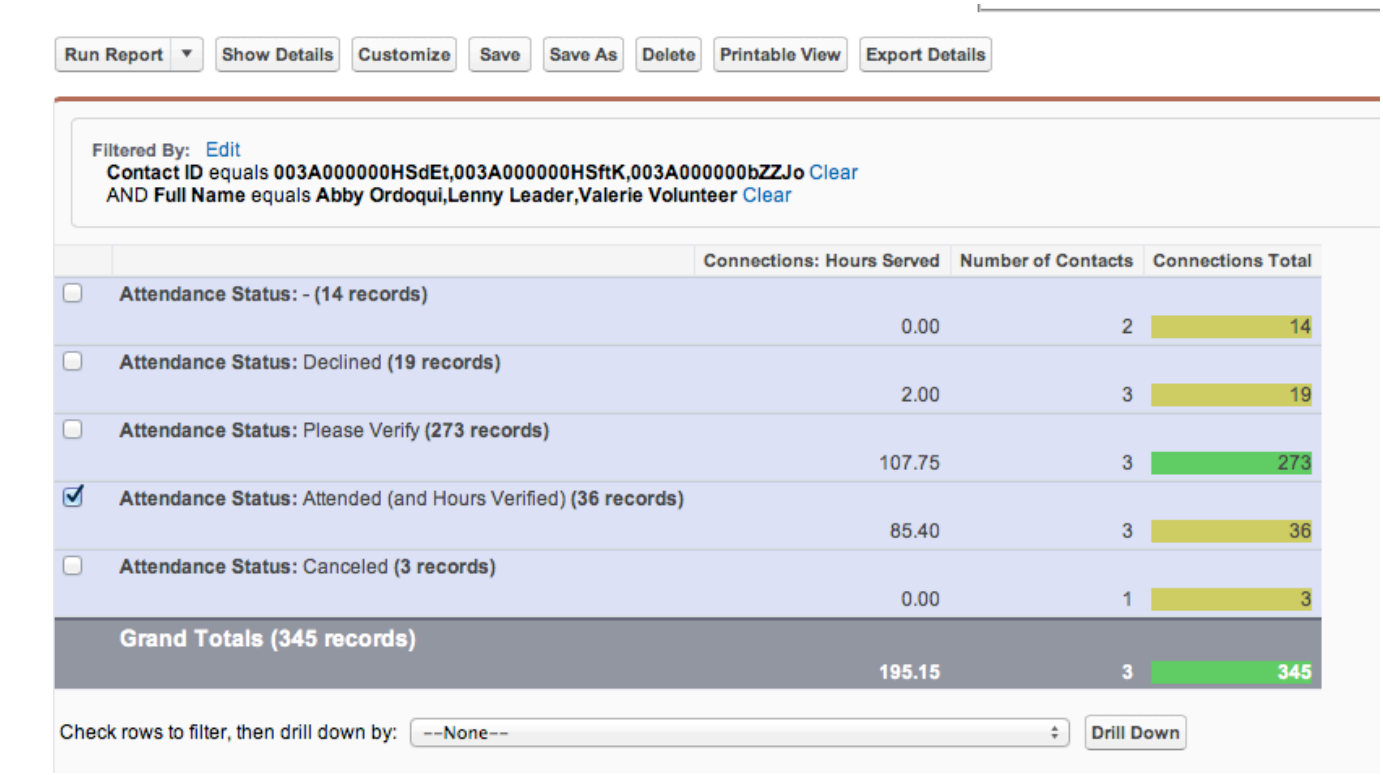
You can now choose to 'show details" (if you want to see more detailed information about the connections.

We can continue to drill down to get any level of detail about these three contacts and their connections that we want.

This one report can be drilled down upon to get any level of information you want. Here's an example:

(Example: Drilliing down on attendance status)

