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Overview

This article walks through the steps to manually log volunteer hours, and then run a summary report showing total hours worked by multiple volunteers for a given time range. The application of Pivot reports in **Trail Blazer** can be beneficial in many different circumstances to create summaries.

IMPORTANT: Some parts of this article require appropriate <u>security clearance</u> for things like creating new log notes.

Tip: If you use another system to track volunteer data, or any other data for that matter, learn about **Trail Blazer's** import utility to import the data from that system to ours.



Steps

You'll first need to create a Log Note Type for volunteer hours.

Navigate to the Log Types list, click [+ New], create a name, and click [Save and Close].



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Click [Search] to refresh the logs list which will display your new log type.



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For more accurate & efficient reporting you may want to create multiple log types for for different volunteer sub categories.

Examples: Volunteer Hours - Data Entry



Tip: For accurate and efficient reporting down the line, you may want to create **sub categories** for these different volunteer categories, such as **Volunteer Hours – Data Entry, Volunteer Hours – Phone Calls, Volunteer Hours – Events**, etc.

Now that you're finished creating the new Log Types it's a good idea to refresh all of the drop-downs in your database. Follow **Application Menu** > **System Manager** > **Settings** > **Update Unique Search Value (Drop Downs)**, and click **[OK]**.



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This may take a bit of time (1-15 min.) if you haven't done it in a while, especially if you have a very large database.



Once complete you'll be prompted with a pop-up, click **[OK]**.



Now that that's done, navigate to your Contacts (*Voters/Donors*) list. Run a search <u>query</u> for the volunteer you want to record hours for, and click on their name to open the record. *In my example I queried for everyone in my database tagged with a Volunteer <u>attribute</u>, and opened the record for Tom Cope as shown in the image below.*



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Click on the Logs tab, and click [+ New] under the Log sub-tab.

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Enter the **date**, the **amount of hours**, and **optionally* a **description** of what the person did, then click **[Save]**. *My example is below*.



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By clicking **Save** instead of **Save and Close** it gives you the option to set a **reminder** with your log note. *The image below details an example reminder, this is of course an *optional step you could take, but isn't covered in-depth in this article.*



This is an ***OPTIONAL*** step you can take, to attach a reminder to your log note.

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Reminders will show here once they're saved, they turn red if they're past due. KNOW

KNOWLEDGE BASE <u>www.trailblz.com/kb</u>



You're now finished recording the volunteer's hours.

Make sure everything is saved correctly, and close out of the volunteer's record card.







From the **Search Log Entries** list select the **Volunteer Hours** as the log type, and click **[Search]**. This will load every volunteer log entry that's been recorded so far in your database.



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Tip: You could filter this query further by things like **Date Range, A Specific Volunteer, Event(s)**, Etc.

Now click the **Pivot** button from the list tool strip.



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<u> </u>		15299	Beecroft	Liea	12/2/2011 9-10 AM	Creating media	materials for web site	Mark Pancer	4.00	Volunteer Hours
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Select First Name and Last Name from the Row Labels tab.



Select First Name and Last Name under the Row Labels tab.

Create Pivot Table		8
Row Labels Column Labels Data		
 \$ or Hours By Contact ID Created First Name ID Incl Zast Name Text Type 	Column Heading Contact.FirstName First Name Contact.LastName Last Name	
Overall Progress Waiting for user input		
Step Progress		
	 OK OK	



Select Show count of occurrences and \$ or Hours under the Data tab, and click [OK].



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Select 'Show count of occurances' and '\$ or Hours' under the Data tab.

Show count of occurrences	Pivot Ta	ible Data	
Columns	 Co	lumn	Heading
Sor Hours	V a	erDecimal001	\$ or Hours
Overall Progress Waiting for user input			
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The pivot report will run and provide you with the results in a grid view once it's finished. *My example finished report is below, I clicked on the* **SUM** (\$ or Hours) column header once to sort in descending orders.



