

Unit 13: Reports

Version 1.6



Document Revision History

<u>Date</u>	<u>Release</u>	<u>Description</u>
6/5/2012	1.6	<ul style="list-style-type: none">• Modified Running Reports section to include steps on how to open the report in an Excel document.
10/24/2011	1.5	<ul style="list-style-type: none">• No changes.
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3/28/2011	1.3	<ul style="list-style-type: none">• No changes.
1/31/2011	1.2	<ul style="list-style-type: none">• No changes.
11/22/2010	1.1	<ul style="list-style-type: none">• No changes.
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Reports

Unit Overview

This unit gives Users a general understanding of how to run reports and work with parameters to pull out specific data. The unit also describes how to access and generate ad-hoc reports.

Important Information

These NYEIS functions are currently under review and will be revised in the future in order to fully capture federal requirements.

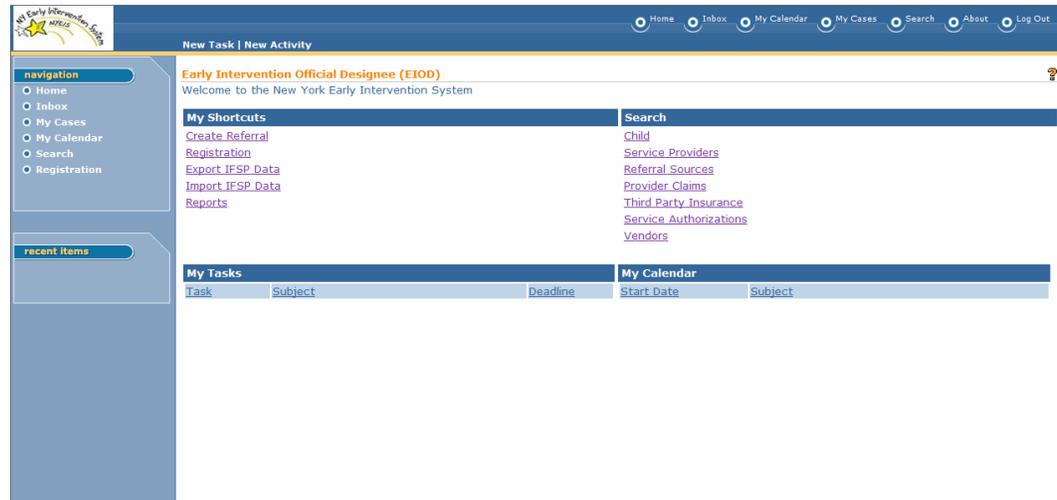
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REPORTS

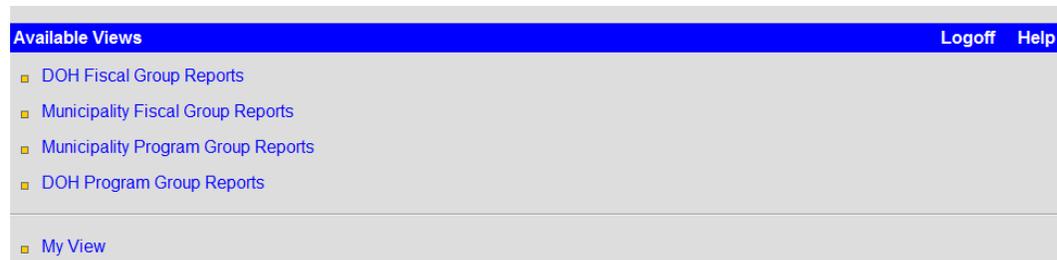
Users *must* have access to Reports in order to run reports. Providers do not have access to Reports.

Running Reports

1. Display User Home Page.



2. Click **Reports** link under **My Shortcuts** section. **WebFOCUS Business Intelligence Dashboard** page displays with several Available Views containing multiple groupings for Reports.