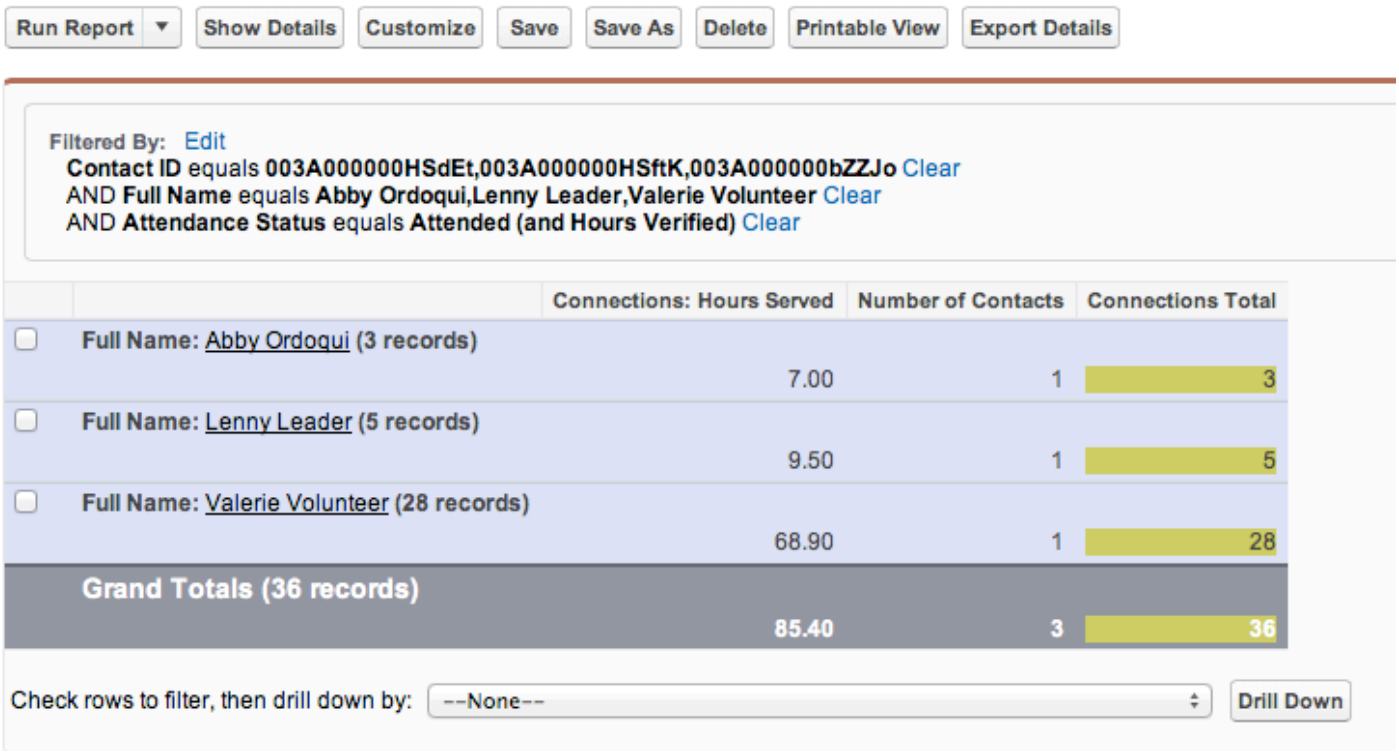




Now I can see, for these three contacts how many of their connections were declined, unreported (please verify), attended, cancelled, etc.

Continue to drill down as you wish. In this example I'm going to summarize the report so that only the "Attended (and hours verified" connections are shown.

Notice now, I am seeing, for these three contacts, JUST the connections with verified attendance!



And Valerie is our real winner! She attended 28 seperate connections this year, for a total of 68.90 hours of service!

Consider other ways to use this!

This example allows you to visually filter the contacts with a certain number of connections.

But the uses are endless. You could use the field "Hours Served" instead, and find those who served "X" number of hours to qualify for the Presidential Service Awards.

You can also use conditional highlighting and drill down to get specific answers to ANY report that counts any 'summarized' calculation.

How can I create a report on connections and only see contacts where their registration answer has a specific value?

Sometimes you want to get a report on hours served, but only want to see SOME of the volunteers, based on their answer to a custom registration question.

Unfortunately, the relationship of connections to contacts, and registration answers to contacts makes it impossible to pull the answer to a registration question into a report involving connections.

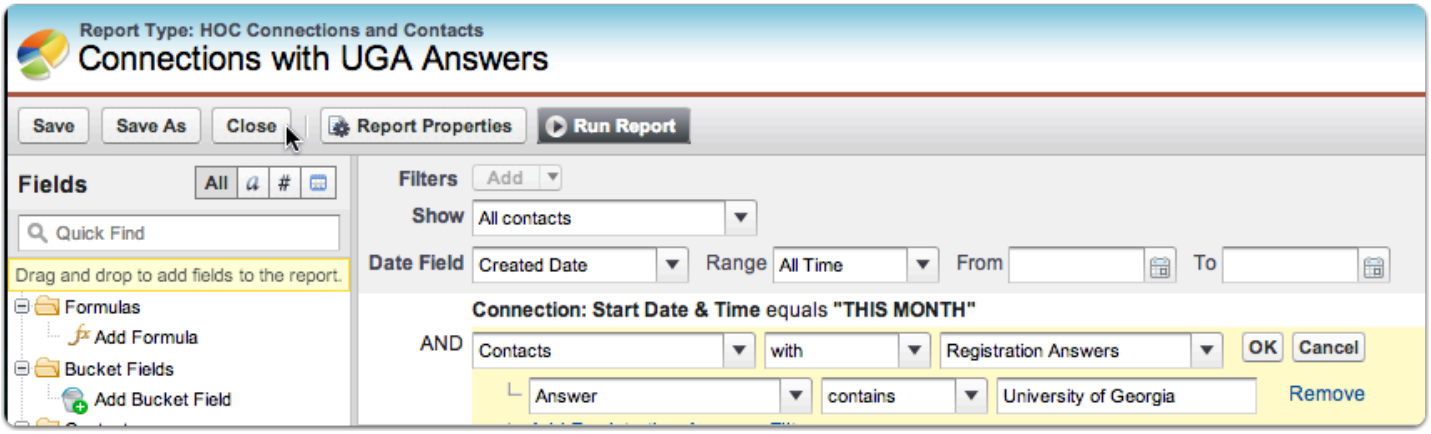
However, you can use cross-filters to limit the report results and see only connections associated with SOME contacts.

Example: Let's say you had a custom registration question that asked volunteers if they had a relationship with the University of Georgia. You can then create a cross filter that looks through ALL the registration answers and only brings in records with an appropriate picklist value.

Use the report type HOC Connections and Contacts

This report gives us access to connections (so we can get the hours for all connections during a given time period. (In this example, we want to report on connections for THIS MONTH).

