

REPORTS AND DASHBOARDS

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Getting Started with Reporting

Views vs Reports

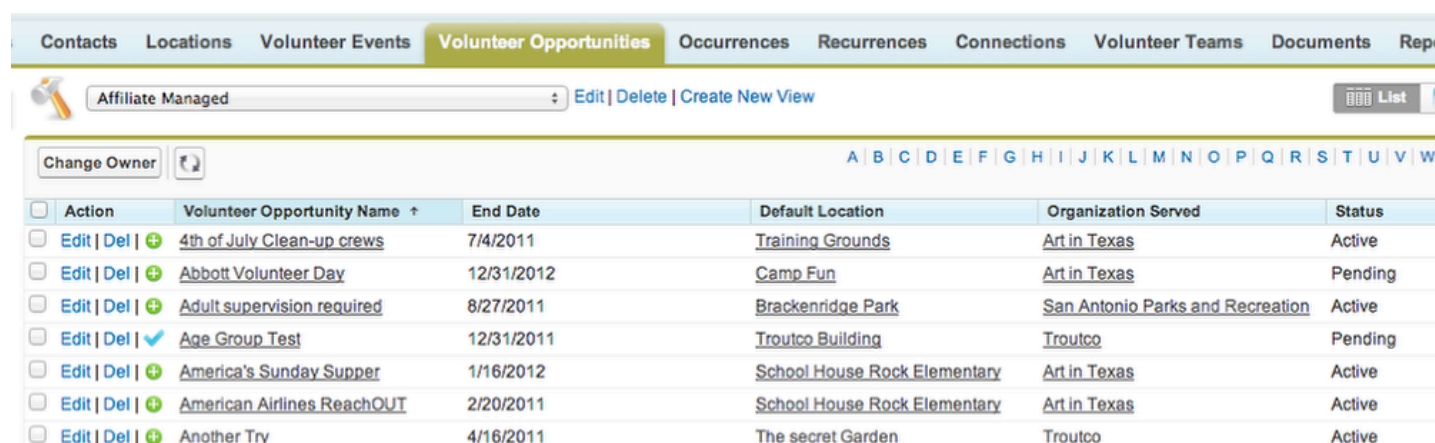
So far we've talked about "Views" as a way of looking at multiple records of data at once.

But Views have limitations.

The deepest view of data is found in reports.

What are the differences?

Views



Volunteer Opportunities						
Affiliate Managed						
Change Owner						
A B C D E F G H I J K L M N O P Q R S T U V W						
Action	Volunteer Opportunity Name	End Date	Default Location	Organization Served	Status	
<input type="checkbox"/> Edit Del +	4th of July Clean-up crews	7/4/2011	Training Grounds	Art in Texas	Active	
<input type="checkbox"/> Edit Del +	Abbott Volunteer Day	12/31/2012	Camp Fun	Art in Texas	Pending	
<input type="checkbox"/> Edit Del +	Adult supervision required	8/27/2011	Brackenridge Park	San Antonio Parks and Recreation	Active	
<input type="checkbox"/> Edit Del ✓	Age Group Test	12/31/2011	Troutco Building	Troutco	Pending	
<input type="checkbox"/> Edit Del +	America's Sunday Supper	1/16/2012	School House Rock Elementary	Art in Texas	Active	
<input type="checkbox"/> Edit Del +	American Airlines ReachOUT	2/20/2011	School House Rock Elementary	Art in Texas	Active	
<input type="checkbox"/> 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.

Volunteer Opportunities
Edit View

Save Save As Delete Cancel

Step 1. Enter View Name

View Name:

View Unique Name: [i](#)

Created By: [Art Ordoqui](#), 3/11/2011 10:55 AM Modified By: [Larry Deckel](#), 12/5/2011 4:08 PM

Step 2. Specify Filter Criteria

Filter By Owner:

☒ All Volunteer Opportunities
☐ My Volunteer Opportunities

Filter By Additional Fields (Optional):

Field	Operator	Value	
Managed By	equals	Affiliate	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

[Add Filter Logic...](#)

Step 3. Select Fields to Display

Available Fields		Selected Fields
Record ID	Add	Volunteer Opportunity Name
Activity Type		End Date
Age Groups Served		Default Location
Apply Restrictions to Opportunity		Organization Served
Background Check Required		Status
...		

Top
Up
Down

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

To get deeper information about data - we use reports.

Volunteer Opportunity Matrix- Current Yr

Report Generation Status: Complete

Report Options:

Summarize information by: Summarize information by: Show

Run Report Show Details Customize Save Save As Delete Printable View Export Details

Filtered By: [Edit](#)
Occurrence End Date & Time greater or equal THIS YEAR [Clear](#)
AND Occurrence Start Date & Time less or equal THIS YEAR [Clear](#)

Schedule Type		Volunteer Opportunity Status				Grand Total
		Active	Pending	Awaiting Approval	Inactive	
<input type="checkbox"/> Date & Time Specific	Volunteer Opportunity Total	55	8	4	7	74
	Occurrence Total	731	47	5	159	942
	Connection Total	325	12	28	4	369
	Total Registered Volunteers	383	12	48	4	447
	Total Hours Served	74.00	0.00	0.00	0.00	74.00
	Record Count	871	48	31	160	1,110
<input type="checkbox"/> To Be Scheduled	Volunteer Opportunity Total	28	4		2,414	2,446
	Occurrence Total	28	4		2,414	2,446
	Connection Total	249	0		21	270
	Total Registered Volunteers	249	0		21	270
	Total Hours Served	43.22	0.00		0.00	43.22
	Record Count	254	4	0	2,427	2,685
Grand Total	Volunteer Opportunity Total	83	12	4	2,421	2,520
	Occurrence Total	759	51	5	2,573	3,388
	Connection Total	574	12	28	25	639
	Total Registered Volunteers	632	12	48	25	717
	Total Hours Served	117.22	0.00	0.00	0.00	117.22
	Record Count	1,125	52	31	2,587	3,795

Check rows to filter, then drill down by: [Drill Down](#)

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!

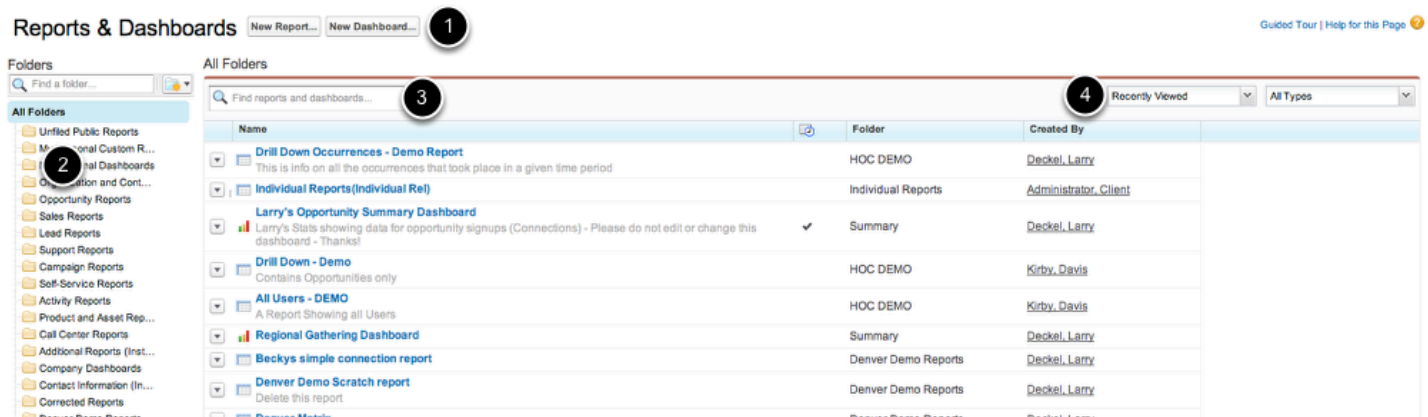
Introduction to Reporting

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



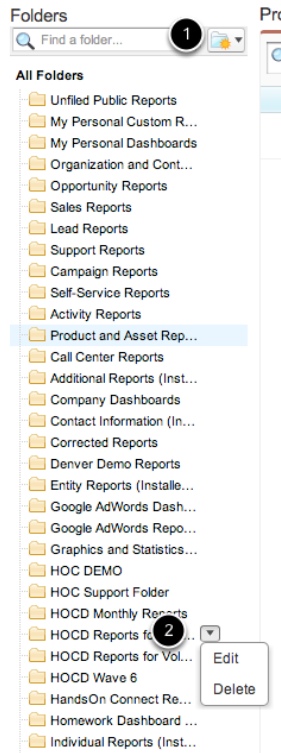
1. Creating New Reports and Dashboards is done here - at the top of the object.
2. All folders that reports are stored in here. You can do a 'quick find' for a specific folder by using the magnifying glass at the top of the column. Clicking on a specific folder will put the list of reports in that folder 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.

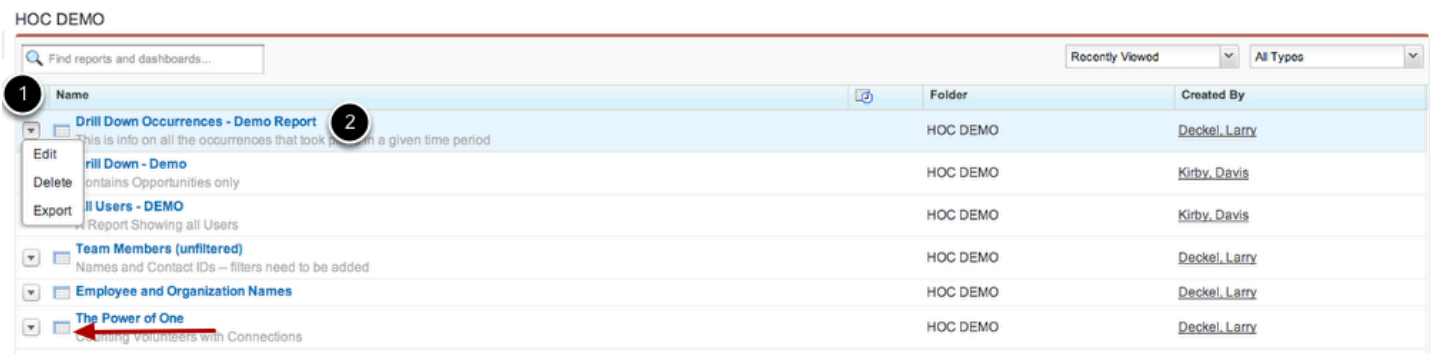
SalesForce comes with a number of reports already built into the system. Some of them will mean something to your organization, some of them will not. Remember that Salesforce calls Organizations: Accounts. Remember, as well, that there is a big difference between a opportunity in Salesforce (which is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



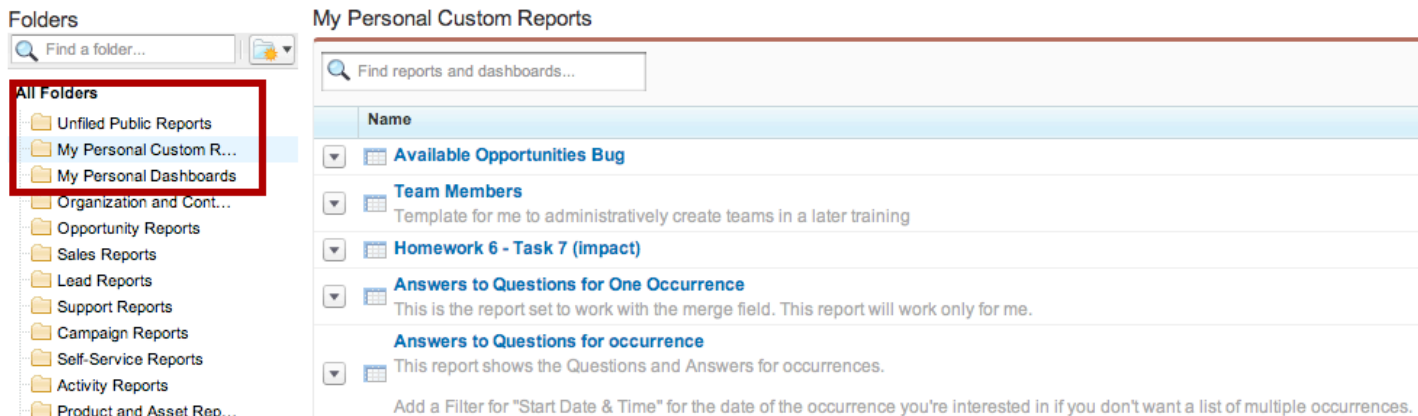
The report section shows you the individual reports that match your search criteria or folder selection (from the left folder list)

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)

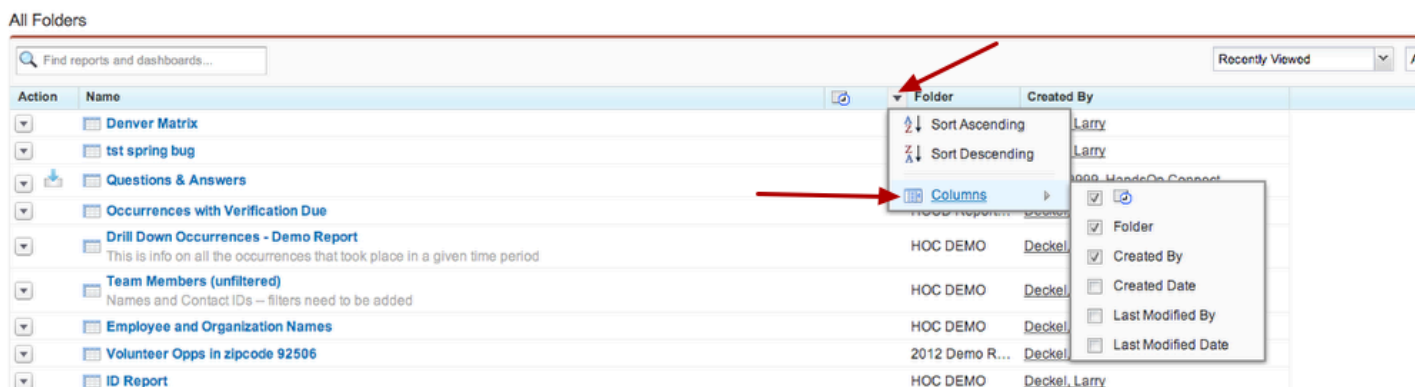
There are three 'special' folders that every user has access to:



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 Occurrence 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 occurrences 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 Communications - 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).

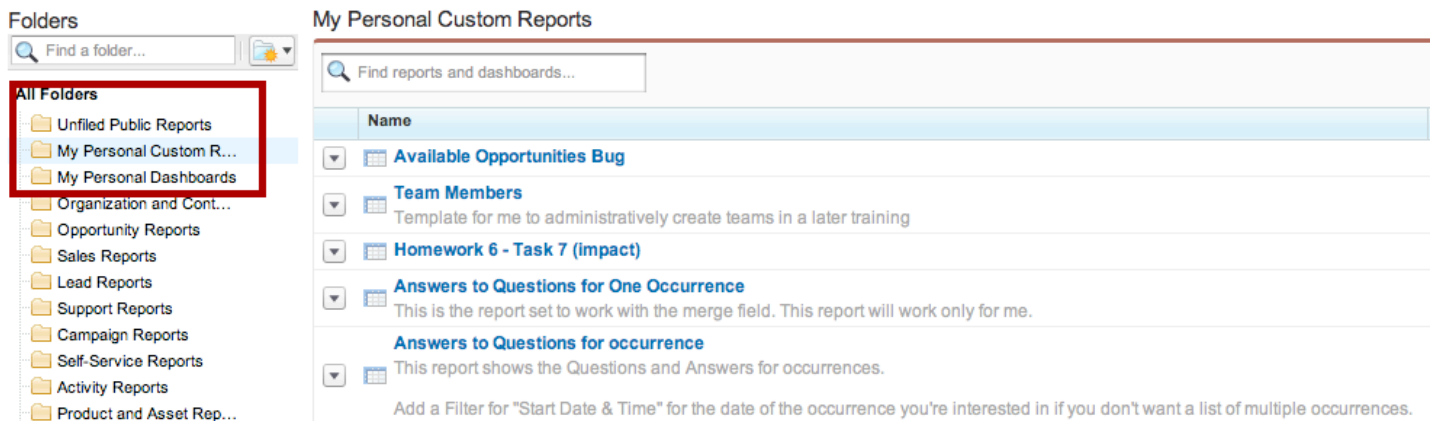
Object Change Report (Search Update) - This report tells you if a request to update search was sent to the search server when you edited a volunteer opportunity or occurrence.

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 Characteristics

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



The screenshot displays the 'Folders' sidebar on the left and the 'My Personal Custom Reports' main panel on the right.

Folders Sidebar:

- Find a folder...
- All Folders** (highlighted with a red box):
 - Unfiled Public Reports
 - My Personal Custom R...
 - My Personal Dashboards
 - Organization and Cont...
 - Opportunity Reports
 - Sales Reports
 - Lead Reports
 - Support Reports
 - Campaign Reports
 - Self-Service Reports
 - Activity Reports
 - Product and Asset Rep...

My Personal Custom Reports Panel:

- Find reports and dashboards...
- Name**
- Available Opportunities Bug
- Team Members
Template for me to administratively create teams in a later training
- Homework 6 - Task 7 (Impact)
- Answers to Questions for One Occurrence
This is the report set to work with the merge field. This report will work only for me.
- Answers to Questions for occurrence
This report shows the Questions and Answers for occurrences.
Add a Filter for "Start Date & Time" for the date of the occurrence you're interested in if you don't want a list of multiple occurrences.

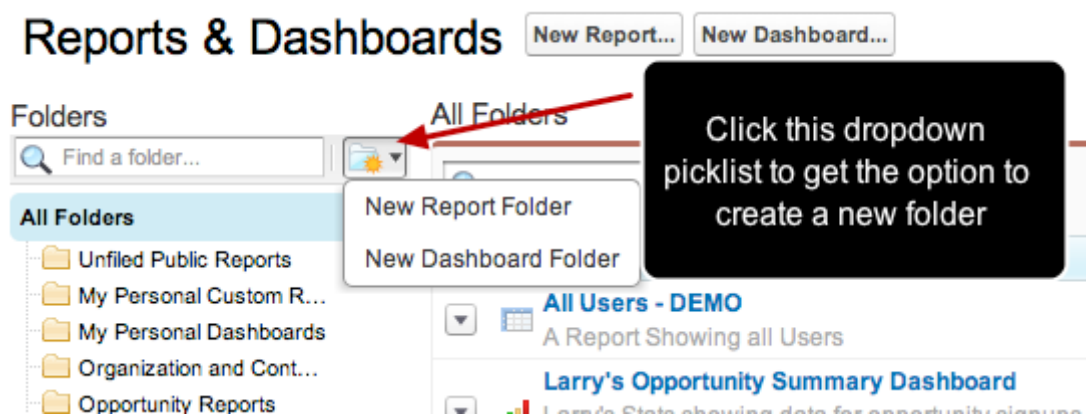
Unfiled Public Reports is a place to stash reports that you are experimenting with and aren't sure where they should be stashed. It's a temporary holding area until you decide what folder you ultimately think I report should live in.

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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

The screenshot shows a 'New Report Folder' dialog box. At the top, there is a logo and the title 'New Report Folder'. Below this, there is a 'Folder Edit' section with 'Save' and 'Cancel' buttons. The 'Report Folder Label' field contains the text 'Year End reports'. The 'Folder Unique Name' field contains the text 'Year_End_reports' and has an information icon (i) to its right. At the bottom, there are 'Save' and 'Cancel' buttons.

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).

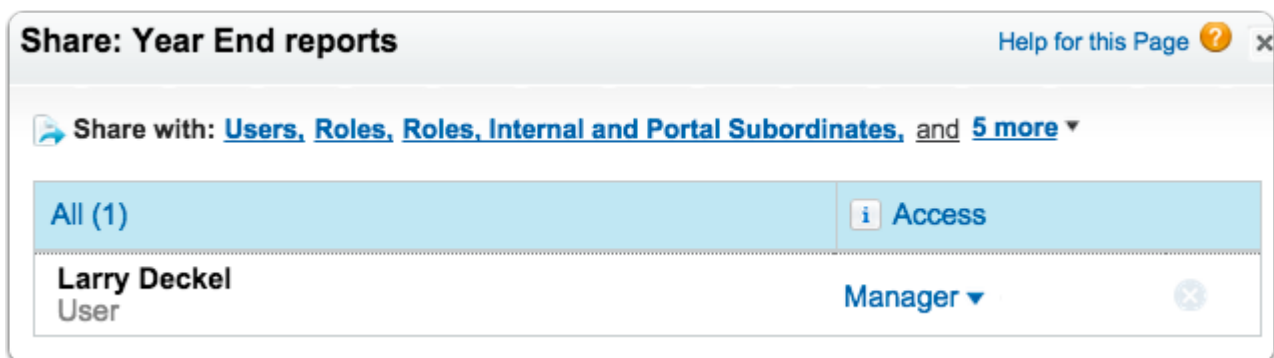
Note: If you do not see this option - see below in this post "Note: If you've not upgraded...." and update your settings!



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:

Report and Dashboard Folder Sharing

This setting lets users selectively share reports and dashboards with other users, roles, public user groups, or portal users.

Folder Sharing

- ☒ Enable access levels for sharing report and dashboard folders

[Save](#)[Cancel](#)

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:

Report and Dashboard User Interface Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

- ☒ Enable Floating Report Headers
- ☒ Export Reports Without Footers [i](#)
- ☒ Enable Dashboard Finder [i](#)

Chatter Options

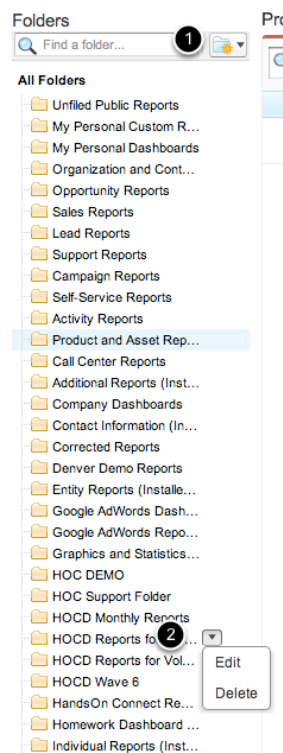
- ☒ Enable Dashboard Component Snapshots [i](#)

[Save](#)[Cancel](#)

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.

The screenshot shows the 'Report Folder Edit' window for 'Campaign Reports'. The 'Public Folder Access' is set to 'Read Only'. Below this, there are four radio button options for folder accessibility. The second option, 'This folder is accessible by all users, except for portal users', is selected. Below the radio buttons is a search bar with 'Public Groups' selected and a 'Find' button. At the bottom, there are two lists: 'Available for Sharing' and 'Shared To'. The 'Available for Sharing' list contains several groups, including 'All Customer Portal Users', 'Group: AmeriCorps', 'Group: Art in Texas, Inc.', 'Group: Brenden's Org', 'Group: Esteem Builders', 'Group: Friends of Screven County Animals', 'Group: HandsOn Connect Demo', 'Group: Happy Campers', 'Group: Jumping for Joy', 'Group: Justice League of America', 'Group: Maco', 'Group: Program Staff', 'Group: Tier 2 Support', and 'Group: Top Tots'. The 'Shared To' list is currently empty. There are 'Add', 'Remove', and 'Find' buttons between the two lists. At the bottom of the window are 'Save', 'Delete', and 'Cancel' buttons.

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.

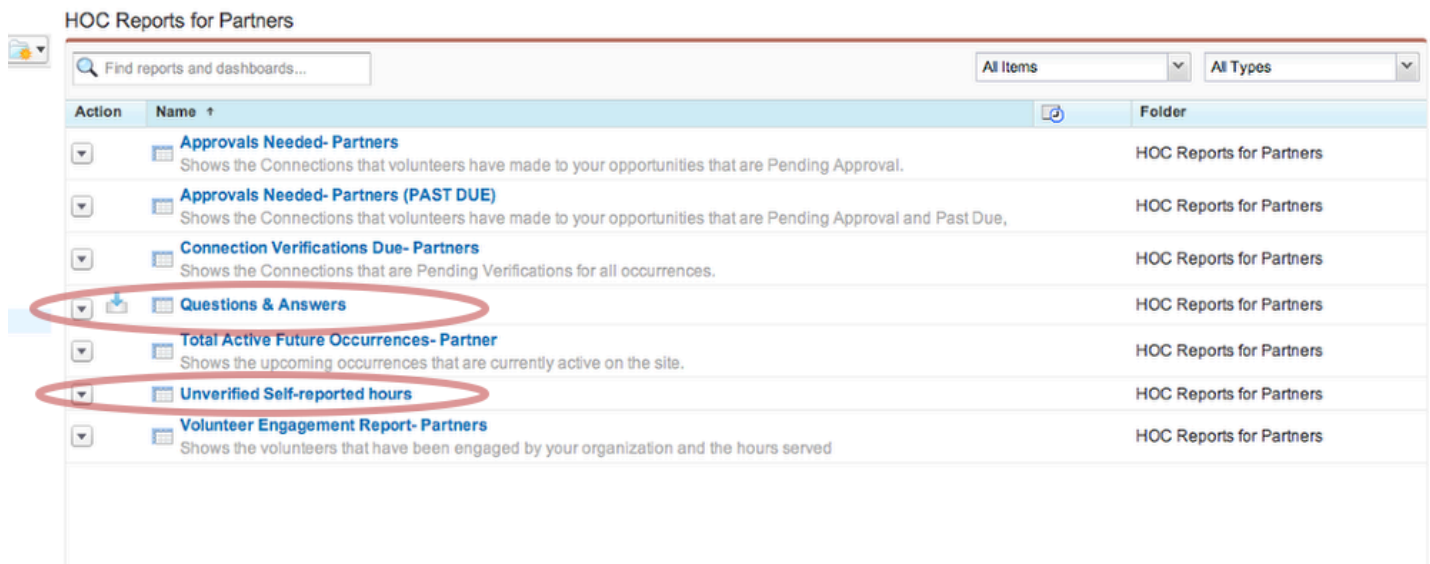
Make custom reports in folder categories that make sense to you and your staff.

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



Action	Name ↑	Folder
▼	Approvals Needed- Partners Shows the Connections that volunteers have made to your opportunities that are Pending Approval.	HOC Reports for Partners
▼	Approvals Needed- Partners (PAST DUE) Shows the Connections that volunteers have made to your opportunities that are Pending Approval and Past Due,	HOC Reports for Partners
▼	Connection Verifications Due- Partners Shows the Connections that are Pending Verifications for all occurrences.	HOC Reports for Partners
▼	Questions & Answers	HOC Reports for Partners
▼	Total Active Future Occurrences- Partner Shows the upcoming occurrences that are currently active on the site.	HOC Reports for Partners
▼	Unverified Self-reported hours	HOC Reports for Partners
▼	Volunteer Engagement Report- Partners Shows the volunteers that have been engaged by your organization and the hours served	HOC Reports for Partners

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.

 **Contacts Created Last Month** 1

Report Generation Status: Complete 2

Report Options: 3

Summarize information by: --None-- Show: All organizations

Time Frame

Date Field: Created Date Range: Last Month

From: 3/1/2012 To: 3/31/2012

Run Report Hide Details Customize Save Save As Delete Printable View Export Details 4

Salutation	First Name	Last Name	Title	Email	Primary Phone	Organization Name	Profile Name	Registration Status
-	Newt	Trout	-	5 troutco+newt@gmail.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	-	nvrwork+vvol@gmail.com	3216549870	Individual	-	Registered
-	Test	NPSP	-	nvrwork+npsdemo@gmail.com	9876543210	Individual	-	Registered
-	AJ	Ordoqui	-	arohoc+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)
-	J	payton	Publisher	arohoc+lpaytonpub@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

Report Generation Status: Complete

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:

All Users - Demo

Report Generation Status: Note: 2,000 of 2,106 records are displayed below. Select Export Details for a complete view of your data.

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

Report Generation Status: Complete

Report Options:

Summarize information by:

--None--

Show

All organizations

Time Frame

Date Field

Created Date

Range

Last Month

From

3/1/2012

To

3/31/2012

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

Report Generation Status: Complete

Report Options:

Summarize information by: **1**
Organization Name

Show
All organizations

2 **3**

Run Report Show Details Customize Save Save As Delete Printable

<input type="checkbox"/>	Organization Name: American Red Cross (1 record)
<input type="checkbox"/>	Organization Name: Barney's Bouncers (1 record)
<input type="checkbox"/>	Organization Name: Grant me Access (1 record)
<input type="checkbox"/>	Organization Name: HandsOn Connect Demo (1 record)
<input type="checkbox"/>	Organization Name: Individual (57 records)
<input type="checkbox"/>	Organization Name: Justice League of America (1 record)
<input type="checkbox"/>	Organization Name: Say Si (1 record)
<input type="checkbox"/>	Organization Name: Si Kids (1 record)
<input type="checkbox"/>	Organization Name: Troutco (3 records)
Grand Totals (67 records) 4	

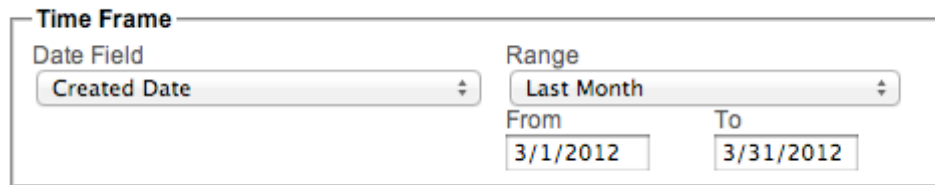
I can summarize (group) the data on any field in the objects that are part of the report.

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



The screenshot shows a 'Time Frame' filter box. It contains a 'Date Field' dropdown menu with 'Created Date' selected. To the right is a 'Range' dropdown menu with 'Last Month' selected. Below these are two input fields: 'From' with the date '3/1/2012' and 'To' with the date '3/31/2012'.

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 screenshot shows the 'Time Frame' filter box with changes. The 'Date Field' dropdown now shows 'Last Modified Date'. The 'Range' dropdown now shows 'Current CY'. The 'From' input field now shows '1/1/2012' and the 'To' input field now shows '12/31/2012'.

The basic filters always available to you are:

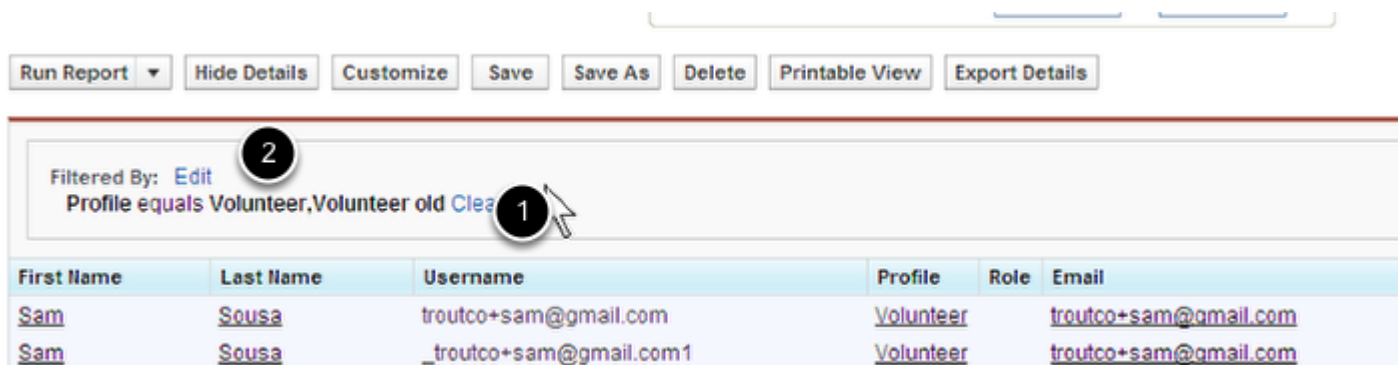
- 1) Do you want to summarize in some way
- 2) Which records do you want to show based on ownership (usually ALL)
- 3) What Time Frame do you want to filter to?

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	Catesman	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	dull	-	memberdull@test.com	-	Individual	-	Pending(Team Registration)
-	hccnt	volunteer	-	hccnt+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

The screenshot shows the Salesforce Reports interface for a report titled "All Users - Demo". The top navigation bar includes links for Home, Organizations, Contacts, Volunteer Events, Volunteer Opportunities, Volunteer Teams, Connections, Documents, and Reports. The report's status is "Report Generation Status: Note: 2,000 of 2,106 records are displayed below. Select Export Details for a complete view of your data."

Report Options:

- Summarize information by:
- View:
- Time Frame:
- Duration:
- Start Date:
- End Date:

Buttons: Run Report, Hide Details, Customize, Save, Save As, Delete, Printable View, Export Details.

The "Run Report" dropdown menu is open, showing the following options:

- Run Report Now
- Schedule Future Runs** (highlighted)

Filtered by: Edit

Profile equals Volunteer Volunteer old Clear

First Name	Last Name	Username	Profile	Role	Email
Sam	Sousa	troutco+sam@gmail.com	Volunteer		troutco+sam@gmail.com
Sam	Sousa	_troutco+sam@gmail.com1	Volunteer		troutco+sam@gmail.com
Melia	Tichenor	melia@handsonportland.org	Volunteer		melia@handsonportland.org
Cerez	Przybylski	cerezp@yahoo.com	Volunteer		cerezp@yahoo.com
Natalie	Clouds	nat.allen@handsonconnect.com	Volunteer		nat.allen@handsonconnect.com

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 yourself 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

The screenshot shows a web application interface with a navigation bar at the top containing links: Home, Organizations, Contacts, Volunteer Events, Volunteer Opportunities, Volunteer Teams, Connections, and a partially visible 'Do' link. Below the navigation bar is a header section with a logo and the text 'All Users - Demo'. The main content area is a 'Schedule Report' dialog box. It has a title bar with 'Options...' and two buttons: 'Save Report Schedule' and 'Cancel'. The dialog contains the following fields and options:

- Running User:** A text input field containing 'Davis Kirby'. To the right of the field is a magnifying glass icon and an information icon 'i'.
- Email Report:** Two radio button options: 'To me' (selected) and 'To me and/or others...'.
- Schedule Report:** A section containing:
 - Frequency:** Three radio button options: 'Daily' (selected), 'Weekly', and 'Monthly'. To the right of these is a sub-menu with two options: 'Every weekday' (selected) and 'Every day'.
 - Start:** A date input field showing '2/11/2011'.

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

Running User:

Email Report: ☐ To me ☒ To me and/or others...

Search: for:

Select From

- User: Allison West
- User: Art Ordoqui
- User: Client Administrator
- User: Colin Tarr
- User: HandsOn Connect Admin 9999
- User: HandsOn Connect Demo (Training) Demo & Training
- User: Jeremy Foreman

Add Remove

Send Email To

- User: Davis Kirby

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

Schedule Report

Frequency: ☐ Daily ☐ Weekly ☒ Monthly

On day 1 of every month ☒ On the 1st Sunday of every month ☐

Start: [2/11/2011]

End: [2/11/2011]

Preferred Start Time: [Find available options...](#)

Exact start time will depend on job queue activity.

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.

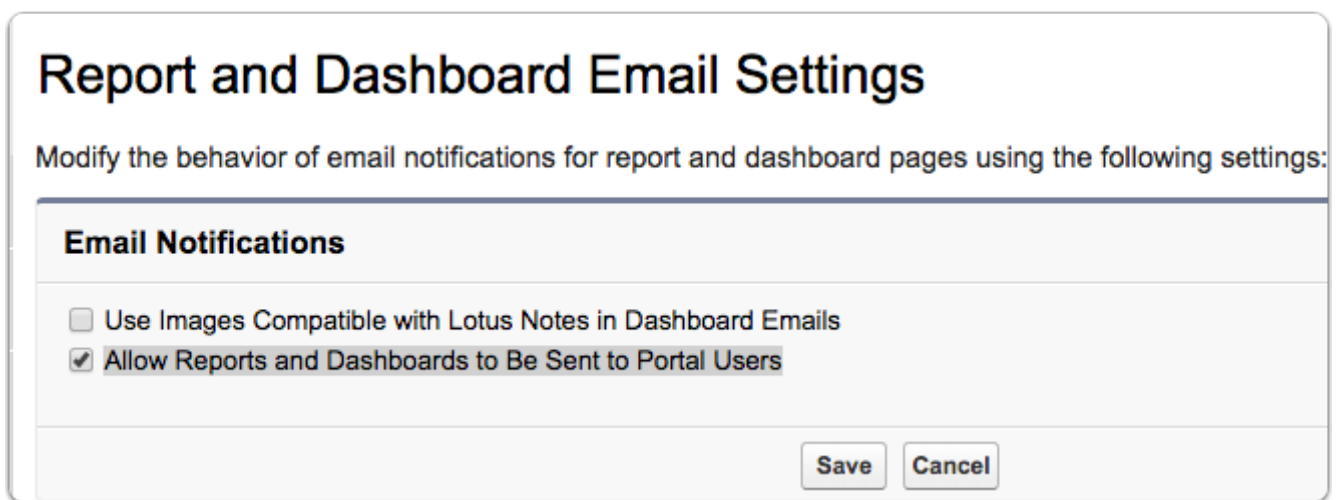
Scheduling Reports to be sent to customer portal users

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"



Report and Dashboard Email Settings

Modify the behavior of email notifications for report and dashboard pages using the following settings:

Email Notifications

- ☐ Use Images Compatible with Lotus Notes in Dashboard Emails
- ☒ Allow Reports and Dashboards to Be Sent to Portal Users

Save Cancel

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")

Running User

Email Report
☐ To me
☒ To me and/or others...

