Generating Reports

Types of Reports

➢Active Participants

➢Notes

➢Follow Up

➢Records without Notes

➢Detail Report

Filters for Reports

➢Status Codes

➢Appforms

➢Date Range

Types of Data Generated

Various types of data can be generated using the Reports Module

❖Examples of data included on the Monthly Reports required by MCDOT

Active Participants   Information Sent (Maps, Schedules, Brochures etc...)
New Applicants   Number Deleted (Moved, No Longer Interested, Marked by COG)
Follow Ups Conducted   Persons Placed in Carpools, Vanpools and Transit
Match Lists Sent   Number of Persons in Carpools, Vanpools and Transit
Number Registered CP/VP

Status Code Definitions

A-Sent Bicycle Information

B-Placed in Carpool

C-Placed in Vanpool

D-Placed in Transit (Bus/Rail/Biking)

E-Sent Pending Letter

F-Sent MTA Information

G-Sent VRE Information

H-Sent Metro Information

I-Sent Telework Information

L-Sent Local Transit Information

M-Moved out of Area (Home or Work)

O-Other

P-Follow-Up/Match at a Later Date

R-Sent MARC Information

S-Follow-Up Contact Performed

T-Still Taking Transit

U-Sent Match List

W-Still Carpooling/Vanpooling

X-No Longer Interested

Z-Sent Transit Information (General)

Reports Used for General Program Data

❖**Notes Report-** Provides various types of data based on status codes used when entering notes into the record. Information such as Follow Ups Conducted Persons Placed, Match Lists Sent, Number of Persons in CP/VP & Transit, Information Sent, Number of Records Deleted

❖**Commuters & Modes Report-** Provides the number of Active Participants at the specific time the report is generated. When generating the Active Participants report you must remember to report commuters whose status is Active. Commuters with a status of Deleted are not considered to be active in the program.

❖**New Apps Report-** Provides the Number of New Applicants for a particular program during a specific date range.

❖**Commuter Detail (New)-** Provides a list of commuters due for follow up and various other reports such as registration date, preferences and program status.

How to Run Reports

Go to Reports Module

Select the Report you would like to run

Please Select a Report
CCRS Registration Summary
CCRS Application Summary by Jursidiction and How Heard
CCRS Registration Summary by Registration Method
CCRS Request Summary
CCRS Pool Summary
CCRS Commuter Detail - Missing Email
CCRS Notes Report
CCRS Commuter Activity Matching Request (Total match requests) by jurisdiction
CCRS Commuter Activity Matching Request (number of commuters who requested a match) by jurisdiction
CCRS Commuter Activity Matching Request (number of request not matched) by jurisdiction
CCRS Commuter Activity Matching Request (number of request matched) by jurisdiction
CCRS Pool Details
CCRS Transit Request by appform
CCRS Commuter Detail List Report
CCRS Commuter Activity Matching Request (Total match requests) by appform
CCRS Commuter Activity Matching Request (number of commuters who requested a match) by appform
CCRS Commuter Activity Matching Request (number of request not matched) by appform
CCRS Commuter Activity Matching Request (number of request matched) by appform
CCRS Transit Request by jurisdiction
CCRS Commuters and Modes
CCRS Commuters to Follow Up
CCRS Commuter Detail (New)

Set Date Range

ADMINISTRATION REPORTS - REPORT QUERY

SELECT FILTER

SELECT FILTER   CCRS

SELECT REPORT

REPORT NAME: CCRS Notes Report

REPORT DESCRIPTION: Details list of commuters who were contacted by a CCRS admin. Report period specifies the date the note record was created.

REPORT PERIOD: 03/01/2016   **To**   03/13/2016

<<	<	February 2016	>	>>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

SET REPORT FILTERS

To add report filter(s), se[...]t, add a condition, enter the value and click on 'Add Filter' button. You may r[...]e filters. For a range, select 'Between' condition and enter two comma sep[...]ple values, select 'In' condition and enter comma delimitted values. For[...]r a value. If no filters are used, a default report is [...]erated

Close

Set Report Filters: Filter Name

❖ Report Filters are identifiers attached to commuter records in the database. Data can be filtered by Account Status, Last Name, First Name, Appform, Jurisdiction, State, Status, ID Status and Follow Up Date by changing the Filter Name.