Add a cross filter:



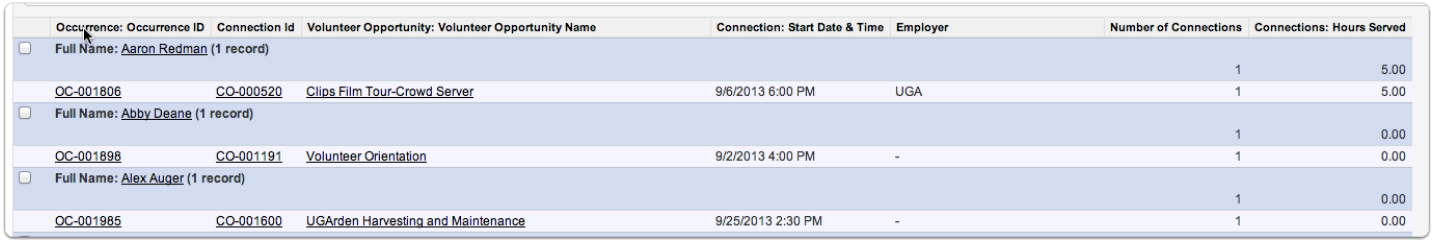
We filter on All Contacts - and want all contacts for all time.

We add a filter for the Connection Start Dates we're interested in. In this case "this month"

Click on Filters and add a "cross filter". We are interested in only seeing contacts that have ('with") a Registration Answer. And then we define what we want that answer to equal or contain. (Note: This will search ALL registration answers so you need to have some unique text that won't be contained in other registration answers. You are not able to choose only the answer to a specific question, so if you have multiple questions with yes or no questions - you won't be able to just get the yes answers to one question.

Once you have this cross filter in place -- you'll only see connections for contacts who have chosen an answer to a custom question that contains the text "University of Georgia".

When you run the report - only those contacts with a "university of Georgia" answer will show up in the results.



Occurrence: Occurrence ID	Connection Id	Volunteer Opportunity: Volunteer Opportunity Name	Connection: Start Date & Time	Employer	Number of Connections	Connections: Hours Served
Full Name: Aaron Redman (1 record)						
					1	5.00
OC-001806	CO-000520	Clips Film Tour-Crowd Server	9/6/2013 6:00 PM	UGA	1	5.00
Full Name: Abby Deane (1 record)						
					1	0.00
OC-001898	CO-001191	Volunteer Orientation	9/2/2013 4:00 PM	-	1	0.00
Full Name: Alex Auger (1 record)						
					1	0.00
OC-001985	CO-001600	UGArden Harvesting and Maintenance	9/25/2013 2:30 PM	-	1	0.00

Advanced: Example of useful Reports

Creating a Report to See What opportunities and occurrences are currently visible on your Public Site

Want an easy way to know what occurrences and opportunities are visible on the public site?

This report will show you exactly what's on your site, whether it requires an invitation code to see it, and how many connections are currently made for all your upcoming opportunities.

This is a good report to put in your partner folder as its useful not just for you, but for anyone who creates volunteer opportunities.

Creating a Report to See What's currently visible on your Public Site

Take the basic report already in HandsOn Connect called "Total Active Future Occurrences" and we'll perform a few modifications on it to make it very specific and useful.

Click on a "Save As" and we'll save it as "Occurrences visible on public site".

It already has filters setting the end date & time of the occurrences to greater or equal to today, and occurrence status = active.

Click on Show Details and customize, and then add the following fields to the report

Volunteer Opportunity: Status

Volunteer Opportunity: Number of Volunteer Opportunities (Summarize on this field to get the SUM

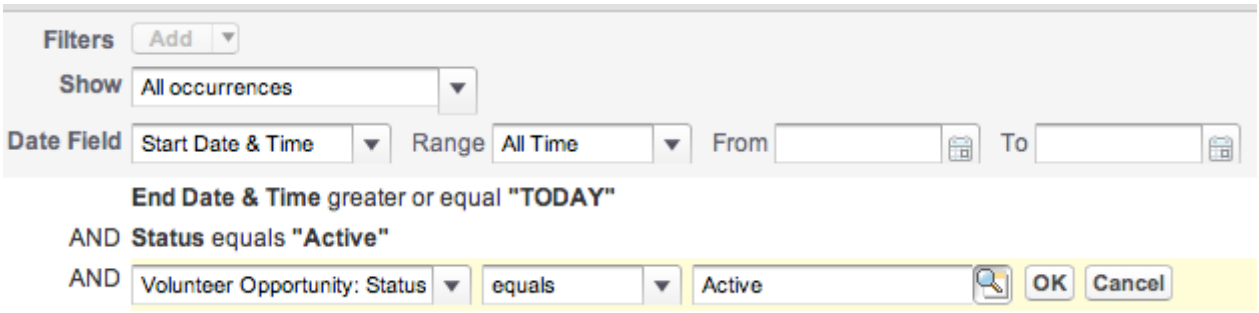
Volunteer Opportunity: Invitation Code

Occurrence: Status

Occurrence: Total Connections (summarize as SUM)

