Conference Reports

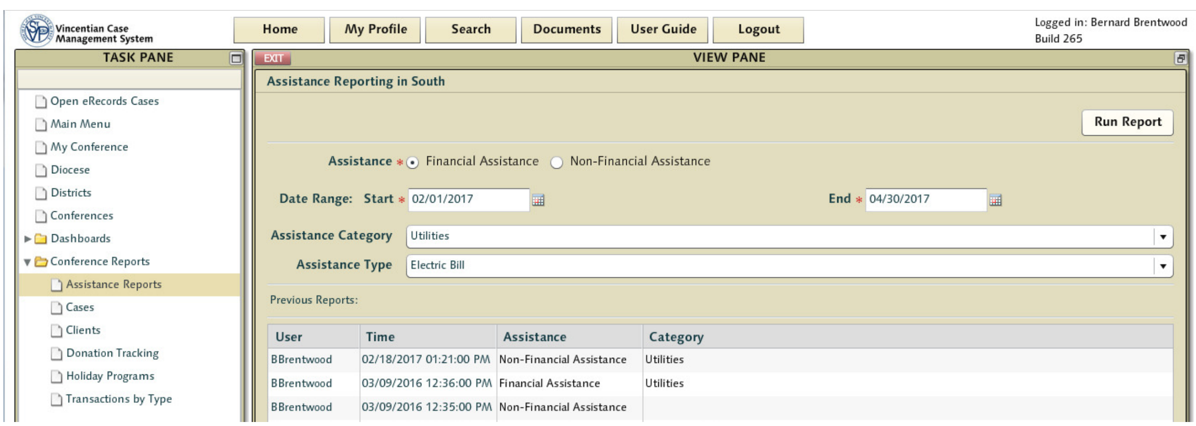
A number of reports are available in the Conference Reports folder found in the Table of Contents section on the left side of the User Interface. These are generally extended versions of the 'Search' functions found at the top with additional filter parameters and data export columns and have CSV export functionality. As such, access to many of these reports is heavily restricted. CSVs can be downloaded and opened in any spreadsheet application, or opened using Google docs by dragging the files into the Google Sheet window.

	A	B	C	D	E	F	G	H	I
1	Case #	Client Name	Date	Check #	Amount	Paid To	Assistance Type	Total Assisted	Paid By
2	2015-00014	Silva, Juan	4/22/2015	55112	178.22	Louisiana Edison	Electric Bill	1	Bernard Brentwood
3	2015-00015	Wilshire, Ross	4/2/2015	55421	73	Louisiana Gas and Electric	Natural Gas Bill	1	Bernard Brentwood
4	2015-00006	Alvarez, Barry	2/8/2015	77759	120	Louisiana Edison	Electric Bill	1	Bernard Brentwood
5	2015-00007	franco, pat	2/10/2015	77797	67	Drinkwater Propane	Propane Gas	1	Bernard Brentwood
6	2015-00009	Putnam, Juan	2/10/2015	77801	135	Louisiana Edison	Electric Bill	2	Bernard Brentwood
7	2015-00024	de Gea, Christian	5/11/2015	Debit Transaction	50	Drinkwater Propane	Propane Gas	1	Bernard Brentwood

Often these spreadsheets are further manipulated outside the system to generate sums for things like 'Direct Aid by Gender' etc - and are useful in discussing the work the conference does with granting authorities and third parties interested in metrics.

Assistance Reports

Reports on specific assistance items over a date range can be run creating a more granular view of the case and in-kind data. This report is mostly useful in tracking non-financial 'in-kind' assistance, capturing the distribution of vouchers, or for getting a big picture breakdown of what sort of assistance the conference has been handing out.



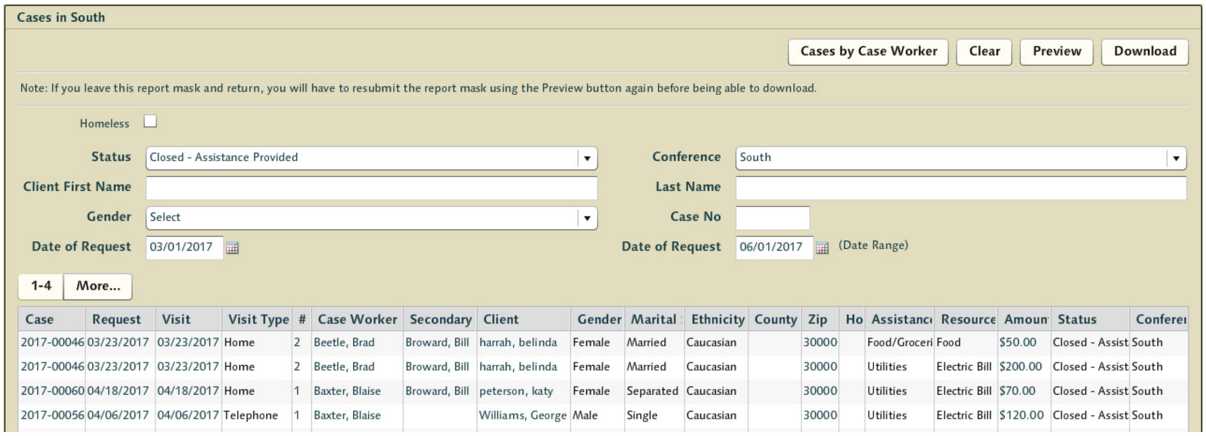
Unlike many of the other Conference Reports, this one keeps old reports on file to be reviewed historically. Often these reports may be run and then compared - as this report is used to track things like the distribution of gas cards etc.

