

Creating District Level Cost/Return and Cost Category Report

1. Using Vol. Expense Detail Report, insert new worksheet for state detail and each district.
 - a. Use insert worksheet tab @ bottom right of worksheet.
2. Rename each tab State Detail, D1, D2. Etc.
 - a. Right click on each tab and rename
3. Copy State worksheet in State Detail tab
 - a. To be used as working copy so original is not changed.
 - b. Use Home-format-move or copy sheet-position cursor before sheet to copy to-select create a copy-OK.
4. Copy rows 1, 2 from detail worksheet into each district worksheet.
 - a. Click on rows 1, 2 on left side of screen.
 - b. Right mouse click and select copy.
 - c. Select all district tabs by holding shift key and clicking on each district tab.
 - d. Click on one of the selected district tabs.
 - e. Right click on row 1 at left end of row and paste.
 - f. This will copy rows 1, 2 from the original detail worksheet into all the district worksheets.
5. Insert row at top of each district worksheet and enter "District Totals" in column A, row 1 cell.
6. Sort worksheet first by 2nd level supervisor, and then by supervisor.
 - a. Select entire worksheet by clicking on top left of worksheet.
 - b. Click on row 1.
 - c. Hide row 1: home-format-hide and unhide-hide rows
 - d. Sort by 2ⁿ level supervisor and then supervisor: data-sort-my data has headers-add levels 2 times- sort by 2nd level supervisor, supervisor and then volunteer name.
7. Using State worksheet & Supervisor Last Name column (E) to find DCs, select individual DC row one at a time, copy and paste each row into respective district worksheet.
8. Copy and paste volunteers into each District worksheet.
 - a. DC is 2nd level supervisor and LC is supervisor.
9. Unhide row 1: home-format-unhide and hide-unhide rows.
10. Sum all values in column J for each district worksheet:
 - a. In row 3, column J enter: = sum (select row 4 to last row with volunteer data in it), enter.
11. Copy this formula across the row:
 - a. Right click on row 3, column J, select copy and slide cursor across to column R, paste.
12. Select all district worksheets and enter Nat'l. Avg. in row 2, column T.

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13. Select all district worksheets and enter \$3.79 (National avg. cost/return from Nat'l. Exp. Summary Report) in row U.
14. Open Flash Report.
15. In each district worksheet, in Vol. Exp. Detail report file input total district federal returns in row 1, column S.
16. To calculate cost per return for each district, in row 1, column T enter: =R1/S1.
17. Pretty up the worksheet by adjusting column widths, adding outlines, etc and save the report. If you wish to make it easier to see when you print it, hide columns A-D.
18. Overall state report by district can be created using LY # of returns, LY total cost, LY cost/return and same for this year, so you get a comparison. See last tab of GA1 report.
19. Or.....find someone in the state who likes to work with Excel and get them to do it.