3. Select from one of the following **Available Views: DOH Fiscal Group Reports, Municipality Fiscal Group Reports, Municipality Program Group Reports and DOH Program Group Reports.**



4. Click Report. **Report Input** page displays selected fields available to specify further report details to run. *Selection fields are different depending on Report selected. Selection fields are used to specify data for a Report.*

Active IFSP Details Listing by Child Report

Report Input

Municipality: ALL

- Albany
- Allegany
- Bronx
- Broome
- Cattaraugus
- Cayuga
- Chautauqua

Active From Date: 07/01/2003

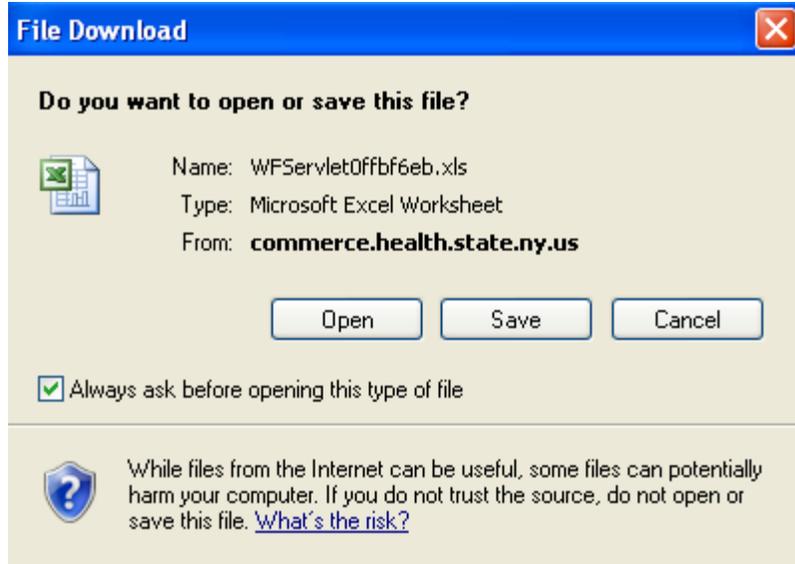
Active To Date: 06/13/2012

Continue Report

Cancel

Output Format: HTML Excel

5. Type or select appropriate information.
6. Click **Continue Report** button. *Click **Cancel** button to exit report and return to Welcome page.*
7. Selecting Excel as the Output Format will open the report in a Microsoft Excel Document. **File Download** dialog box displays.



8. Click **Open** to quickly open and view file. *Clicking **Open** does not save the file to a location. Click **Save** button to download and save file to a desired location prior to opening.* File displays.

Child Name	Child DOB	Referral Date	Initial IFSP Date	Last IFSP Type	Last IFSP Date	Service Type
Test Child 1	05/19/2009	05/27/2011	07/08/2011	Initial	07/08/2011	Speech Language
Test Child 2	05/19/2009	05/27/2011	07/08/2011	Initial	07/08/2011	Service Coordination
Test Child 3	05/19/2009	05/27/2011	07/08/2011	Initial	07/08/2011	Special Instruction
Test Child 4	01/25/2009	10/29/2010	12/08/2010	1st Annual	01/25/2012	Non-physician Supplemental Eval - OT
Test Child 5	01/25/2009	10/29/2010	12/08/2010	1st Annual	01/25/2012	Service Coordination
Test Child 6	01/25/2009	10/29/2010	12/08/2010	1st Annual	01/25/2012	Special Instruction
Test Child 7	01/25/2009	10/29/2010	12/08/2010	1st Annual	01/25/2012	Speech Language
Test Child 8	01/25/2009	10/29/2010	12/08/2010	1st Annual	01/25/2012	Group
Test Child 9	07/04/2008	03/28/2011	05/13/2011	Initial	05/13/2011	Special Instruction

9. Selecting HTML as the Output Format will open the report in a HTML Page. Report Displays

File Edit View Favorites Tools Help Links >>

Child Listing By EI Event Due
Active Between: 04/21/1960 - 10/21/2008
Municipality: ALL Municipalities