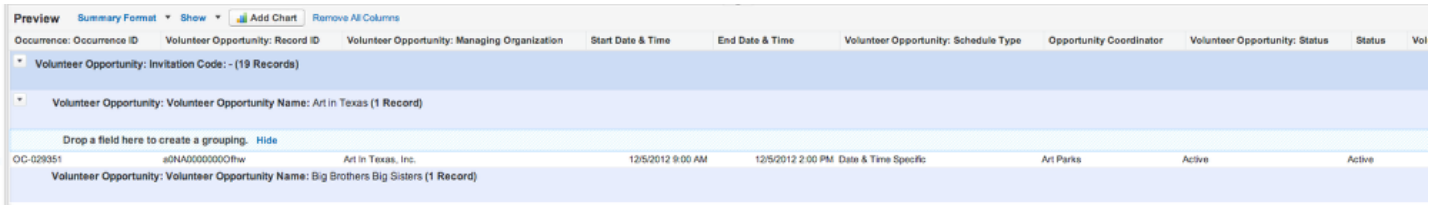
Occurrence: Total Confirmed (summarize as SUM)

Add the following Filter



Volunteer Opportunity: Status = Active

Group by "Invitation Code"



This way you'll know about opportunities that are not normally visible in search, but ARE in fact active, if you have the invitation code.

To do this, you'll need to remove the grouping on the Volunteer Opportunity Record ID (you can only group by three items).

And I also recommend moving the Managing Organization field out of the groupings, so that you'll only see Volunteer Opportunity Names in the 'hide detail' mode.

So you're grouping will now be:

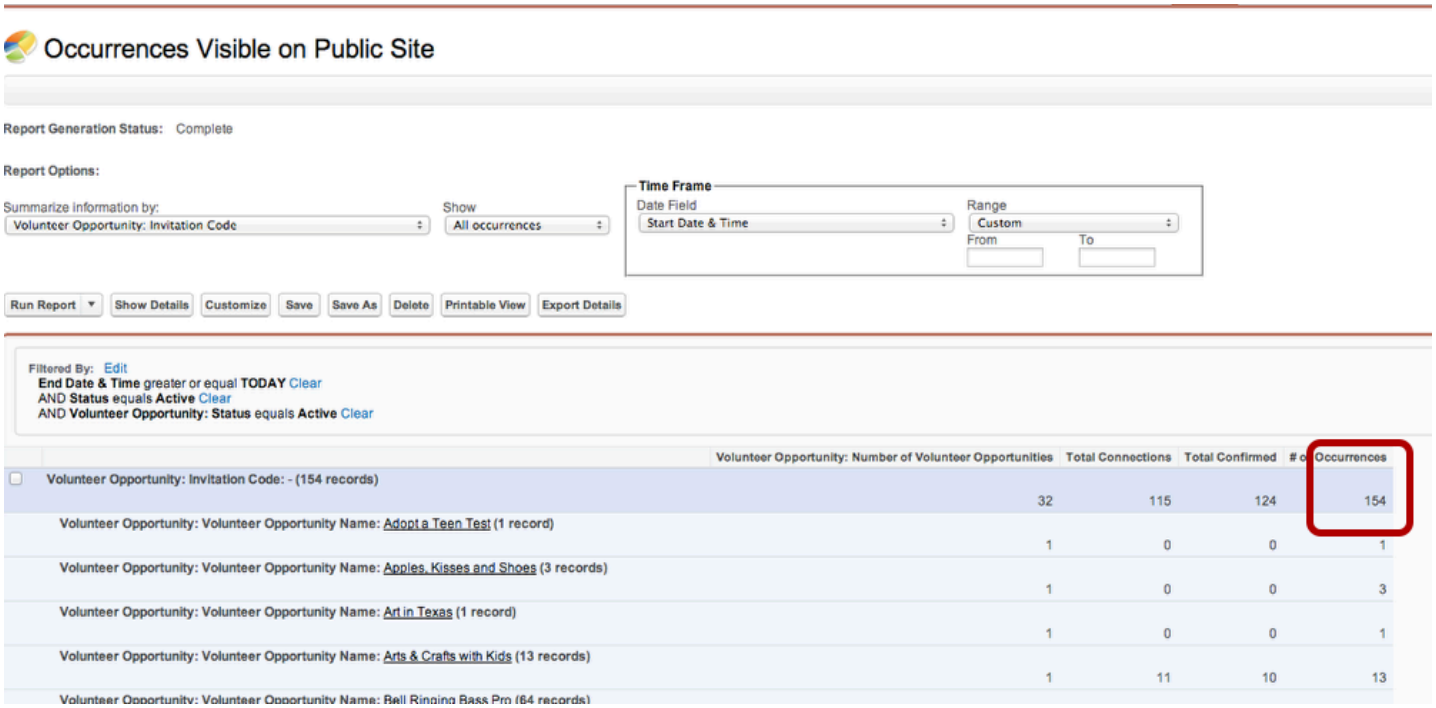
Invitation Code:

Volunteer Opportunity Name

Now Click - HIDE Details, Save the report, and Run it.