Input Parameters
Financial/Non-Financial | Date Range | Assistance Category | Assistance Type

Export Data Columns
Case # | Client Name | Date | Check # | Amount | Paid To | Assistance Type | Total Assisted | Paid by

Cases

The cases report generates a broad list of case data for export to CSV. It is a deeper version of the Case Search function - extended to show date of visit, number helped, and zip code.



Cases in South

Cases by Case Worker | Clear | Preview | Download

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

Homeless

Status: Closed - Assistance Provided — Conference: South

Client First Name — Last Name

Gender: Select — Case No

Date of Request: 03/01/2017 — Date of Request: 06/01/2017 (Date Range)

1-4 | More...

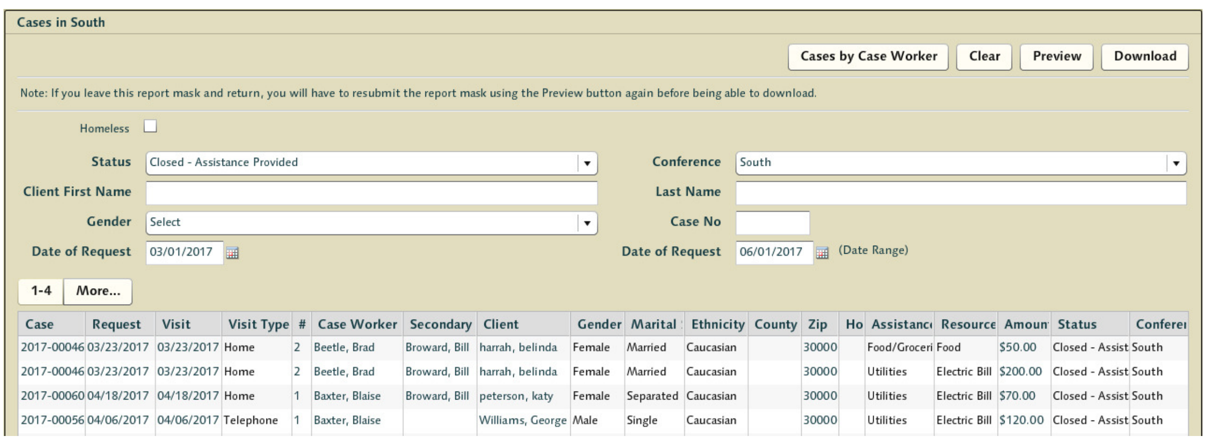
Case	Request	Visit	Visit Type	#	Case Worker	Secondary	Client	Gender	Marital	Ethnicity	County	Zip	Ho	Assistanc	Resource	Amoun	Status	Conferer
2017-00046	03/23/2017	03/23/2017	Home	2	Beetle, Brad	Broward, Bill	harrah, belinda	Female	Married	Caucasian		30000		Food/Groceri	Food	$50.00	Closed - Assist	South
2017-00046	03/23/2017	03/23/2017	Home	2	Beetle, Brad	Broward, Bill	harrah, belinda	Female	Married	Caucasian		30000		Utilities	Electric Bill	$200.00	Closed - Assist	South
2017-00060	04/18/2017	04/18/2017	Home	1	Baxter, Blaise	Broward, Bill	peterson, katy	Female	Separated	Caucasian		30000		Utilities	Electric Bill	$70.00	Closed - Assist	South
2017-00056	04/06/2017	04/06/2017	Telephone	1	Baxter, Blaise		Williams, George	Male	Single	Caucasian		30000		Utilities	Electric Bill	$120.00	Closed - Assist	South

Input Parameters
Case Status | Conference | Client ID | Case Number | Client Name | Client Gender | Homeless Status | Date of Request Range

Export Data Columns
Case Number | Request Date | Visit Date | Visit Type | # Helped | Primary Casewoker | Secondary Caseworker | Client Name | Zip Code | Status of Case | Conference.

