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# FLEXIBLE REPORTING

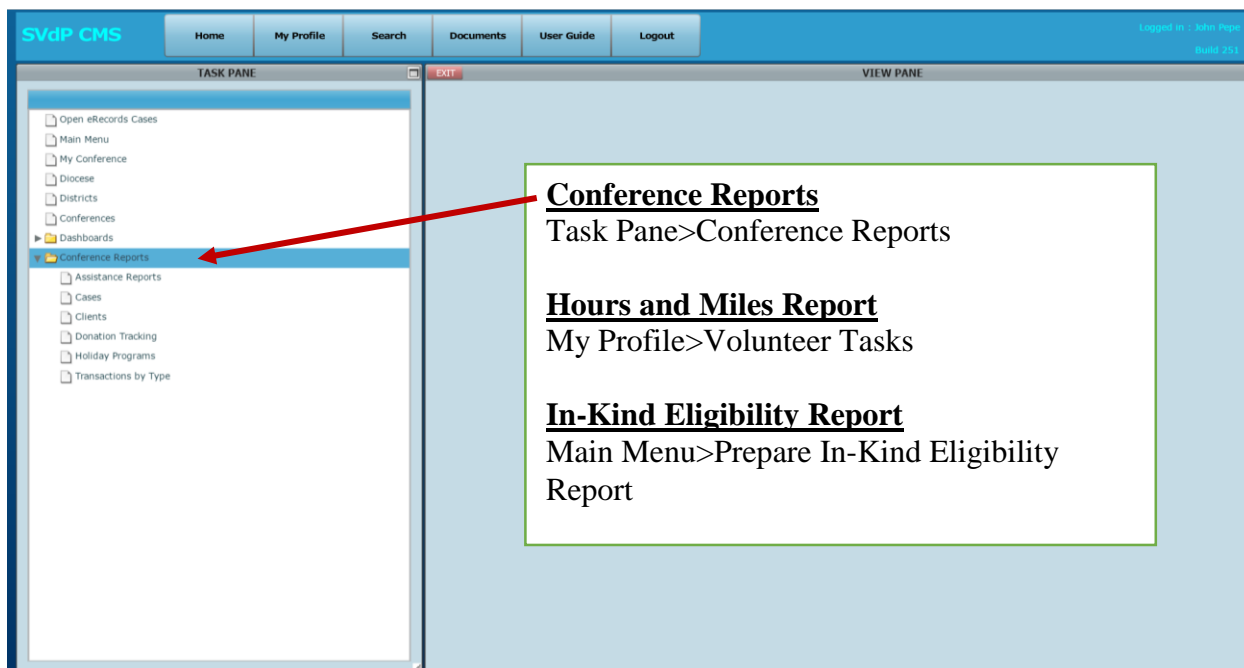
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Quick Guide



# General Information

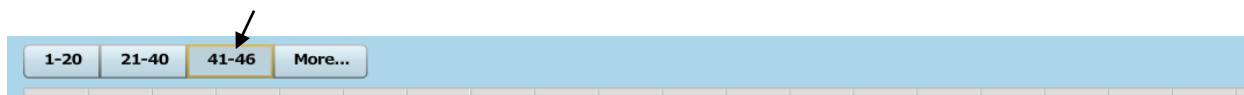
## Where to Find ALL Flexible Reports



## Role(s) Eligible to Create Flexible Reports:

	All	Conf.	Conf.	Conf./Dist.	Conf.	Conf.	Case	Express Assist.
Flexible Reports	Roles	Pres.	VP	Treasures	Sec.	Admin.	Manager	Manager
Assistance Reports		X	X	X	X	X		
Cases & Cases by CW		X	X	X	X	X	X	
Clients		X	X	X	X	X	X	
Donation Tracking		X	X	X	X	X		
Holiday Programs		X	X	X	X	X	X	
Transactions by Type		X	X	X	X	X		
Hours & Miles Report	X							
In-Kind Eligibility Report								X

## Technique to Download ALL results to a CSV File:



### For those reports that have both the "Preview" and "Download" buttons do the following:

- Click the "Preview" button; CMS will display the results in the results grid
- Click the "More" tab (see above) until you see the range is less than 20 (40 for Hours and Miles report). For example, see above tab: The range total is 6 (41-46) which indicates you are at the end of the results retrieved; CMS will download 46 results (1-46)
- Click "Download" button and save the CSV file to your computer



## Assistance Reporting


Assistance Reporting in St. Catherine of Siena, Kennesaw


**Run Report**

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Assistance \*  Financial Assistance  Non-Financial Assistance

Date Range: Start \*   End \*  

Assistance Category **Select** 

Assistance Type 

Click "Run Report" creates a CSV file

### Report Data:

Case#	Client Name	Date
Check#	Amount	Paid To
Assistance Type	Total Assisted	Paid By

## Cases



Cases in St. Catherine of Siena, Kennesaw

**Cases by Case Worker** **Clear** **Preview** **Download**


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Note: If you leave this search and return, you will have to resubmit the search using the Preview button again before being able to download.