Municipality: Albany

ID Num	Child Name	Child DOB	Referral Date	Initial IFSP	First Review	First Annual	Second Review	2nd Annual	Third Review	Third Annual
11289	Janett Jackson	12/12/2007	12/10/2008	01/24/2009	07/24/2009	01/24/2010	07/24/2010	.	.	.
11301	Fred Savage	05/12/2008	12/10/2008	01/24/2009	07/24/2009	01/24/2010	07/24/2010	01/24/2011	07/24/2011	01/24/2012
17920	Bette Midler	05/12/2008	12/17/2008	01/31/2009	07/31/2009	01/31/2010	07/31/2010	01/31/2011	07/31/2011	01/31/2012
20738	Thomas Hanks	05/30/2005	12/22/2008	02/05/2009	08/05/2009	02/05/2010	08/05/2010	02/05/2011	08/05/2011	02/05/2012
257	Jenna Saubier	01/01/2008	09/17/2008	11/01/2008	05/01/2009	11/01/2009	05/01/2010	11/01/2010	05/01/2011	11/01/2011
30000001	Anna Small	01/01/2007	06/02/2007	07/17/2007	12/02/2007	07/16/2008	01/15/2009	06/26/2009	.	.
3074	Sarah Beara	01/03/2008	10/10/2008	11/24/2008	05/24/2009	11/24/2009	05/24/2010	11/24/2010	05/24/2011	11/24/2011
32513	Tina Turner	12/12/2008	01/07/2009	02/21/2009	08/21/2009	02/21/2010	08/21/2010	02/21/2011	08/21/2011	.
33025	John John	01/02/2007	01/09/2009	02/23/2009	08/23/2009	02/23/2010	08/23/2010	02/23/2011	08/23/2011	02/23/2012
3402	Susan Harris	05/12/2008	10/21/2008	12/05/2008	06/05/2009	12/05/2009	06/05/2010	12/05/2010	06/05/2011	12/05/2011

Use vertical and horizontal scroll bars or **Page Up** and **Page Dn** keys to move around and view Report details.

10. Select **File, Print...** from the Internet Browser Menu Bar. Report prints.

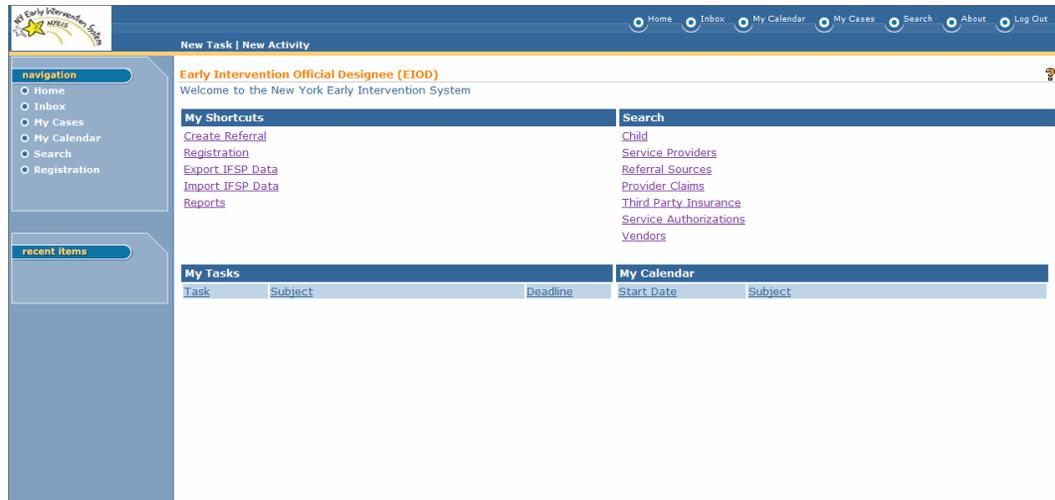
11. Click the **Close**  button to close all open windows and return to the NYEIS.