Cases by Caseworker

This is a report that is a logical subset of the Case Report and is accessed via a button found at the top of that Report. It is intended to provide a more thorough and printable report on the cases worked by individual caseworkers (or secondaries).



Cases in South

Cases by Case Worker | Clear | Preview | Download

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

Homeless

Status: Closed - Assistance Provided — Conference: South

Client First Name — Last Name

Gender: Select — Case No

Date of Request: 03/01/2017 — Date of Request: 06/01/2017 (Date Range)

1-4 | More...

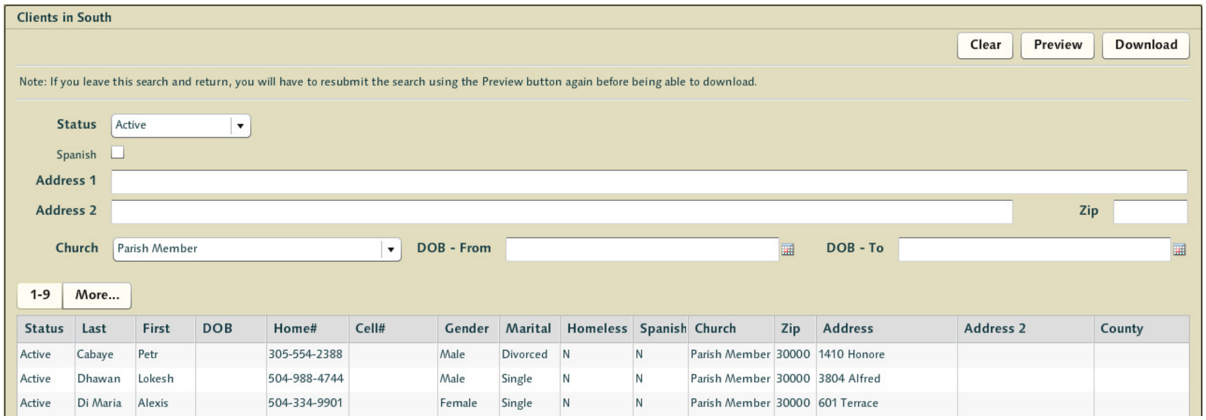
Case	Request	Visit	Visit Type	#	Case Worker	Secondary	Client	Gender	Marital	Ethnicity	County	Zip	Ho	Assistanc	Resource	Amoun	Status	Conferer
2017-00046	03/23/2017	03/23/2017	Home	2	Beetle, Brad	Broward, Bill	harrah, belinda	Female	Married	Caucasian		30000		Food/Groceri	Food	$50.00	Closed - Assist	South
2017-00046	03/23/2017	03/23/2017	Home	2	Beetle, Brad	Broward, Bill	harrah, belinda	Female	Married	Caucasian		30000		Utilities	Electric Bill	$200.00	Closed - Assist	South
2017-00060	04/18/2017	04/18/2017	Home	1	Baxter, Blaise	Broward, Bill	peterson, katy	Female	Separated	Caucasian		30000		Utilities	Electric Bill	$70.00	Closed - Assist	South
2017-00056	04/06/2017	04/06/2017	Telephone	1	Baxter, Blaise		Williams, George	Male	Single	Caucasian		30000		Utilities	Electric Bill	$120.00	Closed - Assist	South

Input Parameters
Case Status | Case Worker | Initial Intake Request Type | Client Name | Date of Request Range

Export Data Columns
Case Number | Request Date | Visit Date | Visit Type | # Helped | Case Status | Primary Caseworker | Secondary Caseworker | Client Name | Zip Code | Initial Intake Request Type

Clients

Clients is a more comprehensive Client report - giving greater flexibility in refining the search using details such as Spanish language or church affiliation. It also exports information such as Caseworker information - allowing an exploration of which caseworkers have worked cases with the client in the past - and what the results of those efforts were.

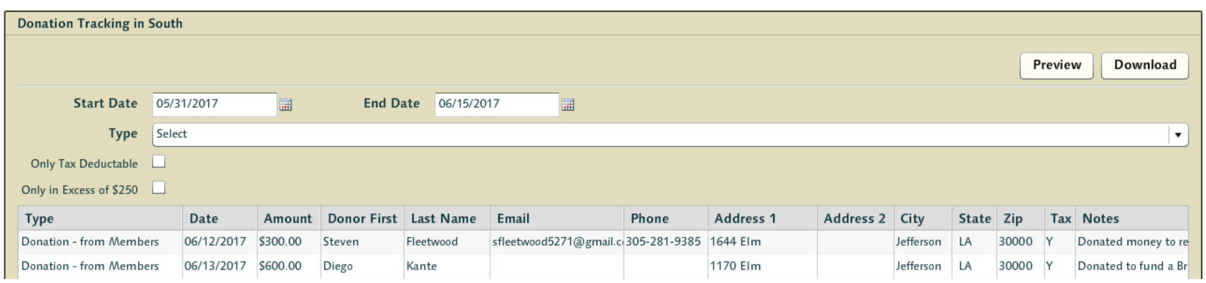


Input Parameters
Case Status | Case Worker | Initial Intake Request Type | Client Name | Date of Request Range