Search
Public Groups
for:
Find

Select From
All Internal Users

Add
Remove

Send Email To
Group: Larry report group
User: Larry Deckel

Edit Schedules

All Folders

Find reports and dashboards...		
Action	Name	Folder
<input type="checkbox"/>	<div> <div>Calendar icon</div> Contacts Created Last Month Reports on the contacts that were created during the previous month </div>	<div> <div>Schedule icon</div> <div>✓</div> HOC Monthly Reports </div>

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



All Users - Demo

Schedule Report

Save Report ScheduleCancelUnschedule Report

Running User

Davis Kirby



Email Report

☒ To me ☐ To me and/or others...

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

All Folders

Find reports and dashboards...

Recently Viewed All Types

Action	Name	Folder	Last Modified By	Last Modified Date	Created By
▼	Contacts Created Last Month Reports on the contacts that were created during the previous month	HOC Monthly Reports	Deckel, Larry	4/11/2012 8:01 PM	Admin 9999, HandsOn Connect
▼	Contacts Shows hours served, contact information and other demographic information for all contacts in the system grouped by the Account Name.	HOC Basic Reports	Deckel, Larry	4/11/2012 7:00 PM	Deckel, Larry
▼	Organizations Report				

In the Reports Tab, you can find the report by changing the View Folders Options, Searching in the folders below, using a keyword search, or if it is 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

Report Generation Status: Note: 2,000 of 51,536 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by: --None-- Show: All organizations

Time Frame

Date Field: Created Date Range: Current and Previous 2 FY

From: 1/1/2010 To: 12/31/2012

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Salutation	First Name	Last Name	Title	Email	Primary Phone	Organization Name	Profile Name	Registration Status
-	Malinda	Hersh	-	hersh.malinda@gmail.com	615-298-1108	Individual	-	Registered
-	member	duff	-	memberduff@test.com	-	Individual	-	Pending (Team Registration)

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

Report Options:

Summarize information by: Show

Time Frame	
Date Field	Range
<input type="text" value="Created Date"/>	<input type="text" value="Current and Previous 2 FY"/>
From	To
<input type="text" value="1/1/2010"/>	<input type="text" value="12/31/2012"/>

<input type="checkbox"/>	Organization Name: Abby's Angels (1 record)
<input type="checkbox"/>	Organization Name: Action Organization (1 record)
<input type="checkbox"/>	Organization Name: Allison's Waterloo Nonprofit (1 record)
<input type="checkbox"/>	Organization Name: American Airlines (6 records)
<input type="checkbox"/>	Organization Name: American Cancer Society (1 record)
<input type="checkbox"/>	Organization Name: American Red Cross (1 record)

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

Notice however, that 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

Home Organizations Contacts Volunteer Events Volunteer Opportunities Volunteer Teams Co

All Users - Demo

Export Report

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▼

Export File Format: Comma Delimited .csv ▼

Comma Delimited .csv
Comma Delimited .csv
Excel Format .xls

Export Done

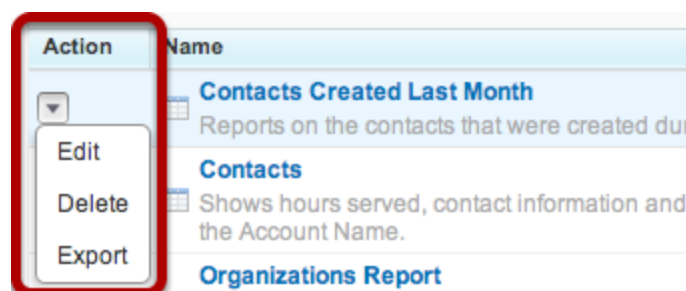
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Always choose the ISO-8859-1 (General US & Western Europe...etc) as the Export File Encoding. This is the most commonly used coding. If, however, your analytic software needs another coding, this is where you choose that option.

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

The screenshot shows a web application interface for a report titled "Contacts Created Last Month". The report generation status is "Complete". Under "Report Options", there are dropdowns for "Summarize information by:" (set to "--None--") and "Show" (set to "All organizations"). A "Time Frame" section shows "Date Field" as "Created Date" and "Range" as "Last Month", with "From" and "To" dates set to "3/1/2012" and "3/31/2012" respectively. Below these options is a row of buttons: "Run Report", "Hide Details", "Customize" (highlighted with a red box), "Save", "Save As", "Delete", "Printable View", and "Export Details". At the bottom is a table with columns: "Salutation", "First Name", "Last Name", "Title", "Email", "Primary Phone", "Organization Name", "Profile Name", and "Registration Status". The table contains 10 rows of data, including contacts like Newt Trout, Omar Trout, Suzie Trout, Barney Bounce, Viki Volunteer, Test NPSP, AJ Ordogui, Daniel Payton, Calvin Carol, and t Payton.

Salutation	First Name	Last Name	Title	Email	Primary Phone	Organization Name	Profile Name	Registration Status
-	Newt	Trout	-	troutco+newt@gmail.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	-	pyrwork+vvol@gmail.com	3216549870	Individual	-	Registered
-	Test	NPSP	-	pyrwork+npstdemo@gmail.com	9876543210	Individual	-	Registered
-	AJ	Ordogui	-	artohoc+ajvolunteer24@gmail.com	(210) 123-4567	Individual	-	Registered
-	Daniel	Payton	-	-	210-123-4567	Individual	-	Pending(Team Registration)
-	Calvin	Carol	-	-	210-123-4567	Individual	-	Pending(Team Registration)
-	t	Payton	Publisher	artohoc+tpaytonpub@gmail.com	456-789-6325	Si Kids	Partner Staff	Registered

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

Report Type: Contacts & Organizations
Contacts Created Last Month

Guided Tour | Video Tutorial | Help for this Page

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Quick Picker

Drag and drop to add fields to the report.

Filters Add

Show All organizations

Date Field Created Date Range Last Month From 3/1/2012 To 3/31/2012

To add filters, click Add.

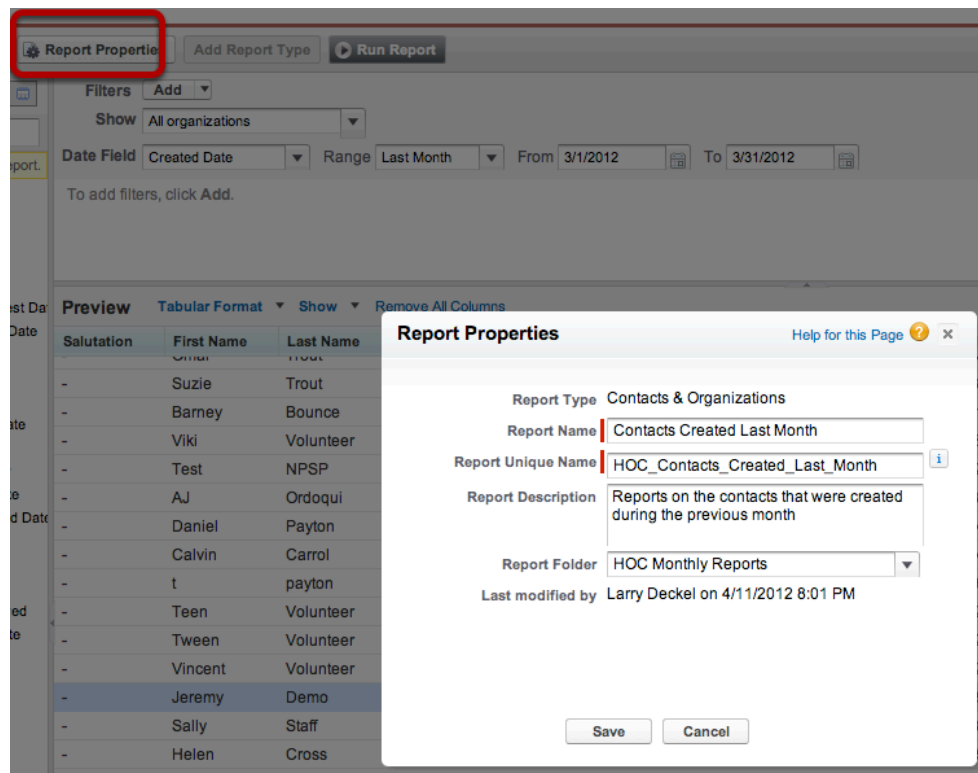
Preview Tabular Format Show Remove All Columns

Salutation	First Name	Last Name	Title	Email	Primary Phone	Organization Name	Profile Name	Registration Status
-	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	-	pvrwork+vvol@gmail.com	3216549870	Individual	-	Registered
-	Test	NPSP	-	pvrwork+npsdemo@gmail.com	9876543210	Individual	-	Registered
-	AJ	Ordoqui	-	artohoc+ajvolunteer24@gmail.com	(210) 123-4567	Individual	-	Registered
-	Daniel	Payton	-	-	210-123-4567	Individual	-	Pending(Team R
-	Calvin	Carrol	-	-	210-123-4567	Individual	-	Pending(Team R
-	t	payton	Publisher	artohoc+tpaytonpub@gmail.com	456-789-6325	Si Kids	Partner Staff	Registered
-	Teen	Volunteer	-	-	9876543210	Individual	-	Pending(Team R
-	Tween	Volunteer	-	-	9876543210	Individual	-	Pending(Team R
-	Vincent	Volunteer	-	-	9876543210	Individual	-	Pending(Team R
-	Jeremy	Demo	-	jeremy.demo@handsonsega.org	912-225-9789	Individual	-	Registered
-	Sally	Staff	Program Mgr	troutco+sally@gmail.com	(209) 878-7688 x123	HandsOn Connect Demo	Partner Staff	Registered
-	Helen	Cross	Director of Disaster Services	artohoc+helencross@gmail.com	503-528-5790	American Red Cross	Partner Staff	Registered
-	Jose	Madrid	-	artohoc+josemadrid@madrid.es	34 712 123 123	Individual	-	Registered
-	Art	madrid	-	artohoc+madrid@gmail.com	1234567890123456	Individual	-	Registered
-	Jose	Madrid	ED	artohoc+madridorg@gmail.com	2101234567	Say Si	-	Not Registered
-	Evan	Finn	-	finn.diedra+test10@gmail.com	571-238-6230	Individual	-	Registered
-

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.

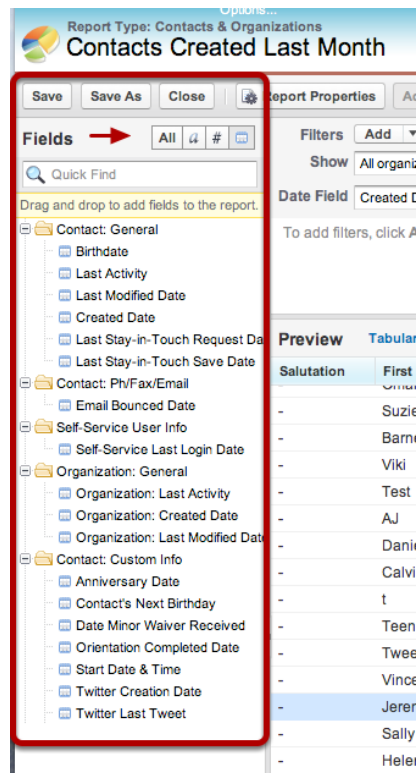
Save As: Creates a new report with the options and settings you have customized. You will be prompted as you would with create new report window. Name of file, unique name, and folder you want it placed in...

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.

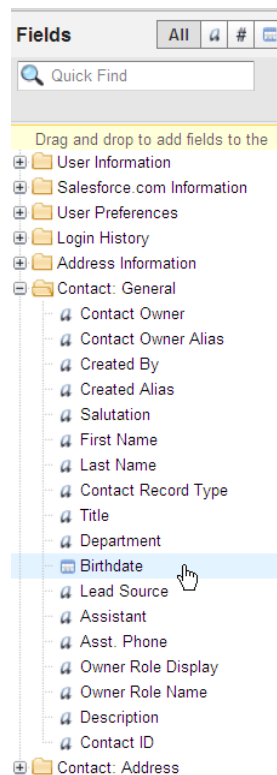
Field Menu



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

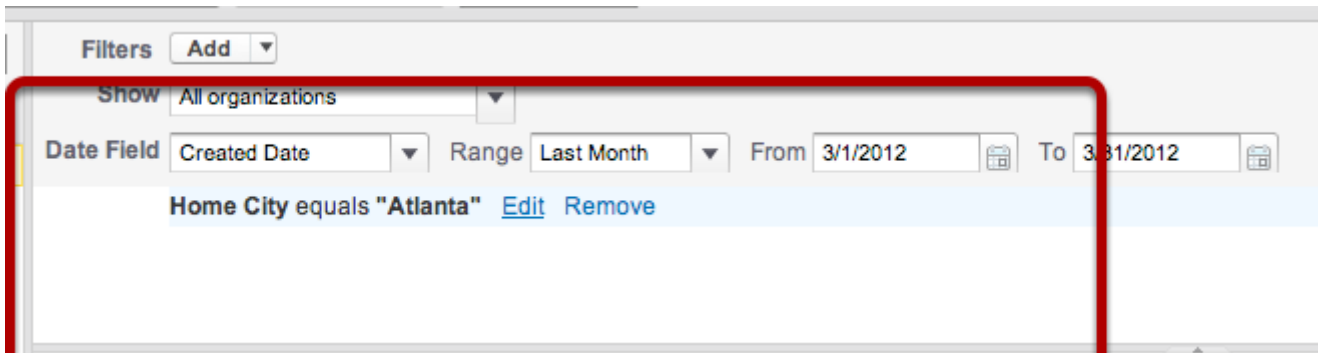


The Field Menu can tell you a lot of information. Let's look at an example. The Folder title tells you the Object where the field is located. The icon next to it tells you what type of field it is, and then you have the name of the field itself. Get to know what fields are located in what objects. It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

First Name	Last Name	Email	Phone	Profile	Role	Email
Dan	Alberti	_dalberti@gmail.com	-	Volunteer Old	-	dalberti@gmail.com
Felula	Borne	_volunteerforlunchicago@gmail.com	-	Volunteer Old	-	volunteerforlunchicago@gmail.com
Bambi	Cares	_chicagocaresvolunteer@gmail.com	-	Volunteer Old	-	chicagocaresvolunteer@gmail.com
Marinda	Hanover	_marinda_h@hotmail.com	-	Volunteer Old	-	marinda_h@hotmail.com
Bob	McIntyre	_volunteerforlunchicago+bobm@gmail.com	-	Volunteer Old	-	volunteerforlunchicago+bobm@gmail.com
Marcus	Oldenwood	_chicagocaresvolunteer+businessman@gmail.com	-	Volunteer Old	-	chicagocaresvolunteer+businessman@gmail.com
Valerie	Volunteer	_troutco+training_volunteer@gmail.com	-	Volunteer Old	-	troutco+training_volunteer@gmail.com
Art	Volunteer2	_artohoc+trainingvolunteer2@gmail.com1	-	Volunteer Old	-	artohoc+trainingvolunteer2@gmail.com
Grand Totals (8 records)						

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

The screenshot shows the 'All Users - Demo' report interface. At the top, there's a header with the report title. Below it, a 'Report Generation Status' message indicates that 2,000 of 2,106 records are displayed. The 'Report Options' section includes a 'Summarize information by:' dropdown set to '-None--', a 'View' dropdown set to 'All Users', and a 'Time Frame' section with 'Columns' set to 'Created Date' and 'Duration' set to 'Custom' with 'Start Date' and 'End Date' input fields. Below these options are buttons for 'Run Report', 'Hide Details', 'Customize' (highlighted with a mouse cursor), 'Save', 'Save As', 'Delete', 'Printable View', and 'Export Details'. A 'Filtered By' section shows 'Profile equals Volunteer, Volunteer old' with an 'Edit' link and a 'Clear' button. The main data table has columns for Username, Last Name, First Name, Profile, and Email, displaying five rows of user data.

Username	Last Name	First Name	Profile	Email
_artohoc+hankhelper@gmail.com	Helper	Hank	Volunteer	artohoc+hankhelper@gmail.com
_artohoc+laurealeader@gmail.com	Leader	Laura	Volunteer	artohoc+laurealeader@gmail.com
_artohoc+test-lenawee@gmail.com	Lenawee	Art	Volunteer	artohoc+test-lenawee@gmail.com
_artohoc+trainingvolunteer2@gmail.com1	Volunteer2	Art	Volunteer Old	artohoc+trainingvolunteer2@gmail.com
_artohoc+user10624@gmail.com	Volunteer	Artie	Volunteer	artohoc+user10624@gmail.com

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

Preview Tabular Format Show Remove All Columns

Username +	Last Name	First Name	Profile	Email
_artohoc+trainingvolunteer2@gmail.com1	Volunteer2	Art	Volunteer Old	artohoc+trainingvolunteer2@gmail.com
_chicagocaresvolunteer@gmail.com	Cares	Bambi	Volunteer Old	chicagocaresvolunteer@gmail.com
_chicagocaresvolunteer+businessman@gmail.com	Oldenwood	Marcus	Volunteer Old	chicagocaresvolunteer+businessman@gmail.com
_dalberti@gmail.com	Alberti	Dan	Volunteer Old	dalberti@gmail.com
_marinda_h@hotmail.com	Hanover	Marinda	Volunteer Old	marinda_h@hotmail.com
_troutco+training_volunteer@gmail.com	Volunteer	Valerie	Volunteer Old	troutco+training_volunteer@gmail.com
_volunteerforfunchicago@gmail.com	Borne	Felula	Volunteer Old	volunteerforfunchicago@gmail.com
_volunteerforfunchicago+bobm@gmail.com	Mcintyre	Bob	Volunteer Old	volunteerforfunchicago+bobm@gmail.com
Grand Totals (8 records)				

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

The screenshot shows the 'Report Properties' window in HandsOnConnect. The 'Fields' panel on the left lists various data sources, including 'User Information', 'Salesforce.com Information', 'User Preferences', 'Login History', 'Address Information', 'Contact: Profile', 'Contact: Address', 'Contact: Ph/Fax/Email', 'Organization: General', 'Organization: Address', 'Contact: Custom Info', and 'Organization: Custom Info'. The 'Profile' field is highlighted. The 'Filters' panel shows 'Time Frame' set to 'Created Date', 'Duration' set to 'All Time', and 'View' set to 'All Users'. The 'Preview' section displays a table with 8 records, showing columns for 'Last Name', 'First Name', 'Username +', 'Profile', and 'Email'. The 'Profile' column is highlighted, indicating it is the field being removed.

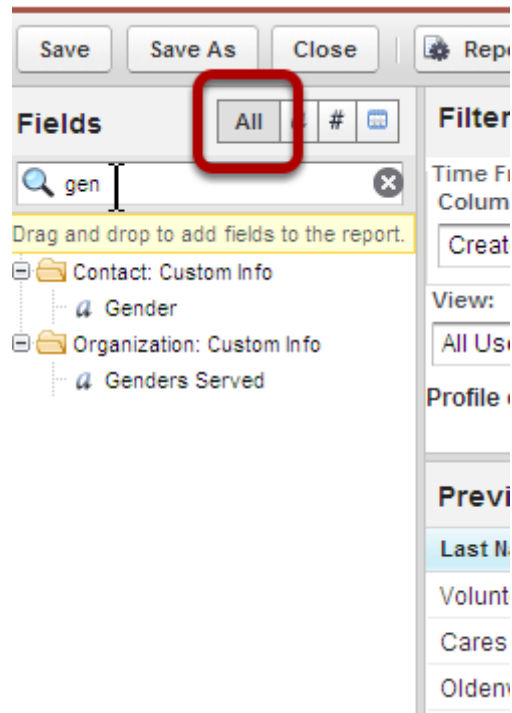
Last Name	First Name	Username +	Profile	Email
Volunteer2	Art	_artohoc+trainingvolunteer2@gmail.com1	Volunteer Old	artohoc+trainingvolunteer2@
Cares	Bambi	_chicagocaresvolunteer@gmail.com	Volunteer Old	chicagocaresvolunteer@gma
Oldenwood	Marcus	_chicagocaresvolunteer+businessman@gmail.com	Volunteer Old	chicagocaresvolunteer+busir
Alberti	Dan	_dalberti@gmail.com	Volunteer Old	dalberti@gmail.com
Hanover	Marinda	_marinda_h@hotmail.com	Volunteer Old	marinda_h@hotmail.com
Volunteer	Valerie	_troutco+training_volunteer@gmail.com	Volunteer Old	troutco+training_volunteer@c
Borne	Felula	_volunteerforfunchicago@gmail.com	Volunteer Old	volunteerforfunchicago@gma
McIntyre	Bob	_volunteerforfunchicago+bobm@gmail.com	Volunteer Old	volunteerforfunchicago+bobm

Grand Totals (8 records)

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.

Fields

All
#

Drag and drop to add fields to the report.

Contact: Custom Info

Gender

Organization: Custom Info

Genders Served

Filters
Edit Custom Filters

Time Frame

Columns:
Created Date

Duration:
All Time

Start Date:

End Date:

View:
All Users

Profile equals Volunteer,Volunteer old
Remove

Preview
Tabular Format
Show
Remove All Columns

Last Name	First Name	Username	Profile
Volunteer2	Art	artohoc+trainingvolunteer2@gmail.com1	Volunteer Old
Cares	Bambi	<input checked="" type="checkbox"/> Gender:svolunteer@gmail.com	Volunteer Old
Oldenwood	Marcus	_chicagocaresvolunteer+businessman@gmail.com	Volunteer Old
Alberti	Dan	_dalberti@gmail.com	Volunteer Old
Hanover	Marinda	_marinda_h@hotmail.com	Volunteer Old
Volunteer	Valerie	_troutco+training_volunteer@gmail.com	Volunteer Old
Borne	Felula	_volunteerforfunchicago@gmail.com	Volunteer Old
McIntyre	Bob	_volunteerforfunchicago+bobm@gmail.com	Volunteer Old
Grand Totals (8 records)			

This preview shows a limited number of records. Run the report to see all results.

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

Save Save As Close Report Properties **Run Report**

Fields All #

Drag and drop to add fields to the report.

- Contact: Custom Info
- Gender
- Organization: Custom Info
- Genders Served

Filters Edit Custom Filters

Time Frame
Columns: Created Date Duration: All Time Start Date: End Date:

View: All Users

Profile equals Volunteer, Volunteer old [Remove](#)

Preview Tabular Format Show Remove All Columns

Last Name	First Name	Gender	Username ↑
Volunteer2	Art	-	_artohoc+trainingvolunteer2@gmail.com1
Cares	Bambi	-	_chicagocaresvolunteer@gmail.com
Oldenwood	Marcus	-	_chicagocaresvolunteer+businessman@gmail.com
Alberti	Dan	-	_dalberti@gmail.com
Hanover	Marinda	-	_marinda_h@hotmail.com
Volunteer	Valerie	-	_troutco+training_volunteer@gmail.com
Borne	Felula	-	_volunteerforfunchicago@gmail.com
McIntyre	Bob	-	_volunteerforfunchicago+bobm@gmail.com

Grand Totals (8 records)

This preview shows a limited number of records. Run the report to see all results.

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

All Users

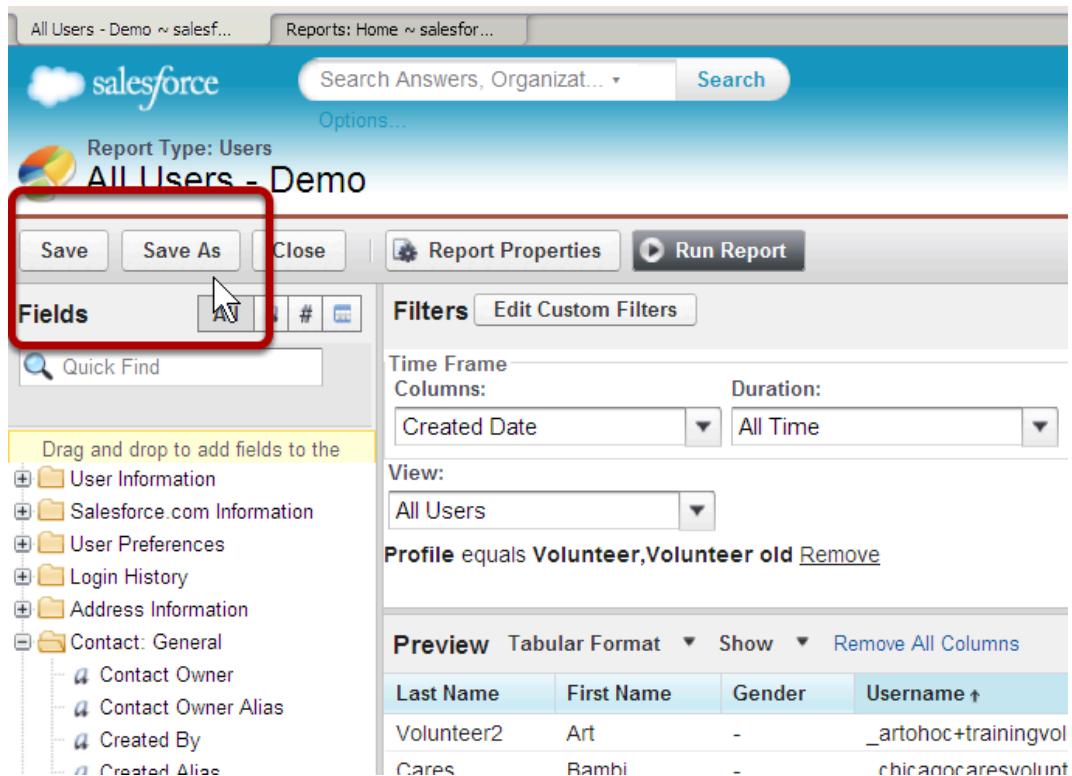
Profile equals Volunteer, Volunteer old [Remove](#)

Preview Tabular Format Show Remove All Columns

Last Name	First Name	Gender	Username ↑
Volunteer2	Art	-	_artohoc+trainingvolunteer2@gmail.com1
Cares	Bambi	-	_chicagocaresvolunteer@gmail.com
Oldenwood	Marcus	-	_chicagocaresvolunteer+businessman@gmail.co
Alberti	Dan	-	_dalberti@gmail.com
Hanover	Marinda	-	_marinda_h@hotmail.com

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.

The screenshot shows the Salesforce Reports interface for a report titled "All Users - Demo". The navigation bar at the top includes links for Home, Organizations, Contacts, Volunteer Events, Volunteer Opportunities, Volunteer Teams, and Connections. Below the navigation bar, the report title "All Users - Demo" is displayed. A message indicates the report generation status: "Report Generation Status: Note: 2,000 of 2,106 records are displayed below. Select Export Details for a complete view of your data." Under the "Report Options" section, there are several dropdown menus: "Summarize information by:" (set to "--None--"), "View" (set to "All Users"), "Time Frame" (set to "Created Date"), and "Duration" (set to "Custom"). Below these options, there are several buttons: "Run Report", "Hide Details", "Customize" (highlighted with a red box), "Save", "Save As", "Delete", "Printable View", and "Export Details".

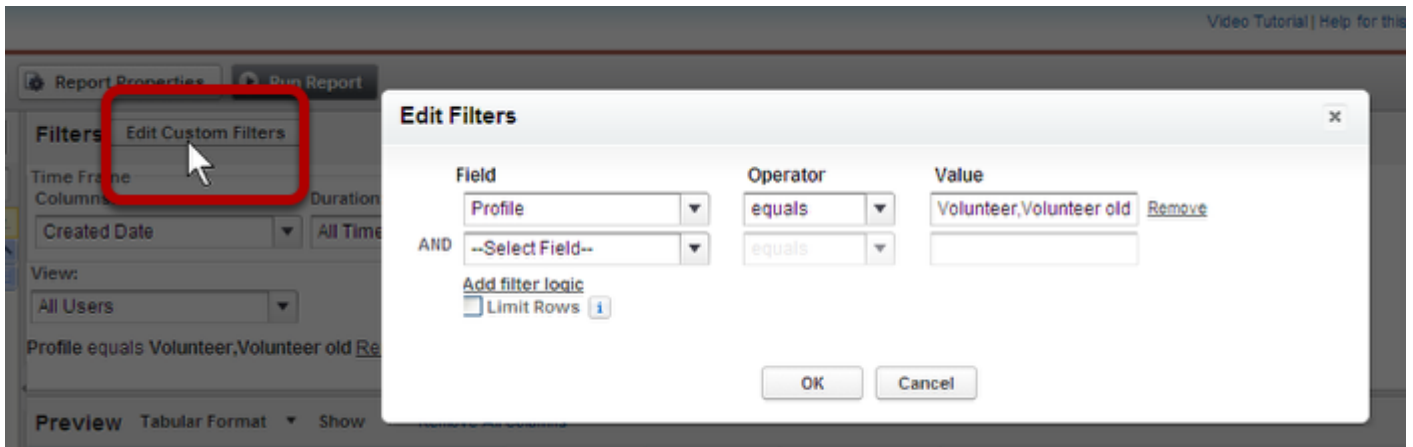
Navigate to the reports Object/Tab and use the Search button to find the report you would like. If you know where the report is you can look in its folder, or if you used it recently, you can use the Recent Reports tab. Click on the report to take you to the Run Report Window. In this case we are going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

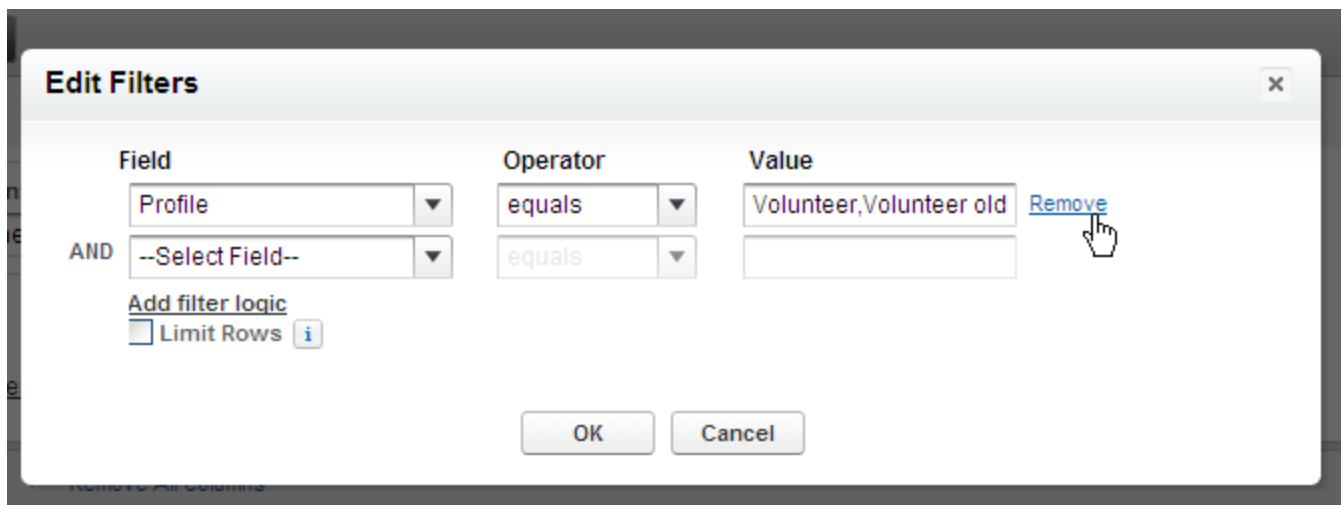
Find out more at : Salesforce [Help and Training: Filters](#)

Open the Filters Menu



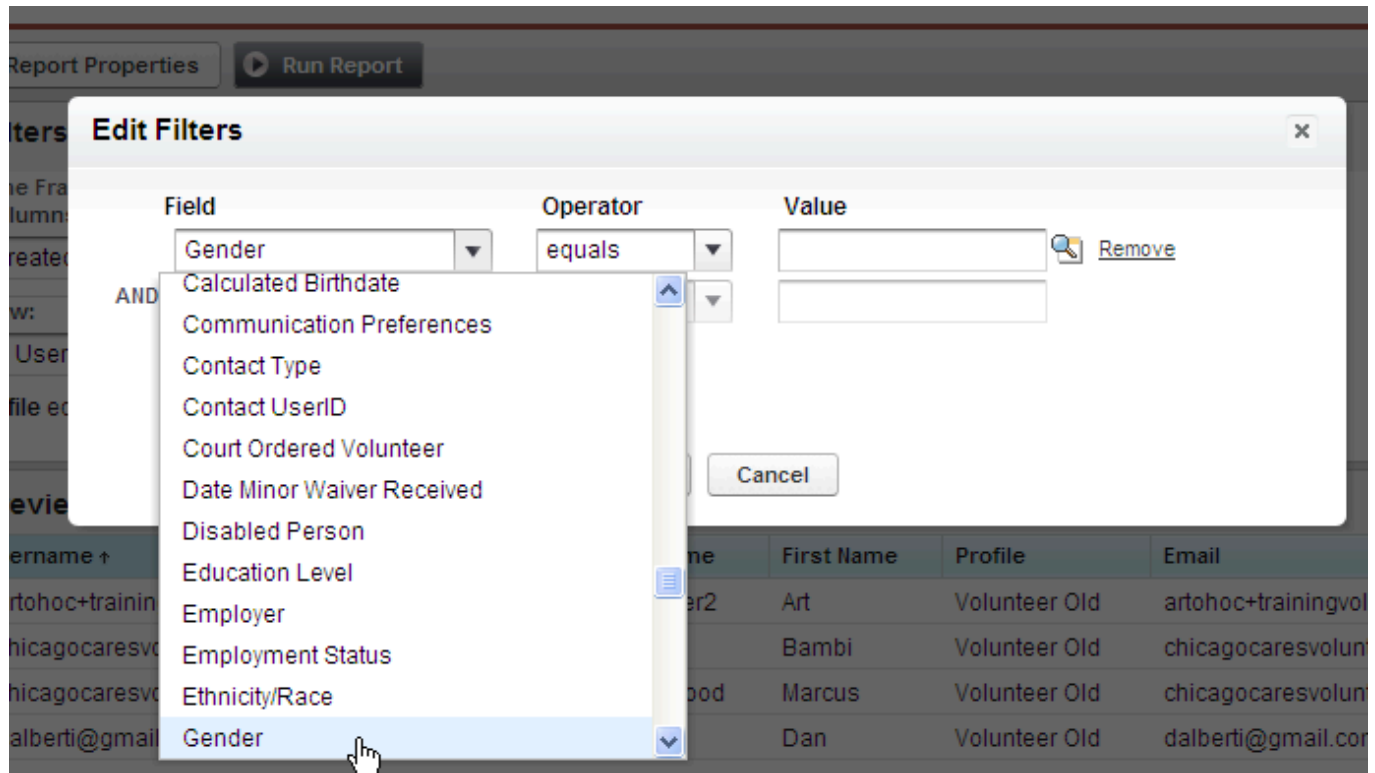
In the Filters Menu of the Customize Reports window, click on the Edit Custom Filters. This will open a new window.