SET REPORT FILTERS

To add report filter(s), select the filter from the list, add a condition, enter the value and click on 'Add Filter' button. You may repeat this to add multiple filters. For a range, select 'Between' condition and enter two comma separated values. For multiple values, select 'In' condition and enter comma delimitted values. For any other condition enter a value. If no filters are used, a default report is generated.

FILTER NAME:

- Account Status
- last name
- first name
- appform
- Jurisdiction
- state
- status
- ID STATUS
- Follow up date

FILTER CONDITION:

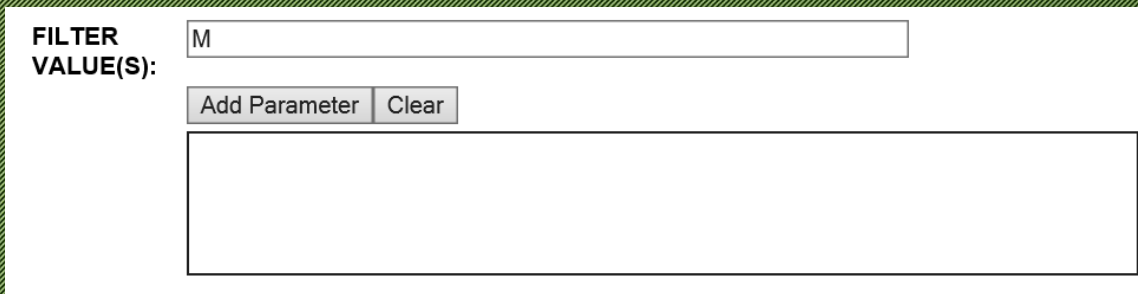**FILTER VALUE(S):**

Clear

Set Report Filters: Filter Condition

❖Filter Conditions are conditions used to generate preferred data. Change the Filter Conditions as appropriate.

FILTER NAME:

FILTER CONDITION:

Equal To
Not Equal To
Greater Than
Greater Than or Equal To
Less Than
Less Than or Equal To
Between
In
Like

FILTER VALUE(S):

Set Report Filters: Values

❖Filter Values are used to identify the specific data to be generated.
Examples of Values are: Appform,Status Codes, Mode, Jurisdiction etc...

FILTER VALUE(S):

M

[Add Parameter] [Clear]

❖ Type in the Value and Select Add Parameter. Multiple parameters can be added.

Select Data to Display & Sort Order

❖Select Data to Display by clicking on the box to check.

SELECT DATA TO DISPLAY		
☑ Commuter ID	☑ Account Status	☑ last name
☑ first name	☑ appform	☑ Jurisdiction
☑ city	☑ state	☑ zip
☑ Notes	☑ status	☑ ID STATUS
☑ date created	☑ Follow up date	

❖ Select the Sort Order of the data. Click on the Drop Down and Select.

SELECT SORT ORDER:		
Sort By:	Follow up date	∨

❖ Select Run Report

[Run Report] [Cancel]

Exporting Data

❖ Once the report data appears, it will have to be exported into an excel worksheet. After the data has been exported it can be manipulated using the Data Sort option.

❖ Select MS-Excel Version (2)

ADMINISTRATION REPORTS - REPORT RESULTS

Click Here

MS-Excel Version (1) MS-Excel Version (2)

Report Name: CCRS Notes Report
Report Period: 03/01/2016 **to** 03/14/2016   **Report Date:** 03/14/2016
# of Records Found: 25

Commuter ID	Account Status	last name	first name	appform	Jurisdiction	city	state	zip	Notes
100745	A	ALLEN	JOHN	SRIDE	MC	GAITHERSBURG	MD	20882	IN CP W/ALLISON ALLEN/ CP#6657/ G58
654719	A	ALLEN	ALLISON	SRIDE	MC	GAITHERSBURG	MD	20882	IN CP W/JOHN ALLEN/ CP#6657 / G58

Exporting Data- Continued

❖After you select MS Excel 2, the following message appears: Select open with Microsoft Excel, then select OK

Exported Data in Excel

After Selecting "OK", the following message appears: Select "Yes"

Microsoft Excel

The file format and extension of 'ADMReportsExcel2.jsp.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?