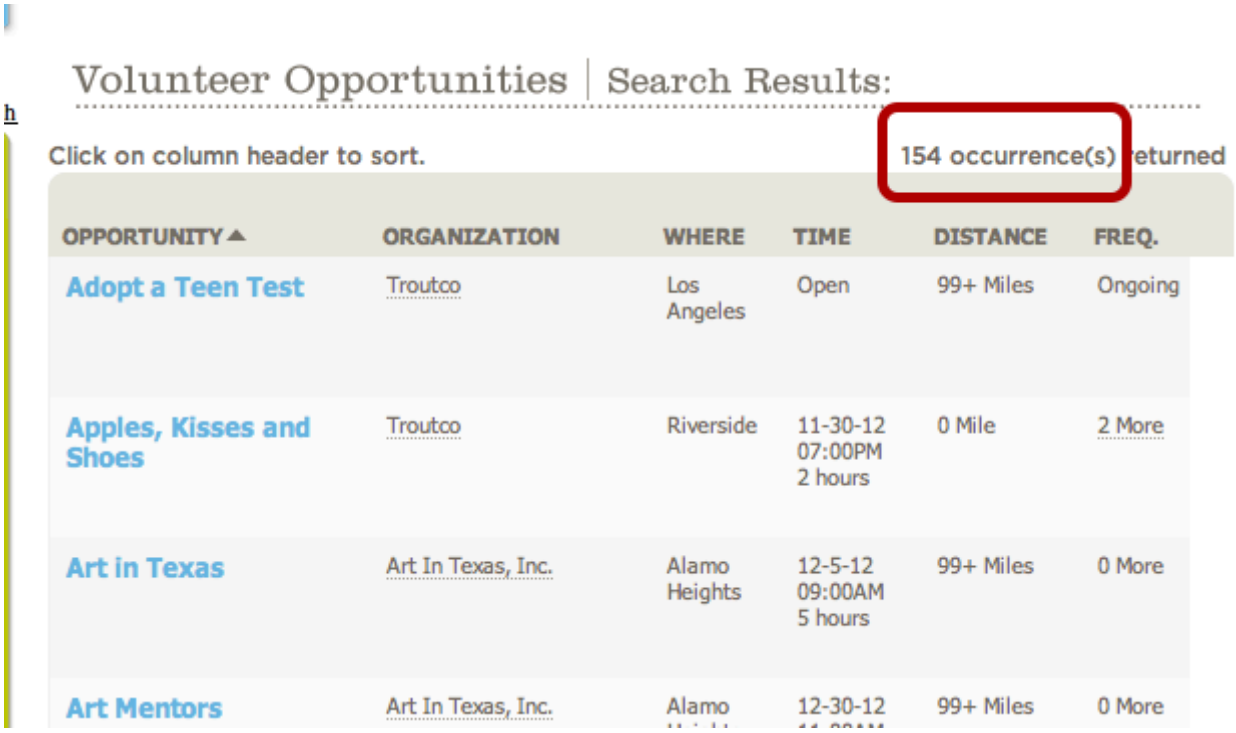
You'll now have a summary of all the Volunteer Opportunities / Occurrences that are visible on the public

site (Grouped by invitation code)



The total of 'non-invitation code" occurrences is what will appear on your public site search.

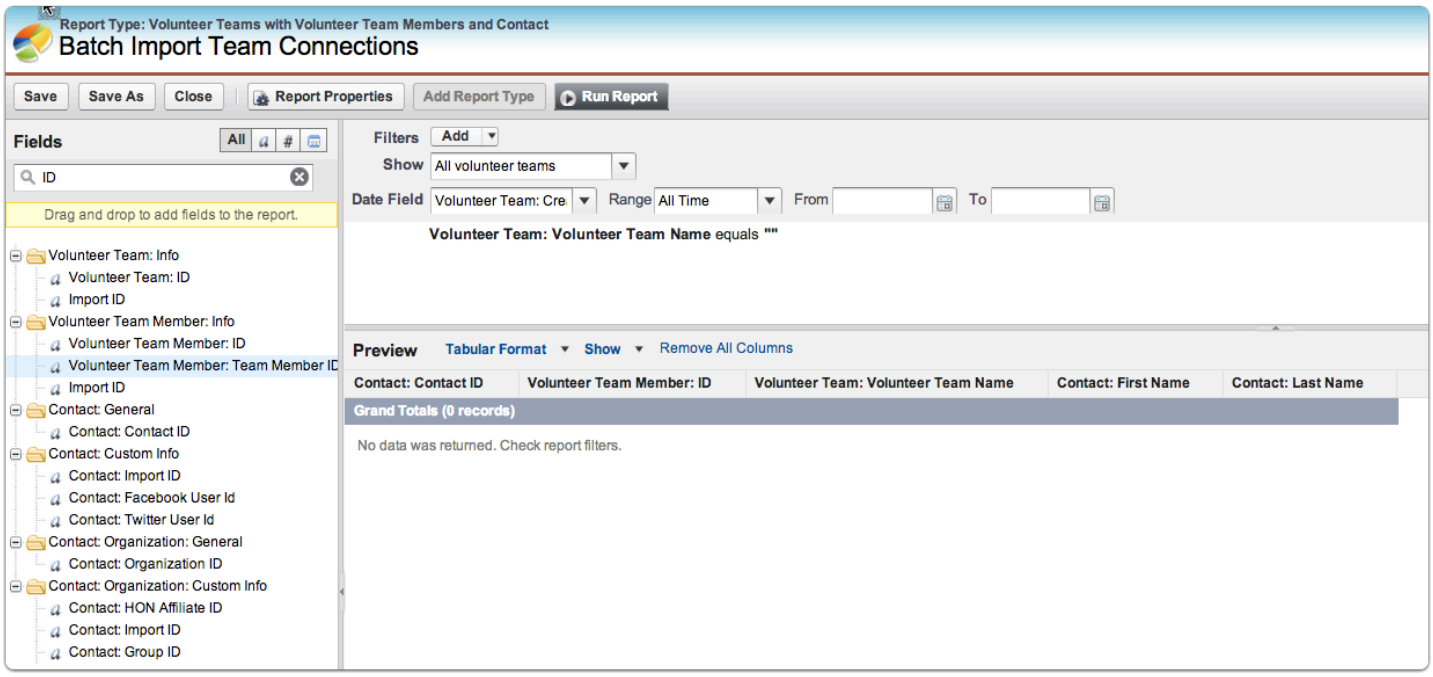
You'll also have a summary of how many upcoming connections and 'confirmed volunteers' you have. (Confirmed volunteers is the number of connections + anon(guests)