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

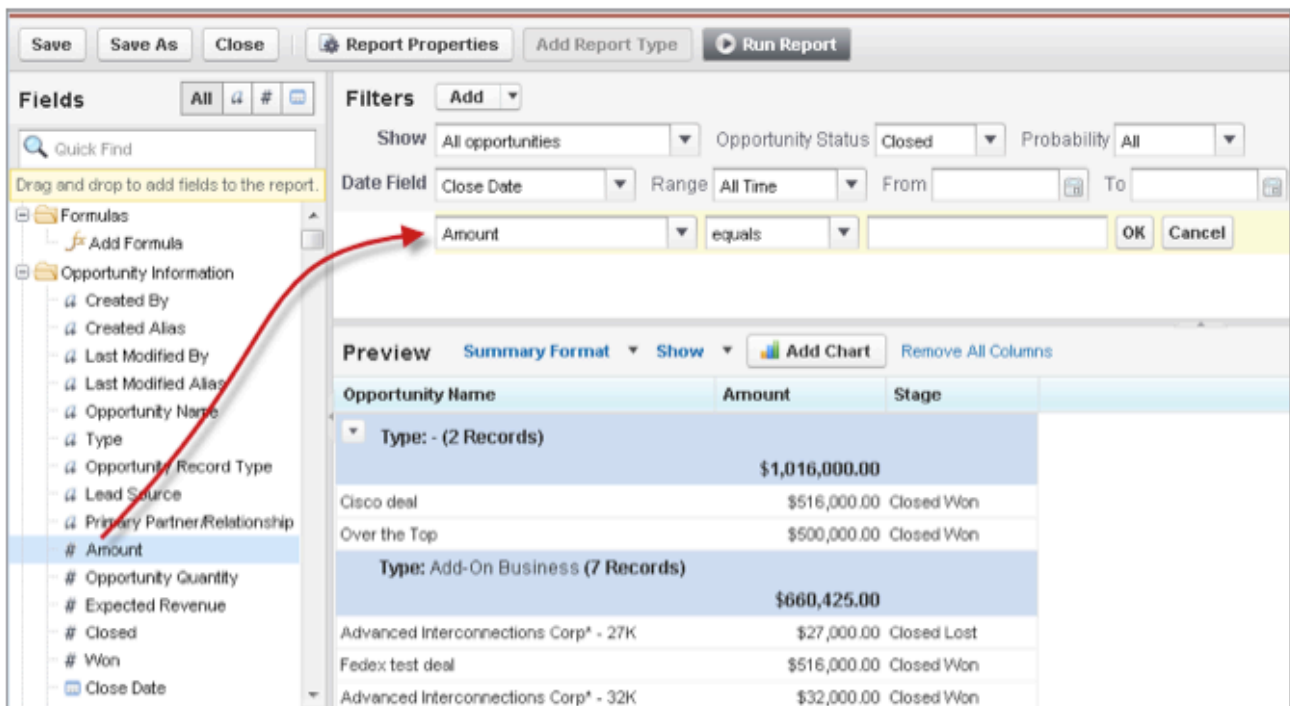
Add your filter Field



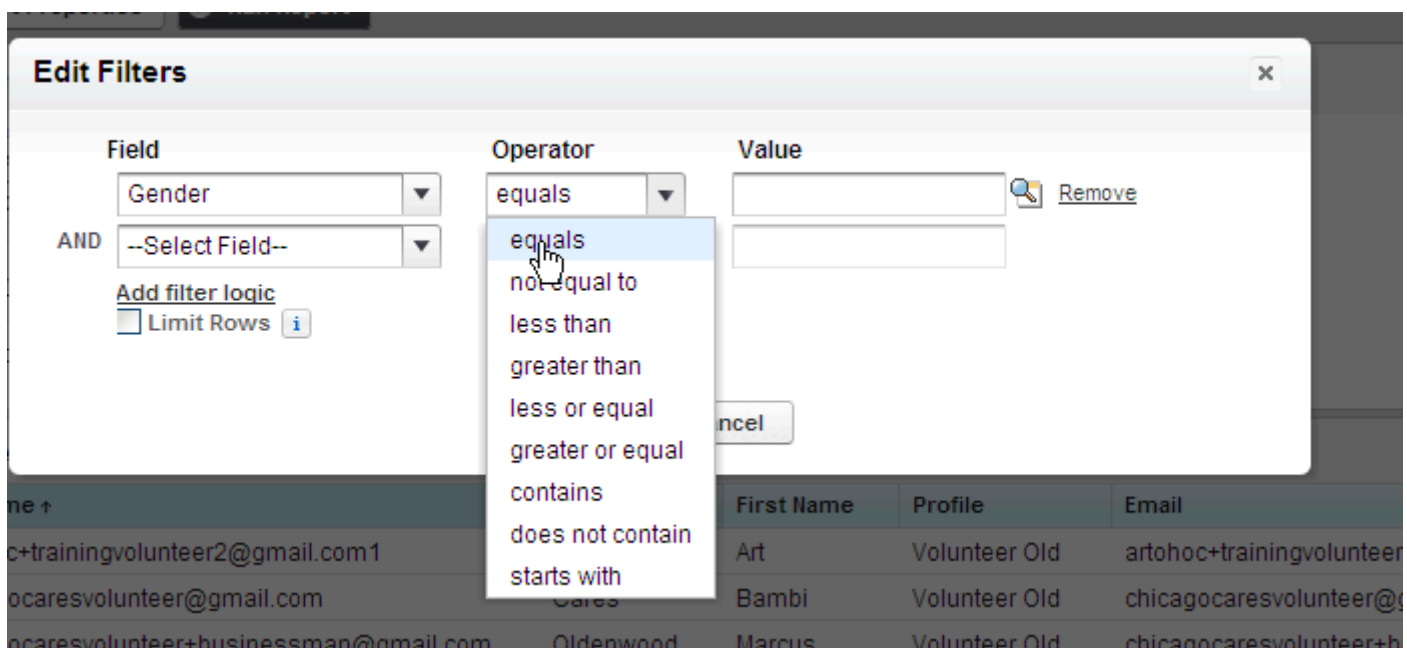
SO, for this report, I want men who are over the age of 55. That is going to be two filters. One on gender, and the other on age or birthdate. Let's add the Gender Filter.

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!

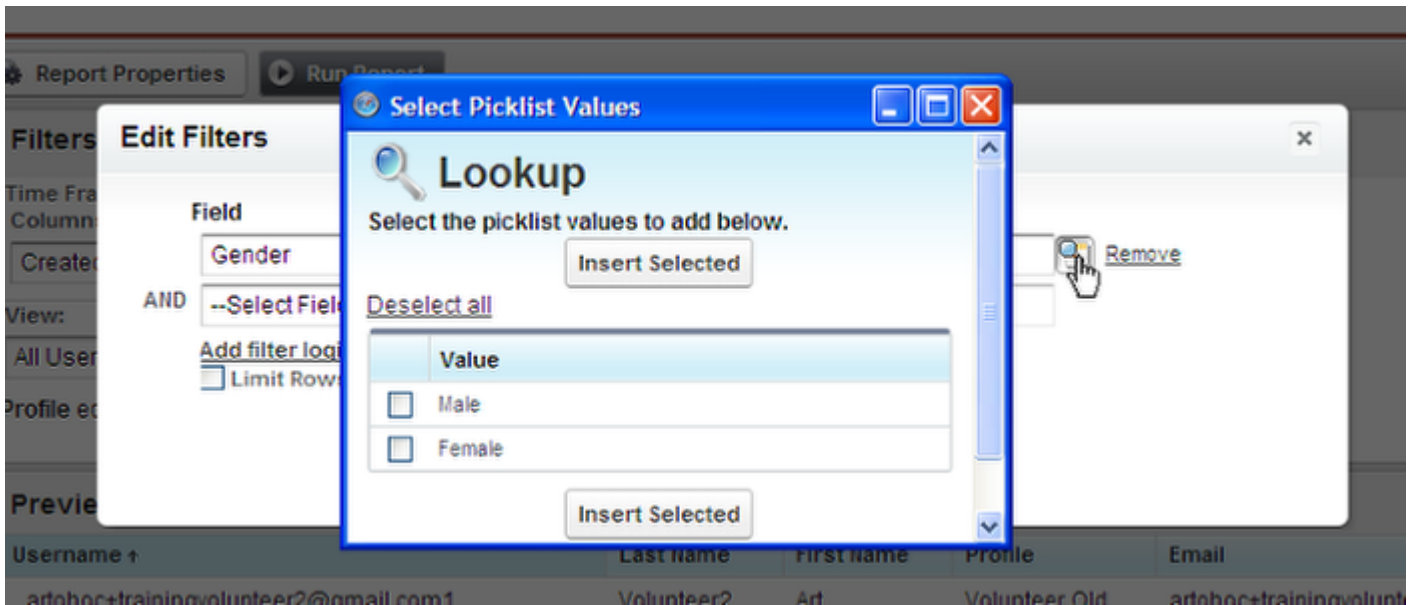


Tell it what you want that filter to do



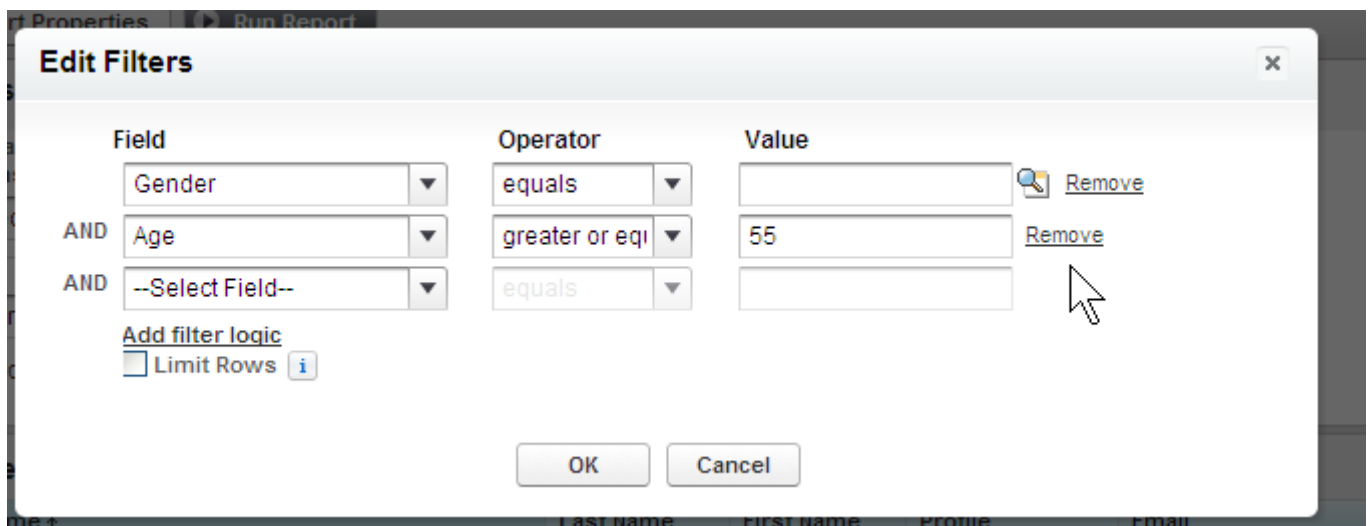
In this case, we only want to bring back records where the Gender is (or equals...) Male. You can see the choices we have here... (We will use greater than or equal in the next filter)

Choose the Value of the filter



If the Field you are choosing to Filter by is a Picklist or Multipick 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

Edit Filters

Field	Operator	Value
Gender	equals	
AND Age	greater or equal	55
AND --Select Field--	equals	

Add filter logic

☒ Limit Rows *i*

Rows to Display: Custom 3 (99 Max)

Sort By: Age

Sort Order: ☐ Ascending ☒ Descending

OK **Cancel**

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

Report Type: Users
All Users - Demo

Save Save As Close Report Properties Dashboard Settings **Run Report**

Fields All #

Quick Find

Drag and drop to add fields to the report.

User Information

- First Name
- Last Name
- Title
- Company Name
- Division
- Department
- Employee Number
- Phone
- Mobile
- Fax
- Email
- Delegated Approver
- Full Name
- User ID

Filters Edit Custom Filters

Time Frame Columns: Duration: Start Date: End Date:

Created Date All Time

View:

Limited to 3 rows, sorted descending by Age Remove
Gender equals "" Remove
Age greater or equal 55 Remove

Report Format: Tabular Format Show Columns

Username	Last Name	First Name	Profile	Age	Email
troutco=sid@gmail.com	Citizen	Sid	Volunteer Leader	60	troutco=sid@gmail.com
troutco=training_partner@gmail.com	Trout	Art	Partner Staff	58	troutco=training2_partner@gmail.com
troutco=petepartner@gmail.com	Partner	Pete	Partner Staff	58	troutco=petepartner@gmail.com

Grand Totals (3 records)

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

All Users - Demo

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- View: All Users

Time Frame

Columns: Created Date Duration: Custom

Start Date: End Date:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Filtered By: [Edit](#) [Clear](#)

Gender equals [Clear](#)

AND Age greater or equal 55 [Clear](#)

Limited Display: [Edit](#)

Limited to 3 rows, sorted Descending by Age [Clear](#)

Username	Last Name	First Name	Profile	Age	Email
chuck.norris@handsonconnect.org	Norris	Chuck	Volunteer	70	chuck.norris@handsonconnect.org
knight4220@comcast.net	Knight	Nancy	Volunteer	66	knight4220@comcast.net
tinacorkum+nicole@gmail.com	Kreps	Nicole	Volunteer	65	tinacorkum+nicole@gmail.com

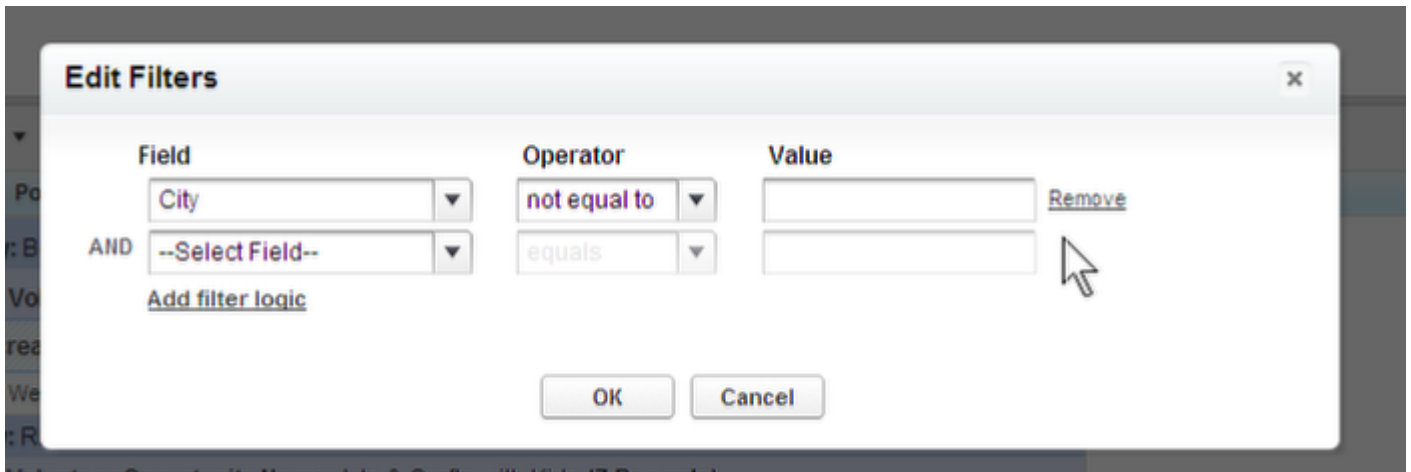
Grand Totals (3 records)

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,

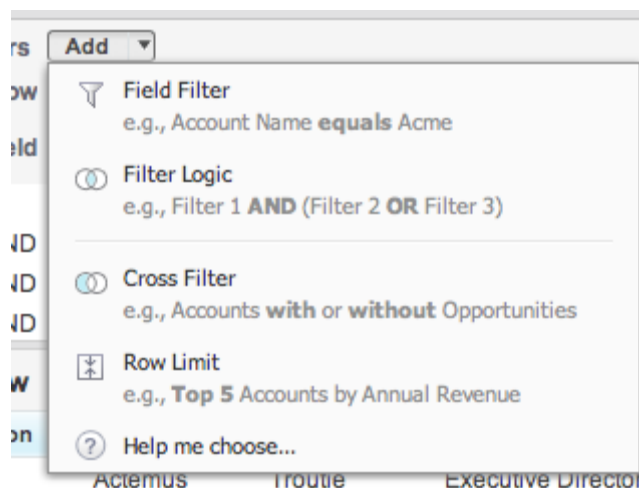
Use save to overwrite the existing file, or Save As to create a new report with the options, layout, and filters you have created.

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.

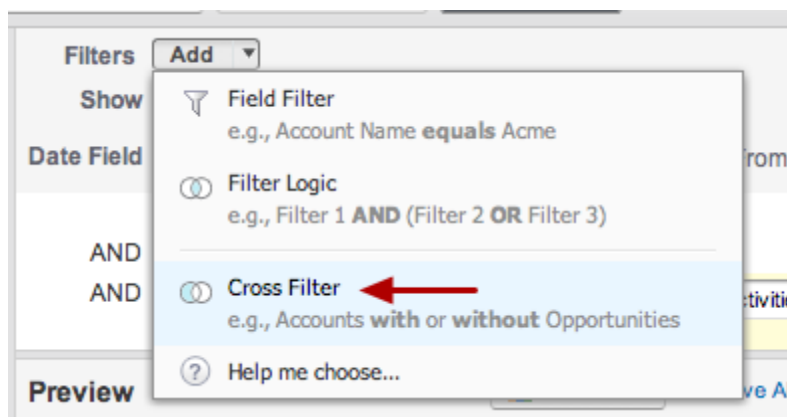
See the next post to learn about [cross-filters](#)

(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.

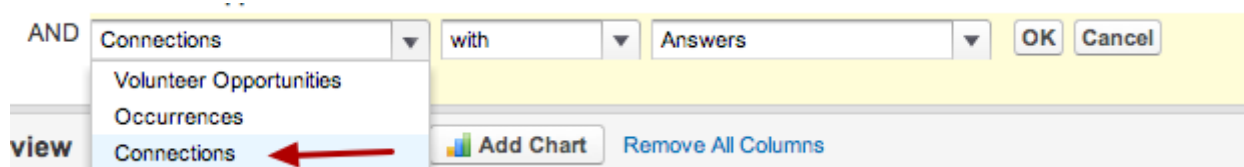
Add subfilters to further filter by fields on the child object. For example, if you have a cross filter of Accounts with Opportunities, click Add Opportunity Filter and create the Opportunity Name equals ACME subfilter to see just those opportunities. You can create up to five subfilters for each cross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

AND with

[Add Answers Filter](#)

5. Optionally add subfilters:

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

equals

- Answer ID
- Owner
- Answer ID
- Created Date
- Created By
- Last Modified Date
- Last Modified By
- Answer
- Connection
- Import ID
- Question
- Number of Answers

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.

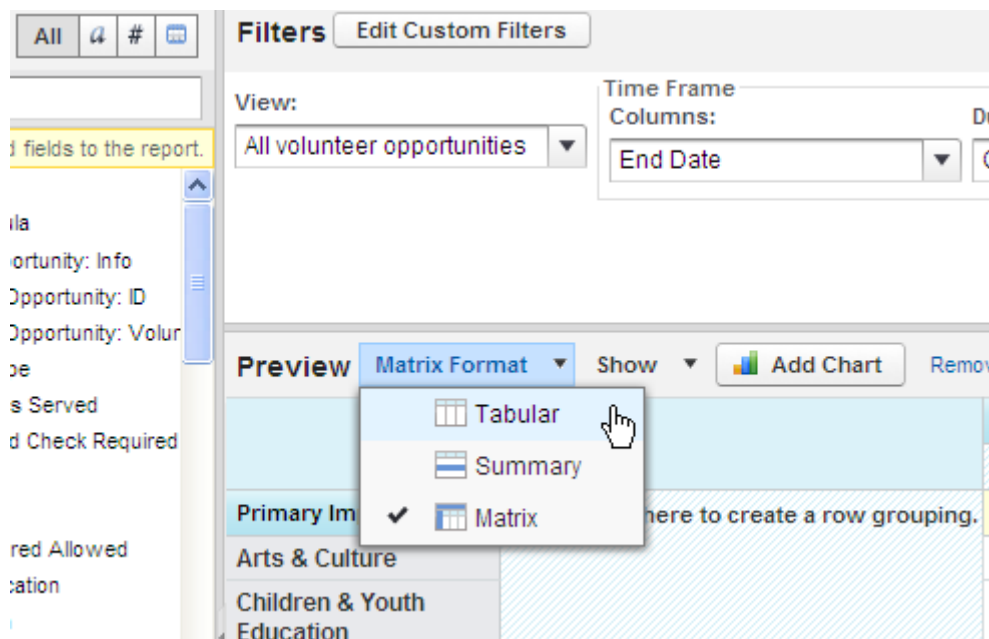
6. Click OK.

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

The screenshot shows the HandsOnConnect interface. On the left is a 'Fields' list with categories like 'Volunteer Opportunity: Info', 'Organization Served: General', 'Organization Served: Address', 'Organization Served: Ph/Fax/URL', and 'Organization Served: Custom Info'. At the top right is a 'Filters' section with 'View: All volunteer opportunities', 'Time Frame: End Date', and 'Duration: Current FQ'. The 'Preview' section at the bottom right shows a table with columns 'Volunteer Opportunity Name' and 'Organization Served'. The table lists various volunteer opportunities, including 'Abernethy', 'American S', 'Answer questions you did not even know you had!', 'Be a regular volunteer with the Habitat ReStore – Vancouver!', 'Be the Portland Affiliate Coordinator for the Pancreatic Cancer Action Network', 'Be the sprinkles on the cupcake', and 'Big for a Day!'. A dropdown menu is open over the 'Preview' section, showing 'Tabular Format' selected, with options for 'Summary' and 'Matrix'.

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

The screenshot shows the HandsOnConnect interface. On the left is a 'Fields' list with categories like 'Signature Initiatives', 'ting Organization', 'ting Syndication Logo UR', 'ict Area (Local)', 'irt ID', 'ation Code', 'aged By', 'aging Organization', 'aging Organization Name', 'imum Age', 'imum Attendance', 'num Age (w/ adult)', 'num Age (w/o adult)', 'num Attendance', 'ir Waiver on File Require', 'onal Impact Goals', 'onal Service Events', 'ortunity Approval Manag', 'ortunity Approval Manag', 'ortunity Characteristics'. At the top right is a 'Preview' section with 'Summary Format' selected, 'Show' button, 'Add Chart' button, and 'Remove All Columns' button. The 'Summary Format' section shows a table with columns 'Volunteer Opportunity: Volunteer Opportunity Name', 'Organization Served: Service Hours Given', 'Total Connections', and 'Minimum'. The table lists various volunteer opportunities grouped by 'Managed By: Affiliate (4 Records)' and 'Managed By: Partner (16 Records)'. The table lists various volunteer opportunities like 'Young Professionals Service Mixer', 'Valentine's Day Party', 'Birthday treat again1', 'birthday blast again', 'Time After Time', 'Help in Lenawee', and 'Clean our Warehouse'.

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

Summarize information by:

Volunteer Opportunity: City

View

All occurrences

Columns

End Date & Time

Duration

Custom

Start Date
End Date

Run Report
Hide Details
Customize
Save As
Printable View
Export Details

Filtered By: [Edit](#)
City equals [Clear](#)

Occurrence: Occurrence ID	Posting Status	Registration Start Date
<input type="checkbox"/> Volunteer Opportunity: City: - (2 records)		
Volunteer Opportunity: Volunteer Opportunity Name: Short term assistance for children with Costello's Syndrome (1 record)		
QC-012007	Your posting expired and was moved on 1/24/2011.	4/11/2007
Volunteer Opportunity: Volunteer Opportunity Name: Volunteer Services Coordinator with DonorsResource.org (1 record)		
QC-021232	We have approved your record and it was posted on 10/25/2010.	11/9/2009
<input type="checkbox"/> Volunteer Opportunity: City: Aloha (2 records)		
Volunteer Opportunity: Volunteer Opportunity Name: Dance Around the World Event Manager (1 record)		

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

The screenshot shows the 'Summary Format' view in the HandsOnConnect interface. The 'View' dropdown is set to 'All volunteer opportunities'. The 'Time Frame' is 'End Date', 'Duration' is 'Current FQ', and 'Start Date' is '1/1/2011'. The 'Show' button is highlighted, and a dropdown menu is open, showing options: 'Details', 'Drop Zones', and 'Conditional Highlighting...'. The 'Details' option is selected. The background shows a summary report with categories like 'Managed By: Affiliate (4 Records)', 'Managed By: Partner (16 Records)', and 'Grand Totals (20 records)'.

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

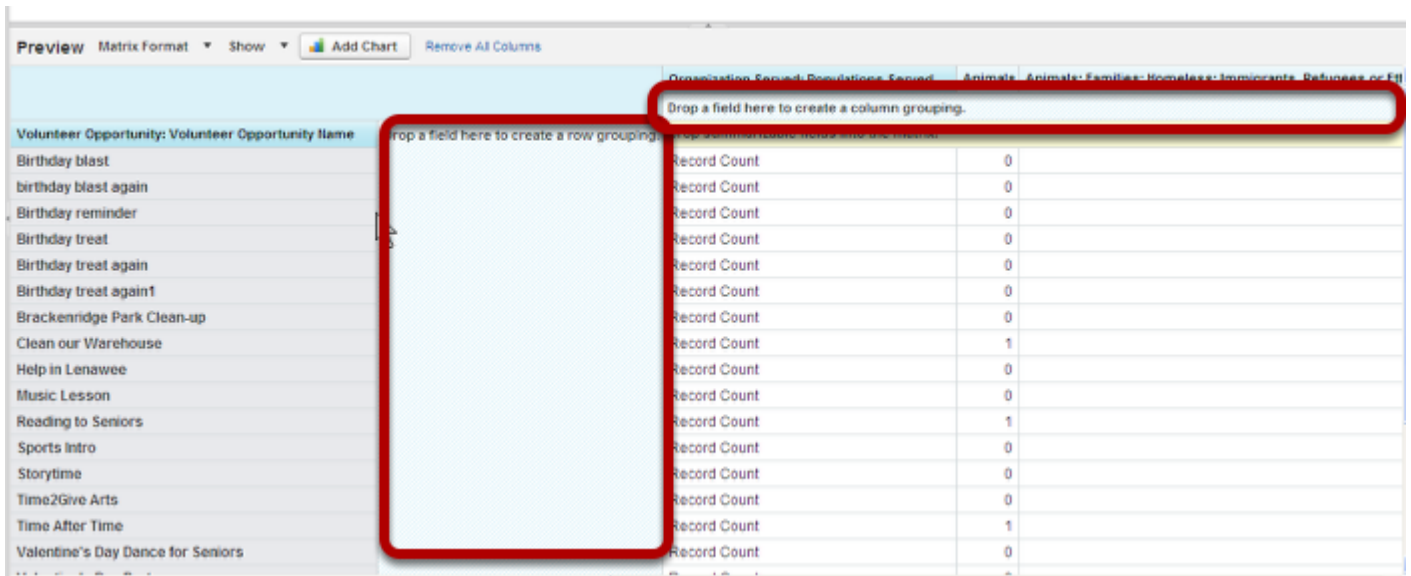
The screenshot shows the 'Matrix Format' view in the HandsOnConnect interface. The 'Run Report' button is highlighted. The background shows a matrix report with columns for 'Volunteer Opportunity Name', 'Record Count', and various population categories like 'Animals', 'Families', 'Immigrants', etc.

Volunteer Opportunity Name	Record Count	Animals	Animals: Families: Homeless: Immigrants, Refugees or Ethnic Groups: LGST (Lesbian, Gay, Bisexual, Transgender): Low-income Communities: Military/Veterans: Offenders/Ex-offenders: People with Disabilities: People with Health-based Concerns: Visitors & Travelers: Other	Families	Immigrants, Refugees or Ethnic Groups	Low-income Communities	Other	People with Disabilities	People with Health-based Concerns	Grand Total
Provide Information and Referrals at the Front Desk of our Busy Lobby	Record Count	0	0	0	0	0	1	0	0	1
20 Museum Volunteers	Record Count	0	0	0	0	0	1	0	0	1
Abernethy Elementary School Kitchen Garden Program	Record Count	0	0	1	0	0	0	0	0	1
Activities Assistant	Record Count	0	0	0	0	0	1	0	0	1
ADVOCATE FOR OTHERS? - YES, YOU CAN!	Record Count	0	0	0	0	0	1	0	0	1

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



The screenshot shows the Salesforce Matrix Format report builder. On the left, there is a list of volunteer opportunities. On the right, there is a report table with columns for 'Record Count' and '0'. A red box highlights the 'Drop a field here to create a row grouping' area, and another red box highlights the 'Drop a field here to create a column grouping' area.

Volunteer Opportunity: Volunteer Opportunity Name	Record Count	0
Birthday blast	Record Count	0
birthday blast again	Record Count	0
Birthday reminder	Record Count	0
Birthday treat	Record Count	0
Birthday treat again	Record Count	0
Birthday treat again1	Record Count	0
Brackenridge Park Clean-up	Record Count	0
Clean our Warehouse	Record Count	1
Help in Lenawee	Record Count	0
Music Lesson	Record Count	0
Reading to Seniors	Record Count	1
Sports Intro	Record Count	0
Storytime	Record Count	0
Time2Give Arts	Record Count	0
Time After Time	Record Count	1
Valentine's Day Dance for Seniors	Record Count	0

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

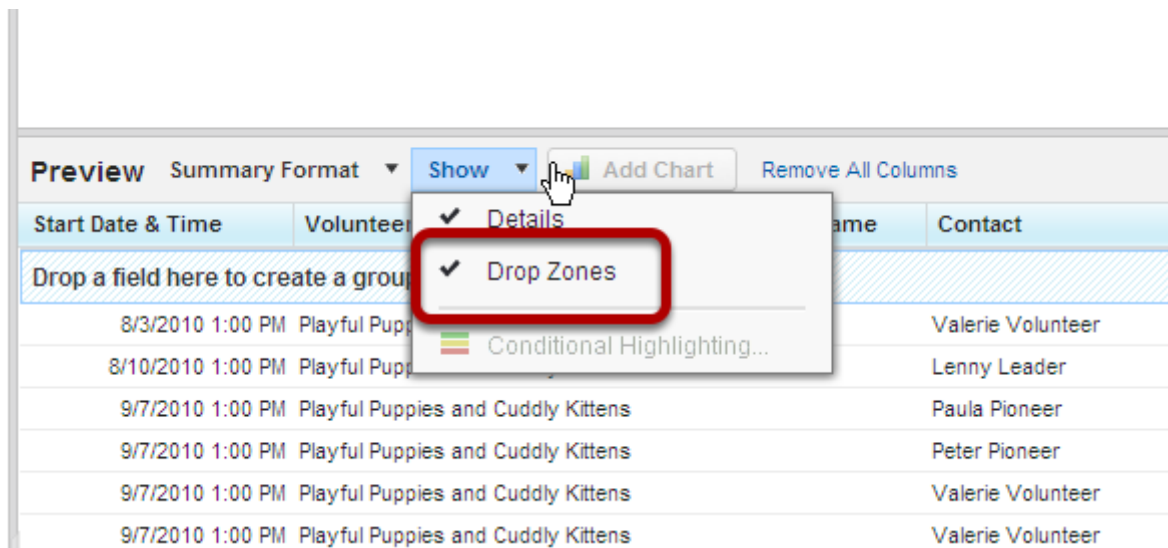
I am working with a report that contains the objects: Connections, Occurrences, and Opportunities, where Connections is the most detailed information. Note the field that I have in the report.

Change the Format Layout to Summary

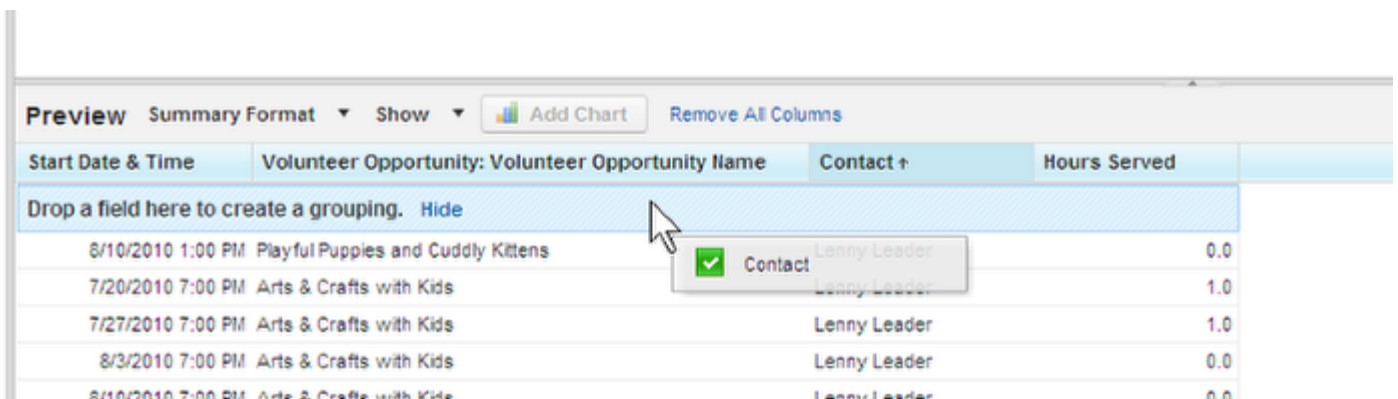
The screenshot shows the HandsOnConnect report interface. At the top, there are three dropdown menus: 'view:' set to 'All occurrences', 'Columns:' set to 'End Date & Time', and 'Duration:' set to 'All Time'. Below these is a 'report.' tab. The main report area has a 'Preview' tab selected, and a 'Summary Format' dropdown menu is open, showing three options: 'Tabular', 'Summary' (which is selected with a checkmark), and 'Matrix'. The report data is displayed in a table with columns: 'Start Date & Time', 'Opportunity: Volunteer Opportunity Name', and 'Contact'. The table contains several rows of data, including dates like 8/3, 8/10/2010, and 9/7/2010, and names like Valerie Volunteer, Lenny Leader, Paula Pioneer, Peter Pioneer, and Pat Pioneer.

Start Date & Time	Opportunity: Volunteer Opportunity Name	Contact
8/3	Playful Puppies and Cuddly Kittens	Valerie Volunteer
8/10/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Lenny Leader
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Paula Pioneer
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Peter Pioneer
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Valerie Volunteer
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Valerie Volunteer
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Paula Pioneer
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Peter Pioneer
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	Pat Pioneer

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.

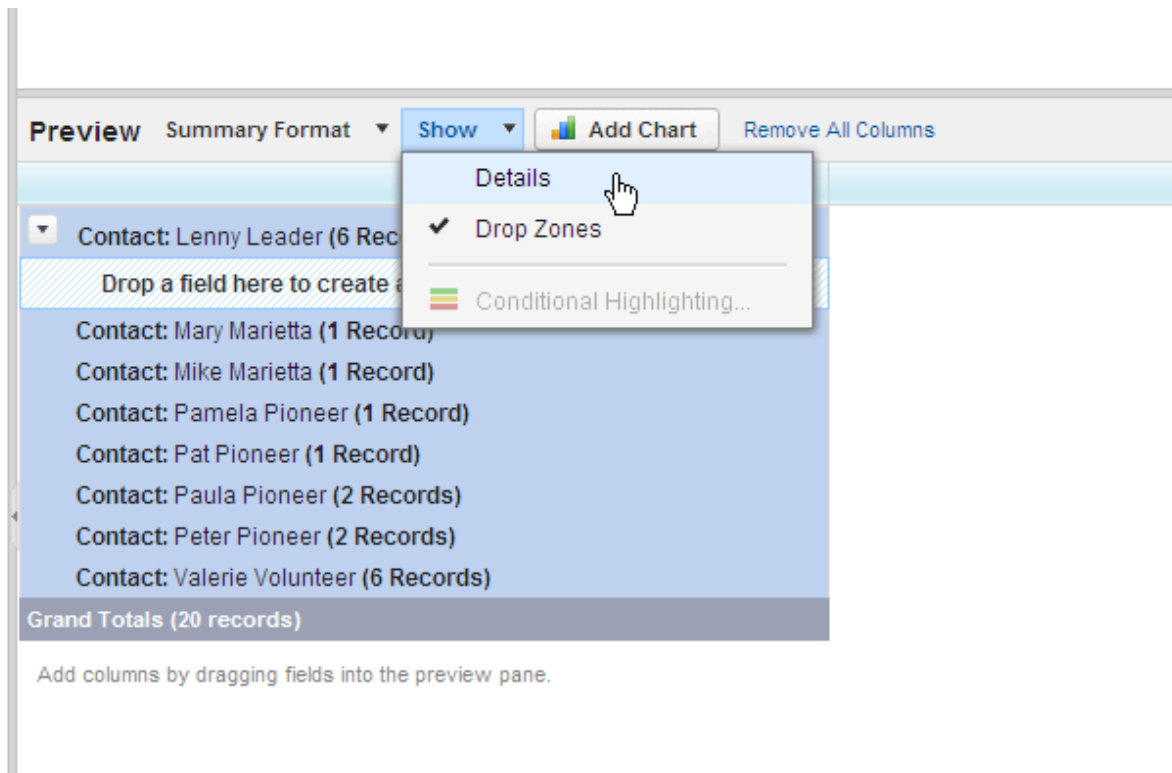
Note your new Summary

Preview Summary Format Show Add Chart Remove All Columns

Start Date & Time	Volunteer Opportunity: Volunteer Opportunity Name	Hours Served
Contact: Lenny Leade (6 Records)		
Drop a field here to create a grouping. Hide		
8/10/2010 1:00 PM	Playful Puppies and Cuddly Kittens	0.0
7/20/2010 7:00 PM	Arts & Crafts with Kids	1.0
7/27/2010 7:00 PM	Arts & Crafts with Kids	1.0
8/3/2010 7:00 PM	Arts & Crafts with Kids	0.0
8/10/2010 7:00 PM	Arts & Crafts with Kids	0.0
8/17/2010 7:00 PM	Arts & Crafts with Kids	0.0
Contact: Mary Marietta (1 Record)		
9/7/2010 1:00 PM	Playful Puppies and Cuddly Kittens	2.0
Contact: Mike Marietta (1 Record)		

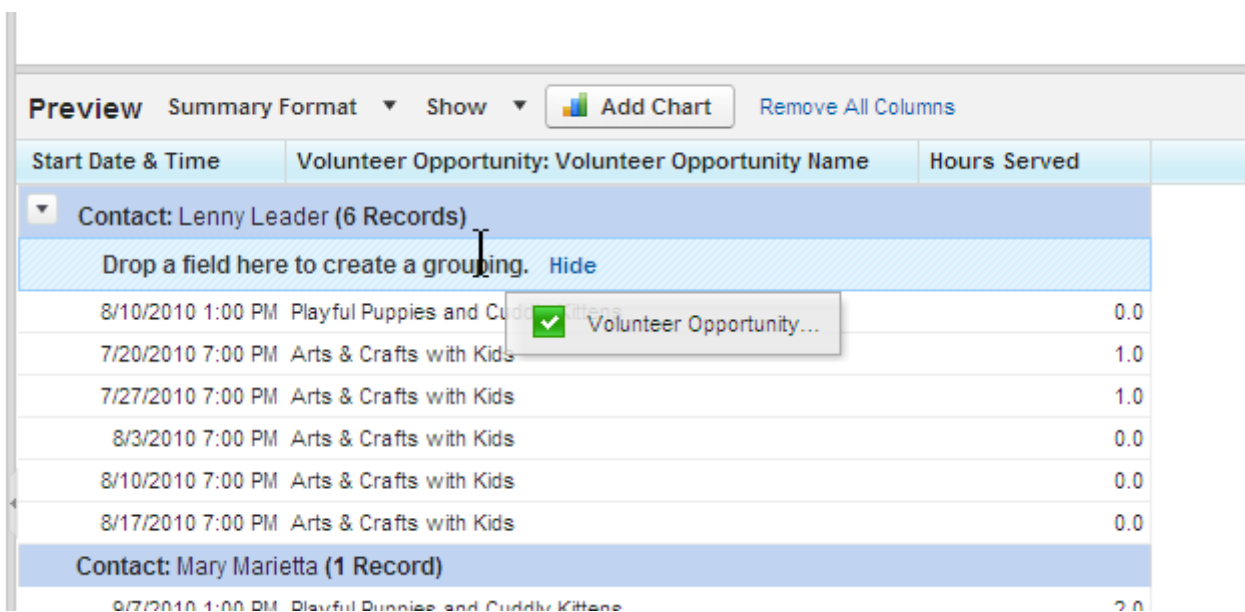
The blue bar shows that we are summarizing by the field Contact (from the Connections Object). The details show the Start and Date time of the Occurrences, and the Name of the Opportunity. Also note that a record count has been included in the Summary. The count is of the most detailed information... 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

<input type="checkbox"/>	Contact: (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Arts & Crafts with Kids (1 record)
<input type="checkbox"/>	Contact: kim uthie (5 records)
	Volunteer Opportunity: Volunteer Opportunity Name: Maintain the Trails at Powell Butte (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: School Supplies for Kids (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Stock The Pantry: Oregon Food Bank (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Stock the Pantry: Oregon Food Bank (2 records)
<input type="checkbox"/>	Contact: 72nd Avenue Telecare (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Bikes For Kids (1 record)
<input type="checkbox"/>	Contact: Amy Jorgensen (9 records)
	Volunteer Opportunity: Volunteer Opportunity Name: Clean for Cats at Animal Aid (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Cook It Up: Mealtime at Clark Center (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Fun at the Hollywood Theatre (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Help Get Books into the Hands Of Children! (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: KIDS Volunteer! Create Packages for Kids (1 record)
	Volunteer Opportunity: Volunteer Opportunity Name: Referral: TogetherGreen Day with the Audubon Society (1 record)

Advanced Users

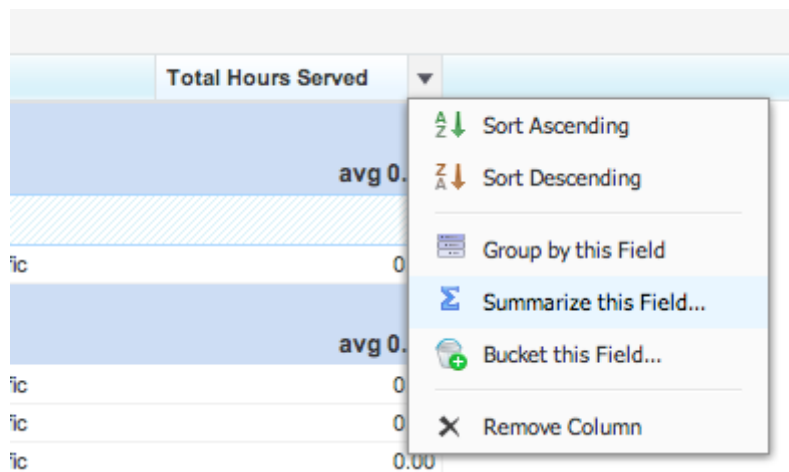
Salesforce has an extensive knowledge base for Reports and Reporting Summaries in their Help and Training Section.