Yes   No   Help
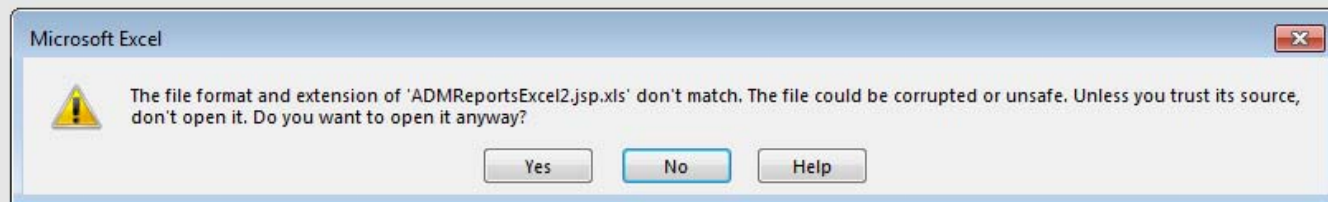
Report Data

The report format will look as it does below:

			METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS									
			777 N Capitol St. NE, Washington DC, 20002									
Report Name: CCRS Notes Report												
Report Period: 03/01/2016 to 03/14/2016	**Report Date: 03/14/2016**											
# of Records Found: 25												
Commuter ID	**Account Status**	**last name**	**first name**	**appform**	**Jurisdiction**	**city**	**state**	**zip**	**Notes**		**status**	**ID S**
100745	A	ALLEN	JOHN	SRIDE	MC	GAITHERSBURG	MD	20882	IN CP W/ALLISON ALLEN/ CP#6657/ G58		B	
654719	A	ALLEN	ALLISON	SRIDE	MC	GAITHERSBURG	MD	20882	IN CP W/JOHN ALLEN/ CP#6657 / G58		B	
674164	A	PHAM	CHAM	SRIDE	PGC	LAUREL	MD	20707			S	
674166	A	SHRESTHA	KIRAN	SRIDE	PGC	LAUREL	MD	20707			S	
674173	A	CHASSE	JILL	SRIDE	MC	GAITHERSBURG	MD	20882	Still in CP W/ Jason Chasse		W	

Report Data Continued

❖ The top few lines of the report need to be deleted in order to use the Data Sort function properly. Delete all lines above the column headings.
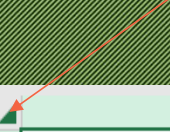
Delete all lines preceding the column headings

	A	B	C	D	E	F	G	H	I	J	K
1				METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS							
2				777 N Capitol St. NE, Washington DC, 20002							
3											
4		Report Name: CCRS Notes Report									
5	Report Period: 03/01/2016 to 03/14/2016 Report Date: 03/14/2016										
6	# of Records Found: 25										
7											
8	Commuter ID	Account Status	last name	first name	appform	Jurisdiction	city	state	zip	Notes	status	ID S

❖ The column headings should now be on line #1

How to Data Sort

It's now time to Data Sort to get the data needed. Click in the upper left hand corner of the spreadsheet to highlight the entire sheet.

Click Here to highlight sheet

	A	B	C	D	E	F	G	H	I	J	K
1	Commuter ID	Account Status	last name	first name	appform	Jurisdiction	city	state	zip	Notes	status
2	100745	A	ALLEN	JOHN	SRIDE	MC	GAITHERSBURG	MD	20882	IN CP W/ALLISON ALLEN/ CP#6657/ G58	B
3	654719	A	ALLEN	ALLISON	SRIDE	MC	GAITHERSBURG	MD	20882	IN CP W/JOHN ALLEN/ CP#6657 / G58	B
4	674164	A	PHAM	CHAM	SRIDE	PGC	LAUREL	MD	20707		S
5	674166	A	SHRESTHA	KIRAN	SRIDE	PGC	LAUREL	MD	20707		S
6	674173	A	CHASSE	JILL	SRIDE	MC	GAITHERSBURG	MD	20882	Still in CP W/ Jason Chasse	W

