

# RecChat – Reporting for Comparison in 2020

10/15/2020

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## RecChat – Reporting for Comparison

### Bottom Line Reports

#### Can you explain what the profit/loss column is looking at?

This looks at all the revenue received (registrations, surcharges and misc. income postings) and any expenses (refunds, instructor pay, and misc. expense posting).

#### Is there a way to run a GL report by reservation date?

If you are able to update screen design, this can be added to a custom screen. An enhancement was written to include this option added to the Facility Criteria tab. This is task PII - 1904.

### Trend Analysis Reports

#### Can I request an enhancement for the trend analysis report to be configured for multiple fiscal years, say 5/1 - 4/30?

An enhancement request was written to include this option. This is task PII - 1905.

#### Is there a limit on the number of pages a report can be? We have a custom unearned income report that is now over 1,000 pages and is not running as scheduled.

This setting can be updated in the Daily Processing profile • Report Default Options • Max Pages per Report field. Please note: very large reports can be detrimental to server speed.

#### Do the Activity Trend and Bottom Line reports pull "enrollment by day" numbers?

Yes, and there is an option on the Detail Criteria tab for "Allow Enrollments By Day" so you can filter results. It will lump enroll by day as a single activity section.

## **Is there a way to have the Trend Analysis Report broken down by location/recreation center?**

The Activity Trend Analysis can be filtered by location on the Detail Criteria tab under the Range Filters by checking the box for "Use Facility Location Range". The Facility Trend Analysis can be filtered by location on the Core Criteria tab by expanding the Facility Range - Advanced section and checking the box to "Use Facility Location Range".

## **Can RecTrac allow for larger report selections using the DataGrid? There are some robust reports that the range simply isn't practical for.**

The database is limited in this functionality for performance and output reasons. Too many individual selections would make the "Selection Criteria" portion of a report huge, and looking through individual records, rather than a range will make the report take significantly longer and use more server resources.

As a work around, Report Tags can be added to activities (and applied in bulk, if you like) to enhance the filtering options available when running reports.

## **Would the "Enroll by Day" activities work the same way as regular activities for trend analysis?**

Yes, this information would appear by Activity or Section code depending on how the report was processed.

## **Is there a report to see a trend in fee codes, for instance Resident vs. Non-Resident enrollment in an activity?**

The VSI - Enrollments by Household Category Report can be processed to provide the total number of enrollments by category, but it will not include additional financial data, only the total registrations by category.

## **Does the Activity Trend Analysis report give us a unique enrollment number? Does the Pass Trend Analysis report do this too?**

No, it does not provide the unique number of enrollees, just a total number of enrollments. There is a separate report called the VSI - Unique Enrollment Report, which will provide this data. This is located in the Report Output Listing.

## Pass Cancellation Report

### **Can we get the export for the Pass cancellation report? I do not see it in our pass options in 3.1.10.04.04?**

You should not need to get this from an export. In the Report Output Manager, use the DataGrid filter of Status to select the option for "New". Locate the report you are looking for, with the report highlighted, click More, then Change Status.

## General Reporting

### **Can you choose to make "print selection criteria" toggled on in Daily Processing device?**

We do not have the ability to set this in the daily processing profile, however you can set it through custom screen design. The Reporting Screen design add/update is the Base Screen of Report Output Settings. If this intended for all screens, then check the box for "Use Base Screen Name for the Name of this Report". If it is for a specific screen design, then leave that box unchecked and choose the specific design in the Design field.

### **Are we able to open report screens more than once? Sometimes we run an activity RecConnect on all the activities in the system and then in the middle need to run a roster report on a couple of classes and have to deselect all our activities.**

You can have multiples of the same screen open by activating the toggle in the new UI for "open application in new tab" and selecting the report again. In the old UI, right click on the report link and choose "Open New Panel". Note: in the old UI, that cannot be done through the report output listing. You must know where to locate under the Report Listing.

### **Can you show more Facility financial reports?**

All the facility financial reports are located in the Report Output Listing. Browsing the facility report options would be best to see a report sample to determine if the report would meet the needs of your organization.

### **Is there a current permissions assignment report available??**

The VSI - Profile Links Report, VSI - Profile Links Report with Profile Details, and the VSI - Profile Assignments Report will all provide this information. These can all be located in the Report Output Listing.

### **Can you show where we can update or eliminate columns on a standard report?**

Report customization will be discussed in RecChat on 10/15/2020. This can be found in the RecChat Archives.

### **Can I access the SAFee table to add items from that table to my custom report?**

It depends on the base table, of the report you are trying to customize. Certain reports have specific links to specific tables. Almost each one is different, and this is discussed in more detail in the October 15<sup>th</sup>, 2020 RecChat.

### **Is there a report that identifies all children linked to two households?**

There is no current report for this.