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

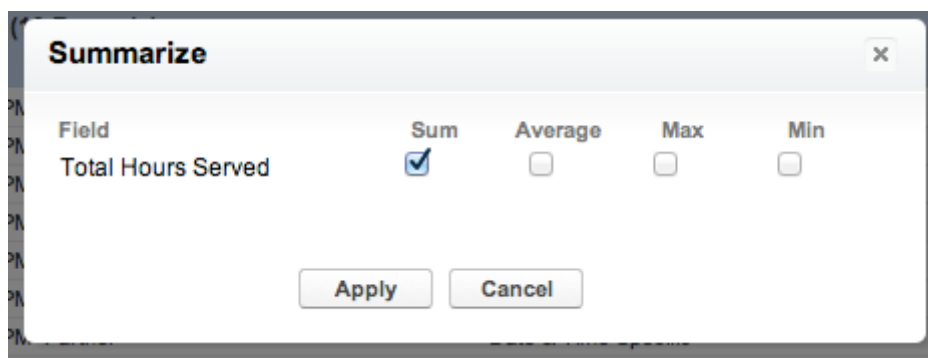
Working with Numbers - Sums, Averages, Min and Max

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.

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

<input type="checkbox"/>	Volunteer Opportunity: Volunteer Opportunity Name: <u>Water the Gardens</u> (19 records)	0.00
<input type="checkbox"/>	Volunteer Opportunity: Volunteer Opportunity Name: <u>We need your Skills!</u> (1 record)	0.00
<input type="checkbox"/>	Volunteer Opportunity: Volunteer Opportunity Name: <u>Wonder of Reading</u> (15 records)	13.50
<input type="checkbox"/>	Volunteer Opportunity: Volunteer Opportunity Name: <u>Young Professionals Service Mixer</u> (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
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: * Morning Restoration at Clatsop Butte (1 record)	22.00
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: 4th of July Clean-up crews (3 records)	0.00
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: Adult supervision required (1 record)	0.00
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: AFD Big Daddy Day (5 records)	0.00
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: Alternative Spring Break (29 records)	0.00
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: America's Sunday Supper (1 record)	4.00
<input type="checkbox"/> 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"

Fields: [Add](#) [Edit](#) [Clear](#)

Filters: [Add](#) [Edit](#) [Clear](#)

Show: All occurrences

Date Field: End Date & Time Range: Custom From: 1/1/2011 To: 4/16/2012

Status equals "Active"
 AND Volunteer Opportunity: Status equals "Active"
 AND Volunteer Opportunity: Volunteer Opportunity Name does not contain "Self-reported"
 AND Schedule Type equals "Date & Time Specific"

Preview Summary Format Show Add Chart Remove All Columns

Occurrence: Occurrence ID	Start Date & Time	End Date & Time	Volunteer Opportunity: Managed By	Schedule Type	Total Hours Served	Volunteer Opportunity: Number of Volunteer Opportunities
Drop a field here to create a grouping. Hide						
Volunteer Opportunity: Volunteer Opportunity Name: Marin Headlands Nursery (1 Record)						
OC-023909	5/4/2011 1:00 PM	5/4/2011 4:00 PM	Partner	Date & Time Specific	0.00	1
Volunteer Opportunity: Volunteer Opportunity Name: Water the Gardens (19 Records)						
OC-023651	6/22/2011 11:00 AM	6/22/2011 1:00 PM	Partner	Date & Time Specific	0.00	1
OC-023652	6/22/2011 11:00 AM	6/22/2011 1:00 PM	Partner	Date & Time Specific	0.00	1
OC-023653	9/5/2011 11:00 AM	9/5/2011 1:00 PM	Partner	Date & Time Specific	0.00	1

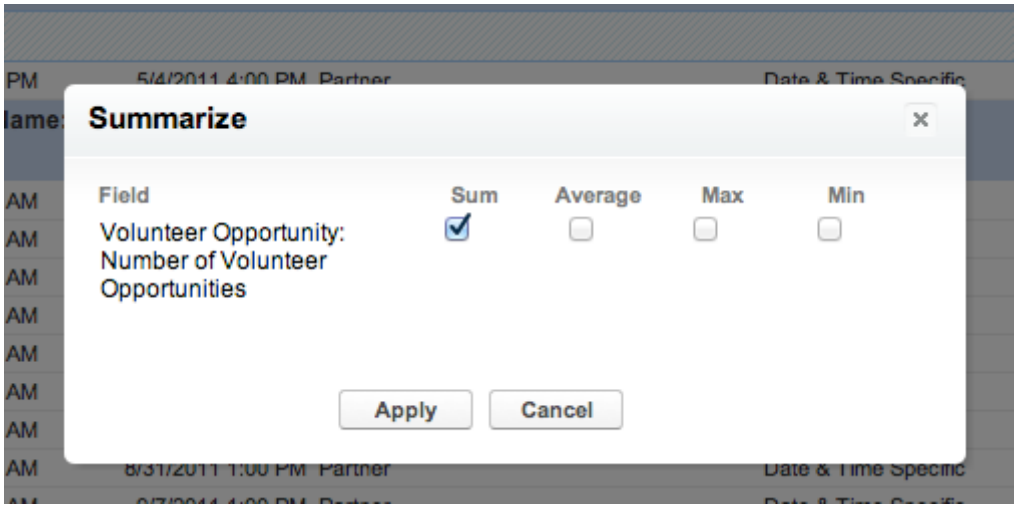
Each object in HandsOn Connect has a field called "Number of...." that has a value of 1 populated in it.

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

<input type="checkbox"/>	Volunteer Opportunity: Volunteer Opportunity Name: <u>Young Professionals Service Mixer</u> (1 record)	0.00	1
Grand Totals (1,267 records)		386.25	135

Check rows to filter, then drill down by: ---None--- Drill Down

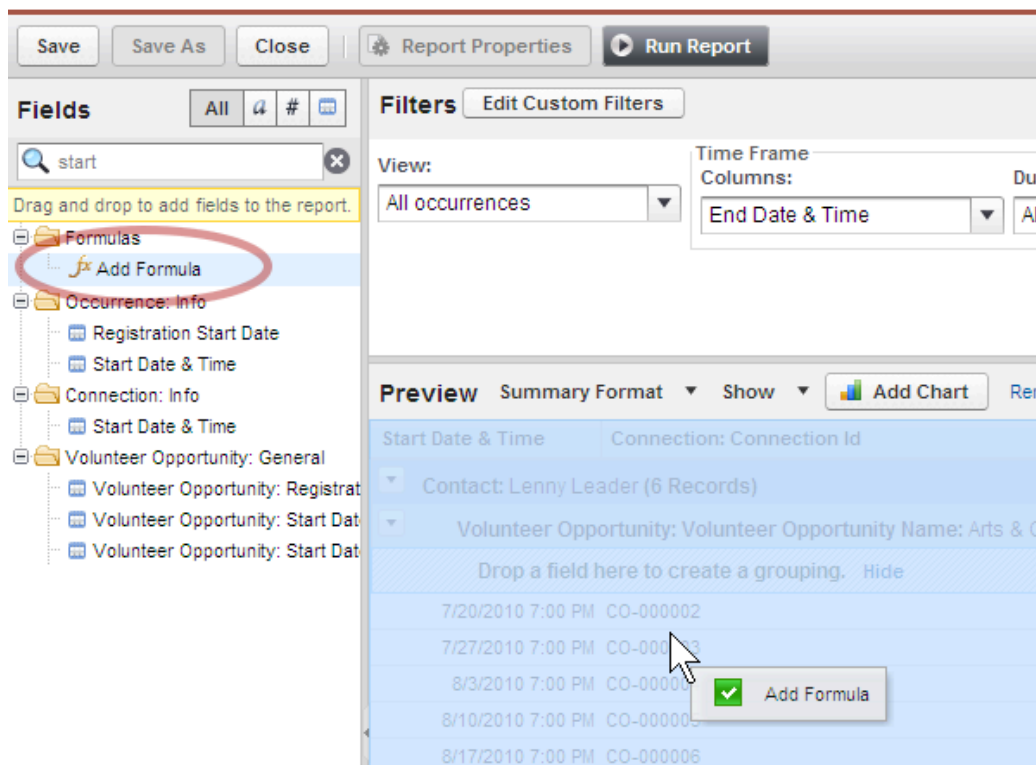
This report has 1267 Records (Occurrences), and 135 separate volunteer opportunities.

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

Custom Summary Formula [Help for this Page](#) ? ×

Column Name:

Description:

Format: ▼ Decimal Places: ▼

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

☒ All summary levels
☐ Grand summary only
☐ **Grouping 1:** Volunteer Opportunity: Volunteer Opportunity Name

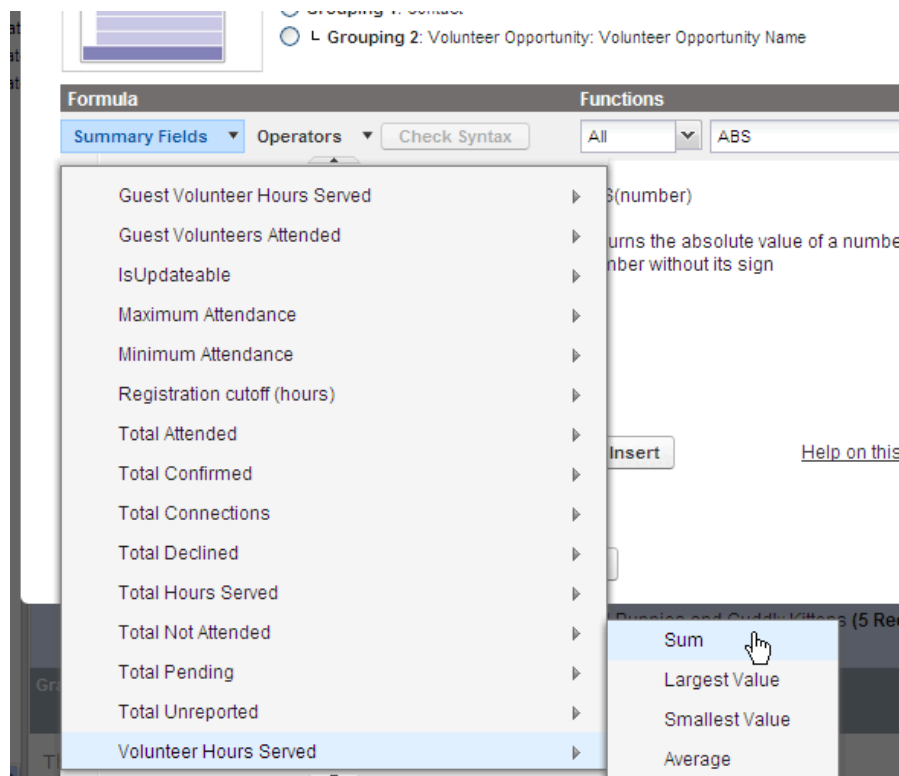
Formula **Functions** **Tips**

I have given this a specific name and description

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

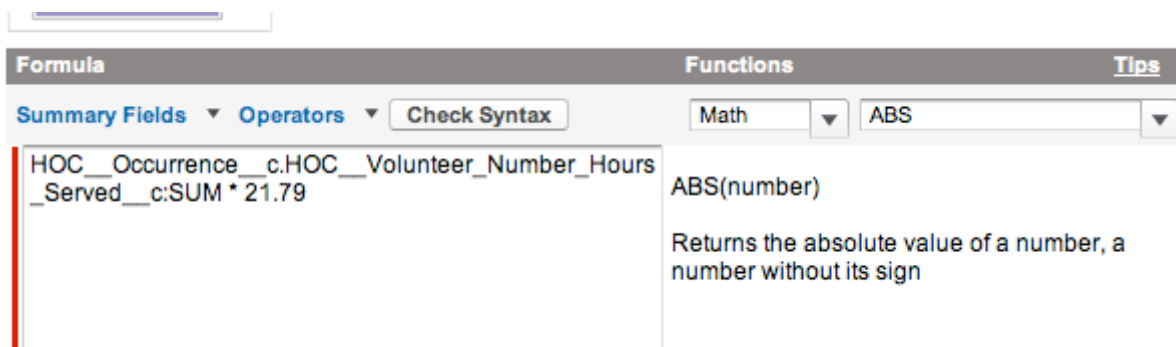
I want to see this \$ total at all Summary Levels

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.

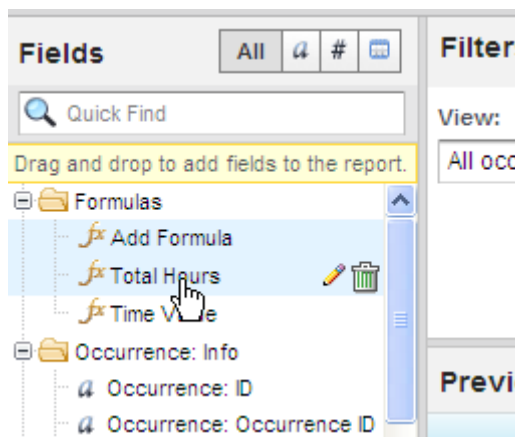
(For complex formulas - use the "Check SYntax" box to make sure everything is OK.

See your Results

<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: <u>We need your Skills!</u> (1 record)	0.00	1	\$0.00
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: <u>Wonder of Reading</u> (15 records)	13.50	1	\$294.17
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: <u>Young Professionals Service Mixer</u> (1 record)	0.00	1	\$0.00
Grand Totals (1,267 records)	386.25	135	\$6,346.34

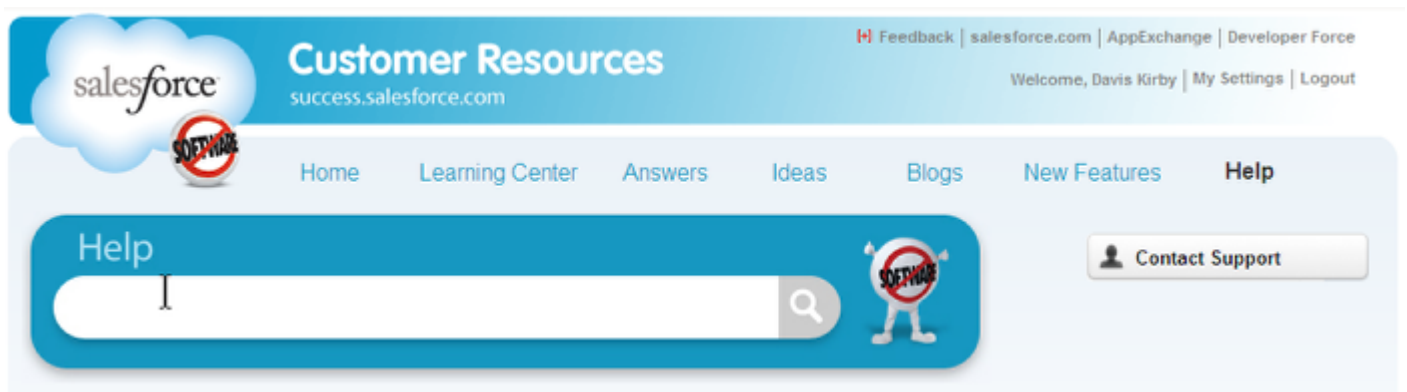
At first you'll just see the summary. But hit RUN report and you'll see the dollar value of service summarized for each opportunity and a grand total at the bottom!

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 separate report.

Find a report you want to work with.

Report Type: Volunteer Opportunities
Unsaved Report

Save Save As Close Report Properties Run Report

Fields: All #

Filters: Add

Show: All volunteer opportunities

Date Field: End Date Range: All Time From To

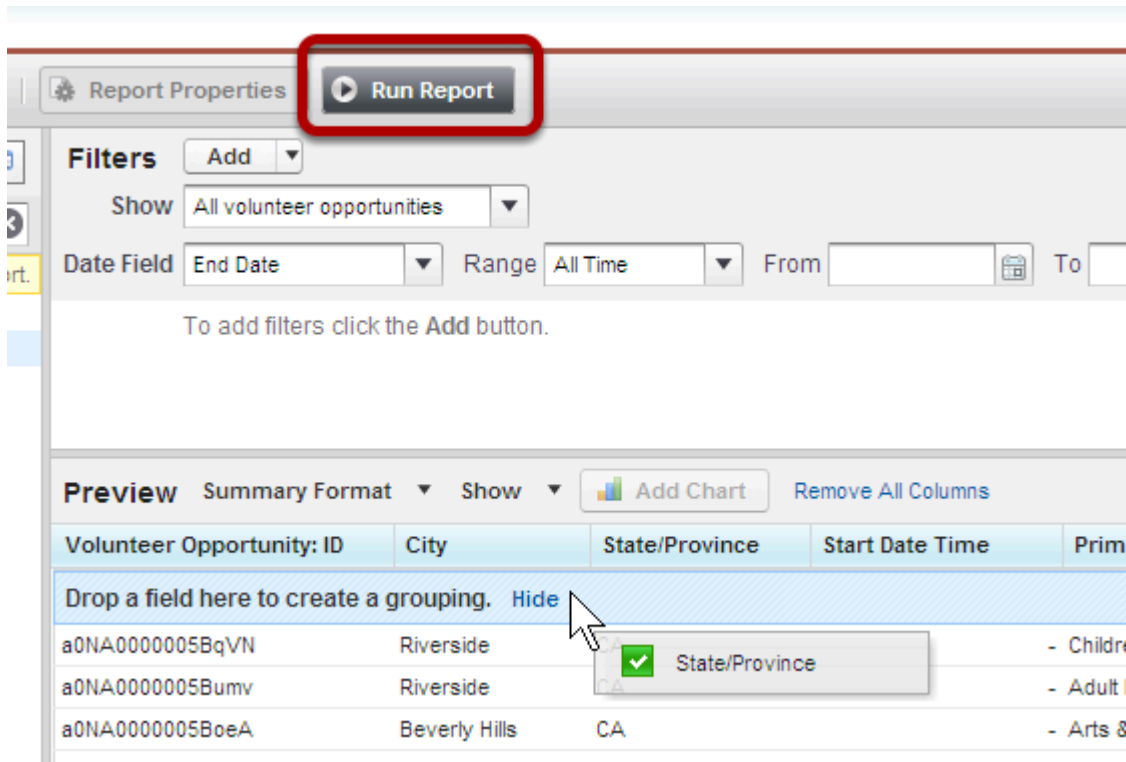
To add filters click the Add button.

Preview Tabular Format Show Remove All Columns

Volunteer Opportunity: Volunteer Opportunity Name	Volunteer Opportunity: ID	Start Date Time	City	State/Province
Help teach the kids to read	a0NA0000005BqVN		- Riverside	CA
Workflow Test 3	a0NA0000005Bumv		- Riverside	CA
Time After Time	a0NA0000005BoeA		- Beverly Hills	CA
Workflow Test 2	a0NA0000005BumW		- Beverly Hills	CA
Standing Tall	a0NA00000000IEY		- Riverside	CA
Coordinating Charities	a0NA0000003Zk4V		- Riverside	CA

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



Report Properties

Run Report

Filters [Add](#)

Show: All volunteer opportunities

Date Field: End Date Range: All Time From: To:

To add filters click the Add button.

Preview Summary Format [Show](#) [Add Chart](#) [Remove All Columns](#)

Volunteer Opportunity: ID	City	State/Province	Start Date Time	Primary Category
Drop a field here to create a grouping. Hide				
a0NA0000005BqVN	Riverside	CA		- Children
a0NA0000005Bumv	Riverside	CA		- Adult
a0NA0000005BoeA	Beverly Hills	CA		- Arts & Crafts

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.

Run Report

Show Details

Customize

Save As

Printable View

Export Details

<input type="checkbox"/>	State/Province: - (8,511 records)
<input checked="" type="checkbox"/>	State/Province: CA (55 records)
<input type="checkbox"/>	State/Province: FL (2 records)
<input type="checkbox"/>	State/Province: GA (3 records)
<input type="checkbox"/>	State/Province: NY (1 record)
<input type="checkbox"/>	State/Province: OR (1 record)
<input type="checkbox"/>	State/Province: TX (30 records)
Grand Totals (8,603 records)	

Check rows to filter, then drill down by:

--None--

Drill Down

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

<input type="checkbox"/>	State/Province: - (8,511 records)
<input checked="" type="checkbox"/>	State/Province: CA (55 records)
<input type="checkbox"/>	State/Province: FL (2 records)
<input type="checkbox"/>	State/Province: GA (3 records)
<input type="checkbox"/>	State/Province: NY (1 record)
<input type="checkbox"/>	State/Province: OR (1 record)
<input type="checkbox"/>	State/Province: TX (30 records)
Grand Totals (8,603 records)	

☐ Opportunity Approval Manager
☐ Opportunity Approval Manager Email
☐ Opportunity Characteristics
☐ Opportunity Coordinator Email
☐ Opportunity Coordinator Name
☐ Organization Served
☐ Organization Served Id
☐ Organization Served Name
☐ Organization Served URL
☐ Orientation Required
☐ Partner Staff Email
☐ Partner Staff Name
☐ Populations Served
☐ Posting Status
☐ Primary Impact Area
☐ Program Area (Local)
☐ Registration cutoff (hours)
☐ Registration Start Date

Check rows to filter, then drill down by:

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

Filtered By: [Edit](#)

State/Province equals CA [Clear](#)

<input type="checkbox"/>	Primary Impact Area: Adult Education (5 records)
<input type="checkbox"/>	Primary Impact Area: Animals (3 records)
<input type="checkbox"/>	Primary Impact Area: Arts & Culture (5 records)
<input type="checkbox"/>	Primary Impact Area: Children & Youth Education (12 records)
<input type="checkbox"/>	Primary Impact Area: Civic & Community (9 records)
<input type="checkbox"/>	Primary Impact Area: Environment (6 records)
<input type="checkbox"/>	Primary Impact Area: Health & Wellness (4 records)
<input checked="" type="checkbox"/>	Primary Impact Area: Hunger & Food Security (10 records)
<input checked="" type="checkbox"/>	Primary Impact Area: Senior Services (10 records)
<input checked="" type="checkbox"/>	Primary Impact Area: Sports & Recreation (10 records)
<input checked="" type="checkbox"/>	Primary Impact Area: Technology (10 records)
<input checked="" type="checkbox"/>	Primary Impact Area: Other (1 records)
Grand Totals (55 records)	

--None--

Volunteer Opportunity: Info

Activity Type

Age Groups Served

Background Check Required

City

Country

Court Ordered Allowed

Default Location

Description

End Date

End Date Time

Genders Served

Google Map URL

Guest Volunteer Hours Served

Guest Volunteers Attended

HOC Domain Name

--None--

Drill Down

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

Run Report Show Details Customize Save As Printable View Export Details

Filtered By: Edit
State/Province equals CA Clear
AND Primary Impact Area equals Hunger & Homelessness, Senior Services, Sports & Recreation, Technology, Other Clear

☐ City: Riverside (11 records)

Grand Totals (11 records)

Check rows to filter, then drill down by: --None-- Drill Down

Hmmmmmmmm... 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.

The screenshot shows the 'All Users - Demo' report interface. At the top, there's a header with the HandsOnConnect logo and the title 'All Users - Demo'. Below the header, a status bar indicates 'Report Generation Status: Note: 2,000 of 2,106 records are displayed below. Select Export Details for a complete view of your data.' The main section is titled 'Report Options:' and contains several controls. On the left, 'Summarize information by:' is set to '-None--'. Next to it, 'View' is set to 'All Users'. To the right, the 'Time Frame' section has 'Columns' set to 'Created Date' and 'Duration' set to 'Custom', with 'Start Date' and 'End Date' input fields. Below these controls is a row of buttons: 'Run Report', 'Hide Details', 'Customize', 'Save', 'Save As', 'Delete', 'Printable View', and 'Export Details'. The 'Customize' button is highlighted with a red rectangular box, and a mouse cursor is pointing at it. At the bottom, a 'Filtered By:' section shows 'Edit' and 'Profile equals Volunteer, Volunteer old Clear'.

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.

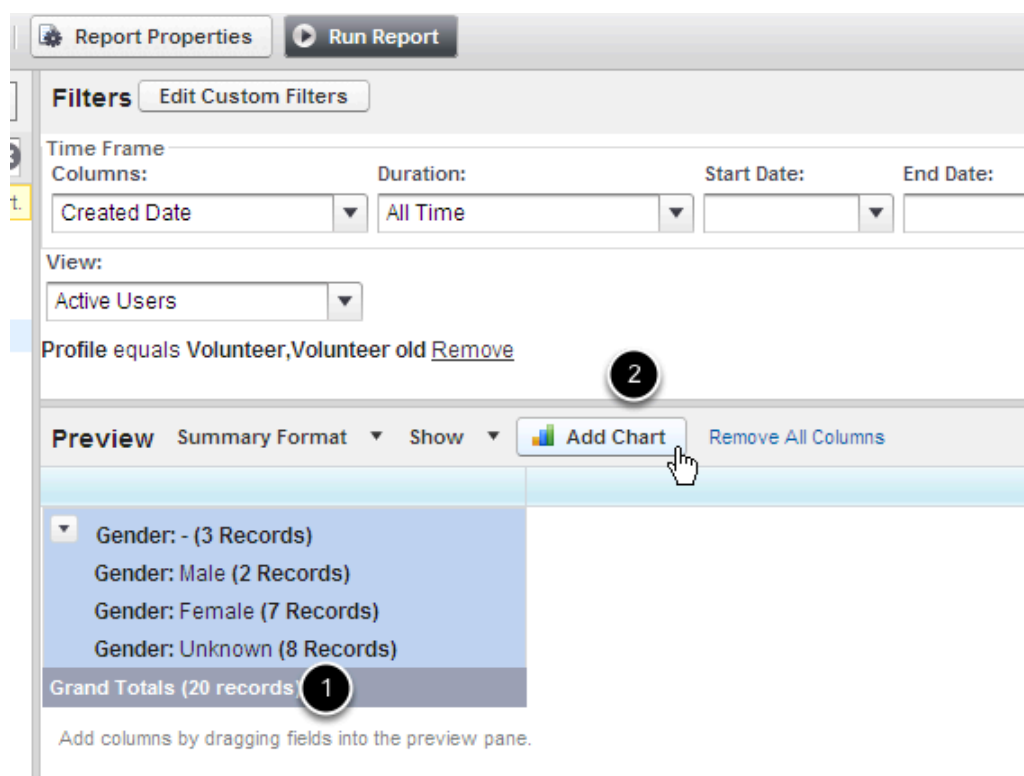
The screenshot shows the Salesforce Reports interface for 'All Users - Demo'. The interface includes a 'Fields' panel on the left, a 'Filters' panel, and a 'Preview' panel. The 'Fields' panel shows 'Gender' selected (1). The 'Filters' panel shows 'Active Users' selected (5). The 'Preview' panel shows a table of users with a 'Gender' column highlighted (3). The 'Summary Format' is selected (2). The 'Show' button is highlighted (4).

First Name	Last Name	Gender	Username	Phone	Profile	Role	Email
Adam	Sandler	-	adam.sandler.hoctest@handsonsega.org	-	Volunteer	-	adam.sar
Barry	Matthews	✓ Gender	barry.matthews@delta.com	-	Volunteer	-	barry.k.m
Gina	Simpson	-	gina.simpson@handsonatlanta.org	-	Volunteer	-	gsimpson
Corrina	Zava	Unknown	artohoc+user9462@gmail.com	-	Volunteer	-	artohoc+I
Emily	All	Unknown	artohoc+user40@gmail.com	-	Volunteer	-	artohoc+I
Sabine	Welling	Unknown	artohoc+user9481@gmail.com	-	Volunteer	-	artohoc+I
Amanda	Beardall	Unknown	artohoc+user18679@gmail.com	-	Volunteer	-	artohoc+I
Levi	Ainslie	Male	artohoc+user41@gmail.com	-	Volunteer	-	artohoc+I
Jennifer	Archer	Female	artohoc+user163@gmail.com	-	Volunteer	-	artohoc+I
Krystal	Wait	Unknown	artohoc+user9608@gmail.com	-	Volunteer	-	artohoc+I
Taylor	Kiefel	Unknown	artohoc+user19002@gmail.com	-	Volunteer	-	artohoc+I
Ronnie	Lones	Female	tanuhtrnkemauf@mail.com	-	Volunteer	-	tanuhtrnk

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

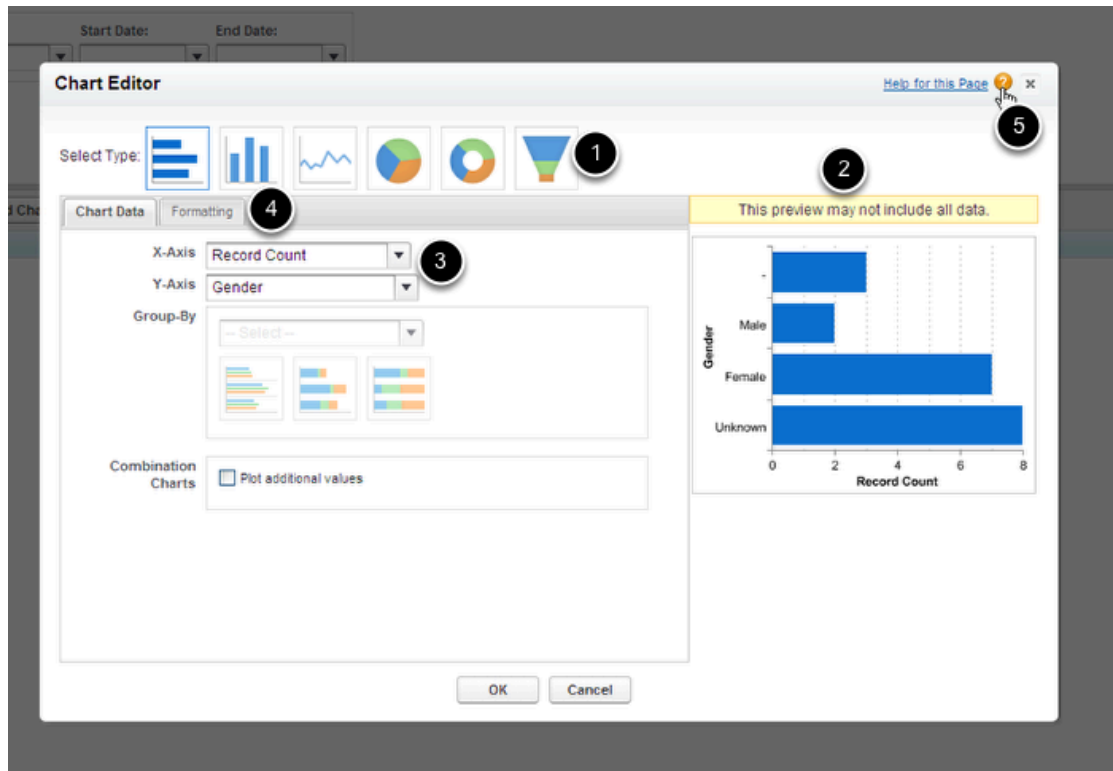


Notice a few things:

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.