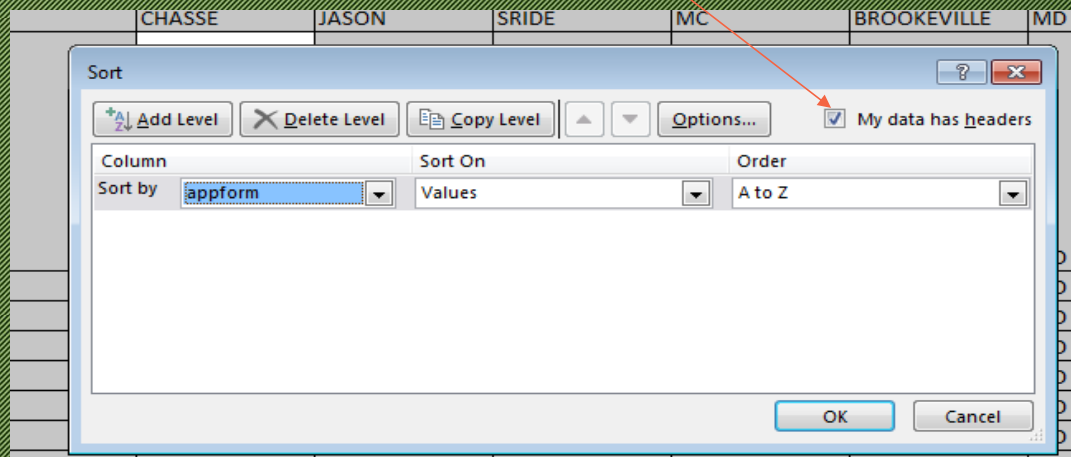# Data Sorting Continued

❖Decide which data is needed then data sort on the appropriate heading.

❖Click on Data, then click on Sort.

Click here Then Click Here
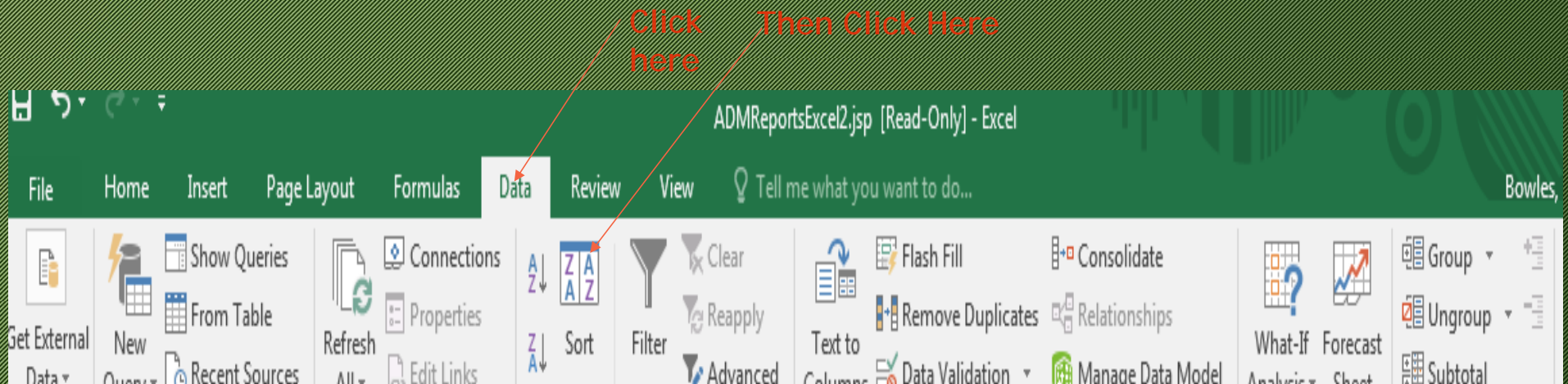
Data Sorting Continued

❖Decide what column to sort depending on the data needed.

❖Make sure the "my data has headers" box is checked

❖Select the column heading in the sort by drop down.

❖ Select OK. The report format will sort accordingly

Sample Reports

❖Sample Report #1- Exported data in Excel prior to Data Sort
❖Sample Report #2- Exported data in Excel sorted

❖Sample Report #3- Active Participants prior to Data Sort
❖Sample Report #4- Active Participants in Excel sorted.

Happy St. Patricks Day**!!!**

❖<u>St. Patrick's Day Trivia</u>

❖The real color of St. Patrick is blue

❖St. Patrick was actually Scottish

❖Hallmark usually sells 8-15 million St. Patrick's Day Cards

❖The four leaf's on the clover represent hope, faith, love and luck

❖The 1st St. Patrick's Day parade was in Boston in 1737, not Ireland