AD-HOC REPORTS

Users *must* have access to Reports in order to access ad-hoc reports. Providers do not have access to Ad-hoc Reports.

Running Ad-Hoc Reports

1. Display User Home Page.



2. Click **Reports** link under **My Shortcuts** section. **WebFOCUS Business Intelligence Dashboard** page displays with several Available Views containing multiple groupings for Reports.

3. Select from one of the following **Available Views**: **DOH Fiscal Group Reports, Municipality Fiscal Group Reports, Municipality Program Group Reports** and **DOH Program Group Reports**.

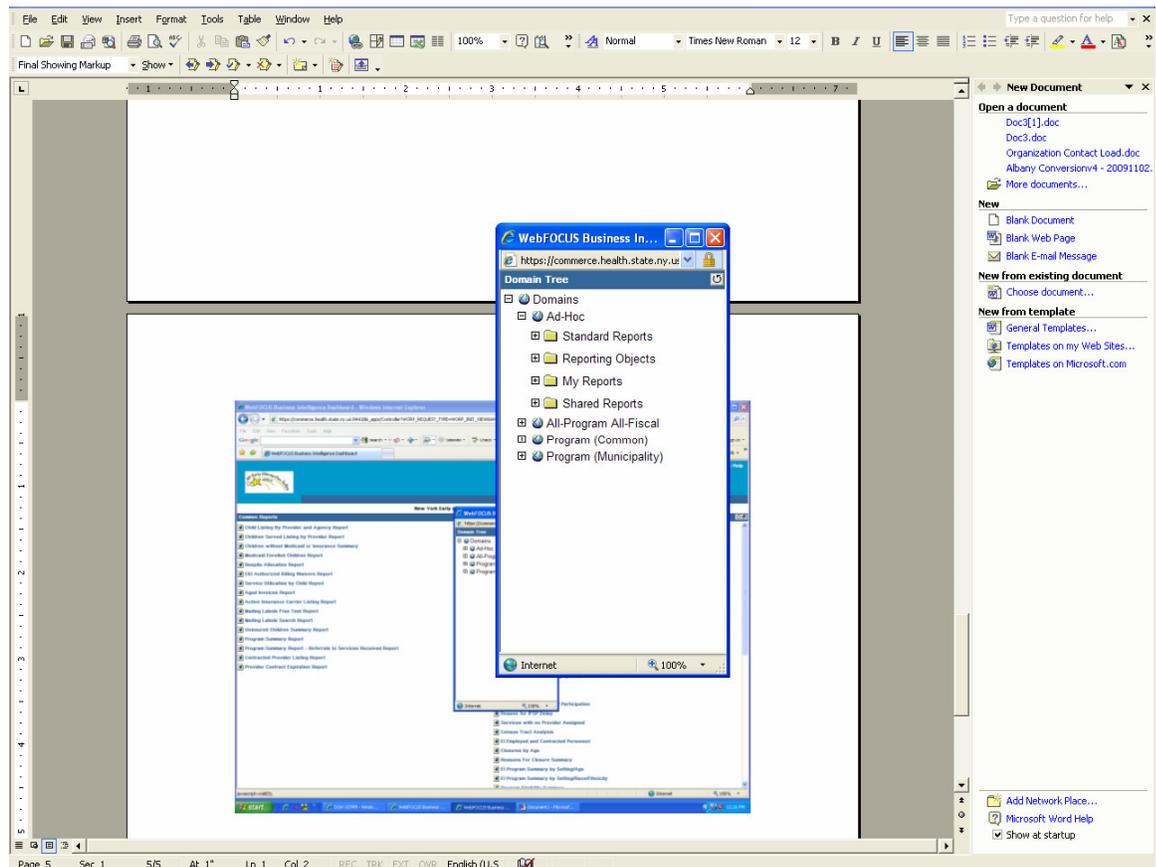


4. Click **Tree** in the heading. A Pop-Up page is displayed that shows the **Domain Tree**. **Domain** is a method used by **WebFocus** to group reports and