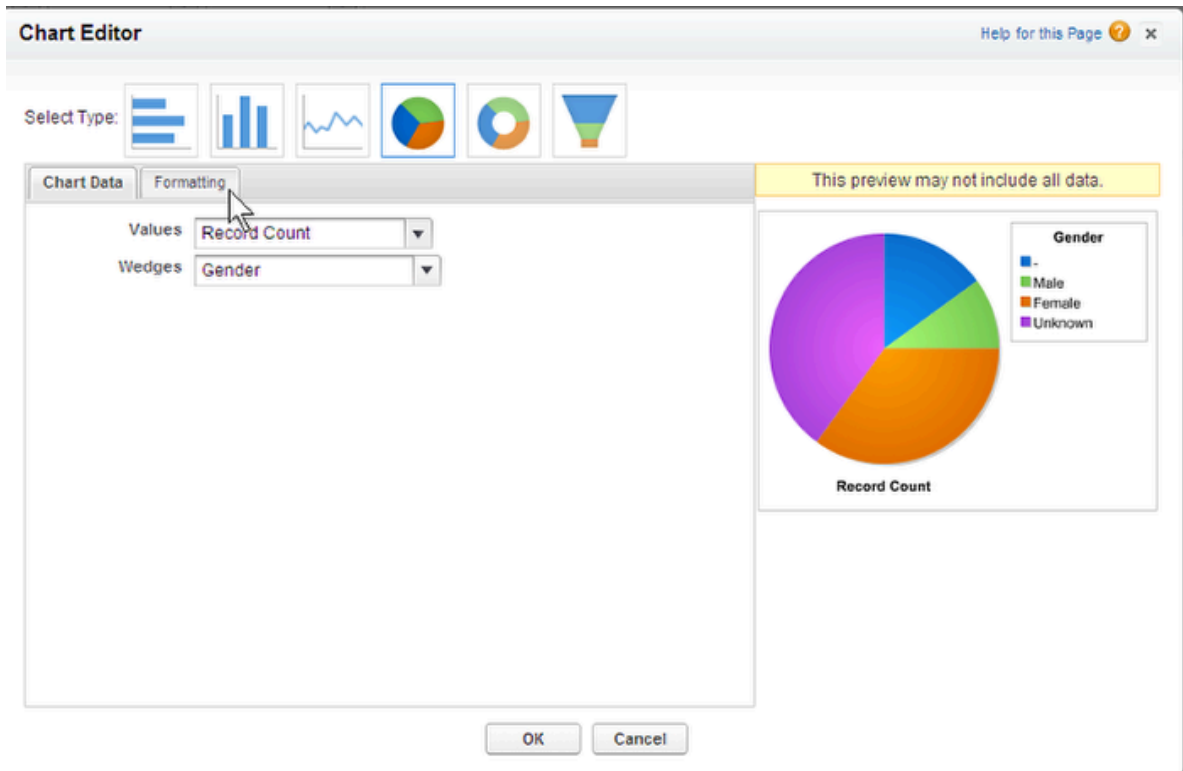
Introduction to Add Chart Window



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

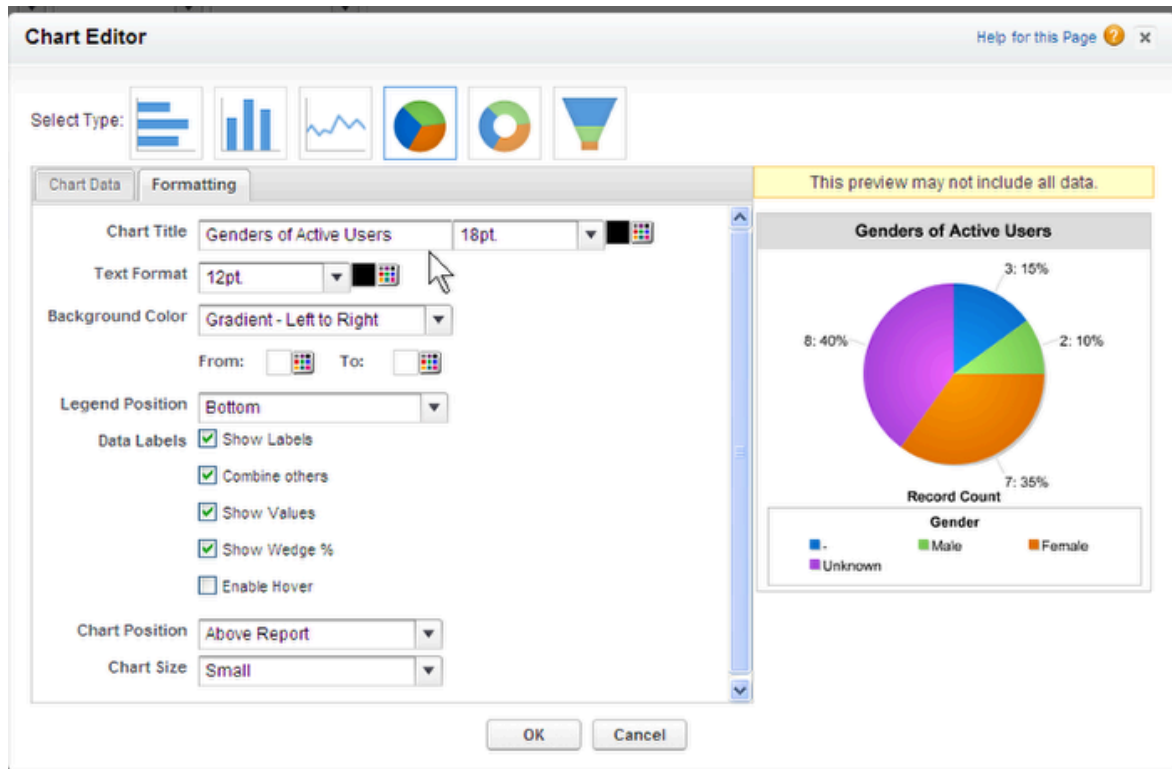
In this case, we want a Pie Chart

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.

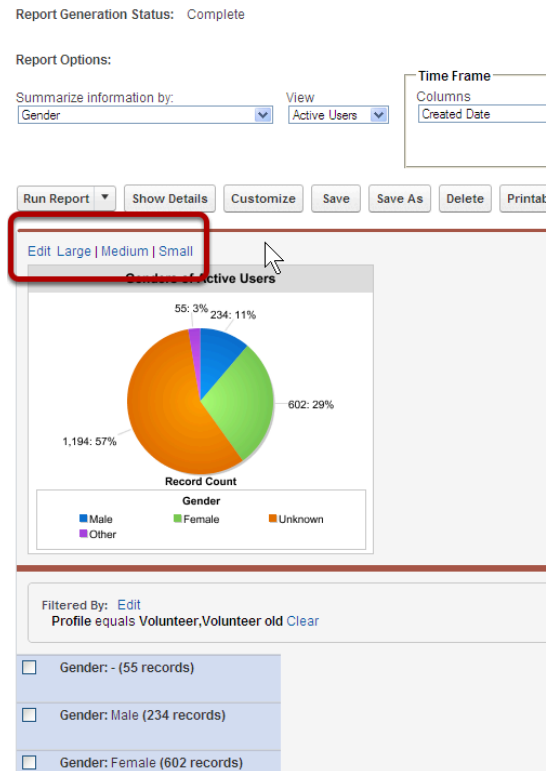
Format your Chart



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

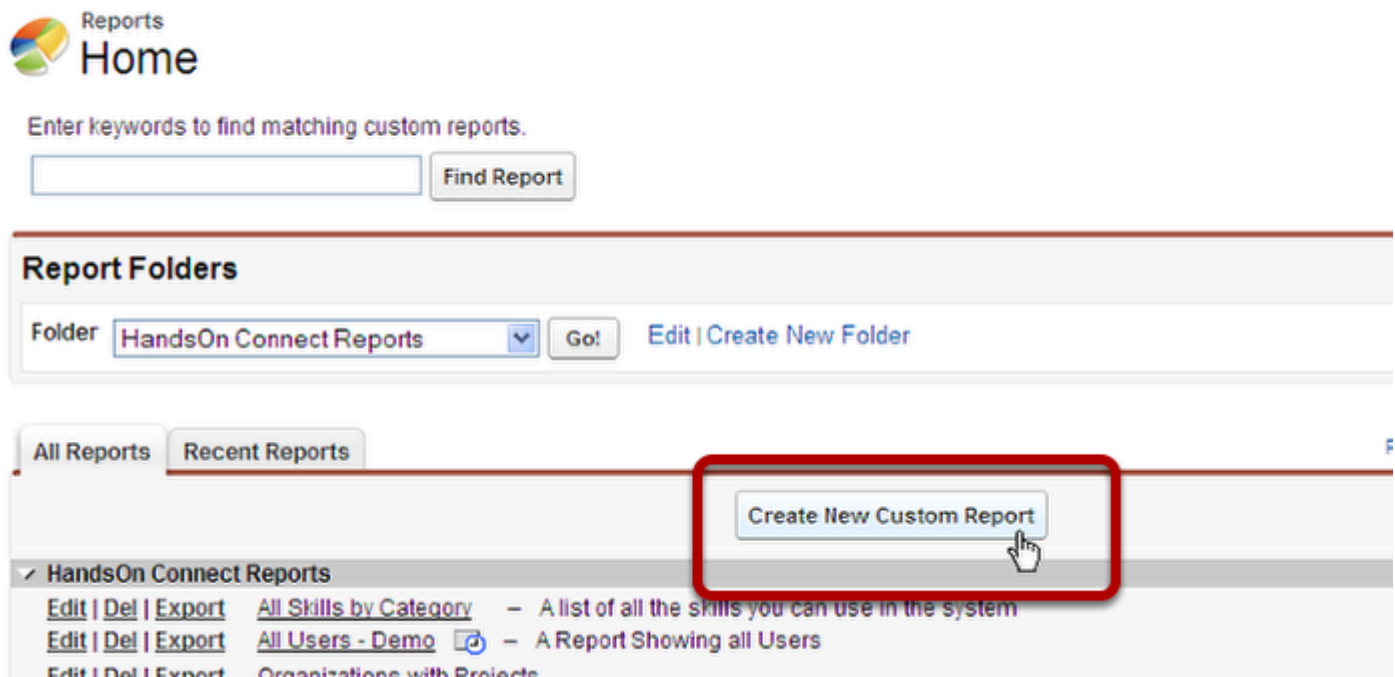
For those of you who would like more advance training on these Charts, you can check out: SF: [Help and Training: Customizing Charts](#)

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.

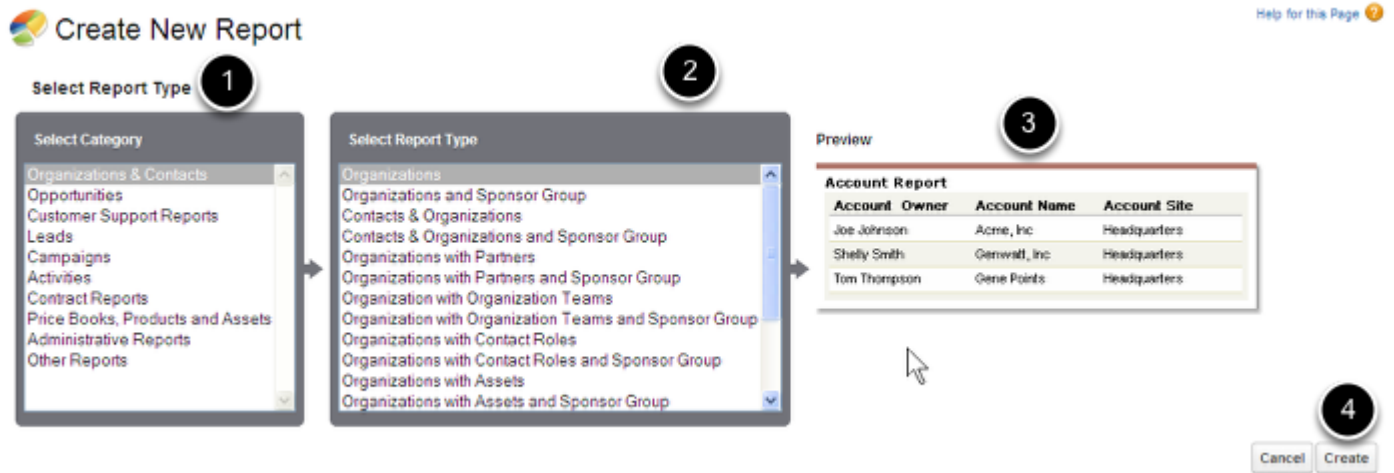
Maybe Opportunities, Occurrences, and Connections

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

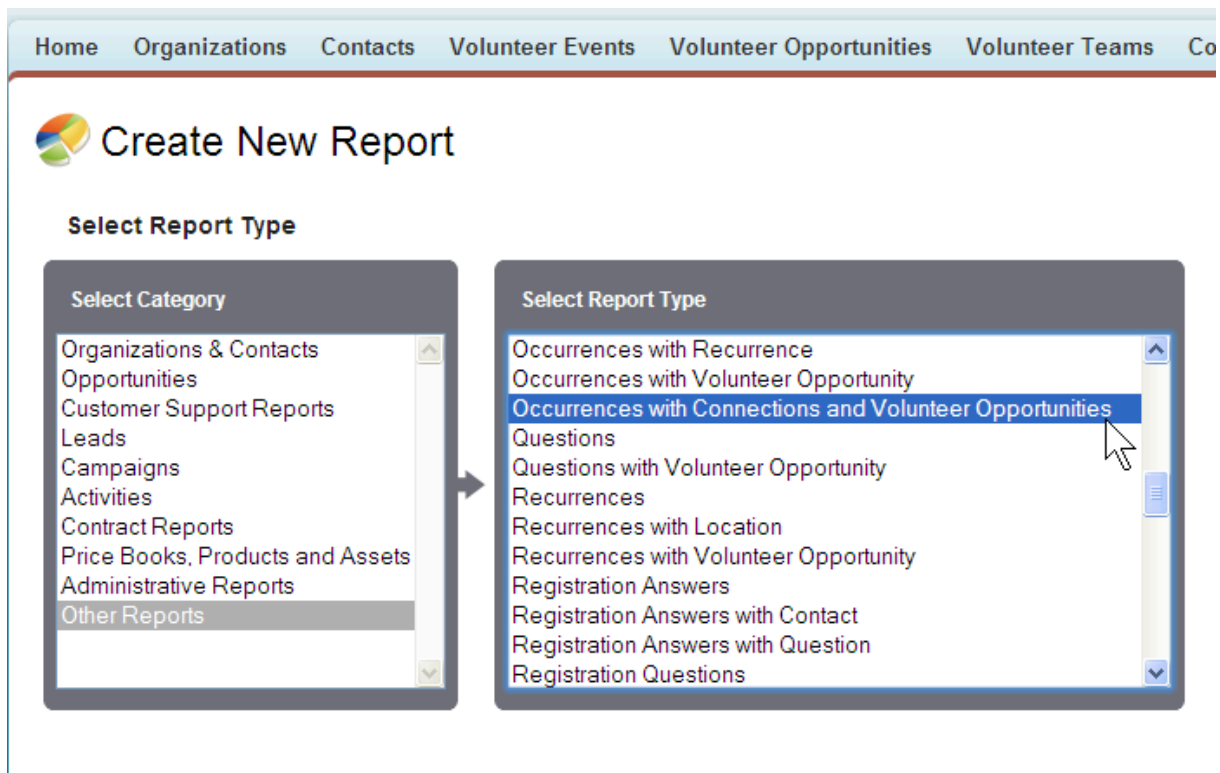
Get to know Custom Report Window



(PS. Different than the CustomIIZE 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...

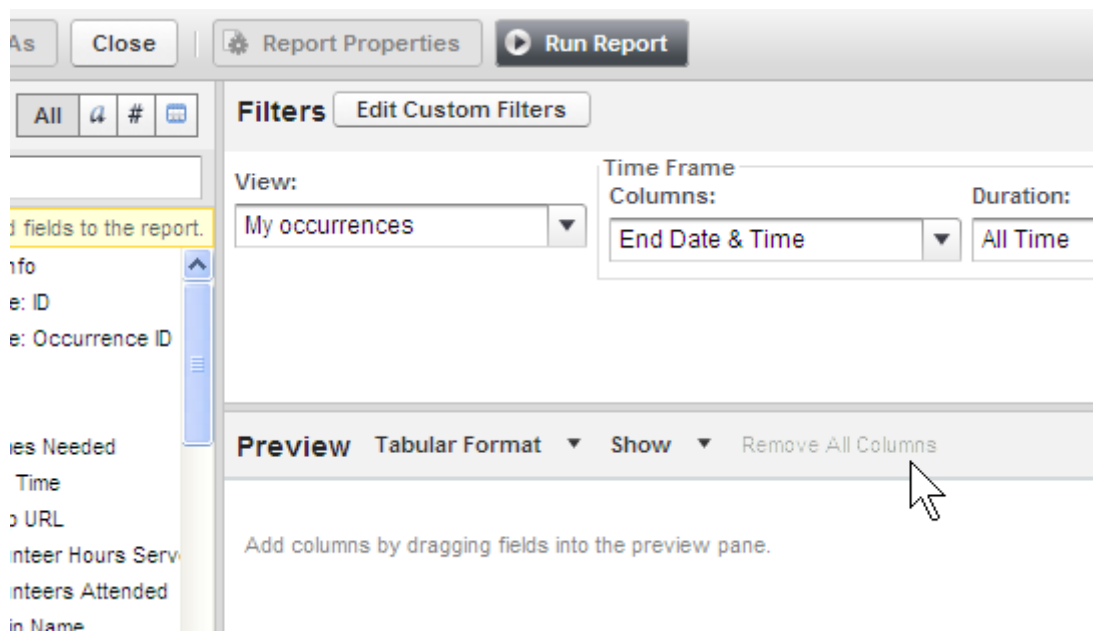
As a general rule: Go to the Category: Other Reports.

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

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

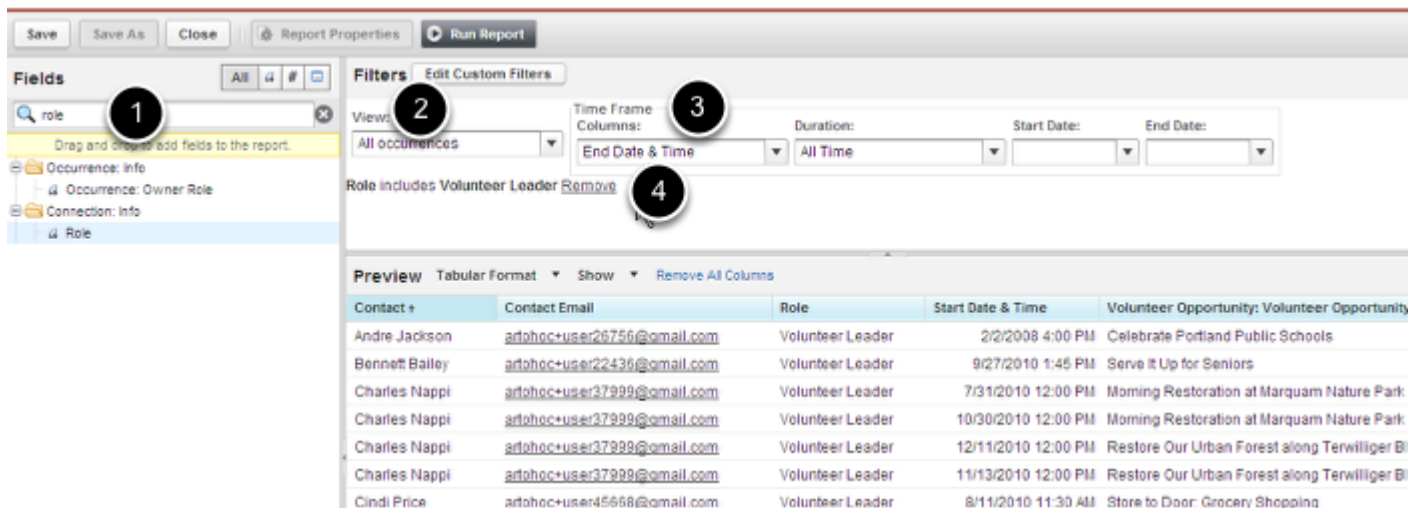
Hit Create which will take us to the Customize WIndow.

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

The screenshot shows the 'Report Properties' window in HandsOnConnect. A red box highlights the 'Run Report' button. Below it, the 'Filters' section shows 'View: All occurrences' and 'Time Frame: End Time'. A red circle with the number '1' is next to the 'End Time' dropdown. Below the filters, the 'Preview' section shows a pie chart with a red circle and the number '3' next to it. The chart is titled 'Volunteer Opportunity: Volunteer Opportunity Name' and shows 'Arts & Crafts with Kids' with a count of 20. Below the chart, a table shows the data. A red circle with the number '2' is next to the table header. The table has columns: Contact, Contact Email, Role, and Start Date & Time. The data is grouped by 'Volunteer Opportunity Name: Volunteer Opportunity Name: Arts & Crafts with Kids (20 Records)'. The table shows 5 rows of data for 'Lenny Leader'.

Contact	Contact Email	Role	Start Date & Time
Volunteer Opportunity: Volunteer Opportunity Name: Arts & Crafts with Kids (20 Records)			
Drop a field here to create a grouping. Hide			
Lenny Leader	troutco-training_leader@gmail.com	Volunteer Leader	8/10/2010 7:00 PM
Lenny Leader	troutco-training_leader@gmail.com	Volunteer Leader	8/17/2010 7:00 PM
Lenny Leader	troutco-training_leader@gmail.com	Volunteer Leader	9/14/2010 7:00 PM
Lenny Leader	troutco-training_leader@gmail.com	Volunteer Leader	8/27/2010 7:00 PM
Lenny Leader	troutco-training_leader@gmail.com	Volunteer Leader	8/21/2010 7:00 PM

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

Report Generation Status: Complete

Report Options:

Summarize information by:
Volunteer Opportunity: Volunteer Opportunity Name

View
All occurrences

Time Frame
Columns
End Date & Time
Duration
Custom
Start Date
Er

Run Report Show Details Customize Save As Printable View Export Details

Edit Large Medium Small



Filtered By: Edit
Role includes Volunteer Leader Clear

- ☐ Volunteer Opportunity: Volunteer Opportunity Name: "Morning Restoration at Clatsop Butte" (1 record)
- ☐ Volunteer Opportunity: Volunteer Opportunity Name: "Planting the Undergrowth at Burnt Bridge Creek" (1 record)
- ☐ Volunteer Opportunity: Volunteer Opportunity Name: "Restore Scenic Elk Rock Island" (1 record)

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 one single 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

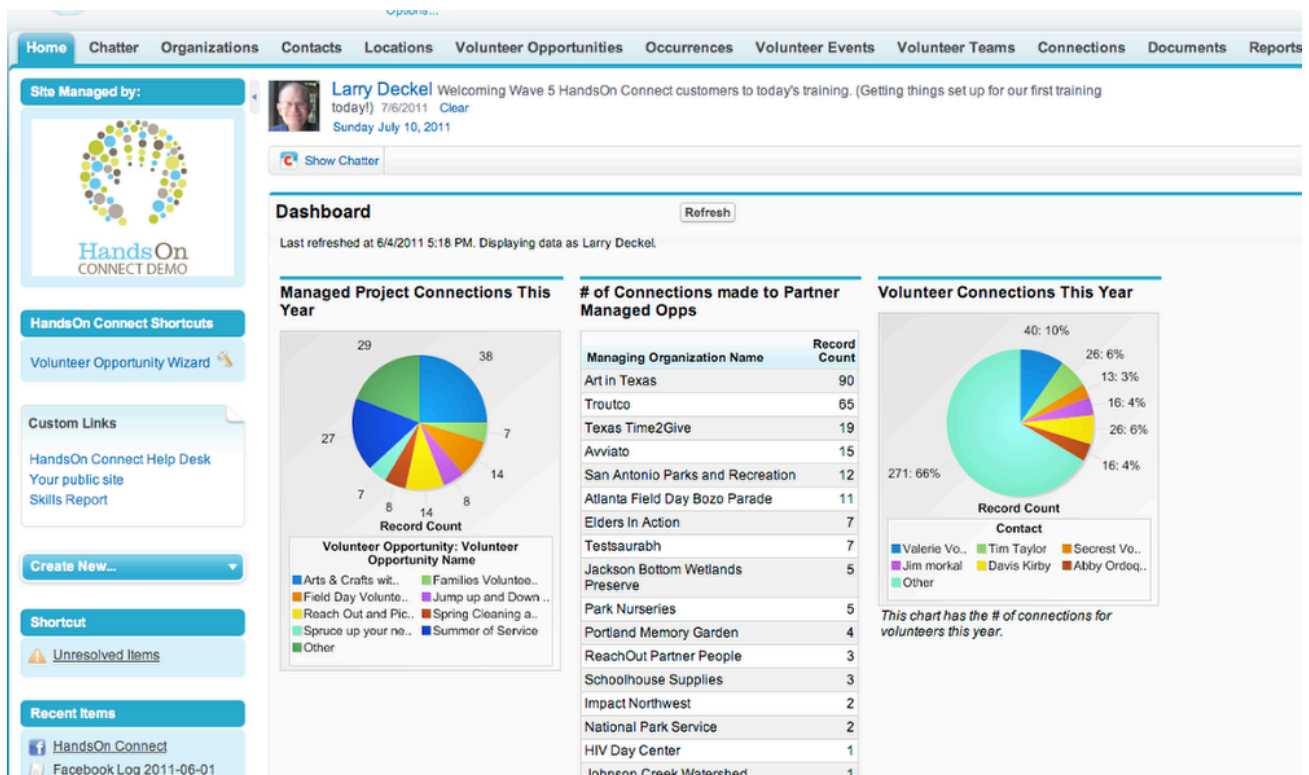
Dashboard Overview

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 than running and reviewing multiple reports.

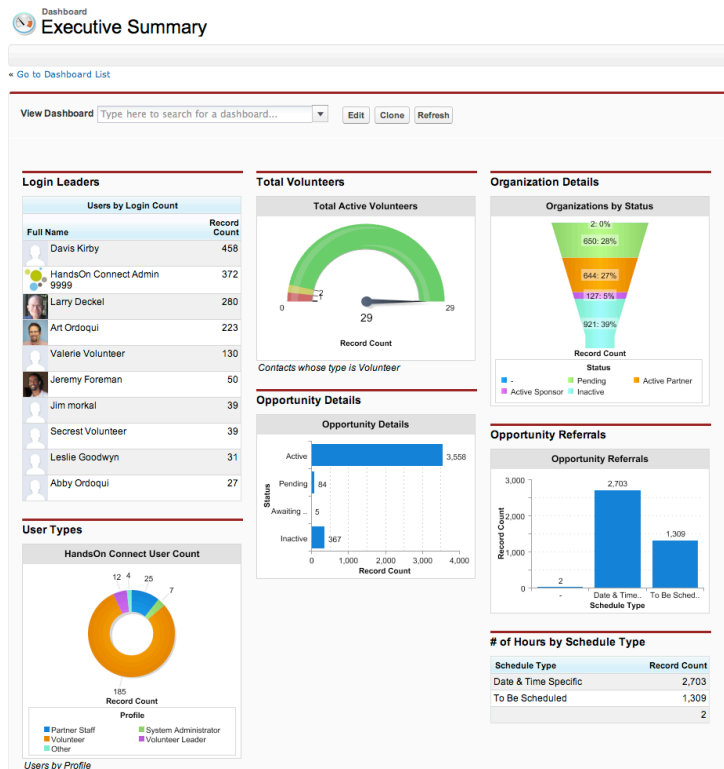
The place you're most likely to have seen a dashboard is on your home page. The home page allows you to pick one of your dashboards and display the top three items on it on the homepage so you always have an 'at a glance' view of the statistics that are most important to you.

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 be brought to the last dashboard you had viewed.

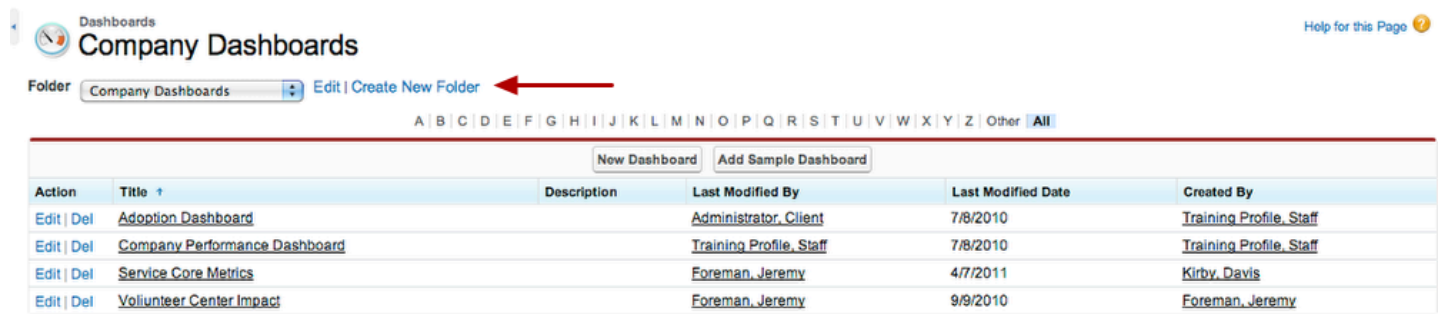
View Dashboard picklist

The screenshot shows the HandsOnConnect Dashboard interface. At the top is a navigation bar with tabs: Home, Chatter, Organizations, Contacts, Locations, Volunteer Opportunities, Occurrences, Volunteer Events, Volunteer Teams, Connections, Documents, Reports, **Dashboards**, and Control Panel. Below the navigation bar is the 'Executive Summary' dashboard. The dashboard has a 'View Dashboard' picklist at the top with a search box and buttons for Edit, Clone, and Refresh. Below the picklist are several data visualizations: 'Login Leaders' (table of users by login count), 'Total Active Volunteers' (gauge chart), 'Organization Details' (funnel chart), and 'Opportunity Details' (table). Numbered callouts 1 through 4 highlight key features: 1. 'Go to Dashboard List' link, 2. 'Last refreshed at' timestamp, 3. 'Refresh' button, and 4. 'View dashboard as' user selector.

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)



Handbook Dashboards Help for this Page

Company Dashboards [Edit | Create New Folder](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

[New Dashboard](#) [Add Sample Dashboard](#)

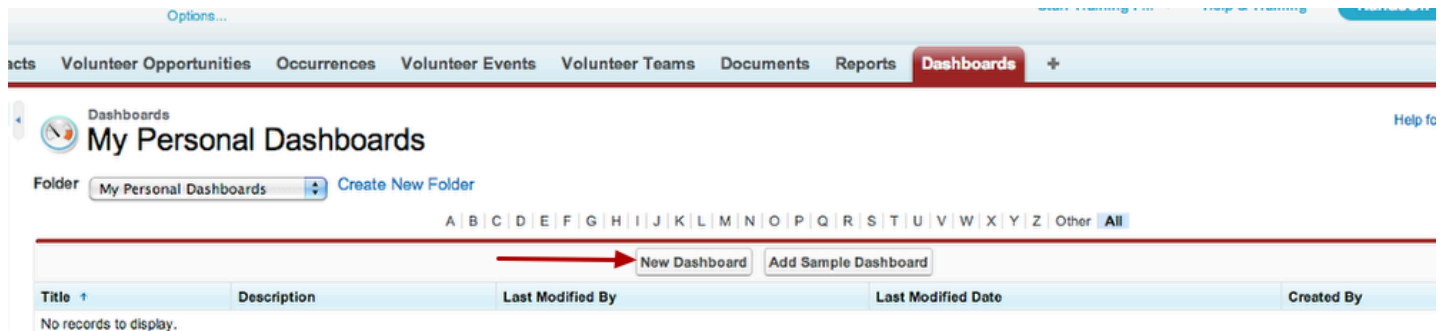
Action	Title	Description	Last Modified By	Last Modified Date	Created By
Edit Del	Adoption Dashboard		Administrator, Client	7/8/2010	Training Profile, Staff
Edit Del	Company Performance Dashboard		Training Profile, Staff	7/8/2010	Training Profile, Staff
Edit Del	Service Core Metrics		Foreman, Jeremy	4/7/2011	Kirby, Davis
Edit Del	Volunteer Center Impact		Foreman, Jeremy	9/9/2010	Foreman, Jeremy

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

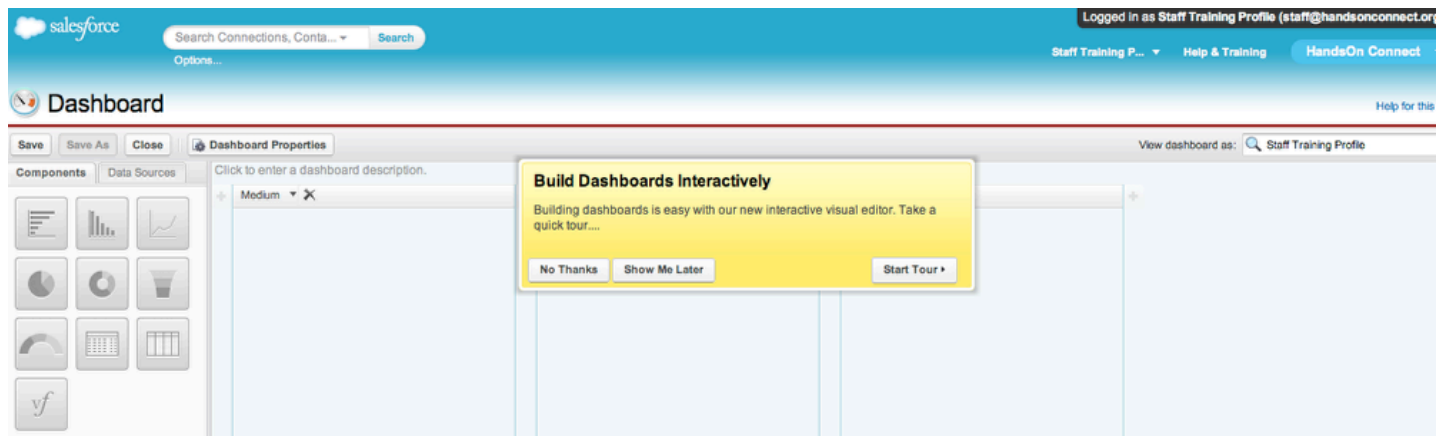
Click on Create New Folder to create a new folder to group your dashboards and control who can see dashboards in a given folder.

Creating Dashboards

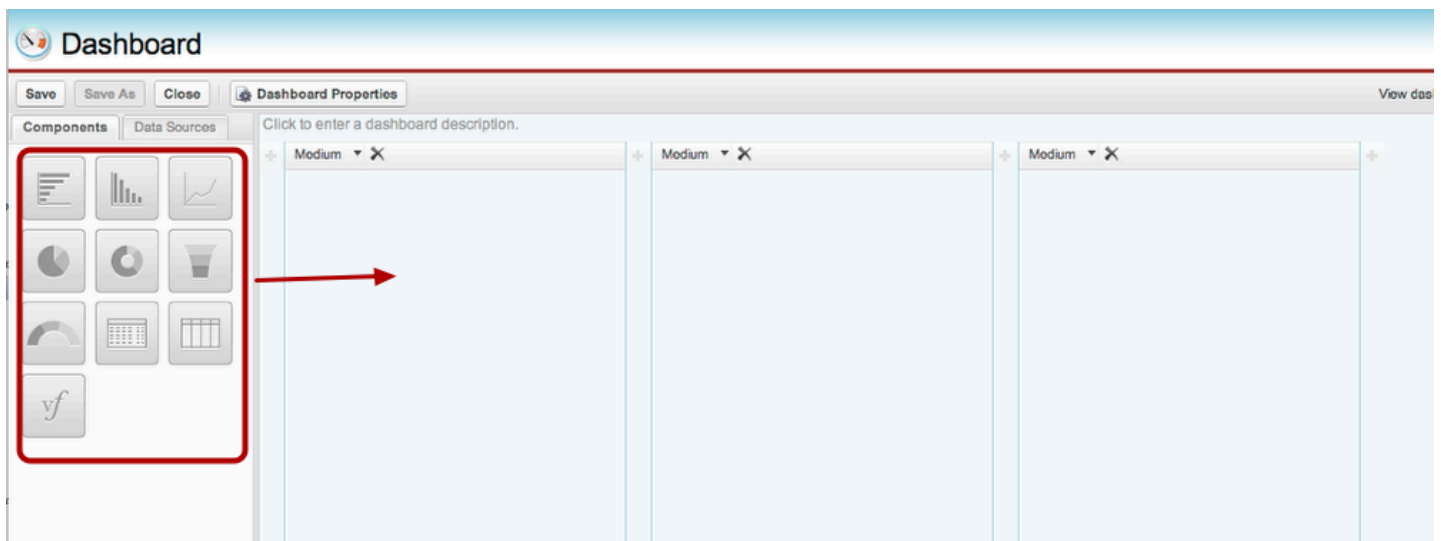
From the folder view for dashboards - click on the "New Dashboard" button



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



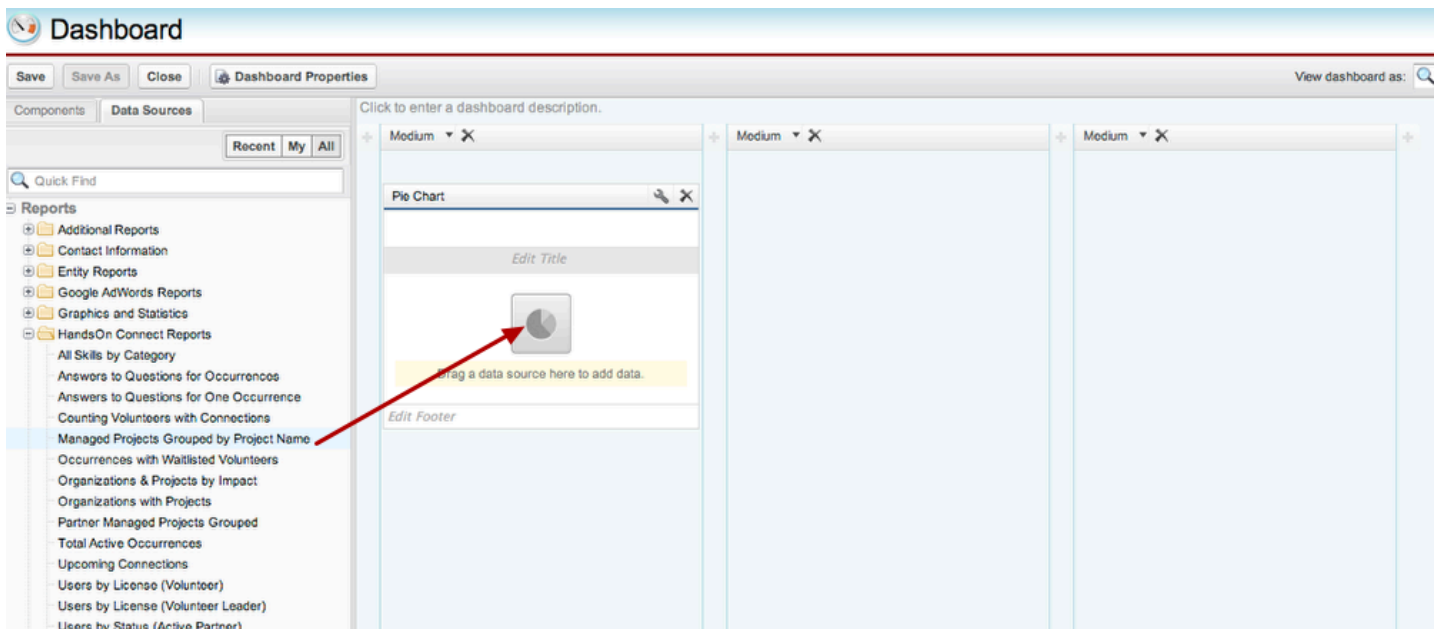
Add Components to Your Dashboard



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.

