

Reporting What Counts Webinar

Fall 2020

Objective: Knowing what information your management wants is half the battle – the other is collecting it. This webinar is an overview of what VSys can collect (and then report).

Getting Started Tips:

- **When:** Pick a realistic date, preferably with your fiscal year/quarters
- **What type of data:** What would “talk the language” of your supervisor?
- **Don't (or try not):** To mix types of volunteer entered data.
- **Do:** Pick the type to accommodate the most complex.
- **Pilot:** Try it first with a limited program
- **Remember – you don't need them all!**

Accounts:

- **Valid on:** Kiosk, Live Kiosk, Live
- **Setting it up:** Accounts setup -> attach to Job or Job Group
- **Things to Remember:**
 - Only numbers
 - Easy to correct by coordinator
 - Sits in its own part of VSys
- **When/how to use:**
 - Easiest way to just collect counts of things.
 - Try to keep categories broad
- **Reports:**
 - Account Summary (totals)
 - Account Details (specifics)
 - Hours Summary Reports
 - Can be used as a filter on other reports

Custom Fields:

- **Valid on:** Live Kiosk, Live
- **Setting it up:** Custom Field setup -> attach to Job or Job Group
- **Things to Remember:**
 - Numbers, Drop-downs, Free-text
 - Easy to correct by coordinator
 - Attaches to hours records.
- **When/how to use:**
 - This will get you numbers and narrative.
 - Easiest way to get more specific per job or group.
- **Reporting:**

- Advanced Custom
- Custom Column
- Summary Crosstabs

Job Activities:

- **Valid on:** Live
- **Things to Remember:**
 - Allows volunteer to sub-divide a shift for time
 - Attaches to hours/creates virtual hours
 - NOT easy to be edited if there is a mistake
 - Many parts to set up
- **When/how to use:**
 - Only use if you need to track time within a shift that varies by the shift. If it is the same regularly, use sequential shifts and automatically switch the volunteer.
 - Try to keep a limited number of activities across all your jobs and re-use them.
- **Reporting:**
 - Advanced Custom
 - Custom Column
 - Summary Crosstabs

Job Value Measurements

- **Valid on:** Everything
- **Things to Remember:**
 - Set by coordinator in the job definition
 - Does not have any volunteer interaction
 - Calculated automatically
- **When/how to use:**
 - Use to connect hours to broad categories – Family, Community, etc.
 - Built-in categories can be changed to whatever initiatives your organization is focusing
 - Jobs can use it, not use it, or be split between multiples.
- **Reporting:**
 - Job Value Analysis reports

Dollar value:

- **Valid on:** Everything
- **Things to Remember:**
 - Can be set at the system level and updated.
 - Can be overridden at the specific job level.
 - Will show up in some places volunteers see unless you remove it.