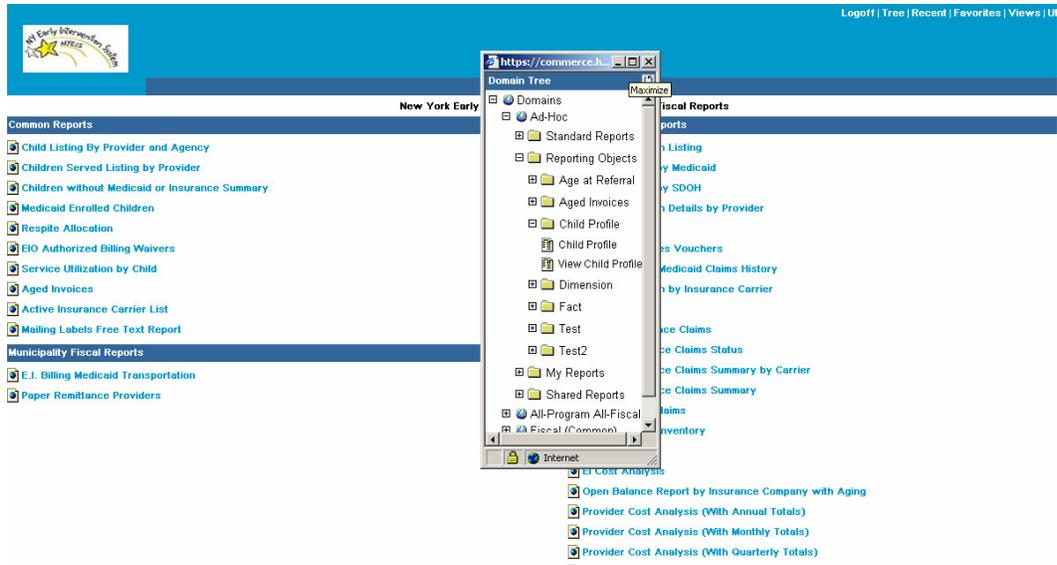
provide secure access. Notice that there is a domain for ad-hoc. Under the ad-hoc domain there are 4 folders entitled:

- Standard Reports
- Reporting Objects
- My Reports
- Shared Reports

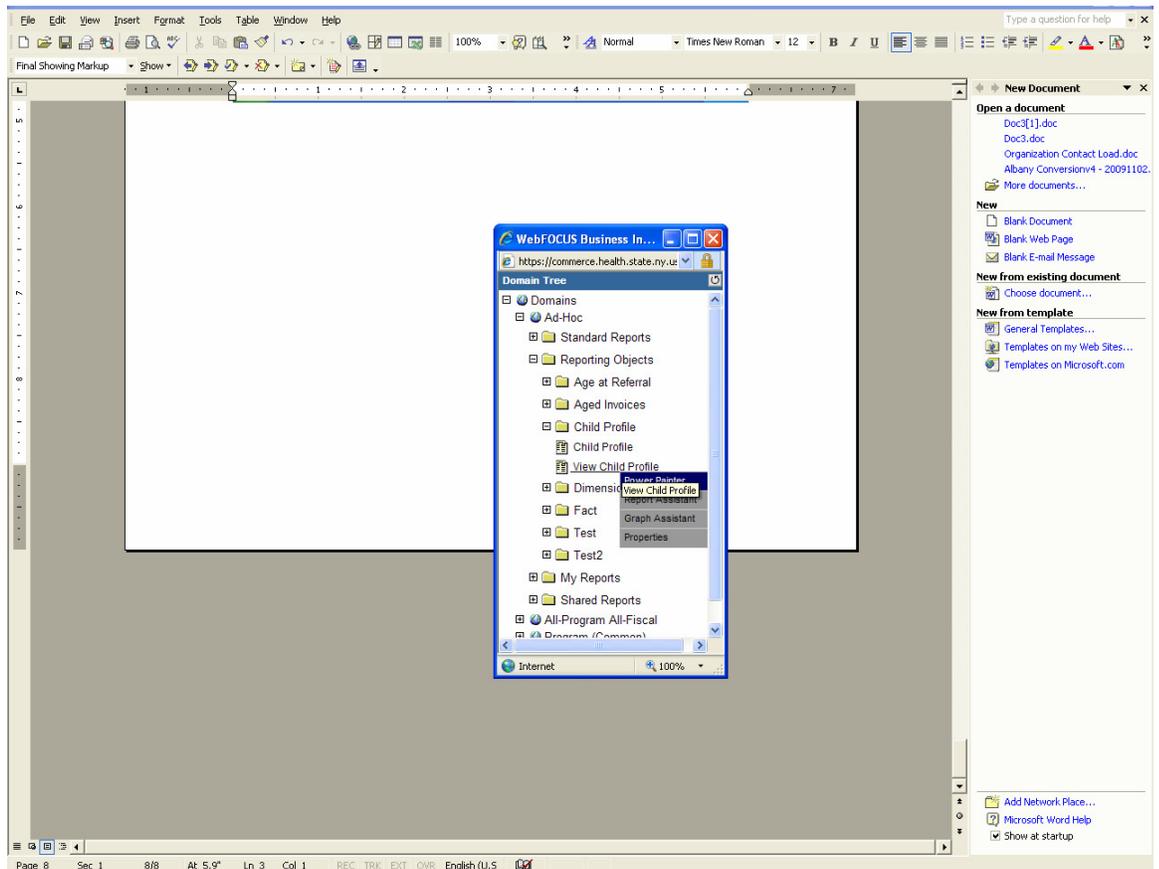
In order to create a new ad-hoc report, click on the **Reporting Objects** folder and open it up. **Reporting Objects** are pre-defined views of NYEIS data that can be utilized to generate ad-hoc reports. Reporting Objects are usually created by application/database developers who understand the data and how it is structured. **Reporting Objects** enable ad-hoc users to focus on the information they want and how to present it without needing to understand the database structure and how to navigate in it.



5. Click on the **Reporting Objects** folder. The folder is opened to display sub-folders under **Reporting Objects**. The sub-folders are used to group reporting objects into logical topics or areas of interest. Under each sub-folder there are one or more reporting objects.