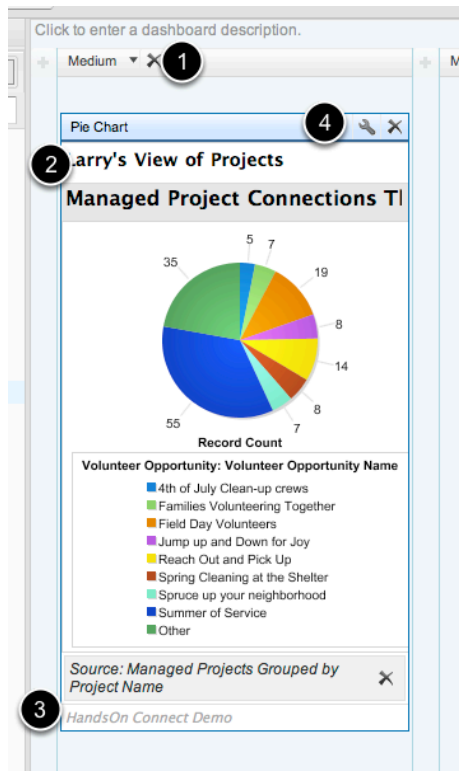
Choose the Data Source for your Component



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

Component Editor

Help for this Page ? x

Select Type:

Component Data

Formatting

Sort Rows By

Label Ascending ▼

Maximum Values Displayed


Legend Position

Bottom ▼

Data Labels

☒ Combine Small Groups into 'Others'
 ☒ Show Values
 ☐ Show %
 ☐ Show Details on Hover

Record Count



Volunteer Opportunity: Volunteer Opportunity Name

- 4th of July Clean-up crews
- Families Volunteering Together
- Field Day Volunteers
- Jump up and Down for Joy
- Reach Out and Pick Up
- Spring Cleaning at the Shelter
- Spruce up your neighborhood
- Summer of Service
- Other

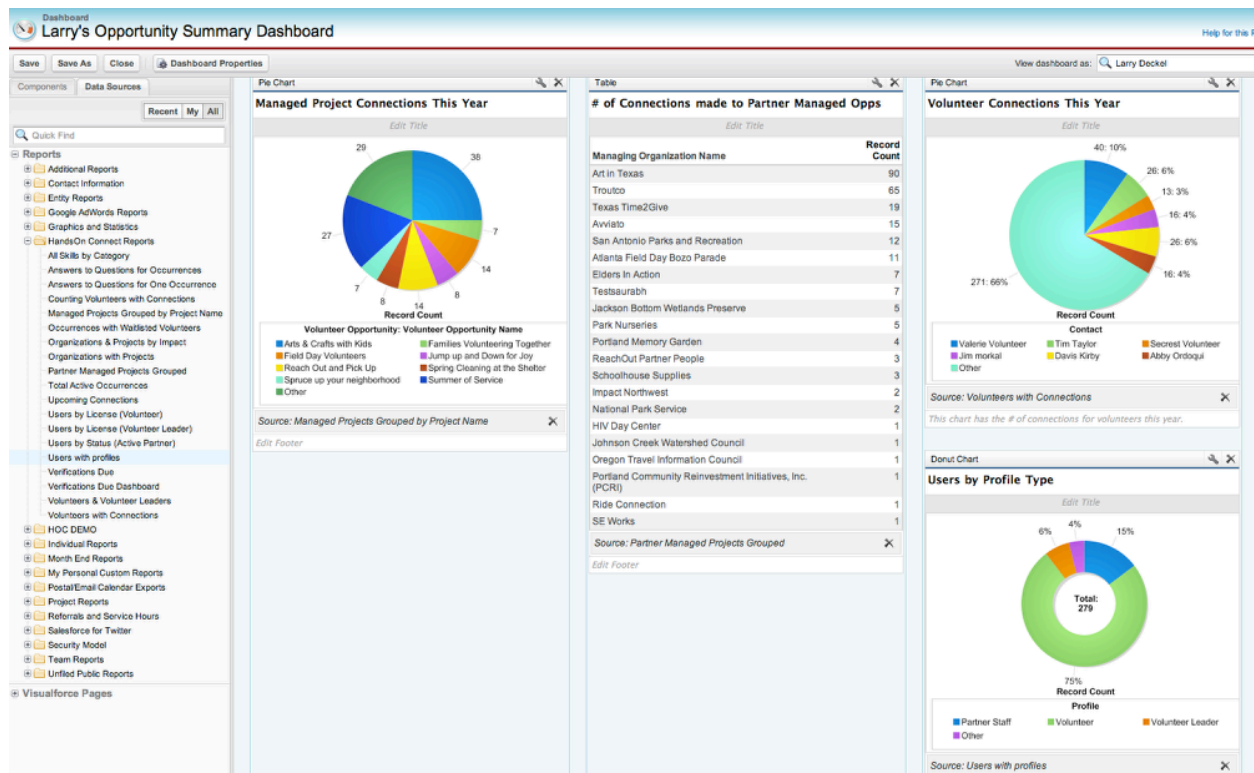
OK

Cancel

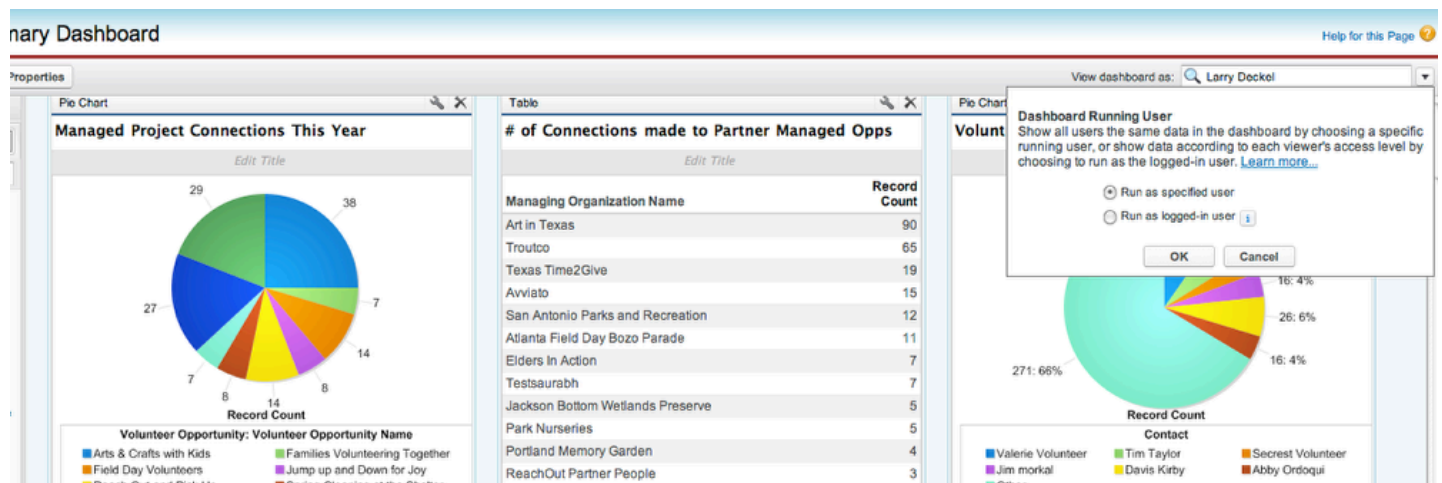
Here you can change the component type, and control the formatting and sorting of the graph or chart.

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.

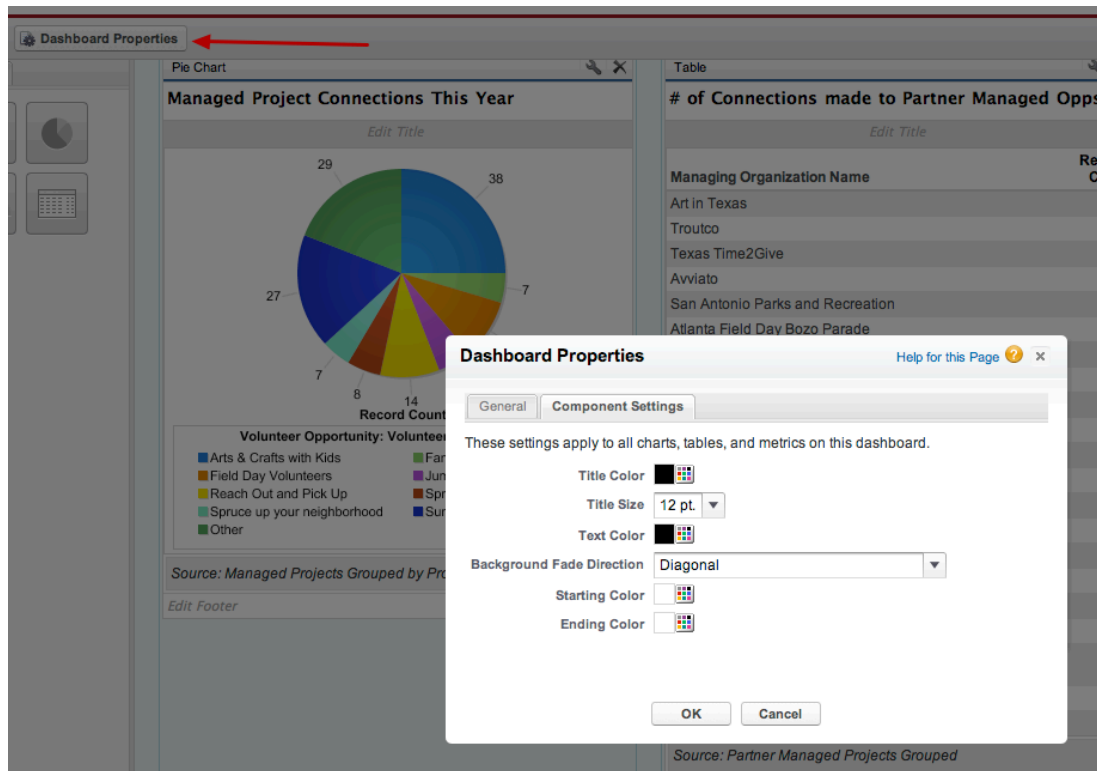


You set the data that will be viewed in the component by clicking on the "View Dashboard As" lookup in the upper right.



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

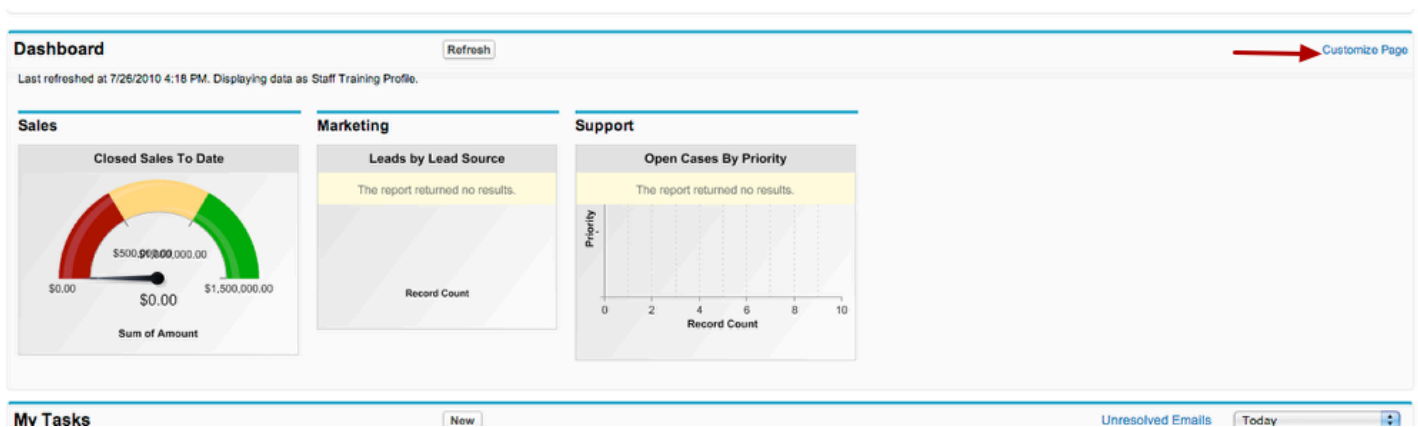
https://help.salesforce.com/HTViewHelpDoc?id=dashboards_post_to_dashboard_feed.htm

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:

Customize your Home Page

Customizable Components:

Your home page includes the following dashboard snapshot. Select the dashboard to use as the source of your snapshot. The snapshot will display the first row of the dashboard.

Component:	Show Data From:
Dashboard Snapshot	<div>Company Performance Dashboard</div>
	<div>Save Cancel</div>

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!

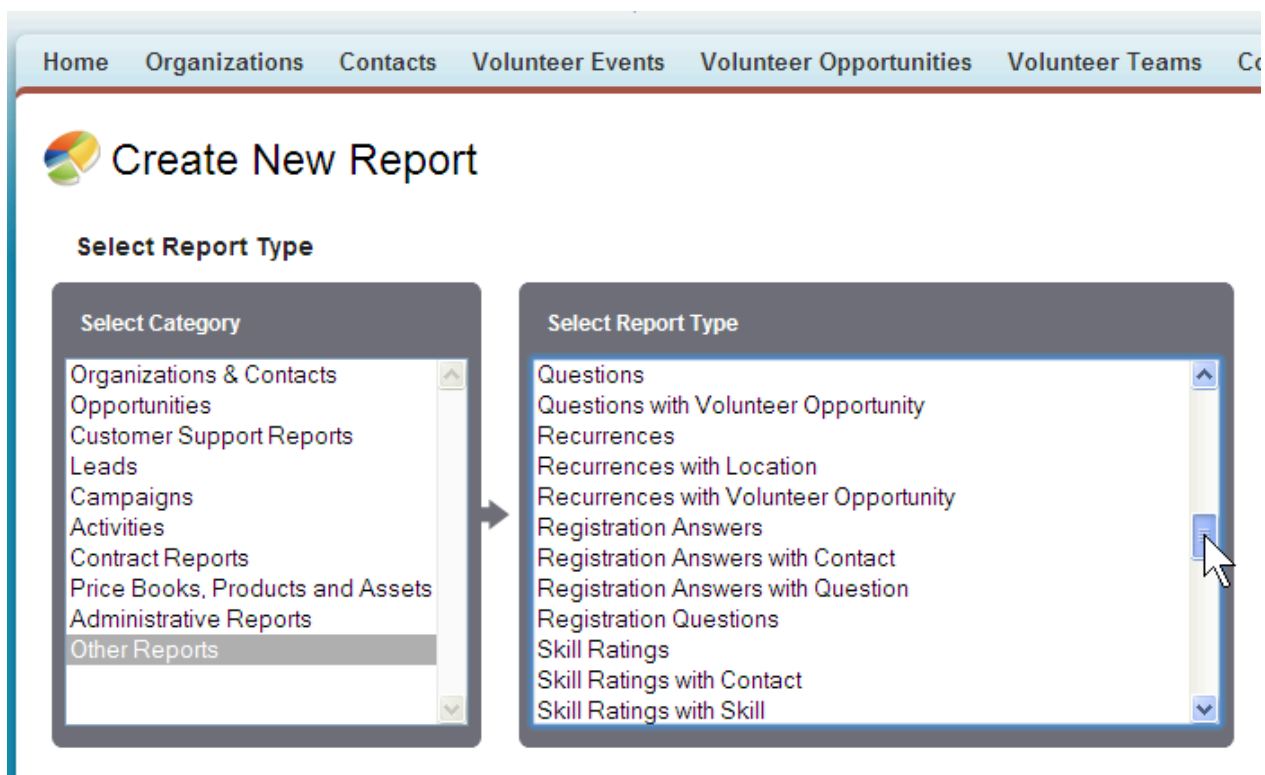
Don't forget to hit REFRESH to get the latests dashboard data.

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"

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined object: specify.

View: All Custom Report Types [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W

New Custom Report Type			
Action	Label ↑	Description	Category
Edit	 Connections	Custom Report Type	Other Reports
Edit	 Contact & Skill	For showing up Contacts and Skill associated	Other Reports

Choose the focus of your report

New Custom Report Type

Step 1. Define the Custom Report Type

Report Type Focus
Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Occurrences
Ad Groups
Answers
Assets
Associations
Campaigns

Identification

Report Type Label

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

Report Type Focus Required Information
Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Occurrences

Identification

Report Type Label

Occurrences, Connections, and Answers

Report Type Name

Occurrences_Connectic ⓘ

Note: Description will be visible to users who create reports.

Description

We are looking for Contact's answers for different Opportunity Questions at the Occurrence Level

Store in Category

Other Reports

Deployment

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

Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☐ In Development ☒ Deployed

Next Cancel

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

Previous Save Cancel

This report type will generate reports about Occurrences. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

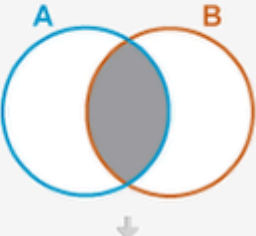
A Occurrences
Primary Object

B

--Select Object--
Activities
Connections

☐ A records must have at least one related "B" record.
☐ A records may or may not have related "B" records.

(Click to relate another object)



A Venn diagram with two overlapping circles, A (blue) and B (orange). The intersection is shaded gray. An arrow points down from the intersection to a table below.

A	B

Previous Save Cancel

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

Step 2. Define Report Records Set

Step 2 of 2

Previous

Save

Cancel

This report type will generate reports about Occurrences. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Occurrences

Primary Object

B

Connections

A to B Relationship:

☒ Each "A" record must have at least one related "B" record.

☐ "A" records may or may not have related "B" records.

(Click to relate another object)

A	B

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

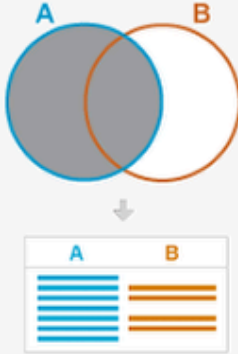
Step 2. Define Report Records Set Step 2 of 2

[Previous](#) [Save](#) [Cancel](#)

This report type will generate reports about Occurrences. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Occurrences
Primary Object

B Connections
A to B Relationship:
☐ Each "A" record must have at least one related "B" record.
☒ "A" records may or may not have related "B" records.
[\(Click to relate another object\)](#)



[Previous](#) [Save](#) [Cancel](#)

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

cts Volunteer Events Volunteer Opportunities Volunteer Teams Connections Documents Reports Dashboards

New Custom Report Type Occurrences, Connections, and Answers [Help for this Page](#)

Step 2. Define Report Records Set Step 2 of 2

Previous Save Cancel

This report type will generate reports about Occurrences. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Occurrences
Primary Object

B Connections

A to B Relationship:

- ☒ Each "A" record must have at least one related "B" record.
- ☐ "A" records may or may not have related "B" records.

C Answers

B to C Relationship:

- ☒ Each "B" record must have at least one related "C" record.
- ☐ "B" records may or may not have related "C" records.

The selected object has no further relatable objects. [More Info](#)

Previous **Save** Cancel

A	B	C
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100		

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.

Create New Report

Help for this Page ?

Select Report Type

Select Category

- Organizations & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contract Reports
- Price Books, Products and Assets
- Administrative Reports
- Other Reports

Select Report Type

- Tools
- Tool History
- Volunteer Team with Volunteer Team Member
- Contacts with Team Member
- Security Model3
- Connections
- Occurrences, Connections, and Answers
- CP Users
- Contacts and Connection
- Security Model2
- Contact & Skill
- Security Model1

Description

We are looking for Contact's answers for different Opportunity Questions at the Occurrence Level

Cancel Create

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

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined objects, i

View: All Custom Report Types Edit Create New View

New Custom Report Type

Action	Label	Description
Edit Del	Occurrences, Connections, and Answers	We are looking for Contact's answers for different Opportunity Questions at the Occurrence Level
Edit Del	Security Model3	for VL reports
Edit Del	Security Model2	This report can be used for the security model reports Locations
Edit Del	Security Model1	This report can be used for the security model reports Vol Opps, Occurrences, and Connections.

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 /

Home Chatter Organizations Contacts Locations Volunteer Opportunities Occurrences Volunteer Events Volunteer Teams Connections Documents Reports Dashb

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types
 - Tabs
- Workflow & Approvals

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

View: All Custom Report Types Edit | Create New View

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Occurrences, Connections, and Answers demo 2	Doing this for the screen shots	Other Reports	✓	LDeck	7/4/2011
Edit Del	Opportunity Coordinators	Provides the Opportunity Coordinator for the Volunteer Opportunity and Occurrences as well as contact's information.	Other Reports	✓	aordo	6/9/2011
Edit	Contacts with Twitter	Contacts with		✓	LDeck	6/1/2011
Edit Del	Contacts with Connections (Unmanaged)	Contacts with connections		✓	LDeck	5/30/2011
Edit Del	Contact, Contact Custom, Connections	sdfgsd		✓	dkirb	5/23/2011
Edit Del	Questions and Answers for an Occurrence	This will com Connections Questions Answers in one report	Other Reports	✓	LDeck	3/4/2011

We can see this report type is part of a managed app and can't be edited

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

Expand All | Collapse All

Quick Find

Personal Setup

My Personal Information

Email

Import

Desktop Integration

My Chatter Settings

App Setup

Customize

Create

Apps

Custom Labels

Objects

Packages

Report Types

Tabs

Workflow & Approvals

Develop

Deploy

Installed Packages

AppExchange Marketplace **Now!**

Critical Updates

Administration Setup

Manage Users

Company Profile

Security Controls

Communication Templates

Translation Workbench

Custom Report Type

Help for this Page ?

Occurrences, Connections, and Answers demo 2

« Back to List: Custom Report Types

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

Edit Delete Clone

Report Type Label	Occurrences, Connections, and Answers demo 2	Report Type Category	Other Reports
Report Type Name	Occurrences_Connections_and_Answers_demo_2	Deployment Status	Deployed
Description	Doing this for the screen shots		
Created By	Larry Deckel, 7/4/2011 11:12 AM	Modified By	Larry Deckel, 7/4/2011 11:12 AM

Object Relationships

Edit

Object Relationships Help ?

Occurrences (A)

with at least one related record from Connections (B)

with at least one related record from Answers (C)

Fields Available for Reports

Edit Layout Preview Layout

Fields Available for Reports Help ?

Source	Selected Fields
Occurrences	60
Connections	42
Answers	10

Click on Edit Layout.

Field Layout Properties screen

Occurrences, Connections, and Answers demo 2

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

- You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
- To rearrange the sections, select the section header and drag it to the desired location.

Field Layout Properties

Save Cancel Preview Layout

Total Fields in Layout: 112

Edit Properties Create New Section

Occurrences			
City	Country	Created By	Created Date
Days & Ti...	End Date &...	Google Map URL	Guest Volume...
Guest Volume...	HOC Domain Name	HOC ID	Impact Measur...
Impact Measur...	Import ID	IsUpdateable	Last Activity...
Last Modified...	Last Modified...	Location	Managing Orga...
Maximum Atten...	Minimum Atten...	Occurrence ID	Occurrence ID
Occurrence URL	Old Guest Vol...	Old Total Hou...	Old Volunteer...
Opportunity A...	Opportunity C...	Opportunity C...	Opportunity C...
Owner	Partner Staff...	Posting Status	Recurrence
Registration ...	Registration ...	Schedule Type	Serial Number
Start Date & a...	State/Province	Status	Street
Total Attended	Total Confirmed	Total Connect...	Total Declined
Total Hours S...	Total Not Att...	Total Pending	Total Unrepor...
Update all th...	Volunteer Hou...	Volunteer Lea...	Volunteer Opp...
Volunteer Opp...	Volunteers At...	Volunteers St...	Zip/Postal Code

Connections			
Attendance St...	Connection Id	Connection ID	Contact
Contact Email	Contact Phone	Created By	Created Date
Parting Pass...	End Date &...	Feedback	Guest Hours S...

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View: Occurrences Fields

Add fields related via lookup

Occurrences Fields (Page 1/4)

Next Page

City Country

Created By Created Date

Days & Ti... End Date &...

Google Map URL Guest Volume...

Guest Volume... HOC Domain Name

HOC ID Impact Measur...

Impact Measur... Import ID

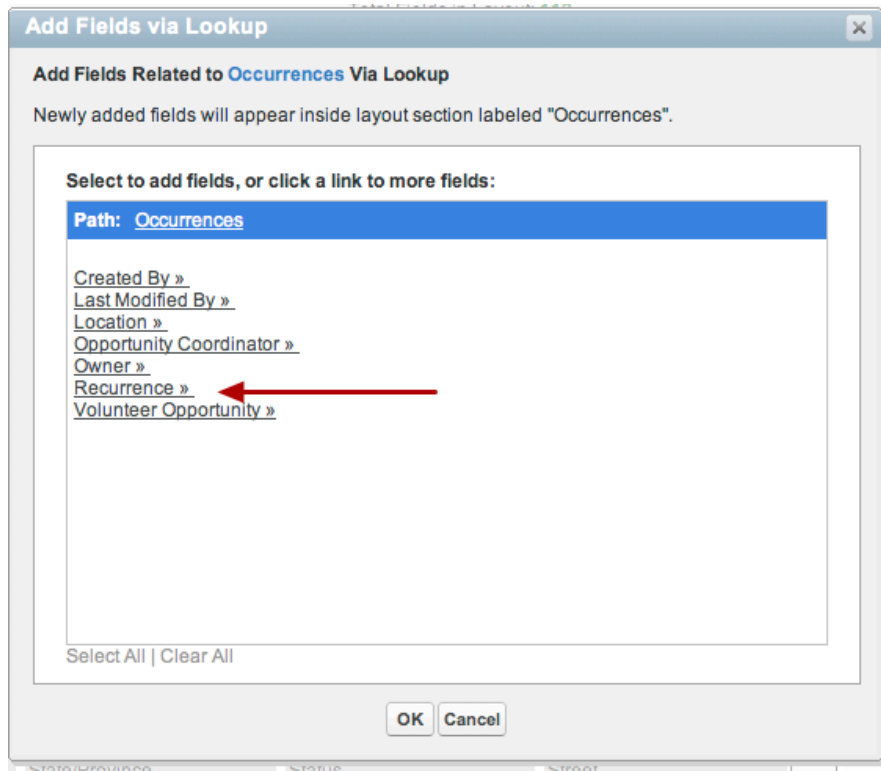
IsUpdateable Last Activity...

Next Page

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.

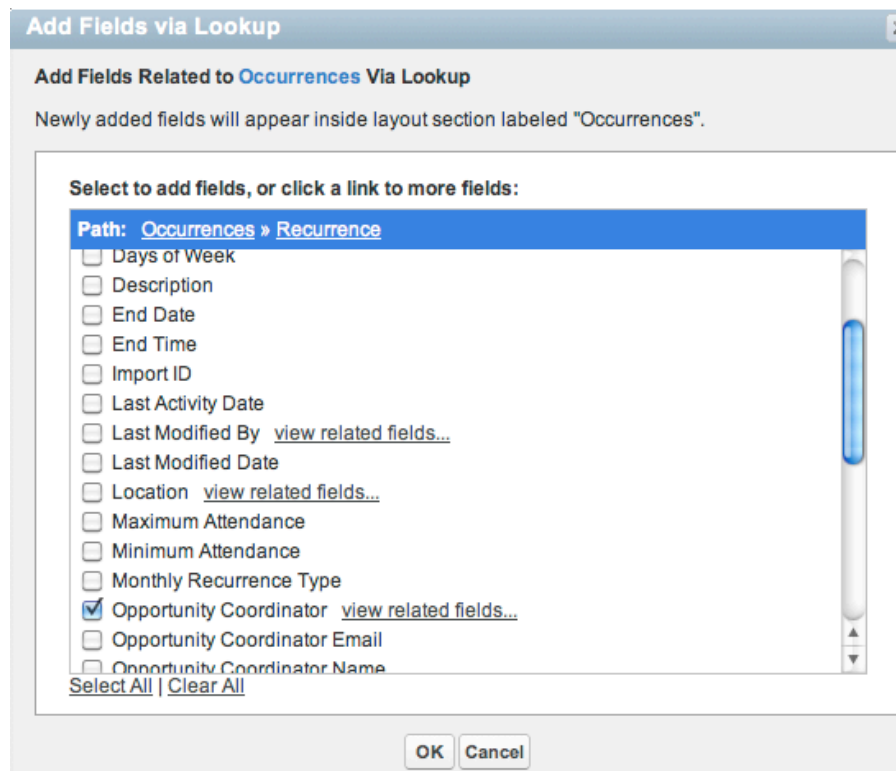
1. Tray of available fields (use the picklist to choose from the different objects in the report). Click on Next Page to see more Fields
2. If you do like the organization of the fields by object name, you can organize the fields any way you like by creating a new section and reorganizing the way the 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

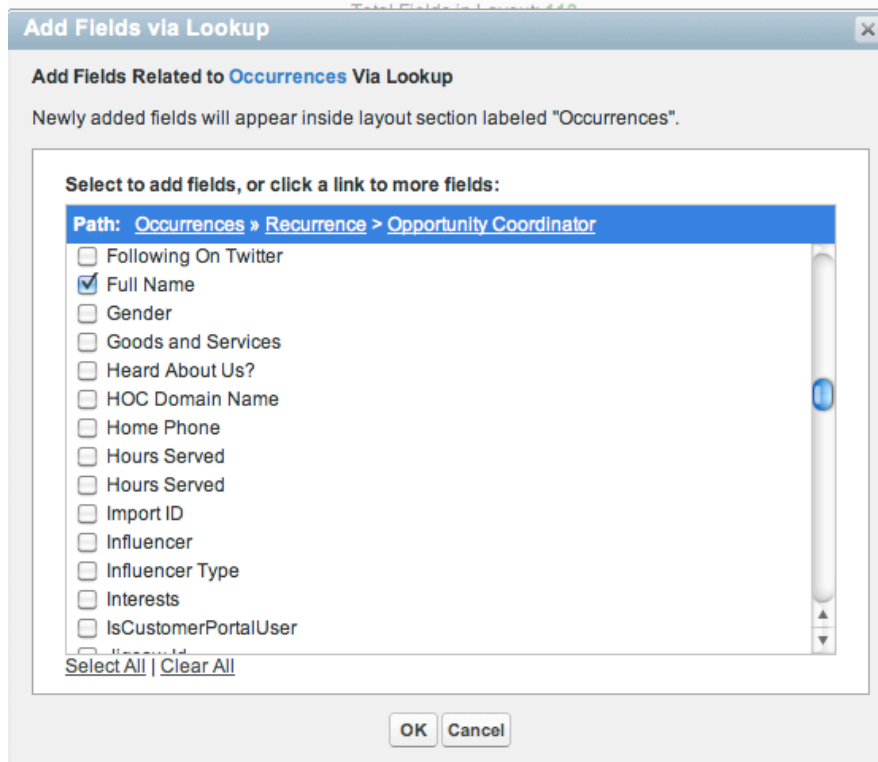


This window pops up to show you fields you can add to the layout through their relationship via lookup. You can next deeply into other objects through their related lookups to other objects. For example, we can find fields in the Recurrence object, even though its not one of the objects contained in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

Field Layout Properties Save Cancel Preview Layout

Total Fields in Layout: 114

Edit Properties Create New Section

Occurrences			
City	Country	Created By	Created Date
Days & Ti...	End Date &...	Google Map URL	Guest Volunte...
Guest Volunte...	HOC Domain Name	HOC ID	Impact Measur...
Impact Measur...	Import ID	IsUpdateable	Last Activity...
Last Modified...	Last Modified...	Location	Managing Orga...
Maximum Atten...	Minimum Atten...	Occurrence ID	✓ Occurrence...
Occurrence URL	Old Guest Vol...	Old Total Hou...	Old Volunteer...
Opportunity A...	Opportunity C...	Opportunity C...	Opportunity C...
Owner	Partner Staff...	Posting Status	Recurrence
Registration ...	Registration ...	Schedule Type	Serial Number
Start Date &a...	State/Province	Status	Street
Total Attended	Total Confirmed	Total Connect...	Total Declined
Total Hours S...	Total Not Att...	Total Pending	Total Unrepor...
Update all th...	Volunteer Hou...	Volunteer Lea...	Volunteer Opp...
Volunteer Opp...	Volunteers At...	Volunteers St...	Zip/Postal Code
Opportunity...	Full Name		

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View: Occurrences Fields (via lookup) +

Add fields related via lookup:

Occurrences Fields (via lookup) [Page 1/1]

Opportunity C...

Full Name

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

The screenshot displays the 'All Custom Report Types' page in the HandsOnConnect application. The page includes a navigation bar at the top with links to Home, Organizations, Contacts, Locations, Volunteer Events, Volunteer Opportunities, Volunteer Teams, Connections, Documents, Reports, and Dashboards. On the left, there is a sidebar with 'Personal Setup' and 'App Setup' sections. The main content area shows a list of custom report types with the following columns: Action, Label, Description, Category, Deployed, Created By Alias, and Created Date. A 'New Custom Report Type' button is located at the top of the list.

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit	Connections	Custom Report Type	Other Reports	✓	rsing	1/3/2011
Edit	Contact & Skill	For showing up Contacts and Skill associated	Other Reports	✓	rsing	1/3/2011
Edit	Contacts and Connection	Contacts with Connections	Other Reports	✓	rsing	1/3/2011
Edit Del	Contacts and Connections - HONO	Contacts and Connections with Custom Fields	Other Reports	✓	Inash	6/30/2011
Edit	Contacts with Team Member	To Display all the Teams, associated with an Individual	Other Reports	✓	rsing	1/3/2011
Edit	CP Users	To find the Inactive and Active CP Users	Other Reports	✓	rsing	1/3/2011
Edit Del	Occurrences, Vol Opps, Connects and Contacts- HONO	Occurrences, Volunteer Opportunities, Connections and Contacts with Custom Fields	Other Reports	✓	Inash	7/7/2011
Edit Del	Organizations, Contacts, and Connections	Used to setup Sharing Security	Accounts & Contacts	✓	HAdmin	1/3/2011
Edit Del	Security Model1	This report can be used for the security model reports for Vol Opps, Occurrences, and Connections.	Other Reports	□	HAdmin	1/3/2011
Edit Del	Security Model2	This report can be used for the security model reports for Locations	Other Reports	□	HAdmin	1/3/2011
Edit Del	Security Model3	for VL reports	Other Reports	□	HAdmin	1/3/2011
Edit	Volunteer Team with Volunteer Team Member	For the display of Team associated with Contact	Other Reports	✓	rsing	1/3/2011

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

Home Organizations Contacts Locations Volunteer Events Volunteer Opportunities Volunteer Teams Connections Documents Reports Dashboards

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
- Report Types
- Tabs
- Workflow & Approvals
- Develop
- Deploy
 - Installed Packages
 - AppExchange Marketplace **New!**
 - Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates

New Custom Report Type

Help for this Page ?

Step 1 of 2

Step 1. Define the Custom Report Type

Next Cancel

Report Type Focus ! = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object Connections

Identification

Report Type Label Connections with Lookups

Report Type Name Connections_with_Loo

Description This report type will allow you to get all related information about your connections (even from other objects!)

Note: Description will be visible to users who create reports.

Store in Category Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development ☒ Deployed

Next Cancel

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

Edit Custom Report Type

Connections with Lookups

Changes you make to this report type will affect existing reports created from it. We recommend that you clone any report type you wish to edit, rather than change a working report type.

Object Relationships

Save Cancel

This report type will generate reports about Connections. You may define which related records from other objects are returned i

A
Connections
Primary Object

B

--Select Object--
Activities
Answers

☒ "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

X

A
B

A
B

Save Cancel

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!

New Custom Report Type

[Help for this Page](#) ?

Connections with Lookups

Step 2. Define Report Records Set

Step 2 of 2

Previous

Save

Cancel

This report type will generate reports about Connections. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A

Connections

Primary Object

(Click to relate another object)

A

↓

A

Previous

Save

Cancel

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

Custom Report Type

Connections with Lookups

[Help for this Page](#)

[Back to List: Custom Report Types](#)

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

EditDeleteClone

Report Type Label	Connections with Lookups	Report Type Category	Other Reports
Report Type Name	Connections_with_Lookups	Deployment Status	Deployed
Description	This report type will allow you to get all related information about your connections (even from other objects!)		
Created By	0037 HOC Admin, 7/15/2011 2:32 PM	Modified By	0037 HOC Admin, 7/15/2011 2:32 PM

Object Relationships

Edit

[Object Relationships Help](#)

Connections (A)

A

↓

A

Fields Available for Reports

Edit LayoutPreview Layout

[Fields Available for Reports Help](#)

Source	Selected Fields
Connections	42

Click on Edit Layout

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

Edit Custom Report Type Help for this Page ?