Finished pivot report, sorted in ascending order by the 'Sum (\$ or Hours' column.

	Incl	First Name	Last Name	COUNT (°)	SUM (\$ or Hours)	
	V	Brian	Као	1	1.25	
	V	David	McCarty	1	1.25	
	V	Susan	Maki	1	1.75	
	V	Robin	Maher	1	2.50	
		Sarah	Adams	1	4.00	
	V	Andrew	Davis	1	4.00	
	1	Walt	McHenry	1	4.25	
	V	Nadine	Gregerson	1	4.50	
	1	Matthew	McGlory	1	4.50	
	V	Lisa	Beecroft	1	6.00	
	V	Russell	Boring	1	6.00	
	V	Mary	Behling	1	6.00	
	V	Linda	Hamilton	1	6.50	
	V	Paul	Maher	1	6.50	
	V	Kathleen	McHenry	1	7.50	
	V	Julie	Ellefson	1	8.00	
	V	Tom	Соре	1	9.50	
	V	Oliver	Gatten	1	10.00	
	V	Stephanie	Maddock	1	10.00	
	V	Melissa	Jacobowitz	1	14.00	
	V	Sharon	Mclaughlin	1	16.50	
51	21			21	134 50	E ASE www.trailblz.

How many times _



You're now finished with these steps. Take a look at the related resources below for useful articles and videos on similar topics.

Tip: You can **export** your final report to a .csv file, or **print** it onto paper which will maintain the grid lines. The two images below show a print preview of my final pivot table.

Img 1 – Print

Print the report.

_										
	🖽 Sort 🌐 Format 🗸 🏝 Export 🃚 Print 🕅 Chart									
Lo	Log Count,\$ or Hours by First Name/Last Name									
ШE	Incl	First Name	Last Name	COL Print	contents of li Hours)	st.				
		Brian	Kao	1	1.25					
		David	McCarty	1	1.25					
	V	Susan	Maki	1	1.75					
		Robin	Maher	1	2.50					
		Sarah	Adams	1	4.00					
		Andrew	Davis	1	4.00					
		Walt	McHenry	1	4.25					
		A	~		4.50					



Img 2 – Print Preview



Final print preview of the finished volunteer pivot report.

Log Cou	nt,\$ or Ho	ours by	First Name/Last Name	Date/Time: 6/3/2015 12:03 PM Page: 1
First Name	Last Name	COUNT (*)	SUM (\$ or Hours)	
Brian	Kao	1	1.25	
David	McCarty	1	1.25	
Susan	Maki	1	1.75	
Robin	Maher	1	2.50	
Sarah	Adams	1	4.00	
Andrew	Davis	1	4.00	
Walt	McHenry	1	4.25	
Nadine	Gregerson	1	4.50	
Matthew	McGlory	1	4.50	
Lisa	Beecroft	1	6.00	
Russell	Boring	1	6.00	
Mary	Behling	1	6.00	
Linda	Hamilton	1	6.50	
Paul	Maher	1	6.50	
Kathleen	McHenry	1	7.50	
Julie	Ellefson	1	8.00	
Tom	Cope	1	9.50	
Oliver	Gatten	1	10.00	
Stephanie	Maddock	1	10.00	
Melissa	Jacobowitz	1	14.00	
Sharon	Mclaughlin	1	16.50	
		21	134 50	





- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: Log Notes vs User Fields vs Attributes Article: Adding Log Types Article: Adding Log Notes, Mass Log Notes, and Reminders Article: Fund Allocation and Summary Report (Another Example of a Pivot Report) Video: Reporting 105 – Pivots – summary reporting Video: Attributes – Adding New Video: Importing 3rd Party Resource (Tool): Volgistics – Robust Donor Management

Trail Blazer Live Support

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- Email: <u>support@trailblz.com</u>
- **Facebook:** <u>https://www.facebook.com/pages/Trail-Blazer-Software/64872951180</u>
- **Twitter:** <u>https://twitter.com/trailblazersoft</u>



* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.