Export Data Columns
Case Number | Request Date | Visit Date | Visit Type | # Helped | Case Status | Primary Caseworker | Secondary Caseworker | Client Name | Zip Code | Initial Intake Request Type

Donation Tracking

Donation tracking is a report that uses the 'Enable Tracking' functionality in the Treasury 'Add Credit' operation to generate a list of donations that have been recorded in the system.



Input Parameters
Date Range | Transaction Type | Only Tax Deductible | Only in Excess of $250

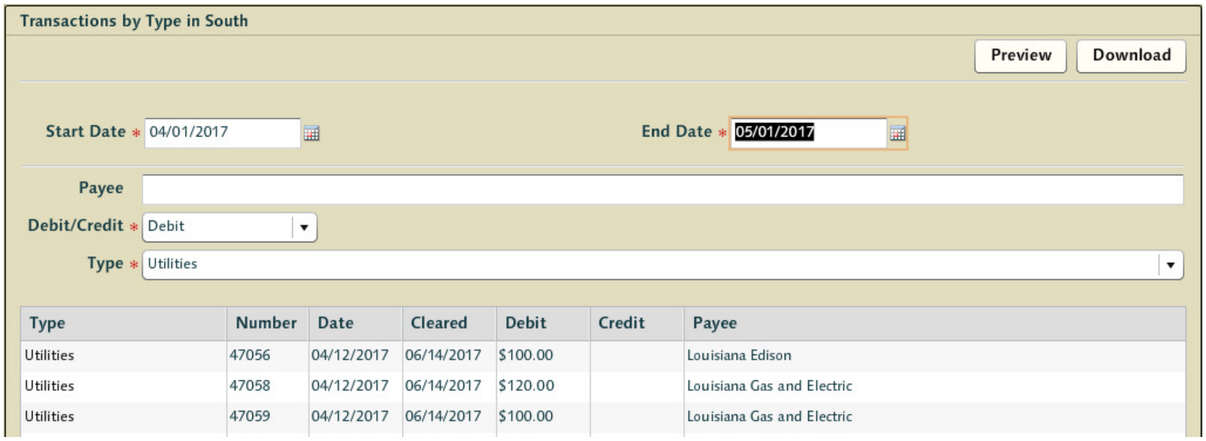
Export Data Columns
Type | Date | Amount | Donor Name | Donor Email | Donor Phone | Donor Address | Donor City | Donor State | Donor Zip | Tax Deductible | Notes

Being able produce data polled from any credit transaction type allows for the generation of some very useful spreadsheets.

Note: Whereas this can easily be used to track donations, and with some create use of the note field track relations to things like grants, CMS is not a 'donor' tracking system. Data recorded in the donor fields is not searchable and the system is not intended to extend into the field of donor contact management for external email generation etc...

Transactions by Type

This report allows treasurers to isolate particular transaction types out of the system and generate a CSV of the output. It does require the transaction type parameter - but it provides a better method of producing a list of transactions than using the search for Check Requests in Case or simply trying to pick out particular types of transactions from the check register itself.



Input Parameters
Date Range | Payee | Debit/Credit | Transaction Type

Export Data Columns
Transaction Type | Check Number | Date | Cleared Status | Debit Amount | Credit Amount | Payee

Dashboards

Dashboards are intended as informational views into the system. They are intended to provide leadership the ability to see the system operation from altitude. Data presented here is valuable as summary metrics that can be used by leadership for purposes that exist outside the system (discussing the health of the conferences, discussing the general 'business' of the diocese, etc). Leadership need not use these at all - they are merely tools that give a certain class of users an over-watch ability - so they can review how CMS is being used, possibly manage potential issues before they become problematic, and potentially improve their own relationship with the conferences through better coordination and understanding of needs.

We anticipate many of the drivers for these reports will be external to the conference operational mission - and to that end many of them will simply be foreign to the system altogether. However, giving conference and diocese leadership the ability to watch conference performance metrics can extend the power of CMS by giving leadership the tools to understand, appreciate what is going on at the conference level without having to dig down into a conference's financials and monthly reports.

Many of the details presented in these screens are culled in nightly cached queries or are taken from prepared reports. This means much of the time the data isn't live - so it's best if it's used primarily for 'general sense' evaluations.