Connections with Lookups

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

- You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
- To rearrange the sections, select the section header and drag it to the desired location.

Field Layout Properties

Save Cancel Preview Layout

Total Fields in Layout: 42

Edit Properties Create New Section

Connections				Edit Delete
Admin Fix Field	Attendance St...	✓ Connection Id	Connection ID	
Contact	Contact Email	Contact Phone	Created By	
Created Date	Decline Reason	End Date &...	Feedback	
Guest Hours S...	Guest Volunte...	HOC ID	Hours Served	
Import ID	Last Activity...	Last Modified...	Last Modified...	
Occurrence	Old_Guest Hou...	Old_Hours Ser...	Partner Staff...	
Partner Staff...	Rating	Role	Serial Number	
Signup Origin	Source	Star Rating	Start Date &a...	
Status	Team Member	Team Name	Total Volunte...	
VO Location	Volunteer Coo...	Volunteer Email	Volunteer Lea...	
Volunteer Opp...	VO Volunteer ...			

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View: Connections Fields

[Add fields related via lookup](#)

Connections Fields [Page 1/3]

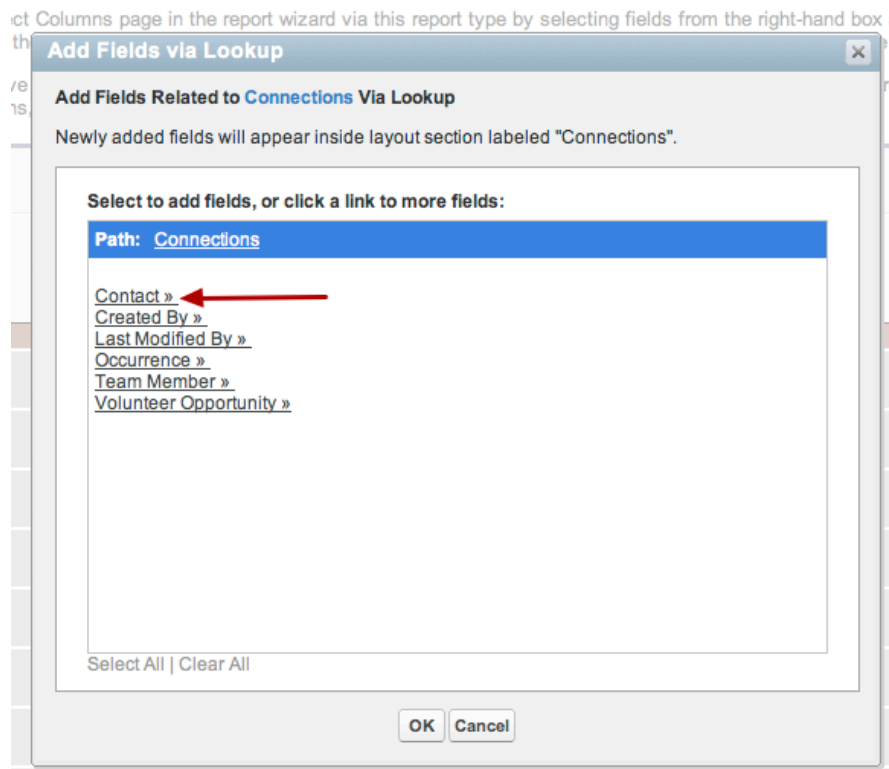
Contacts Tab Next Page

Admin Fix Field	Attendance St...
Connection ID	Connection Id
Contact	Contact Email
Contact Phone	Created By
Created Date	Decline Reason
End Date &...	Feedback
Guest Hours S...	Guest Volunte...
HOC ID	Hours Served

Next Page

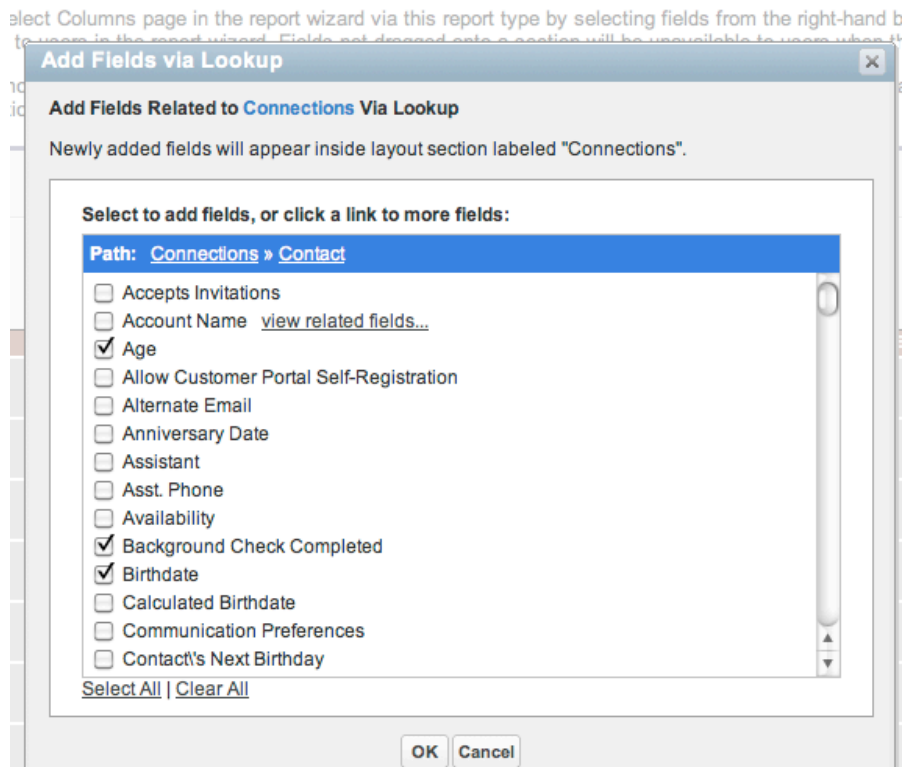
We can however also add fields that are accessible to the Connections record via **lookups**. To do this we click on the link that says "**Add fields related via lookup**"

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

Field Layout Properties

Save Cancel Preview Layout

Total Fields in Layout: 46

Edit Properties Create New Section

Connections			
Attendance St...	✓ Connection...	Connection ID	Contact
Contact Email	Contact Phone	Created By	Created Date
Decline Reason	End Date &...	Feedback	Guest Hours S...
Guest Volunte...	Hidden Admin ...	HOC ID	Hours Served
Import ID	Last Activity...	Last Modified...	Last Modified...
Number of Con...	Occurrence	Old_Guest Hou...	Old_Hours Ser...
Partner Staff...	Partner Staff...	Rating	Role
Serial Number	Signup Origin	Source	Star Rating
Start Date &a...	Status	Team Member	Team Name
Total Volunte...	VO Location	Volunteer Coo...	Volunteer Email
Volunteer Lea...	Volunteer Opp...	VO Volunteer ...	Age
Background ...	Birthdate		

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

Connections Fields

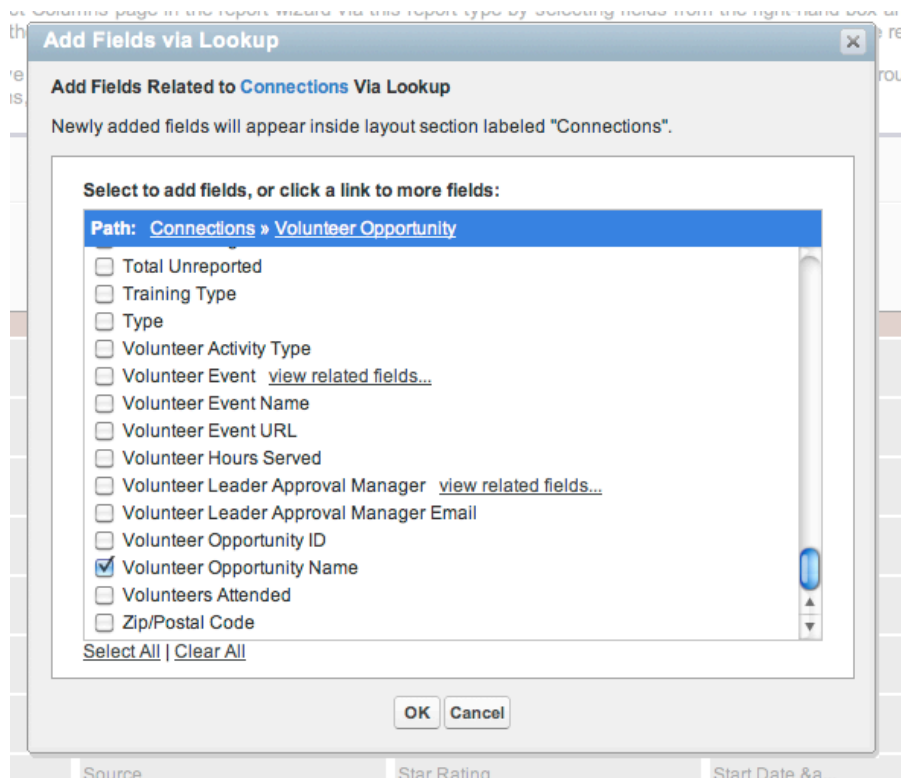
- Connections Fields (via lookup)
- Add fields related via lookup »

Connections Fields (via lookup) [Page 1/1]

- Age
- Background Ch...
- Birthdate

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

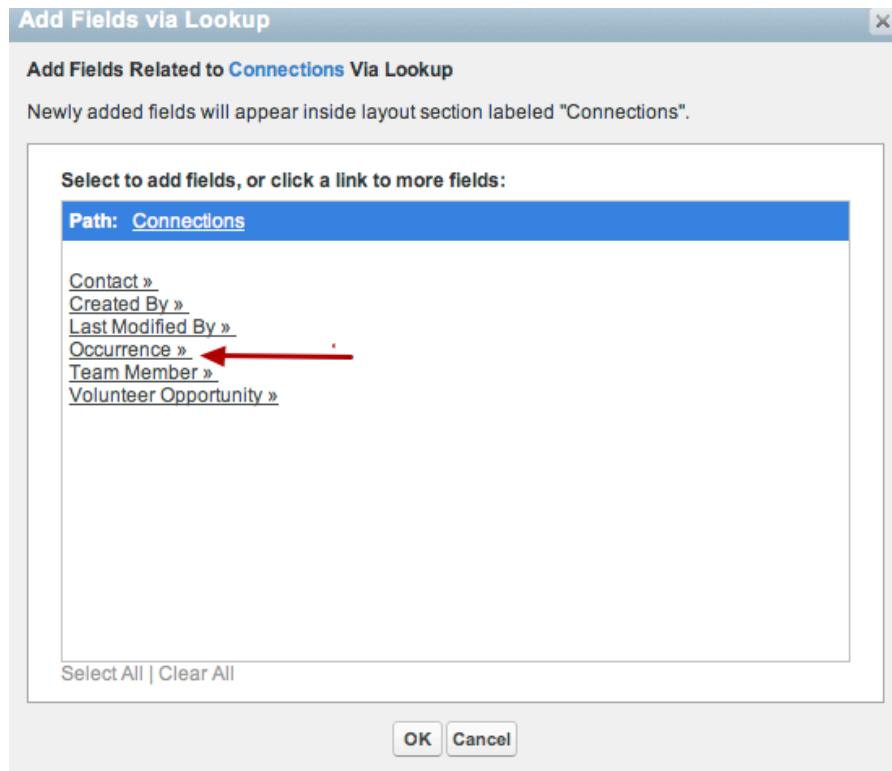
Select lookup again - and this time lookup items available through the Volunteer Opportunity Record



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

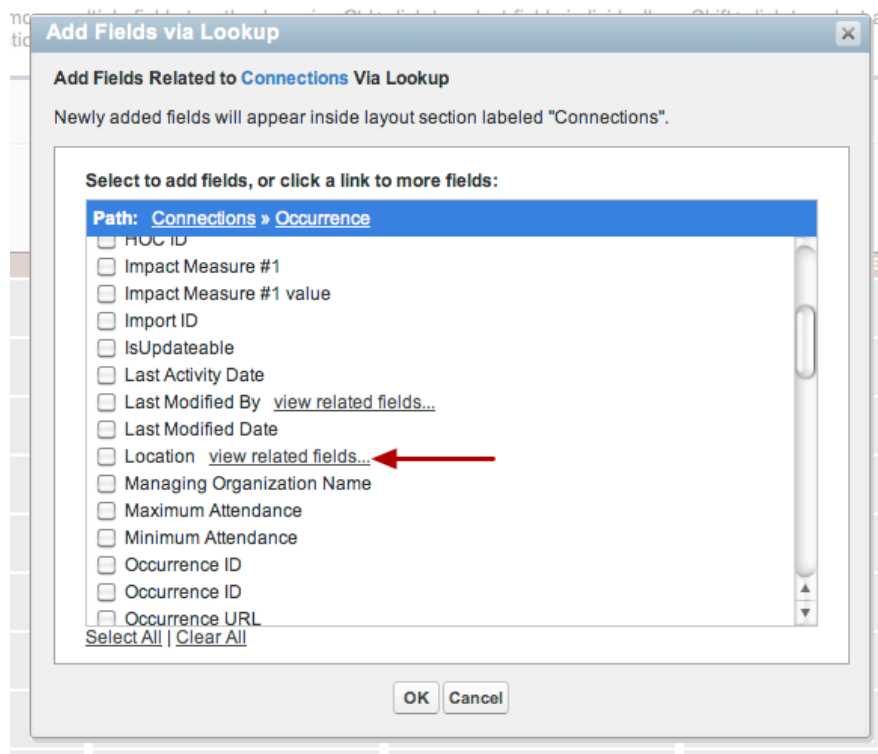
Let's grab the Volunteer Opportunity name from the Volunteer Opportunity record.

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



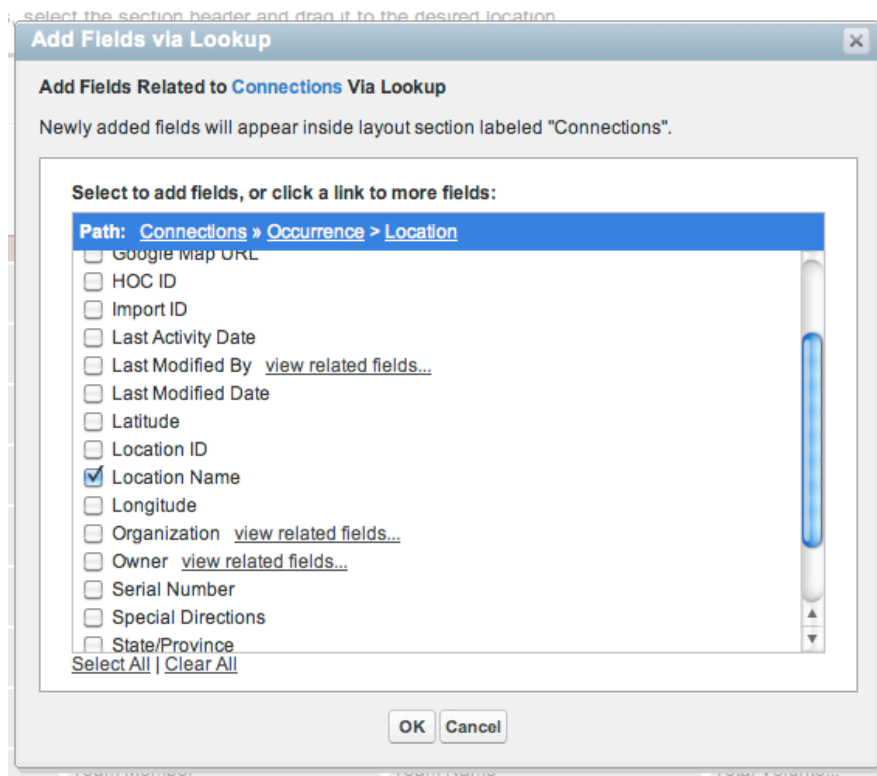
To do this we first select Occurrence (as that's what Locations are related to)

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'

EDIT Custom report type [Help for this Page](#)

Connections with Lookups

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

- You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
- To rearrange the sections, select the section header and drag it to the desired location.

Field Layout Properties

Save Cancel Preview Layout

Total Fields in Layout: 48

Edit Properties Create New Section

Connections				Edit Delete
Attendance St...	✓ Connection...	Connection ID	Contact	
Contact Email	Contact Phone	Created By	Created Date	
Decline Reason	End Date &...	Feedback	Guest Hours S...	
Guest Volunte...	Hi			
Import ID	La			
Number of Con...	Oc			
Partner Staff...	Pa			
Serial Number	Sig			
Start Date & a...	St			
Total Volunte...	VC			
Volunteer Lea...	Volunteer Opp...	VO Volunteer ...	Age	
Background ...	Birthdate	Volunteer O...	Location Name	

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View:

Connections Fields (via lookup) :
Add fields related via lookup »

Connections Fields (via lookup) [Page 1/1]

Age

Background Ch...

Birthdate

Volunteer Opp...

Location Name

Section:

Name: Lookup Fields

OK Cancel

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.

Field Layout Properties

Save

Cancel

Preview Layout

Total Fields in Layout: 48

Edit Properties

Create New Section

Connections

Attendance St...	✓ Connection...	Connection ID	Contact
Contact Email	Contact Phone	Created By	Created Date
Decline Reason	End Date &...	Feedback	Guest Hours S...
Guest Volunte...	Hidden Admin ...	HOC ID	Hours Served
Import ID	Last Activity...	Last Modified...	Last Modified...
Number of Con...	Occurrence	Old_Guest Hou...	Old_Hours Ser...
Partner Staff...	Partner Staff...	Rating	Role
Serial Number	Signup Origin	Source	Star Rating
Start Date &a...	Status	Team Member	Team Name
Total Volunte...	VO Location	Volunteer Coo...	Volunteer Email
Volunteer Lea...	Volunteer Opp...	VO Volunteer ...	

Legend

Not in Page Layout

Used in Page Layout

Selected

✓ Checked by Default

Added via Lookup

View:

Connections Fields (via lookup)

Add fields related via lookup

Connections Fields (via lookup) [Page1/1]

Age

Background Ch...

Birthdate

Volunteer Opp...

Location Name

Lookup Fields

Age

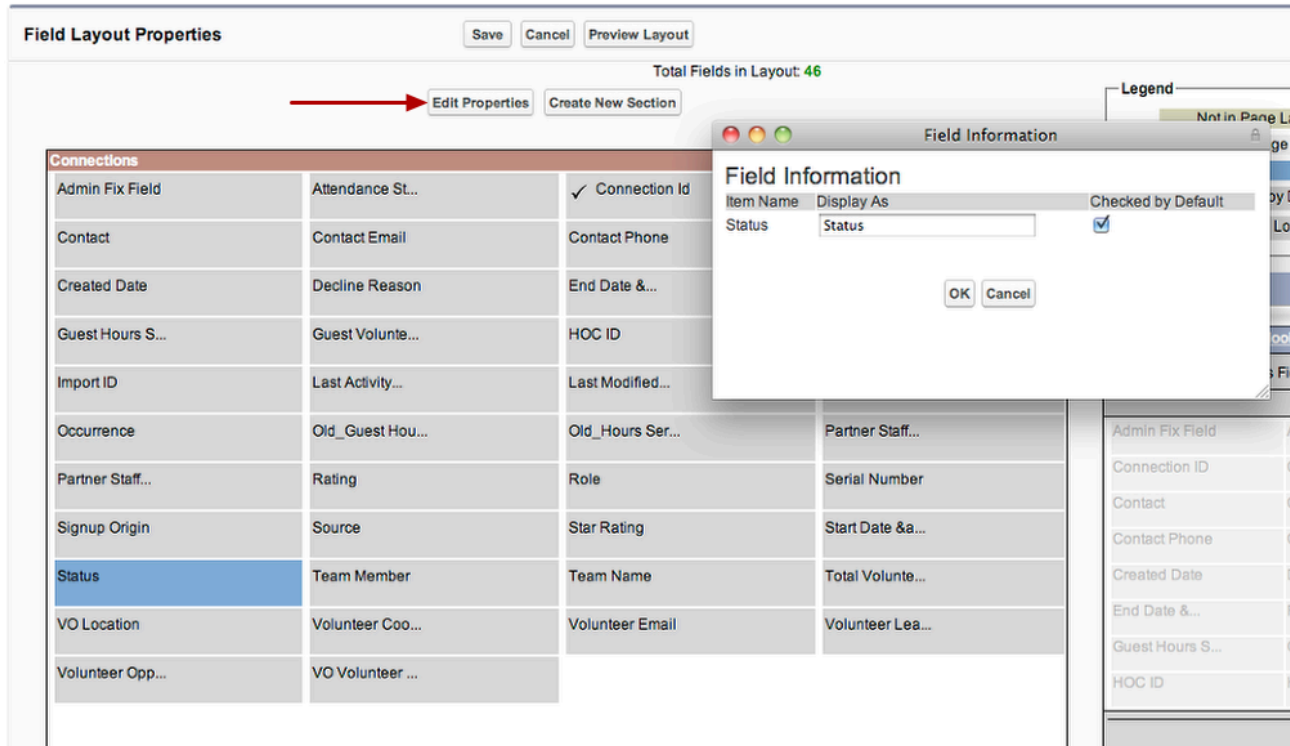
Background ...

Birthdate

Volunteer O...

Location Name

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!

Create New Report

Select Report Type

Select Category	Select Report Type	Description
Organizations & Contacts	Volunteer Teams with Volunteer Team Members	This report shows the list of volunteer teams and their members.
Opportunities	Volunteer Teams with Volunteer Team Members and Contact	This report shows the list of volunteer teams and their members, along with their contact information.
Customer Support Reports	ZipCodes	This report shows the list of zip codes.
Leads	Connections with Lookups	This report shows the list of connections with lookups.
Campaigns	Contacts and Connections – HONO	This report shows the list of contacts and connections for HONO.
Activities	Occurrences, Vol Opps, Connects and Contacts– HONO	This report shows the list of occurrences, volunteer opportunities, connections, and contacts for HONO.
Contract Reports	Connections	This report shows the list of connections.
Price Books, Products and Assets	CP Users	This report shows the list of CP users.
Administrative Reports	Contacts and Connection	This report shows the list of contacts and connections.
Other Reports	Contact & Skill	This report shows the list of contacts and skills.
	Volunteer Team with Volunteer Team Member	This report shows the list of volunteer teams and their members.
	Contacts with Team Member	This report shows the list of contacts and team members.

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 it's 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"

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field Range

From To

Filtered By: [Edit](#)

End Date & Time greater or equal 1/1/2011 [Clear](#)

AND Start Date & Time less or equal 12/31/2011 [Clear](#)

AND Occurrence Status equals Active [Clear](#)

	Guest Volunteers	Total Contacts	Total Occurrences	Total Volunteer Opportunities	Total Connections
<input type="checkbox"/> Schedule Type: Date & Time Specific (4,349 records)	2,158	2,329	623	313	4,349
<input type="checkbox"/> Schedule Type: To Be Scheduled (2,047 records)	4	1,280	179	179	2,047
Grand Totals (6,396 records)	2,162	3,294	802	492	6,396

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

Home Chatter Organizations Contacts Locations Volunteer Opportunities Occurrences Volunteer Events Volunteer Teams Connections Documents Reports Dashboards Control Panel +

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create**
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types**
 - Tabs
- Workflow & Approvals
- Develop
- Deploy
 - Installed Packages
 - AppExchange Marketplace **New!**
 - Critical Updates

Custom Report Types

Help for this Page

What is a Custom Report Type?

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between objects so that you can:

- Choose which standard and custom objects to display to users creating and customizing reports
- Define the relationships between objects displayed to users creating and customizing reports
- Select which objects' fields can be used as columns in reports

Note that the visibility of custom report types in the report wizard is controlled by users' access to the objects in the report type.

☐ Don't show me this page again

Continue

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 screenshot shows the 'Custom Report Type Definition' page in HandsOnConnect. The page title is 'Questions and Answers for an Occurrence'. Below the title, there is a description: 'This will combine information from: Connections, Questions, Answers in one report'. The 'Report Type Category' is 'Other Reports' and the 'Deployment Status' is 'In Development'. The 'Object Relationships' section shows a Venn diagram with three overlapping circles labeled A, B, and C. Circle A is blue, B is orange, and C is green. The intersection of A and B is shaded. Below the diagram, there are three tables labeled A, B, and C. The 'Fields Available for Reports' section shows a table with the following data:

Source	Selected Fields
Occurrences	53
Connections	38
Answers	11

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

Edit Custom Report Type Help for this Page

Questions and Answers for an Occurrence

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

- You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
- To rearrange the sections, select the section header and drag it to the desired location.

Field Layout Properties

Save Cancel Preview Layout

Total Fields in Layout: 102

Edit Properties Create New Section

Occurrences			
City	Country	Created By	Created Date
Days & Ti...	End Date &...	Google Map URL	Old Guest Vol...
Guest Volunte...	HOC Domain Name	HOC ID	Import ID
IsUpdateable	Last Activity...	Last Modified...	Last Modified...
Location	Managing Orga...	Maximum Atten...	Minimum Atten...
Occurrence ID	✓ Occurrence ID	Occurrence URL	Opportunity A...
Opportunity C...	Opportunity C...	Owner	Partner Staff...
Posting Status	Recurrence	Registration ...	Registration ...
Schedule Type	Serial Number	✓ Start Date ...	State/Province
Status	Street	Total Attended	Total Confirmed
Total Connect...	Total Declined	Old Total Hou...	Total Not Att...
Total Pending	Total Unrepor...	Old Volunteer...	Volunteer Lea...
Volunteer Opp...	Volunteer Opp...	Volunteers AT...	Volunteers St...
Zip/Postal Code			

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View: Occurrences Fields
Add fields related via lookup »

Occurrences Fields [Page 1/4]

Next Page

City	Country
Created By	Created Date
Days & Ti...	End Date &...
Google Map URL	Guest Volunte...
Guest Volunte...	HOC Domain Name
HOC ID	Impact Measur...
Impact Measur...	Import ID
IsUpdateable	Last Activity...

Next Page

Total Confirmed
Display As: Total Confirmed
Default State: Unchecked
Source Object: Occurrences

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!?!

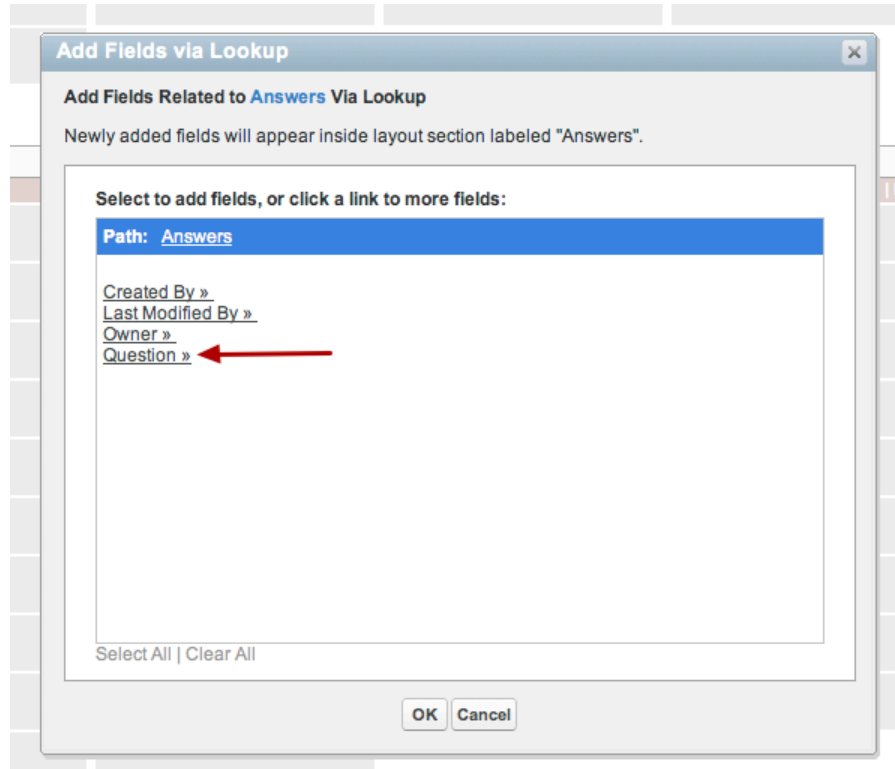
The screenshot shows the HandsOnConnect interface. At the top, there's a 'Zip/Postal Code' input field. Below it is a 'Connections' table with columns: Attendance SL..., Connection ID, Connection ID, and Contact. The 'Answers' table below it has columns: Answer, Answer ID, Answer ID, and Created By. A red circle highlights the 'Question' field in the 'Answers' table. On the right, the 'Answers Fields' panel shows a dropdown menu with 'Answers Fields' selected and a button 'Add fields related via lookup'. A red arrow points from this button to the 'Question' field in the 'Answers' table.

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!

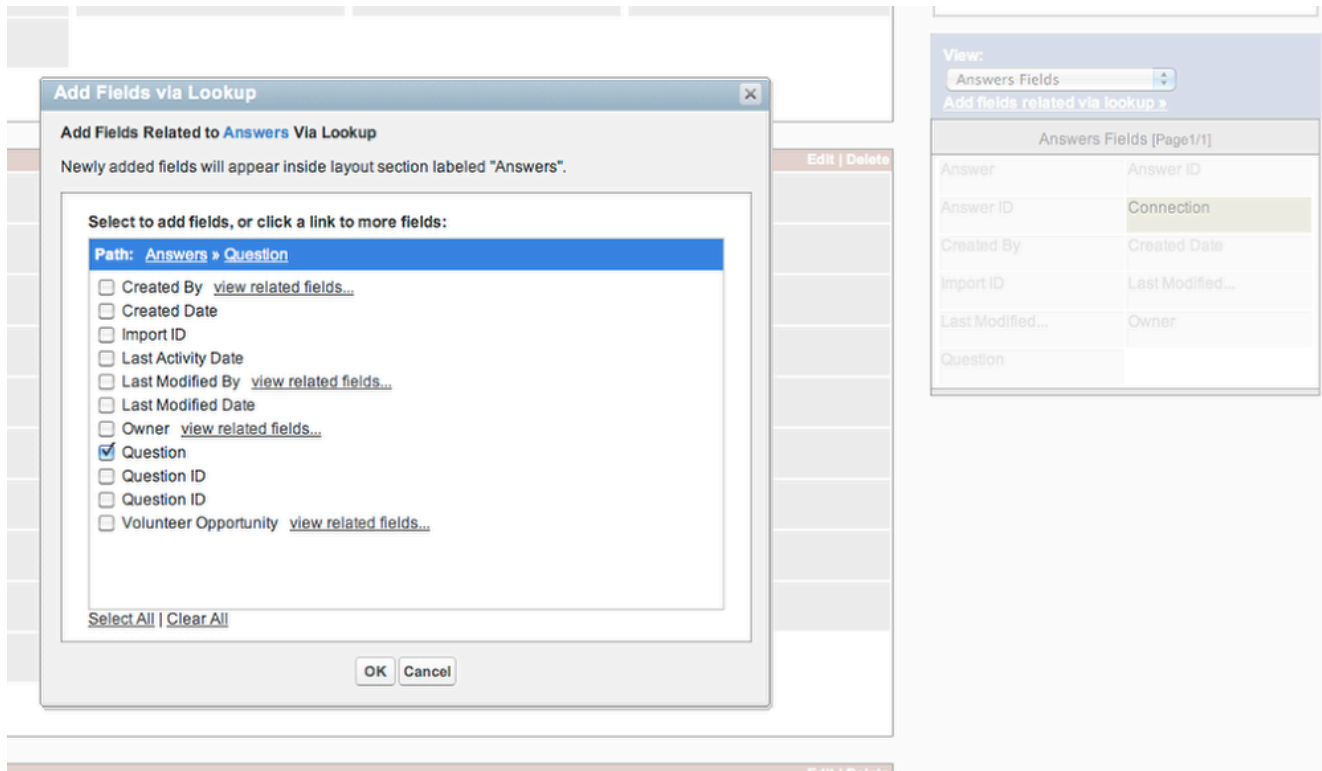
As recently pointed out by Chris Pokrana during a community lab session, you can Add fields to a report via lookup!

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

Answers				Edit Delete
✓ Answer	Answer ID	✓ Answer ID	Created By	
Created Date	Import ID	Last Modified...	Last Modified...	
Owner	✓ Question	⌕ Question		

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

Summarize information by: Volunteer Opportunity: Volunteer Opportunity Name Show: All occurrences Date Field: Start Date & Time Range: This Month From: 6/1/2011 To: 6/30/2011

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Filtered By: Edit
Status not equal to Declined Clear

Contact: Full Name	Answer	Connection Id	Occurrence ID
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: Arts & Crafts with Kids (4 records)			
Start Date & Time: 6/2/2011 (1 record)			
<p>Question: Question: We need volunteers to bring Arts and Crafts items for the kids. Please indicate if you can bring any of the following to this project when you volunteer:</p> <p>A) Crayons B) Washable Markers C) Construction paper D) other arts and crafts supplies. (1 record)</p>			
Davis Proficio Kirby	No.	CO-084861	OC-024421
Start Date & Time: 6/9/2011 (1 record)			
<p>Question: Question: We need volunteers to bring Arts and Crafts items for the kids. Please indicate if you can bring any of the following to this project when you volunteer:</p> <p>A) Crayons B) Washable Markers C) Construction paper D) other arts and crafts supplies. (1 record)</p>			
Valerie Volunteer	I am not bringing anything but my personality...sooooooooooooooooooooo	CO-084744	OC-023390
Start Date & Time: 6/18/2011 (2 records)			
<p>Question: Question: We need volunteers to bring Arts and Crafts items for the kids. Please indicate if you can bring any of the following to this project when you volunteer:</p> <p>A) Crayons B) Washable Markers C) Construction paper D) other arts and crafts supplies. (2 records)</p>			
Valerie Volunteer	I will bring a large box of crayons! Happy to help the kids!	CO-085553	OC-024436
Valerie Volunteer	I will bring a large box of crayons! Happy to help the kids!	CO-085554	OC-024436
<input type="checkbox"/> Volunteer Opportunity: Volunteer Opportunity Name: Express Yourself Date and Time (2 records)			

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

Filters Add

Show All occurrences

Date Field Start Date & Time Range Next 30 Days From 6/24/2011 To 7/23/2011

Status not equal to "Declined"

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 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.

The screenshot shows the Salesforce Custom Object Definition page for 'Occurrence (Managed)'. The page is divided into several sections:

- Custom Object Definition Detail:** This section contains a table with the following data:

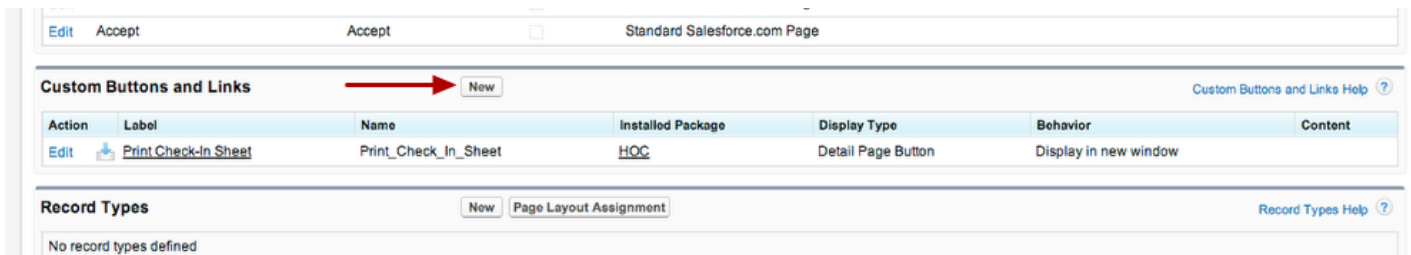
Field Label	Field Name	Data Type	Controlling Field	Track History
Singular Label	Occurrence			
Plural Label	Occurrences			
Object Name	Occurrence			
Namespace Prefix	HOC			
API Name	HOC__Occurrence__c			
Created By	Client Administrator	7/8/2010 6:33 PM		
- Package Information:** This section shows the installed package 'HOC' and its available versions '1.0 - Current'.
- Standard Fields:** This section contains a table with the following data:

Action	Field Label	Field Name	Data Type	Controlling Field	Track History
Created By	CreatedBy	Lookup(User)			
Last Modified By	LastModifiedBy	Lookup(User)			
Occurrence ID	Name	Auto Number			
Owner	Owner	Lookup(User,Queue)			
- Custom Fields & Relationships:** This section contains a table with the following data:

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	Modified By	Track History
Edit	City	HOC__City__c	HOC	Formula (Text)		Client Administrator, 7/8/2010 6:33 PM	
Edit	Country	HOC__Country__c	HOC	Formula (Text)		Client Administrator, 7/8/2010 6:33 PM	
Edit Replace	Days & Times Needed	HOC__Days_Times_Needed__c	HOC	Picklist (Multi-Select)		Client Administrator, 7/8/2010 6:33 PM	
Edit	End Date & Time	HOC__End_Date_Time__c	HOC	Date/Time		Client Administrator, 7/8/2010 6:33 PM	

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.