Creating a report to import connections for team members

If you have enabled the advanced feature that allows for batch importing connections, you'll want a report that allows you to get the Contact ID and Team Member ID for contacts you want to batch create team connections for. Here's the basics of such a report:

Create a new report of type "Volunteer Teams with Volunteer Team Members and Contact"



Change the show to "All Volunteer Teams" and add the following fields to the report:

- Contact ID
- Volunteer Team Member: ID (note: This is different than "Volunteer Team Member: Team Member ID' which is the VTM- record # -- NOT what we want)

These two IDs are the ones you'll reference when importing the template using the wizard.

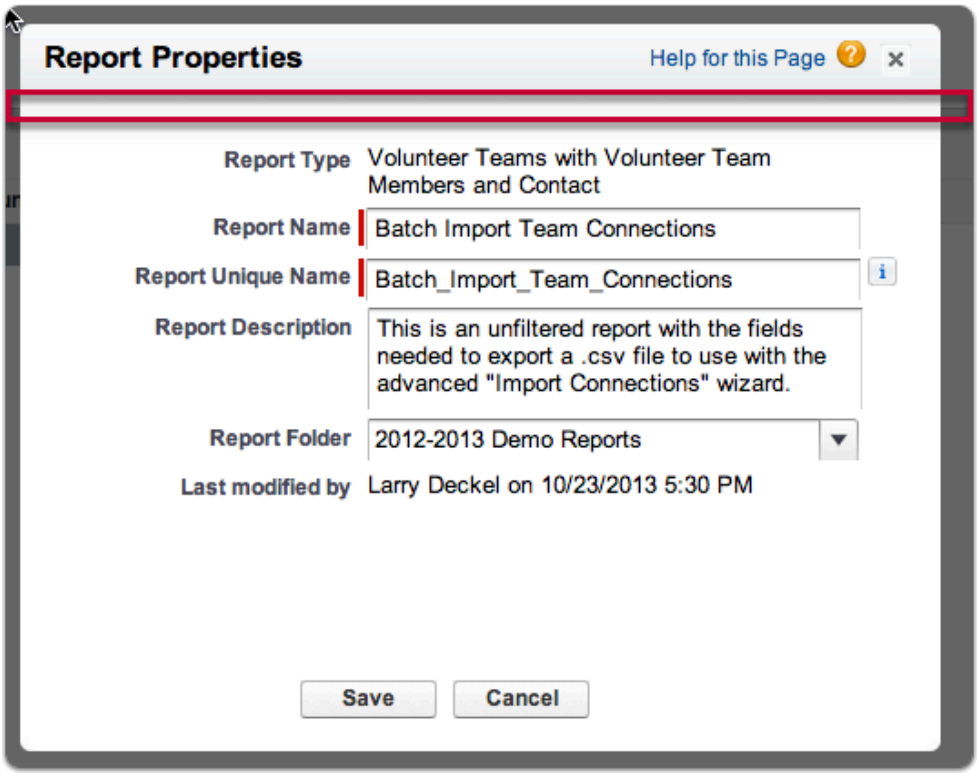
I've optionally added the fields

- Team Name
- Contact: First Name
- Contact: Last Name

(strictly so I can see that I have the people I expected)

