LISC Salesforce Reporting Exercises

Employment Counseling: create a list of clients with subsidized job placements ONLY.

- Start with the standard report entitled "People placed in jobs (all types)"
- Customize the report.
- Search on the left hand side for "wage type" and then drag this into the filter area. Use the magnifying glass to select Subsidized Job.
- Make sure "All case records" is selected in the Show field.
- Take out one of the columns you don't need (for instance Employment Name).
- Save the report in a folder your colleagues can see. Run the report.

Financial Counseling: create a list of clients who are unbanked.

- Click New Report. Search for "Case Records with Assessment", highlight this selection, and click Create.
- Make sure "All case records" is selected in the Show field.
- Search for the assessment record type in the Fields box and drag it to the filters box. Click on the magnifying glass next to the OK button, select "Financial Health", click Insert Selected, and click OK.
- Drag the Assessment # column header to the left to get rid of it.
- Search for "Do you have" in the Fields box. Drag BOTH "Do you have a checking account" and "Do you have a savings account" into the preview box as columns.
- Drag both of those column headings into the filter box one at a time, selecting "No" for both.
- The resulting records show you people who answered no to BOTH questions. If you also want the names of clients who answered no to ONE question, start by clicking the dropdown menu next to Filters: Add. Select Filter Logic.
- Change the logic to 1 AND (2 or 3). This means that the resulting records meet the first condition and one OR the other of the next two.
- Add EITHER an assessment date column OR filter by the sequence field to ensure that you're getting the most recent assessment.
- Save the report in a folder your colleagues can see. Run the report.

Groups/Classes: Create a list of clients who participated in a vocational training workshop/class from 2/1/2017 to the present.

- Click New Report. Search for “Direct Services with Case Record”, highlight this selection, and click Create.
- Make sure “All direct services” is selected in the Show field.
- Search in the “Fields” box on the left for “Service” and drag this into the filters area. Type “Workshop/Class” into the box and click OK.
- Search in the “Fields” box on the left for “Client attendance” and drag this into the filters area. Click on the magnifying glass, select “Attended,” and click Insert Selected and then OK.
- Search in the “Fields” box on the left for “Workshop Type” and drag this into the filters area. Type “Vocational Training Class” and click OK.
- Search in the “Fields” box on the left for “Unduplicated ID” and drag this into the previews area as a new column. Click on the arrow that appears at the top of the column and select “Summarize this field”. Then check the box that says “Sum”.
- Remove the “Direct Service” column by dragging it by the column header into the “Fields” box. This information isn’t necessary for the report, so we can leave it off.
- Search in the “Fields” box on the left for “Date/Time” and add this to the report as a column AND to the Filters area. In the Filters, set it to “Date/Time greater or equal 2/1/2017” and click OK.
- Save the report in a folder your colleagues can see. Run the report.

BCO/Education: Create a list of clients with TABE scores and determine which clients showed increases over time.

- Click New Report. Search for “Case Records with Assessment”, select this report, and click Create.
- Make sure “All case records” is selected in the Show field.
- Search for Assessment Record Type on the left and drag it into the filter section. Click on the magnifying glass next to the “OK” button, select TABE from the list, and click Insert Selected. Click OK.
- Search in the “Fields” box on the left for “TABE” and drag all three “Grade equivalent” fields into the preview area as new columns.
- Remove the Assessment: Assessment # column by dragging the header back into the Fields box.
- Add “Assessment Date” as a column.
- In the Date Field at the top, select Assessment Date and in the Range field, select Current and Previous FY.
- Add “Unduplicated Client ID” as a column. Hover over the column heading and open the dropdown menu. Select “Summarize this Field”, check the Sum box, and click Apply.
- Save the report in a folder your colleagues can see. Run the report.
- This report now shows everybody who had TABE scores recorded in the report period, but you will have to download the information to Excel in order to sort through and determine which clients had increased scores and in which subjects.

Income Supports Counseling: create a list of clients grouped by the type(s) of benefits they applied for from 1/1/17 to the present.

- Start with the standard report entitled “Benefits Applied/Re-applied For”
- Customize the report. Start by deleting the chart. Then drag “Home Site: Entity Name” to the left to remove it from the report.
- Open the drop-down menu by hovering next to the column labeled “Service Name”. Select Remove Group.
- Next to Preview, change Matrix Format to Tabular Format.
- Search on the left for “type of recurring cash assist/payments” AND “type of non-recurring assistance” and then drag these as new columns in the report.
- Open the drop-down menu next to “Type of recurring cash assist/payments” and select Group by this field.
- Make sure “All case records” is selected in the Show field.

Program oversight: create a report that shows you demographic fields left blank in intake and the staff name attached to the case record from 1/1/17 to the present.

- Start with the standard report called “Demographics for FOC enrolled clients”.
- Customize the report. Start by removing home site and home site market fields by dragging the column headers to the left.
- Next to Filters, select Filter Logic. Type “1 AND 2” into the box and click OK. This is telling the report to pull records that meet both conditions. If you typed “1 OR 2”, it would tell the report to pull records that only meet one of these conditions.
- Drag the column header labeled “Client Ethnicity” to the filter area. Leave the middle box as the default “equals” and then type a full set of quotation marks in the third box “”. This will filter the report to show all clients with no data entered for ethnicity.
- Now drag the column header labeled “Client: Race” up to the filter area and repeat the step above.
- Edit the filter logic above so that it says “((1 AND 2) OR 3)”. This is now telling the report to filter clients who are blank in either ethnicity OR race but not necessarily both.
- Repeat these steps as needed for gender and age.
- If you want to see who “owns” these records, search the Fields box for “Owner Name” and add this as a column in the report. This will tell you which staff member (or someone using that account) left these fields blank.
- Make sure “All Case records” is selected in the Show field.
- Save the report in a folder your colleagues can see. Run the report.