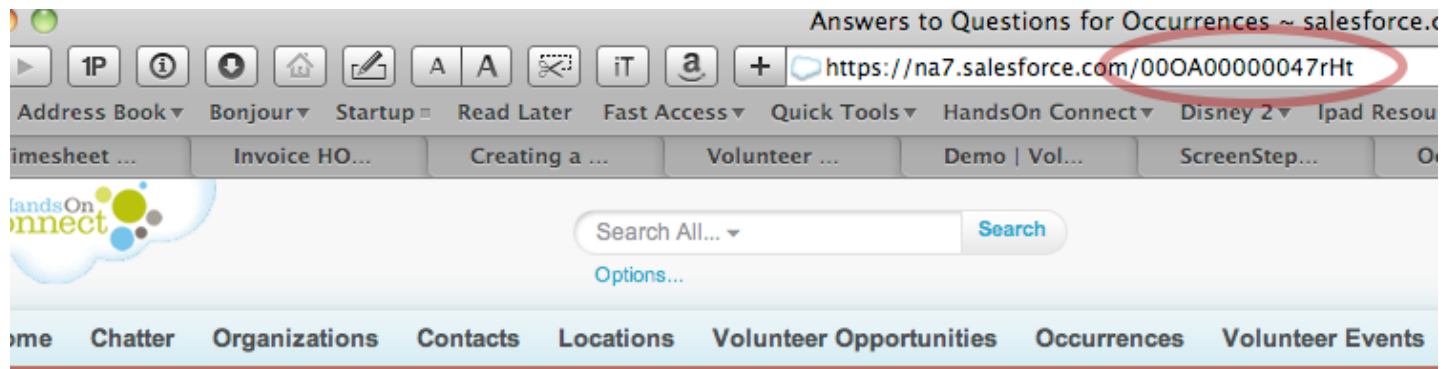
Scroll down the page to the Custom Buttons and Links section.



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

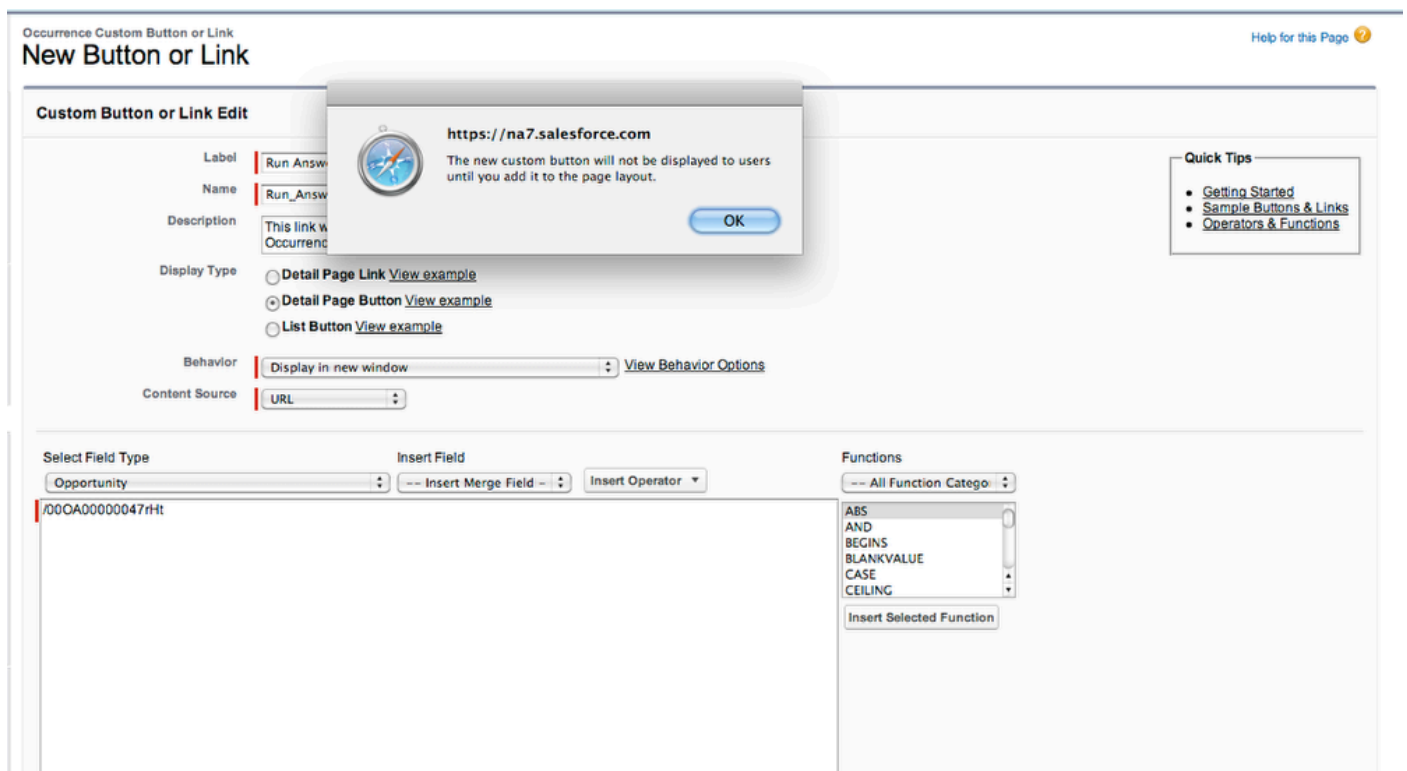
1. We give our button a Label so people know what it's going to.
2. We choose the appropriate type of button to create. We chose a button rather than a link. (but we could have gone with a custom link instead of a button if we preferred).
3. We chose to have the report show up in a new window. (There 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.

Page Layouts					Page Layouts Help ?
		New	Page Layout Assignment		
Action	Page Layout Name	Installed Package	Created By	Modified By	
Edit Del Add	Occurrence Layout	HOC	Client Administrator , 7/8/2010 6:33 PM	Art Ordoqui , 6/2/2011 10:11 PM	
Edit Del Add	Partner Staff Occurrence Layout	HOC	Client Administrator , 7/8/2010 6:33 PM	Art Ordoqui , 6/3/2011 11:03 AM	
Edit Del Add	Staff Occurrence Layout	HOC	Client Administrator , 7/8/2010 6:33 PM	HandsOn Connect Admin 9999 , 6/2/2011 11:25 PM	
Edit Del Add	VL Occurrence Layout	HOC	Client Administrator , 7/8/2010 6:33 PM	HandsOn Connect Admin 9999 , 6/2/2011 11:26 PM	

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.

Occurrence
OC-000010

[Logout](#) | [Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

[Show Chatter](#) | [Follow](#)

[Back to List: Occurrences](#)

[Connections \(2\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes & Attachments \(0\)](#)

Occurrence Detail

[Edit](#) | [Delete](#) | [Clone](#) | [Sharing](#) | [Print Check-In Sheet](#) | [Run Answers Report](#)

HandsOn Connect Shortcuts

Occurrence Overview
 Here's your at-a-glance view of this Occurrence.

- ☒ Occurrence Published (Status: Active)
- ☐ Verifications Complete

 Total Verifications Due: 1
 Ready to create a new Occurrence? If so, [click here](#) to get started.

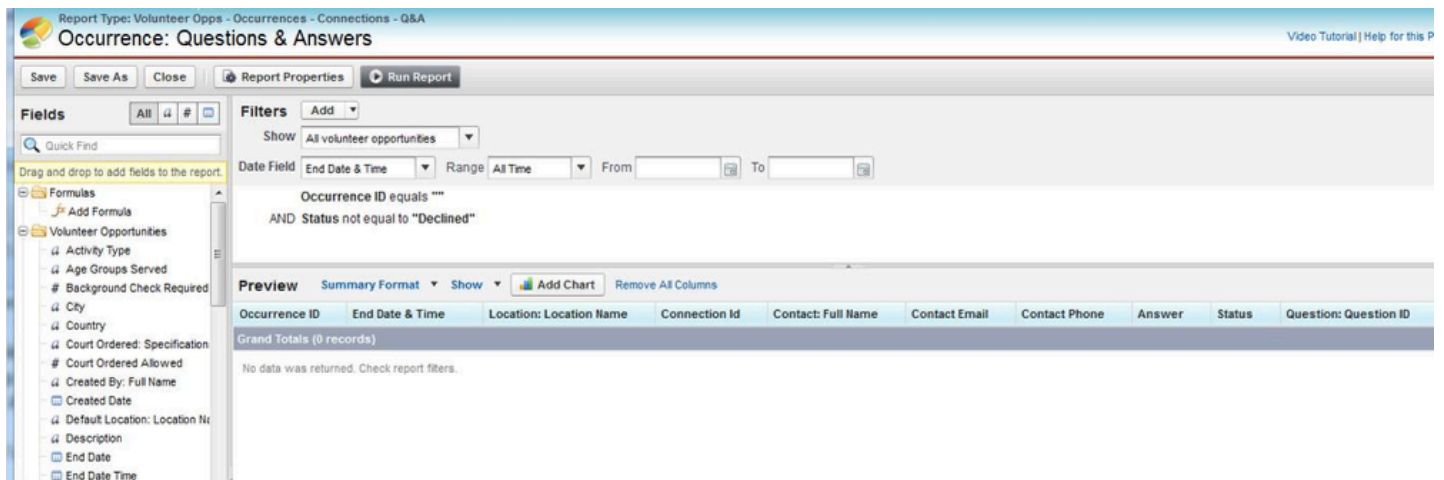
Clicking on this button will cause the report to pop up right from the occurrence record!

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

Find Volunteer Answers for this Occurrence

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: See Volunteer Answers

Name: See_Volunteer_Answer: [i](#)

Description: This link will open the report that allows partners to view the answers to volunteer questions related to the specific Occurrence record that they are viewing.

Display Type: ☐ Detail Page Link [View example](#)
☒ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior: Display in new window [View Behavior Options](#)

Content Source: URL

Select Field Type: Occurrence

Insert Field: -- Insert Merge Field --

Insert Operator: =

Functions: -- All Function Categories --
BLANKVALUE
CASE
CEILING
CONTAINS

This link will open the report that allows partners to view the answers to volunteer questions related to specific volunteer opportunities and their occurrences. (Text) =
/000A0000004BxZY?pv0={!HOC__Occurrence__c.ID}

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!

Occurrence Questions & Answers

Report Generation Status: Complete

Report Options:

Summarize information by: Volunteer Opportunity Name Show: All volunteer opportunities

Time Frame: Date Field: End Date & Time Range: Custom From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Filtered By: Edit Occurrence ID equals a0CA000000AhcnM Clear AND Status not equal to Declined Clear

Occurrence ID	End Date & Time	Location: Location Name	Connection Id	Contact: Full Name	Contact Email	Contact Phone	Answer	Status	Question: Question ID	Guest Volunteers
Volunteer Opportunity Name: Referral: Explorando el Columbia Slough (age 14+) (6 records)										
Start Date & Time: 6/18/2011 (6 records)										
Question: Question: Are there any special considerations we should take into account when assigning you a volunteer position? (2 records)										
QC-101461	6/18/2011 6:00 PM	7040 NE 47th Ave	CO-470005	Erin McAllester	erinmcalleser@gmail.com	(503)-961-2484	I do not speak Spanish well, but communicate well by smiling. I am very interested in the ecology of the slough.	Pending Approval	QU-000055	0
QC-101461	6/18/2011 6:00 PM	7040 NE 47th Ave	CO-470126	cristen chambers	cristen@greenworldnow.com	5032355006	I'm 15	Pending Approval	QU-000055	0
Question: Question: Do you have experience in and around canoes/kayaks? (2 records)										
QC-101461	6/18/2011 6:00 PM	7040 NE 47th Ave	CO-470005	Erin McAllester	erinmcalleser@gmail.com	(503)-961-2484	Some experience around canoes and kayaks; have canoed in lakes, understand the basics of paddling both canoes and kayaks, have kayaked on lakes and in a river in an inflatable kayak.	Pending Approval	QU-000054	0
QC-101461	6/18/2011 6:00 PM	7040 NE 47th Ave	CO-470126	cristen chambers	cristen@greenworldnow.com	5032355006	no but love water sports	Pending Approval	QU-000054	0
Question: Question: Do you speak Spanish, and how well? (2 records)										
QC-101461	6/18/2011 6:00 PM	7040 NE 47th Ave	CO-470005	Erin McAllester	erinmcalleser@gmail.com	(503)-961-2484	I know basic statements/question/answer-hola, como te llamas, bueno, bien, gracias, porque?, donde, si, no, adios, los ciento	Pending Approval	QU-000053	0
QC-101461	6/18/2011 6:00 PM	7040 NE 47th Ave	CO-470126	cristen chambers	cristen@greenworldnow.com	5032355006	no	Pending Approval	QU-000053	0
Grand Totals (6 records)										

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

Clicking on This Custom Button: "Run Answers Report"

Produces a Pop-up Window with this report: Which gives you the name of each volunteer, the question or questions that were associated with the volunteer opportunity, AND the answers to each question the volunteer supplied. All visible without leaving the Occurrence Record Page

Report Generation Status: Complete

Report Options:

Summarize information by: Volunteer Opportunity: Volunteer Opportunity Name Show All occurrences

Time Frame: Date Field Created P Range Custom From 1/1/2000 To

Run Report Hide Details Customize Save Save As Delete Printable View Report Details

Filtered By: Edit Occurrence ID equals a0CA00000051MzV Clear AND Status not equal to Declined Clear


Contact: Full Name	Answer	Connection Id	Occurrence ID
Volunteer Opportunity: Volunteer Opportunity Name: Reach Out and Pick Up (5 records)			
Start Date & Time: 4/9/2011 (5 records)			
Question: Question: If you have plastic trash bags, will you please bring them to the opportunity. Let us know how many bags you will commit to bring. (5 records)			
Robert Boylan	10	CO-084562	OC-023638
Josh Kidd	I'll bring a box of 50.	CO-084676	OC-023638
Dominic Canubba	3 bags of a large capacity.	CO-084688	OC-023638
Davis Kirby	No.	CO-084691	OC-023638
Ashley Knight	10	CO-084703	OC-023638
Grand Totals (5 records)			

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.

 # of Connections per vol (Calendar Yr) Help for this Page

Report Generation Status: Complete Add Tags

Report Options:

Summarize information by: Show:

Time Frame

Date Field: Range:

From: To:

Run Report

First Name	Last Name	Connection Id	Attendance Status	Connections: Hours Served	Volunteer Opportunity: Volunteer Opportunity Name	Volunteer Opportunity: Managing Organization: Organization Name	Volunteer Opportunity: Type	Connections Total
Contact ID: 003A000000HS7xN (3 records)								
Ad	Trout	CO-086261	Attended (and Hours Verified)	1.50	Wonder of Reading	HandsOn Connect Demo	Project	3
Ad	Trout	CO-086262	Please Verify	0.00	Girl Scout Cookie Distribution	Girl Scouts of the USA	Project	
Ad	Trout	CO-086305	Declined	0.00	Walk a Buffalo	Waterloo Water Buffalo Conservation, Inc.	Project	
Contact ID: 003A000000HSdEt (134 records)								
Valerie	Volunteer	CO-086257	Declined	0.00	Be a Camp Counselor	Girl Scouts of the USA	Project	134

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

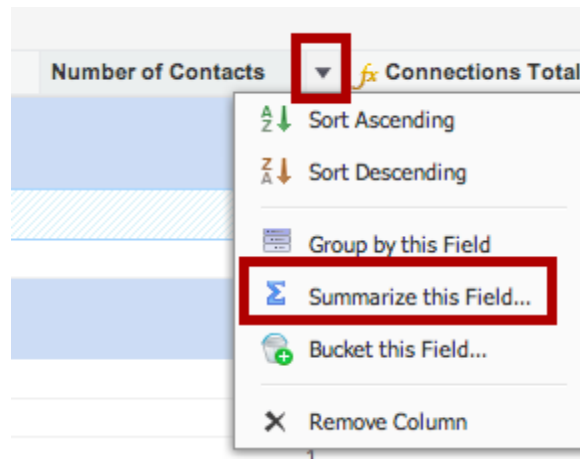
If desired, you could filter further and only show connections with an attendance status of "Attendance Verified" if, for example, you wanted to know how many times they'd actually volunteered. (screening out their 'not attended' or 'unverified' service.

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

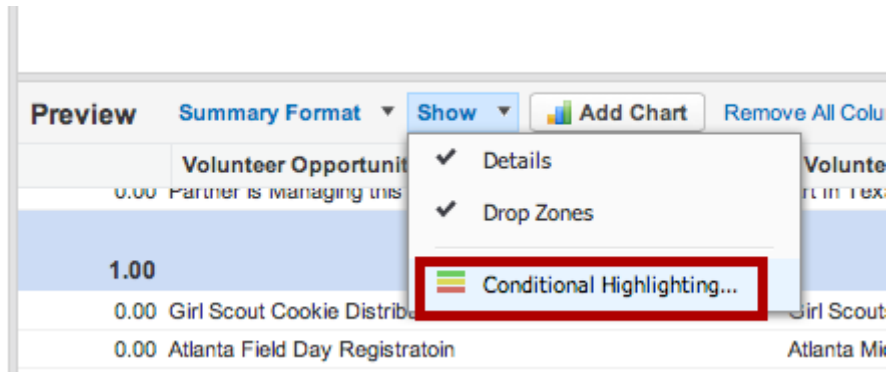
summarize on it, and at the bottom of the report you'll know how many contacts.



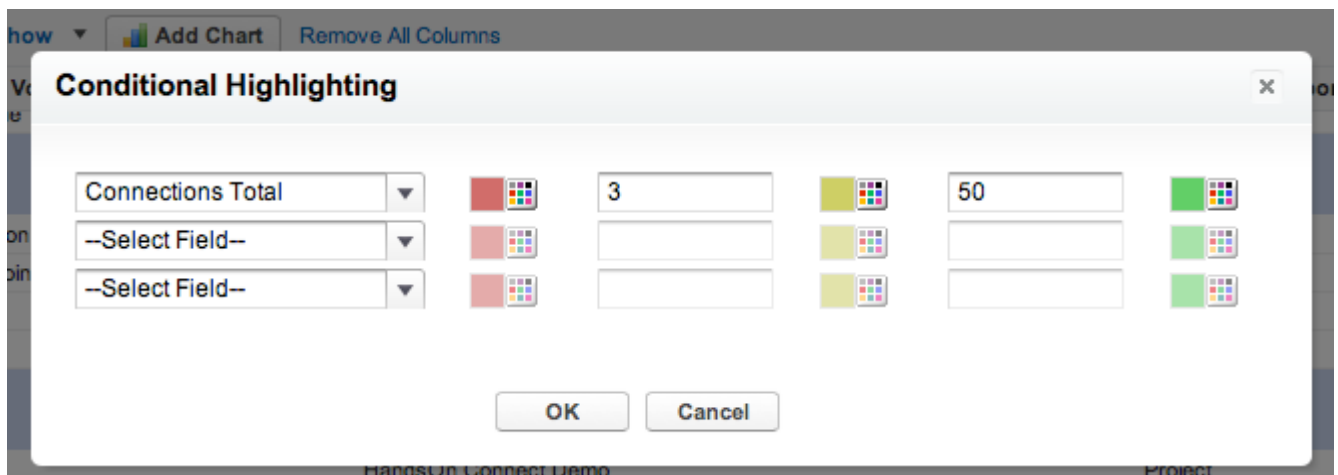
Summarize				
Field	Sum	Average	Max	Min
Number of Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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).

Run Report ▼ Show Details Customize Save Save As Delete Printable View Export Details

		Connections: Hours Served	Number of Contacts	Connections Total
<input type="checkbox"/>	Contact ID: 003A000000HS7xN (3 records)	1.50	1	3
<input type="checkbox"/>	Contact ID: 003A000000HSdEt (134 records)	172.15	1	134
<input type="checkbox"/>	Contact ID: 003A000000HSfK (160 records)	9.50	1	160
<input type="checkbox"/>	Contact ID: 003A000000lelks (6 records)	5.00	1	6
<input type="checkbox"/>	Contact ID: 003A000000lelwu (6 records)	1.50	1	6
<input type="checkbox"/>	Contact ID: 003A000000Mr23H (1 record)	0.00	1	1
<input type="checkbox"/>	Contact ID: 003A000000Mr5HW (4 records)	4.00	1	4
<input type="checkbox"/>	Contact ID: 003A000000MrBKZ (1 record)	0.00	1	1
<input type="checkbox"/>	Contact ID: 003A000000MrBOy (2 records)	0.00	1	2
<input type="checkbox"/>	Contact ID: 003A000000MrvC1 (3 records)	0.00	1	3

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

Run Report Show Details Customize Save Save As Delete Printable View Export Details

		Connections: Hours Served	Number of Contacts	Connections Total
<input type="checkbox"/>	Contact ID: 003A000000HS7xN (3 records)	1.50	1	3
<input checked="" type="checkbox"/>	Contact ID: 003A000000HSdEt (134 records)	172.15	1	134
<input checked="" type="checkbox"/>	Contact ID: 003A000000HSftK (160 records)	9.50	1	160
<input type="checkbox"/>	Contact ID: 003A000000Ielks (6 records)	5.00	1	6
<input type="checkbox"/>	Contact ID: 003A000000Ielwu (6 records)	1.50	1	6
<input type="checkbox"/>	Contact ID: 003A000000Mr23H (1 record)	0.00	1	1
<input type="checkbox"/>	Contact ID: 003A000000Mr5HW (4 records)	4.00	1	4

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 report was using 'contact ID' but I want to see the names now.)

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

<input type="checkbox"/>	Contact ID: 003A00000015rZom (1 record)	4.00	1	1
Grand Totals (752 records)		377.38	164	752
Check rows to filter, then drill down by		Full Name		Drill Down

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!

Filtered By: [Edit](#)
 Contact ID equals 003A000000HSdEt,003A000000HSftK,003A000000bZZJo [Clear](#)

	Connections: Hours Served	Number of Contacts	Connections Total
<input type="checkbox"/> Full Name: Abby Ordoqui (51 records)	13.50	1	<div><div></div></div> 51
<input type="checkbox"/> Full Name: Lenny Leader (160 records)	9.50	1	<div><div></div></div> 160
<input type="checkbox"/> Full Name: Valerie Volunteer (134 records)	172.15	1	<div><div></div></div> 134
Grand Totals (345 records)	195.15	3	<div><div></div></div> 345

Check rows to filter, then drill down by: --None-- Drill Down

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: Drilling down on attendance status)

Filtered By: [Edit](#)
 Contact ID equals 003A000000HSdEt,003A000000HSftK,003A000000bZZJo [Clear](#)

	Connections: Hours Served	Number of Contacts	Connections Total
<input checked="" type="checkbox"/> Full Name: <u>Abby Ordoqui</u> (51 records)	13.50	1	51
<input checked="" type="checkbox"/> Full Name: <u>Lenny Leader</u> (160 records)	9.50	1	160
<input checked="" type="checkbox"/> Full Name: <u>Valerie Volunteer</u> (134 records)	172.15	1	134
Grand Totals (345 records)	195.15	3	345

Check rows to filter, then drill down by: Attendance Status Drill Down

[Run Report](#)
[Show Details](#)
[Customize](#)
[Save](#)
[Save As](#)
[Delete](#)
[Printable View](#)
[Export Details](#)

Filtered By: [Edit](#)
 Contact ID equals 003A000000HSdEt,003A000000HSftK,003A000000bZZJo [Clear](#)
 AND Full Name equals Abby Ordoqui,Lenny Leader,Valerie Volunteer [Clear](#)

	Connections: Hours Served	Number of Contacts	Connections Total
<input type="checkbox"/> Attendance Status: - (14 records)	0.00	2	14
<input type="checkbox"/> Attendance Status: Declined (19 records)	2.00	3	19
<input type="checkbox"/> Attendance Status: Please Verify (273 records)	107.75	3	273
<input checked="" type="checkbox"/> Attendance Status: Attended (and Hours Verified) (36 records)	85.40	3	36
<input type="checkbox"/> Attendance Status: Canceled (3 records)	0.00	1	3
Grand Totals (345 records)	195.15	3	345

Check rows to filter, then drill down by: --None-- Drill Down

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!

Run Report
Show Details
Customize
Save
Save As
Delete
Printable View
Export Details

Filtered By:
Edit

Contact ID equals 003A000000HSdEt,003A000000HSftK,003A000000bZZJo
Clear

AND Full Name equals Abby Ordoqui,Lenny Leader,Valerie Volunteer
Clear

AND Attendance Status equals Attended (and Hours Verified)
Clear

	Connections: Hours Served	Number of Contacts	Connections Total
<input type="checkbox"/> Full Name: <u>Abby Ordoqui</u> (3 records)	7.00	1	3
<input type="checkbox"/> Full Name: <u>Lenny Leader</u> (5 records)	9.50	1	5
<input type="checkbox"/> Full Name: <u>Valerie Volunteer</u> (28 records)	68.90	1	28
Grand Totals (36 records)	85.40	3	36

Check rows to filter, then drill down by:
--None--
Drill Down

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:

The screenshot shows the 'Report Type: HOC Connections and Contacts' interface. The title is 'Connections with UGA Answers'. The top bar includes buttons for 'Save', 'Save As', 'Close', 'Report Properties', and 'Run Report'. The 'Fields' section on the left has a 'Quick Find' box and a list of fields: 'Formulas', 'Add Formula', 'Bucket Fields', and 'Add Bucket Field'. The 'Filters' section on the right has an 'Add' button and a 'Show' dropdown set to 'All contacts'. Below this, the 'Date Field' is set to 'Created Date' with a 'Range' of 'All Time'. A cross-filter is added: 'Connection: Start Date & Time equals "THIS MONTH"'. Below this, an 'AND' filter is shown: 'Contacts' with 'Registration Answers' containing 'University of Georgia'. The filter is highlighted in yellow, and there are 'OK', 'Cancel', and 'Remove' buttons.

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
<input type="checkbox"/> 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
<input type="checkbox"/> Full Name: Abby Deane (1 record)					1	0.00
OC-001898	CO-001191	Volunteer Orientation	9/2/2013 4:00 PM	-	1	0.00
<input type="checkbox"/> 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

Preview Summary Format Show Add Chart Remove All Columns									
Occurrences: Occurrence ID	Start Date & Time	End Date & Time	Volunteer Opportunity: Schedule Type	Opportunity Coordinator	Volunteer Opportunity: Status	Status	Volunteer Opportunity: Number of Volunteer Opportunities	Number of Occurrences	
Volunteer Opportunity: Managing Organization: Art In Texas, Inc. (2 Records)								2	2.00
Volunteer Opportunity: Record ID: aDNA0000000Ofhw (1 Record)								1	1.00
Volunteer Opportunity: Volunteer Opportunity Name: Art In Texas (1 Record)								1	1.00
C-029351	12/5/2012 9:00 AM	12/5/2012 2:00 PM Date & Time Specific	Art Parks		Active	Active	1	1	1.00

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

Filters Add

Show All occurrences

Date Field Start Date & Time Range All Time From To

End Date & Time greater or equal "TODAY"

AND Status equals "Active"

AND Volunteer Opportunity: Status equals Active OK Cancel

Volunteer Opportunity: Status = Active

Group by "Invitation Code"

Occurrence: Occurrence ID	Volunteer Opportunity: Record ID	Volunteer Opportunity: Managing Organization	Start Date & Time	End Date & Time	Volunteer Opportunity: Schedule Type	Opportunity Coordinator	Volunteer Opportunity: Status	Status	Vol
Volunteer Opportunity: Invitation Code: - (19 Records)									
Volunteer Opportunity: Volunteer Opportunity Name: Art in Texas (1 Record)									
Drop a field here to create a grouping. Hide									
OC-029351	a0NA00000000fw	Art in Texas, Inc.	12/5/2012 9:00 AM	12/5/2012 2:00 PM Date & Time Specific	Art Parks		Active	Active	
Volunteer Opportunity: Volunteer Opportunity Name: Big Brothers Big Sisters (1 Record)									

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 your 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)

 Occurrences Visible on Public Site

Report Generation Status: Complete

Report Options:

Summarize information by: Volunteer Opportunity: Invitation Code

Show: All occurrences

Time Frame: Date Field: Start Date & Time Range: Custom From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details

Filtered By: [Edit](#)
 End Date & Time greater or equal TODAY [Clear](#)
 AND Status equals Active [Clear](#)
 AND Volunteer Opportunity: Status equals Active [Clear](#)

	Volunteer Opportunity: Number of Volunteer Opportunities	Total Connections	Total Confirmed	# of Occurrences
<input type="checkbox"/> Volunteer Opportunity: Invitation Code: - (154 records)	32	115	124	154
Volunteer Opportunity: Volunteer Opportunity Name: Adopt a Teen Test (1 record)	1	0	0	1
Volunteer Opportunity: Volunteer Opportunity Name: Apples, Kisses and Shoes (3 records)	1	0	0	3
Volunteer Opportunity: Volunteer Opportunity Name: Art in Texas (1 record)	1	0	0	1
Volunteer Opportunity: Volunteer Opportunity Name: Arts & Crafts with Kids (13 records)	1	11	10	13
Volunteer Opportunity: Volunteer Opportunity Name: Ball Rinsing Bass Pro (64 records)				

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))

Volunteer Opportunities | Search Results:

Click on column header to sort.

154 occurrence(s) returned

OPPORTUNITY ▲	ORGANIZATION	WHERE	TIME	DISTANCE	FREQ.
Adopt a Teen Test	Troutco	Los Angeles	Open	99+ Miles	Ongoing
Apples, Kisses and Shoes	Troutco	Riverside	11-30-12 07:00PM 2 hours	0 Mile	2 More
Art in Texas	Art In Texas, Inc.	Alamo Heights	12-5-12 09:00AM 5 hours	99+ Miles	0 More
Art Mentors	Art In Texas, Inc.	Alamo	12-30-12 11:00AM	99+ Miles	0 More

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"

The screenshot shows the 'Batch Import Team Connections' report configuration window. The title bar indicates the report type is 'Volunteer Teams with Volunteer Team Members and Contact'. The interface includes buttons for 'Save', 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. On the left, a 'Fields' pane lists various data sources: 'Volunteer Team: Info' (including ID and Import ID), 'Volunteer Team Member: Info' (including ID and Team Member ID), 'Contact: General' (including Contact ID, Custom Info, Import ID, Facebook User ID, and Twitter User ID), and 'Contact: Organization: General' (including Organization ID, Custom Info, HON Affiliate ID, Import ID, and Group ID). A search bar in the Fields pane shows 'ID'. A yellow banner prompts the user to 'Drag and drop to add fields to the report.' The 'Filters' section on the right shows a 'Show' dropdown set to 'All volunteer teams' and a 'Date Field' dropdown set to 'Volunteer Team: Cre' with a range of 'All Time'. A filter expression is visible: 'Volunteer Team: Volunteer Team Name equals ""'. The 'Preview' section at the bottom shows a table with columns: 'Contact: Contact ID', 'Volunteer Team Member: ID', 'Volunteer Team: Volunteer Team Name', 'Contact: First Name', and 'Contact: Last Name'. Below the table, it states 'Grand Totals (0 records)' and 'No data was returned. Check report filters.'

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.

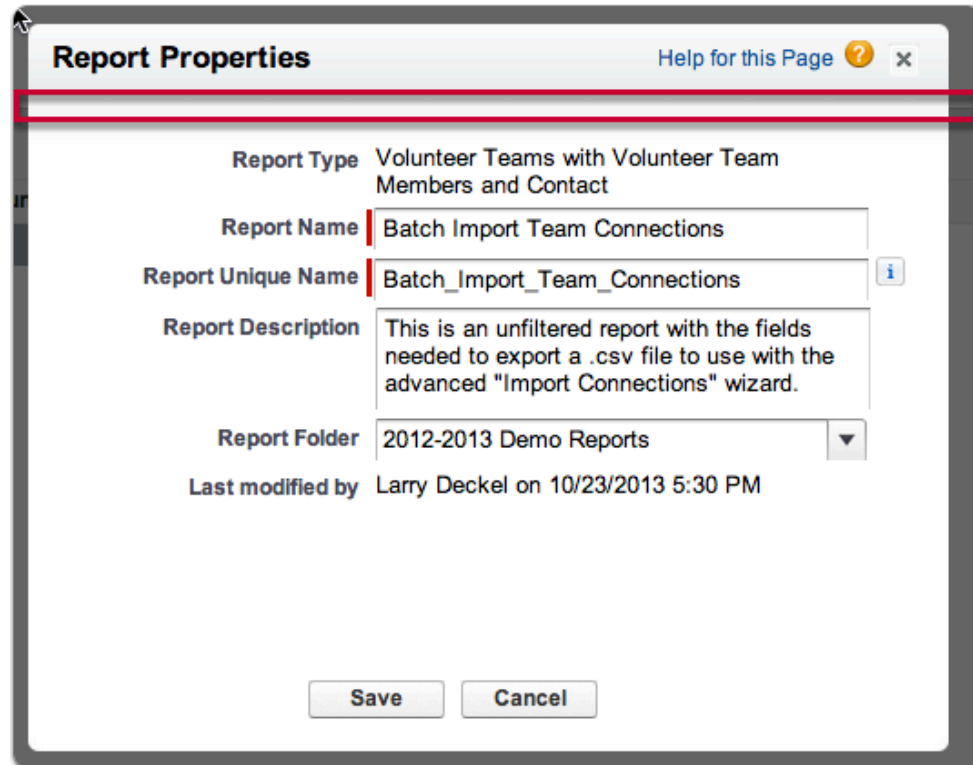
I've optionally added the fields

- 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"



Report Properties [Help for this Page](#) ? x

Report Type Volunteer Teams with Volunteer Team Members and Contact

Report Name Batch Import Team Connections

Report Unique Name Batch_Import_Team_Connections [i](#)

Report Description This is an unfiltered report with the fields needed to export a .csv file to use with the advanced "Import Connections" wizard.

Report Folder 2012-2013 Demo Reports ▼

Last modified by Larry Deckel on 10/23/2013 5:30 PM

Save **Cancel**

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.

Home Chatter Organizations Contacts Volunteer Events Volunteer Opportunities Occurrences Connections Locations Control Panel CMS

Batch Import Team Connections

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show All volunteer teams

Time Frame

Date Field Volunteer Team: Created Date Range Custom

From To

Run Report Hide Details Customize Save Save As Delete Printable View **Export Details** Add to Campaign

Filtered By: [Edit](#)
Volunteer Team: Volunteer Team Name equals Edison 5th Grade [Clear](#)

Contact: Contact ID	Volunteer Team Member: ID	Volunteer Team: Volunteer Team Name	Contact: First Name	Contact: Last Name
003A000001IB5v2	a0OA000000CrljIN	Edison 5th Grade	Andrew	Abadoir
003A000001IB5v1	a0OA000000CrljIO	Edison 5th Grade	Amy	Aardvark
003A000001IB5v0	a0OA000000CrljIP	Edison 5th Grade	Abigail	Adams

Grand Totals (3 records)

Confidential Information - Do Not Distribute

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. [Batch 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

Report Properties [Help for this Page](#) ? x

Report Type HOC Vol Opps and Occurrences with/without Connections

Report Name Upcoming Occurrences I'm leading

Report Unique Name Upcoming_Occurrences_I_m_leading [i](#)

Report Description This report shows a volunteer leader all their upcoming occurrences. Click on 'Show Detail' to see the contact info for the volunteers who are connected to the

Report Folder HOC Reports for Volunteer Leaders ▼

Last modified by Larry Deckel on 8/27/2013 2:21 PM

Save **Cancel**

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:

Report Options:

Summarize information by: Show

Time Frame

Date Field Range

From To

Filtered By: [Edit](#)
Occurrence Start Date & Time greater or equal **TODAY** [Clear](#)
 AND Occurrences with **Connections** [Clear](#)

Add the following fields

Preview

Summary Format

Show

Add Chart

Remove All Columns

Occurrence ID	Connection ID	Contact: Full Name	Contact: Primary Phone	Contact Email	Team Name	Opportunity Coordinator: Full Name	Number of Connections
---------------	---------------	--------------------	------------------------	---------------	-----------	------------------------------------	-----------------------

- 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:

Volunteer Opportunity Name: Finish Line Helper (2 records)							2
Occurrence Start Date & Time: 8/31/2013 (2 records)							2
OC-030642	CO-087690	Jessica Welz	571-238-6230	finn.diedra+test22@gmail.com	-	Diedra Finn	1
OC-030642	CO-087689	Evan Finn	571-238-6230	finn.diedra+test10@gmail.com	-	Diedra Finn	1
Volunteer Opportunity Name: Franklin Canyon Park Conservation (5 records)							5
Occurrence Start Date & Time: 11/12/2013 (1 record)							1
OC-030062	CO-087113	Pete Partner	(510) 584-1265	troutco+petepartner@gmail.com	-	Art Trout	1
Occurrence Start Date & Time: 12/12/2013 (4 records)							4
OC-025909	CO-087010	Devon Depot	-	-	Team Depot	Art Trout	1
OC-025909	CO-087009	Diana Depot	-	-	Team Depot	Art Trout	1
OC-025909	CO-087008	Doug Depot	-	-	Team Depot	Art Trout	1
OC-025909	CO-087007	Valerie Volunteer	951-123-1234	troutco+training_volunteer@gmail.com	Team Depot	Art Trout	1
Volunteer Opportunity Name: Habitat for Humanity Build (67 records)							67

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 both rows 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 compare values in several different fields, or you want to look at data by date 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.