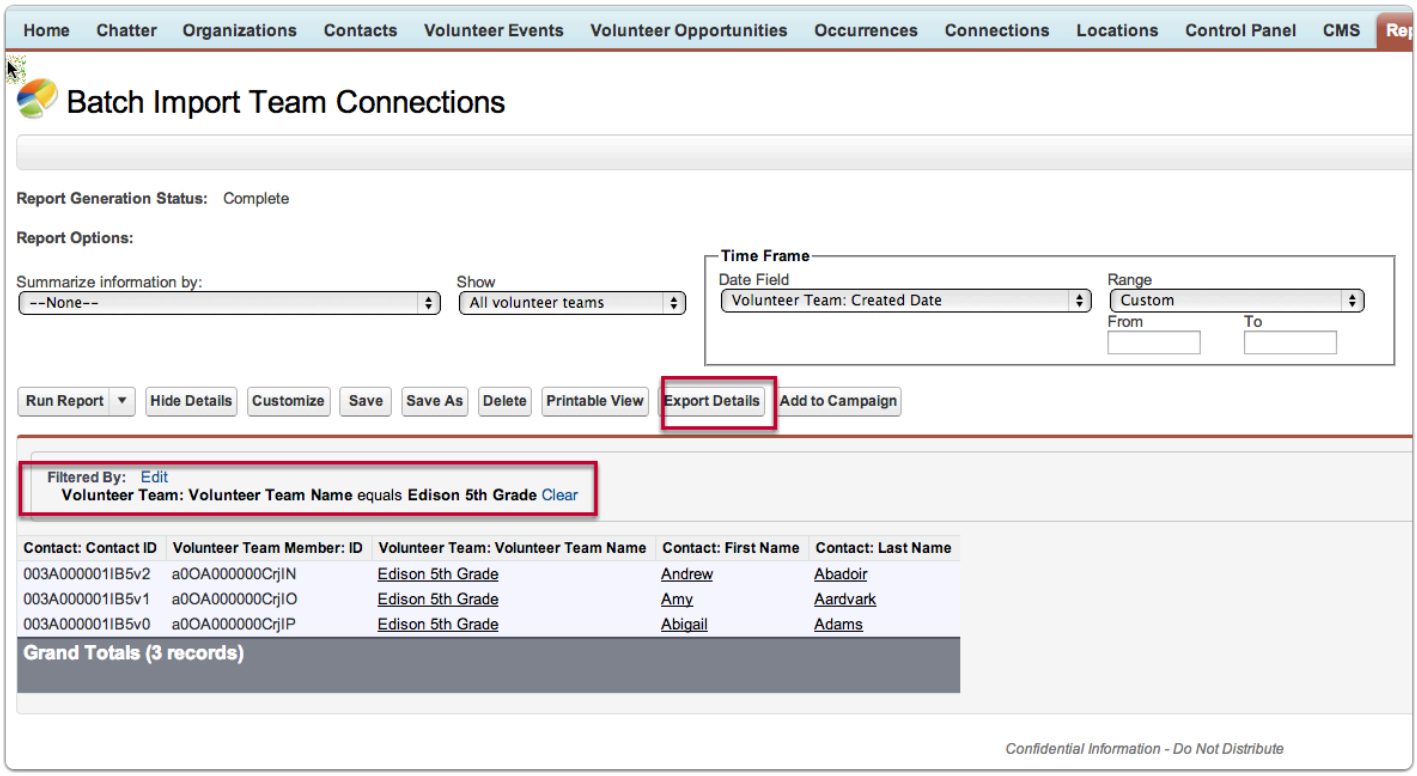
Add the filter: Volunteer Team: Volunteer Team Name equals (null). When you use this report - you'll edit this one filter to put in the team name you wish to run the report on.

Save the report with a clear name like "Batch Import team connections"



This gives you everything you'll need for your import file. Save this report and don't modify it. Use it each time you want to add some filters to find and export contacts to connect.

Add filters as desired each time you want to export contacts, and save as a .csv file which you can then import via the wizard.



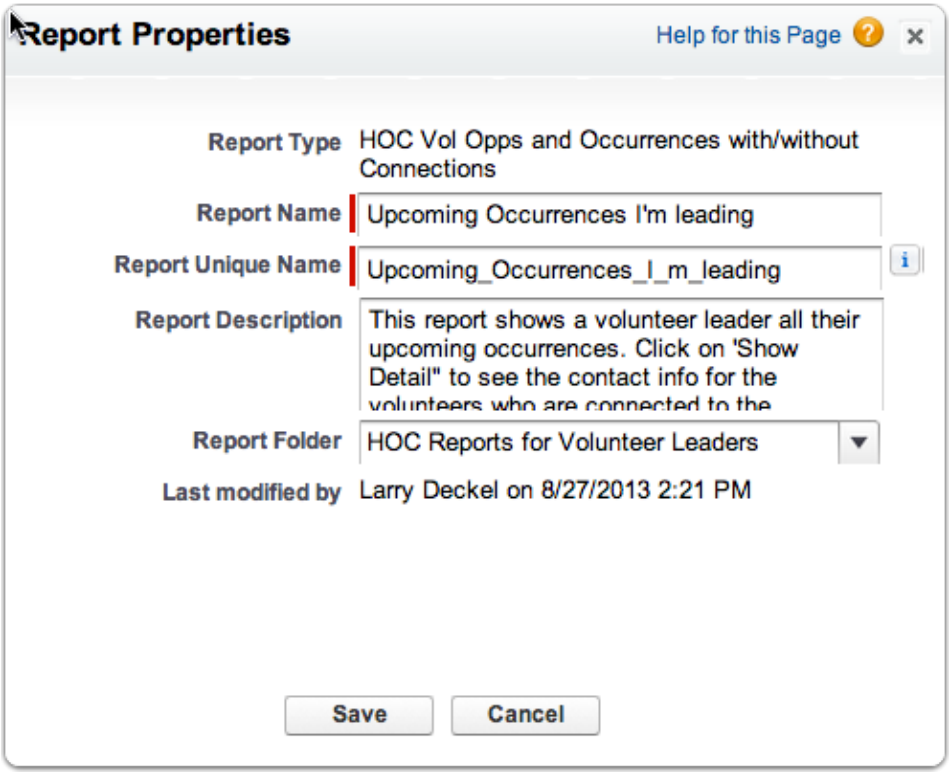
Edit the filter to find all the team members for a specific team, and then export as a .csv file. (Or use any filters you wish if you batch adding a number of different contacts to connections).

