

RUNNING YEAR-END REPORTS IN TRACK IT FORWARD

Log into Track It Forward (TIF) then go to **Organizer Dashboard**. Choose **Reports**.

The screenshot shows the 'Organizer Dashboard' with a navigation bar containing 'Organizer Dashboard', 'Volunteer Log', 'Events', and 'Kiosk'. Below the navigation bar is a secondary menu with 'Overview', 'Approvals (91)', 'Photos', 'Reports', 'Volunteers', 'Promote', 'Settings', 'Payments', and 'Account'. The main content area is titled 'Create a New Report' and features several report options: 'All Hour Report', 'Organization Report', 'Volunteer Report', 'Milestone Report', 'Volunteer & Organization Report', and 'Transcript Report'. Three yellow callout boxes provide instructions: one points to 'Organization Report' with the text 'Use Organization Report for volunteer hours reporting'; another points to 'Volunteer & Organization Report' with the text 'Use Volunteer & Organization Report for GIK reporting'; and a third points to the same report with the text 'Use Volunteer & Organization Report for GIK reporting'.

RUNNING VOLUTEER & ORGANIZATION REPORTS

Use this report only if you need GIK data. Otherwise, skip to Organization Reports.

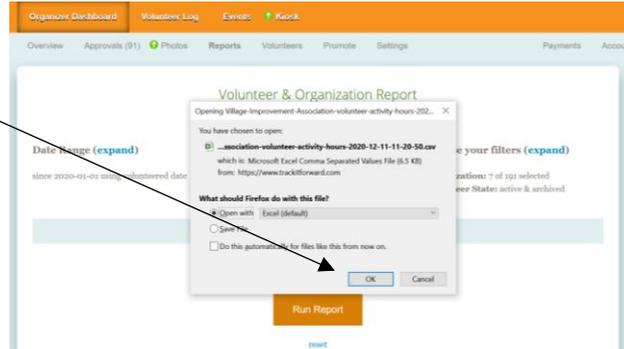
The screenshot shows the configuration page for the 'Volunteer & Organization Report'. It has three main sections: 'Date Range (collapse)', 'Choose the fields (collapse)', and 'Choose your filters (collapse)'. The 'Date Range' section has a 'Choose Range:' dropdown with 'Since 2020-01-01' selected, and a 'Choose Date to Filter By:' dropdown with 'Volunteered Date' selected. The 'Choose the fields' section has a 'select all' link and a list of fields with checkboxes: 'Hour Log Organization', 'Site Name', 'Site Id', 'Volunteer Id', 'Volunteer Name', 'Hour Log Hours', 'Volunteer Email', 'Volunteer Notes', and 'Volunteer Joined Date'. The 'Choose your filters' section has 'Volunteer State: active & archived', a 'Volunteer:' dropdown, an 'Organization:' dropdown, and 'Volunteer Areas of Interest:' dropdown. At the bottom, there are radio buttons for 'Volunteer State: Active Only', 'Archived Only', and 'Active & Archived'.

Expand this column if you need to customize the dates.

Expand this column and deselect all. Choose **ONLY Hour Log Organization** (1st choice) and **Hour Log GIK** (Last choice. It doesn't show on this screen shot.)

Expand this column and use only the **Organization** field. The arrow will give you a list of all VIA activities. Select those you need.

Click on the orange **Run Report** button at the bottom of the page. Once the report has been created, you will see a dialog box on the screen asking what you would like to do with the file. Excel is the default. Click OK.



Excel will open and the report will show. Unfortunately, each GIK entry is listed individually. You will need to sort the data and total the donations yourself. It isn't the best system for generating the type of GIK report that we need, but it's all they offer this year. We can make suggestions for next year.

RUNNING ORGANIZATION REPORT

This report generates the total number of volunteer hours logged per activity.

Organization Report
save this report as a template

Date Range (collapse)
since 2020-01-01 using volunteered date

Choose Range:

- Since 2020-01-01
- All Time
- Custom

Choose Date to Filter By:

- Volunteered Date
- Submitted Date
- Approved Date

Choose the fields (collapse)
all fields selected

- Hour Log Activity
- Hours

Choose your filters (collapse)
Volunteer State: active & archived

Volunteer:

Organization:

Volunteer Areas of Interest:

Volunteer State:

- Active Only
- Archived Only
- Active & Archived

Expand this column if you need to customize dates.

Ignore this column. It is preselected and can't be changed.

Expand this column. Use the drop-down menu in the Organization field to see a list of VIA activities. Select those you need. You should not need any other fields for year-end reports.

Click on the orange **Run Report** button. You will see your report at the bottom of the page. You will also see a dialog box asking if you would like to view the report in Excel. If you would like a printed copy of your report, run it in Excel.

Your TIF team,
 Ronnie Dannerhoj vedanner@gmail.com
 Susan Thompson-White stwhite@comcast.net