

Flexible Reporting Overview

Fixed vs. Flexible Reports

Fixed:

- Pre-Determined Data That Will Appear on The Report
- Report Format is Rigid and Structured
- Generated in PDF format; Can Not Be Easily Edited
- Examples: Case Record Form, Monthly Conference Financial Report

Flexible:

- User Determines Data to be Selected
- Saved in Excel File Format; Can be Edited
- Report Format is Designed by the User
- User Can Sort, Total, Sub-Total, Create Pie Charts, Graph, etc.
- Examples: Cases, Cases by Caseworker, Assistance Reporting

Fixed and Flexible Reports

- Fixed

- Annual Conference Report
- Case Distribution
- Case Record Form
- Check Register
- Financial Reports
- Outstanding Checks
- Membership Roster
- Monthly Conference Report
- Multi-Month Conference Report

- Flexible

- Assistance Reporting
- Cases
- Cases by Caseworker
- Clients
- Donation Tracking
- Holiday Programs
- In Kind Eligibility Report
- Member Hours & Miles
- Transaction by Type

Flexible Report Creation Process