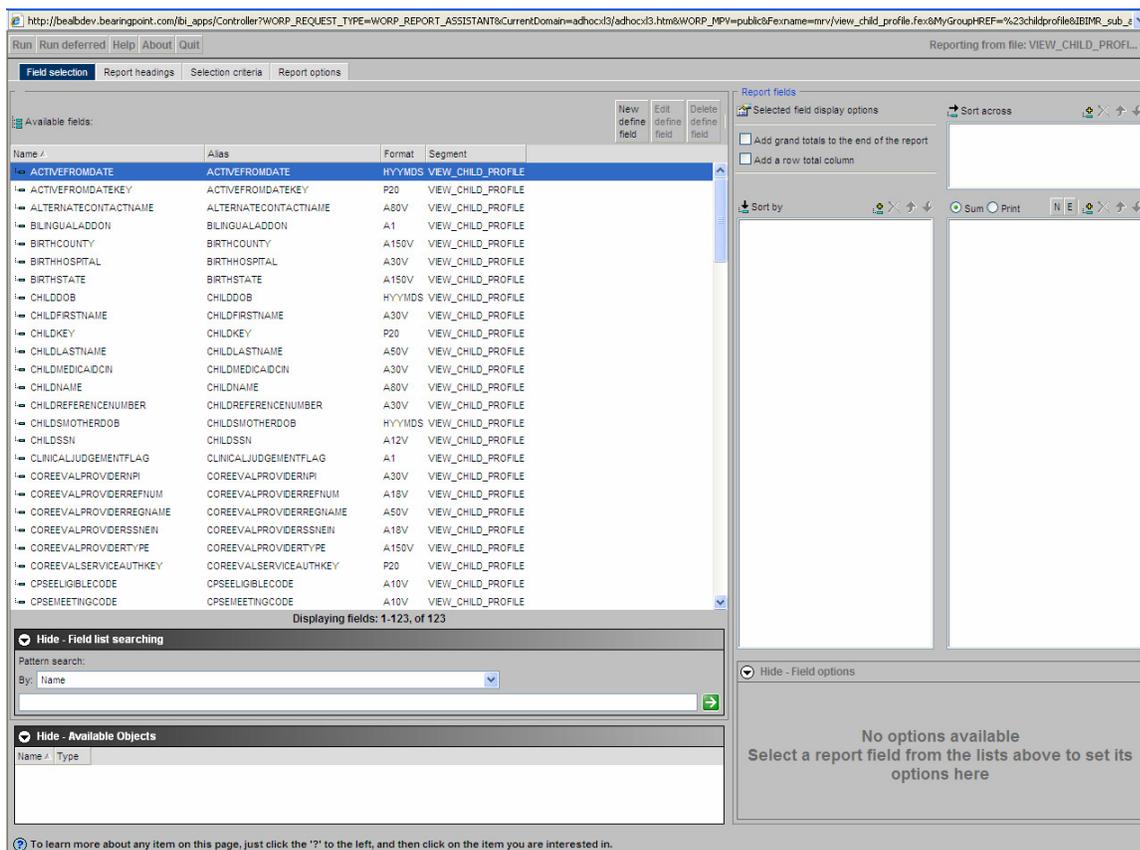


- Right click on **View Child Profile**. A pop-up appears displaying different tools that can be used to create reports. **Report Assistant** is utilized by ad-hoc users to create reports.



7. Click on the **Report Assistant** link in the drop-down menu. **Report Assistant** is launched. **Report Assistant's** interface is a tabbed display that addresses the areas of:
 - Field Selection
 - Report Headings
 - Selection Criteria
 - Report Options

The field selection tab allows a user to select the fields from the **Reporting Object** that will be used in the report. The user can also define summing, report totaling and sorting options.