Remove the footer, and then import using the 'import connections' wizard following the instruction in this post. B[atch importing connections,]

A nice report to make available for Volunteer Leaders

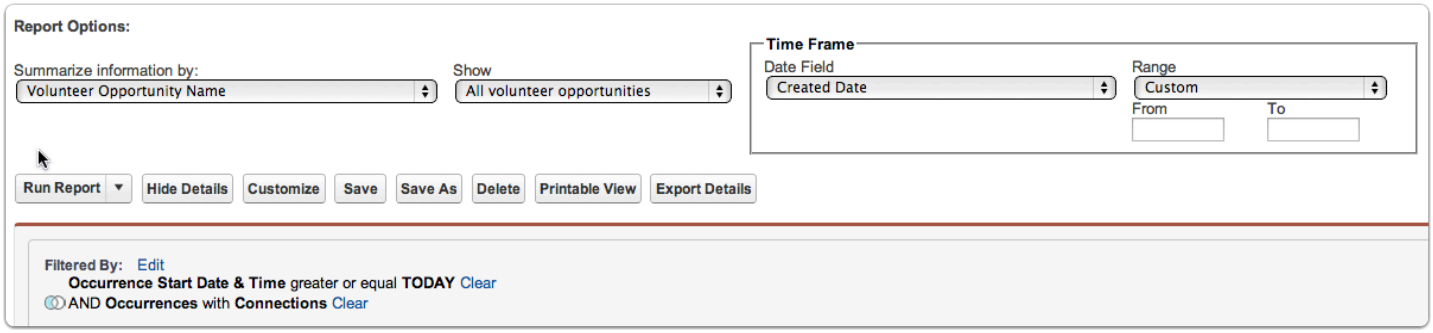
Volunteer Leaders with access to reports, might appreciate a handy little report that shows them all the upcoming occurrences of Volunteer Opportunities where they are the Opportunity Coordinator - as well as as at-a-glance view of the volunteers signed up for each. Here's how to make such a report:

Make a report using report type HOC Vol Opps and Occurrences with/without Connections



Give it a name and description, and save. Place it in the folder that is accessible to your volunteer leaders.

Set the filters as follows:

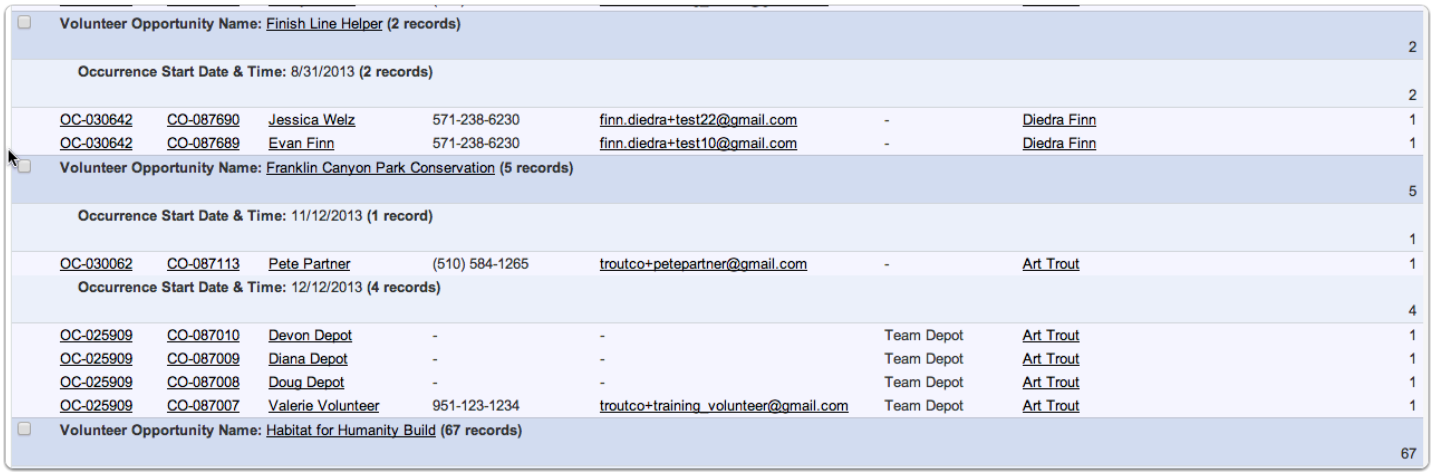


Add the following fields

- Volunteer Opportunity Name (group on this field)
- Occurrence ID
- Connection ID
- Contact: Full Name
- Contact: Primary Phone
- Contact: Email
- Team Name
- Opportunity Coordinator: Full Name
- Number of Connections (Summarize on this field)

Make sure that the volunteer leader profile gives them read access to the fields in the report!

The resulting report will look like this:



This will give your Volunteer Leaders an 'at a glance' look at the occurrences they'll be leading, and who will be attending.

Advanced: Report Overview Videos (analytic features)

Video: Building Matrix Reports

Matrix reports are similar to summary reports but allow you to group and summarize data by bothrows and columns. They can be used as the source report for dashboard components. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to comparevalues in several different fields, or you want to look at data bydate and by product, person, or geography. Matrix reports without at least one row and one column grouping show as summary reports on the report run page.

Video: Building Joined Reports

Joined reports let you create multiple report blocks that provide different views of your data.Each block acts like a “sub-report,” with its own fields,columns, sorting, and filtering. A joined report can even contain data from different report types.

Video: Data Bucketing

Data Bucketing lets you quickly categorize report records without creating a formula or a custom field. When you create a bucket field, you define multiple categories (buckets) used to group report values. For example, create a bucket field named Size based on the # Employees field. Then, create buckets that group records into “Large,” “Medium,” or “Small” ranges that you define. Bucket fields can be used like any other field to sort, filter, and group your report.