Homeless

Status **Select**  Conference **St. Catherine of Siena** 

Client First Name  Last Name

Gender **Select**  Case No

Date of Request   Date of Request   (Date Range)

### Report Data:

Case#	Request Date	Visit Date	Visit Type
# Helped	Case Worker	Secondary	Client Name
Client Gender	Marital Status	Ethnicity	County
Zip Code	Homeless	Assistance Resource	Amount
Case Status	Conference Name		

## Cases by Case Worker

Click Task Pane>Conference Reports>Cases. Then click the “Cases by Case Worker” button

### Report Data:

Case#	Request Date	Visit Date	Visit Type
# Helped	Case Worker	Secondary	Client Name
Client Gender	Marital Status	Ethnicity	County
Zip Code	Homeless	Assistance Resource	Amount
Case Status	Conference Name		

## Clients (Restricted to Conference Zip Codes)

### Report Data:

Client Status	Last Name	First Name	DOB
Home#	Cell#	Gender	Marital Status
Homeless	Spanish	Church Name	Zip Code
Address1	Address2	County	

## Donation Tracking

**Donation Tracking in Holy Family, Marietta**

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Start Date  End Date

Type

Only Tax Deductable

Only in Excess of \$250

### Report Data:

Type      Date      Amount

#### Donors Information:

First Name	Last Name	Email	Phone#	Address1	Address2
City	State	Zip Code		Tax Dedcutible	Notes

## Holiday Programs

**Holiday Programs in St. Catherine of Siena, Kennesaw**

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Note: If you leave this search and return, you will have to resubmit the search using the Preview button again before being able to download.

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Client First Name  Last Name

Category  Resource

Date - From  Date - To

Report Data: - There will be entry for each member of the household in the CSV file

Resource	Visit Type	Case#	Visit Date
Client Name	Amount	Spouse/Other Adult	# Helped
Home#	Cell#	Address1	Address2
Zip Code	Household Member: Age, Gender, First Name, Last Name		

## Transactions by Type

Transactions by Type in St. Catherine of Siena, Kennesaw

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Start Date \* 02/01/2017

End Date \* 03/01/2017

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Payee

Debit/Credit \*

Type	Number	Date	Cleared	Debit	Credit	Payee
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### Report Data:

Type	Check#	Check Date	Cleared
Debit	Credit	Payee	

## Hours and Miles Report

To access this report, navigate to My Profile>Volunteer Tasks  
 Click "Download CSV" button

Janice Sigurdson

Current Conference \*

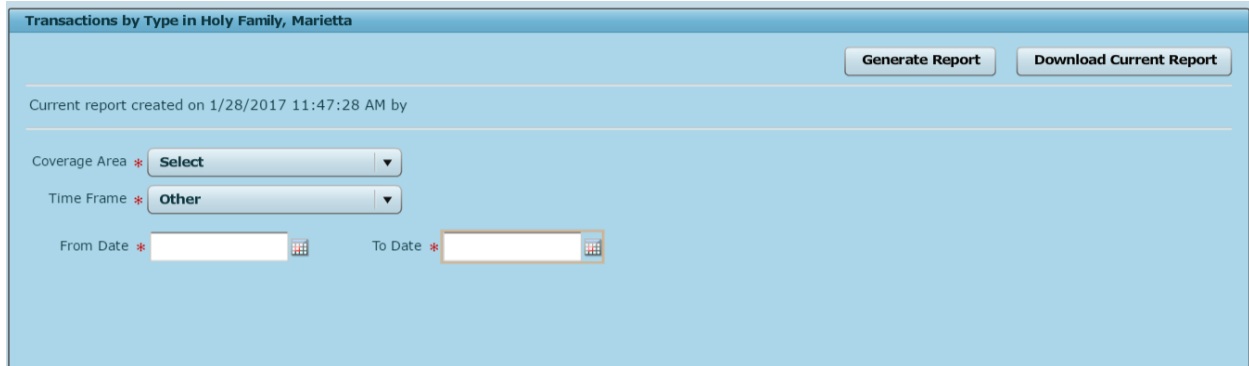
Date	Category	Minutes	Miles	Num Helped	Case
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### Report Data:

First Name	Last Name	Date	Category
Minutes Miles	Number Helped	Case#	

## In-Kind Eligibility Report

IF you have been assigned an Express Assistance Manager's role, you can access this report as one of the options from the main menu.



Transactions by Type in Holy Family, Marietta

Generate Report Download Current Report

Current report created on 1/28/2017 11:47:28 AM by

Coverage Area \* Select

Time Frame \* Other

From Date \* To Date \*

Click "Generate Report" then "Download Current Report" CSV file to your computer

### Report Data:

Client Name	Type	Estimate Value	Date
DOB	SS#	# Of Household Members	Conference Name