# **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	В	С	D	E	F	G	Н	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.

Vincentian Case Management System	Home	My Profile Search	Documents	Jser Guide Logout		Logged in: Bernard Brentwood Build 265
TASK PANE				VIEW PANE		8
	Assistance Re	porting in South				
Den eRecords Cases						
🗋 Main Menu						Run Report
My Conference						
Diocese	Ass	istance * • Financial As	sistance 🔵 Non-Financ	ial Assistance		
Districts	Date Range	: Start * 02/01/2017			End * 04/30/2017	
Conferences						
▶ 🛄 Dashboards	Assistance C	ategory Utilities				<b>▼</b>
🔻 🗁 Conference Reports	Assistan	ce Type Electric Bill				•
Assistance Reports						
Cases	Previous Report	ts:				
Clients	User	Time	Assistance	Category		
Donation Tracking	BBrentwood	02/18/2017 01:21:00 PM	Non-Financial Assistance	Utilities		
Holiday Programs	BBrentwood	03/09/2016 12:36:00 PM	Financial Assistance	Utilities		
Transactions by Type	BBrentwood	03/09/2016 12:35:00 PM	Non-Financial Assistance			

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

DQ

## 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 Sout	th																	
												Cases	by C	ase Worke	r Clea	r Pre	eview Da	wnload
Note: If you lea	ave this rep	ort mask and	l return, you v	vill I	have to resubmit	the report ma	sk using the Previo	ew buttor	n again befoi	e being able	to downlo	ad.						
Hor	meless	]																
s	Status (	Closed - Assis	tance Provide	ł				•	Conf	erence	outh							•
Client First	Name								Last	Name								
G	ender	Select						•	Ca	ase No								
Date of Re	quest	03/01/2017							Date of R	equest 0	6/01/2017	7 🖬	(Date	e Range)				
1-4 Mo	re																	
Case F	Request	Visit	Visit Type	#	Case Worker	Secondary	Client	Gender	r Marital	Ethnicity	County	Zip	Но	Assistance	Resource	Amoun	Status	Confere
2017-00046 03	3/23/2017	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	3/23/2017	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	4/18/2017	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	4/06/2017	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 So	uth																	
												Cases	by C	ase Worke	Clear	Pre	view Do	wnload
Note: If you	leave this rep	ort mask and	i return, you	will	have to resubmit	the report ma	sk using the Previo	ew butto	on again befo	re being able	to downlo	oad.						
H	lomeless	]																
	Status	Closed - Assis	tance Provide	d				•	Conf	erence	outh							•
Client Firs	t Name								Last	Name								
	Gender	Select						-	Ca	ase No								
Date of F	Request	03/01/2017							Date of R	equest (	06/01/201	7 🖬 1	Date	Range)				
1-4 N	\ore																	
Case	Request	Visit	Visit Type	#	Case Worker	Secondary	Client	Gend	er Marital	Ethnicity	County	Zip	Ho	Assistance	Resource	Amoun	Status	Conferei
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.

													Clear Previ	iew Downle
ote: If yo	u leave this	s search an	d return, you	will have to resub	mit the sea	rch using the Pre	eview butto	n again before	being able	to download.				
St	atus Ad	tive												
Spa	anish 🗌													
Addre	ss 1													
Addre	ss 2													Zip
Ch	urch Pa	rish Memt	er		•	DOB - From						DOB - To		
1-9	More	]												
tatus	Last	First	DOB	Home#	Cell#	Gender	Marital	Homeless	Spanish	Church	Zip	Address	Address 2	County
tive	Cabaye	Petr		305-554-2388		Male	Divorced	N	N	Parish Member	30000	1410 Honore		
tive	Dhawan	Lokesh		504-988-4744		Male	Single	N	N	Parish Member	30000	3804 Alfred		
		Alexis		504-334-9901		Female	Single	N	N	Parish Member		CO.1 T		

ľ

## 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.

											Р	reviev	v Download
Start Date 05	/31/2017		End Da	ate 06/15/20	17								
Type Se	lect												-
Only Tax Deductable													
Only in Excess of \$250					Email	Phone	Address 1	Address 2	City	State	Zip	Tax	Notes
	Date	Amount	Donor First	Last Name	Email	Thome							
Only in Excess of \$250				Last Name Fleetwood	sfleetwood5271@gmail.c		1644 Elm		Jefferson	LA	30000	Y	Donated money to



## **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.

							Preview Downloa
Start Date * 04/01/2017	7				Enc	Date * 05/01/2017	
Рауее							
Debit/Credit * Debit	•	•					
Type * Utilities							
Туре	Number	Date	Cleared	Debit	Credit	Рауее	
	47056	04/12/2017	06/14/2017	\$100.00		Louisiana Edison	
Utilities			06/14/2017	\$120.00		Louisiana Gas and Electric	
Utilities Utilities	47058	04/12/2017	00/14/2017	\$120.00			



## **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.