

VMS REPORTING

2019 ANNUAL MEETING



TEXAS A&M
AGRILIFE
EXTENSION





I. INTRODUCTION – VMS TEAM

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I. INTRODUCTION - OBJECTIVE

- Know what data is available within the VMS
- Be able to design a grid to display the data
- Be able to use filters to select profiles/opportunities
- Be able to answer *ad hoc* questions
- Be able to generate reports from the VMS by extracting and importing data to a 3rd party app

I. INTRODUCTION – WHAT YOU NEED

- A computer with Internet access
- VMS admin logon credentials
- EXCEL or Access or some other 3rd party software
- A pdf viewer (like Adobe Reader DC)
- VMS Data Element Sheet
- “eCoordinator FileCombine” Utility (Help Desk)
- “eCoordinator Reporting Guide” (Help Desk)

II. VMS DATA ELEMENTS

- Refer to the **VMS Data Element** Handout
 - Describes the location in the VMS of that element
 - Describes the data element (type/values)
- Understanding the data is key to reporting it
- If the data is not in the VMS, you cannot report it
- Data elements for Volunteers and Opportunities
 - Opportunities – prefix in the handout is Opp:
 - Log Book Data- prefix is LBE:

II. VMS DATA ELEMENTS

- VMS uses 'Filters' to select 'records'
- VMS uses 'Grids' to display 'records'
 - There are TMN- standard grids; you can use
 - Or, you can design your own & save them
- VMS has only a few "built-in" reports
- VMS can output text, CSV, pdf, and EXCEL
- By importing the data to a 3rd party app, you have greater control over appearance of the report

III. EXTRACT – EXPORT – IMPORT VMS DATA

- The process overview:
 - Create a folder typically on your Desktop where you can save any downloaded data
 - Get the VMS data we need in a grid
 - Using a grid selection, grid settings, and filters
 - If there are missing data elements, add them using the Grid Settings
 - Use the 'Reports' menu item / '<tab> Data Grid'

III. EXTRACT – EXPORT – IMPORT VMS DATA

- Exclude the data elements we do not want
- Choose the report format (text, pdf...)
- Download the report (browser dependent steps)
- If text or CSV, import it to the 3rd party application (maybe EXCEL)
- Use the 3rd party application (EXCEL) to format the data, manipulate it, or insert charts or figures

IV. REPORT & *AD HOC* QUESTION

- The task: generate a chapter roster for display on the chapter web site
 - We'll need a pdf as the output
 - In our example, the data we will need:
 - Last Name, First Name, High School attended
 - Email address, City, Phone #, and TMN Class Year
- This has to do with Volunteers, so that is the tab to be used

IV. REPORT & AD HOC QUESTION

- In this example:
 - Select the Volunteer tab and your chapter folder
 - Clear filters
 - Select the volunteers to include using filters
 - Select a grid that has most, if not all, of the data we need (we'll use TM-Standard (City is missing))
 - We can add elements to the grid using 'Grid Settings'
 - We'll need to add the City (of residence) to this grid

IV. REPORT & AD HOC QUESTION

- Chapter roster continued:
- We'll need to change the grid name and save it
- Select 'Reports'
 - Select Volunteer Data Grid Report
 - Check off the elements we do NOT want
 - We want to export this, select format 'EXCEL'
 - Click OK
 - Our report can now be opened (click the name)

IV. REPORT & AD HOC QUESTION

- When we click the exported (downloaded) report name, the output should open in a new EXCEL window
- We can format it using EXCEL features and do additional formatting when we convert it to a pdf
 - Set the 'Print Area'; maybe set the margins to narrow
 - Set gridlines to print
 - In 'Print Titles': set to landscape, create a header
 - Set Rows to repeat as \$1:\$1; click OK; format as table
 - Save as EXCEL and save as pdf (for the Web)

IV. REPORT & AD HOC QUESTION

- Next example: (V.a) what percent are reporting
- We do not need to export a report to answer this
- In the Volunteers tab, clear filters and select the grid 'TMN-Standard Hours Eligible'
- This will give us the **number who should be reporting**
- Select 'Log Book' from the menu and 'All Volunteers in Grid'

IV. REPORT & AD HOC QUESTIONS

- Set the 'Log Book System' dialog box to:
 - All log book entries
 - Applies to start date
 - This calendar year
 - "Apply"
 - Select 'Summary mode'
- The number of rows returned will be the number of **volunteers reporting service** and/or AT hours

IV. REPORT & AD HOC QUESTIONS

- You can divide the number of volunteers reporting by the number of volunteers who should be reporting to get the percent reporting
- If you need a list of those who are not reporting, it can be accomplished with a download and that will be our last example as it is a bit involved

IV. REPORT & AD HOC QUESTIONS

- Example (V-d) chart a comparison of service hours over the years
- Using the Volunteer tab, clear filters and select the menu item 'Log Book' / all volunteers in grid
- Set the Log Book System dialog box to
 - Ordinary log book entries
 - Relative Date Range / Applies to Start Date /All Time
 - Apply and set the mode to Detail
 - Wait a bit

IV. REPORT & AD HOC QUESTIONS

- Service hour comparison by year con't
- From the menu, select 'Reports' / Log Book Data Grid
- Exclude all elements other than TMN Hours and Start Date
- Select format type 'text'
- You may have several 'pieces' of the report that must be downloaded and saved to import

IV. REPORT & AD HOC QUESTIONS

- Service hour comparison by year con't
- Use the 'eCoordinator FileCombine' utility to import the text files into EXCEL – see the Help Desk manual on Reporting for details
- Once the text files have been imported to EXCEL, we can use EXCEL features for manipulating and charting the data
- Extract the Year into a column of it's own

IV. REPORT & AD HOC QUESTIONS

- Service hour comparison by year con't
- Replicate the Year formula down the column
- Sort the Year column (smallest to highest)
- Create subtotals (Data tab – subtotals on Start Year)
- Collapse the detail so only the subtotals are visible
- Make active only the visible cells (function F5)
- Select and Copy the Start Year and Hours subtotal

IV. REPORT & AD HOC QUESTIONS

- Service hour comparison by year con't
- Create a new sheet and paste these two columns
- Select the two columns Start Year and TMN Hours
- From the Insert tab, select a bar chart
- The bar chart should appear in the data grid
- You can format it (change axis headings and chart title, colors, etc)



V. EXAMPLES OF QUERIES

- What percent of current membership are reporting
- What percent of hours for each category
- Percent of our volunteers have at least a HS diploma
- Service hour comparison by year
- Percent of each class that has certified
- Who has not reported hours this year

VI. WHO HAS NOT REPORTED SERVICE OR AT HOURS THIS YEAR

- In the Volunteer Tab, select your folder and Clear Filters
- Select the Grid: TMN Standard and Filter Hours Entry Eligible
- Select “Grid Settings”; on the left side about halfway down is a check box: “Include Volunteers with no LBEs” (check this box) and click OK
- Set the Log Book dialog box at the top to:
 - All Log Book Entries, Relative Date Range, This Year – Apply
 - Select Summary mode
- The resulting display will show one row per volunteer
- Those who have reported nothing other than Initial Training hours this year will have blanks in the TMN Hours and AT Hours columns; you can check these and select “Reports” from the menu to get a listing of them

QUESTIONS...

- The data element grid and a pdf of this **PowerPoint** will be placed on the TMN VMS Help Desk (txmn.org/help)
- For additional examples, see the VMS Reporting Guide on the TMN VMS Help Desk