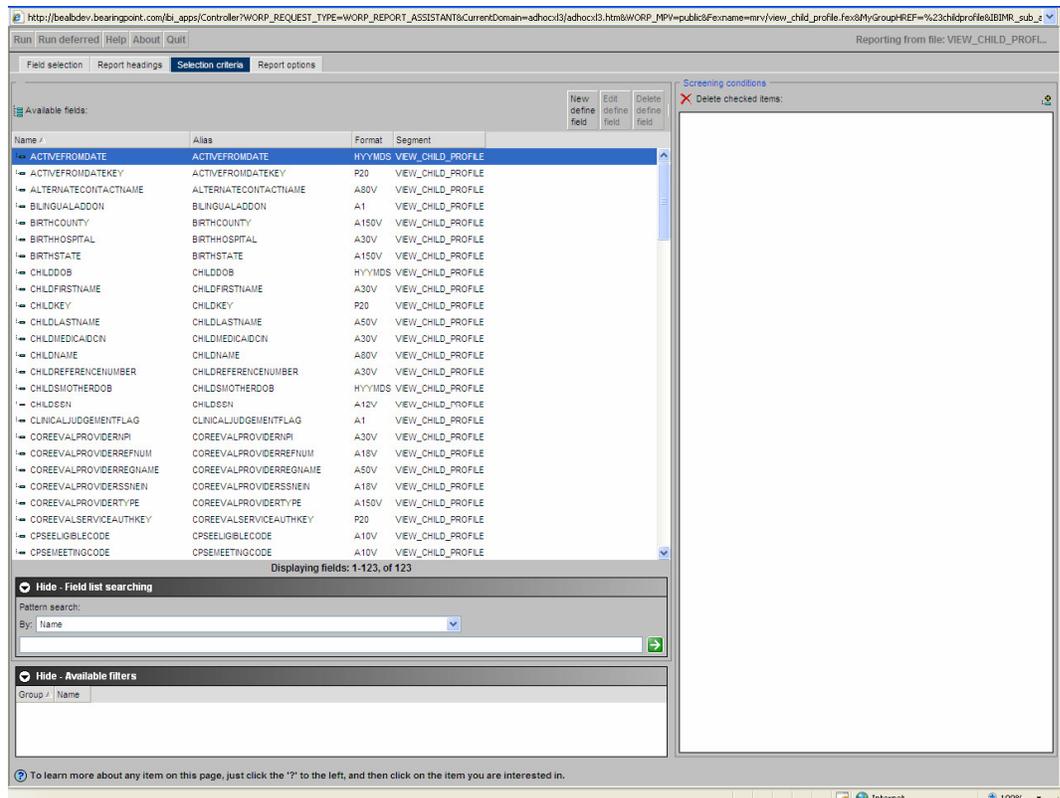


The Report Headings tab is where users can set the Page Headings and Footings for the ad-hoc report.

The screenshot shows a web application interface for selecting report fields. The browser address bar displays a URL: `http://bea4dev.bearingpoint.com/bi_apps/Controller?WORP_REQUEST_TYPE=WORP_REPORT_ASSISTANTS&CurrentDomain=adoc33/adoc33.htm&WORP_MPW=public&Fname=envr/view_child_profile.fex&MyGroup+REF=%23childprofile&EDMR_sub_s`. The application has a menu bar with 'Run', 'Run deferred', 'Help', 'About', and 'Quit'. Below the menu bar is a toolbar with 'Field selection', 'Report headings', 'Selection criteria', and 'Report options'. A message states 'A predefined WebFOCUS Style Sheet is in effect'. The main area contains a table of available fields with columns for Name, Alias, Format, and Segment. A search box at the bottom of the field list is labeled 'Hide - Field list searching' and contains the text 'By: Name'. The table lists various fields such as ACTIVEFROMDATE, ALTERNATECONTACTNAME, BILINGUALADDDN, BIRTHCOUNTY, BIRTHHOSPITAL, BIRTHSTATE, CHILDOOB, CHILDFIRSTNAME, CHLDKEY, CHLDLASTNAME, CHLDMEDICADCN, CHLDNAME, CHLDREFERENCENUMBER, CHLDSMOTHERDOB, CHLDSN, CLINICALJUDGEMENTFLAG, COREEVALPROVIDERINPI, COREEVALPROVIDERREFNUM, COREEVALPROVIDERREGNAME, COREEVALPROVIDERSSNEN, COREEVALPROVIDERTYPE, COREEVALSERVICEAUTHKEY, CPSEELIGBLECODE, CPSEMEETINGCODE, and CPSEMEETINGDATE. The table indicates 'Displaying fields: 1-123, of 123'. On the right side, there are sections for 'Page heading' and 'Page footing'.

Name	Alias	Format	Segment
ACTIVEFROMDATE	ACTIVEFROMDATE	HYMDS	VIEW_CHILD_PROFILE
ACTIVEFROMDATEKEY	ACTIVEFROMDATEKEY	P20	VIEW_CHILD_PROFILE
ALTERNATECONTACTNAME	ALTERNATECONTACTNAME	A80V	VIEW_CHILD_PROFILE
BILINGUALADDDN	BILINGUALADDDN	A1	VIEW_CHILD_PROFILE
BIRTHCOUNTY	BIRTHCOUNTY	A150V	VIEW_CHILD_PROFILE
BIRTHHOSPITAL	BIRTHHOSPITAL	A30V	VIEW_CHILD_PROFILE
BIRTHSTATE	BIRTHSTATE	A150V	VIEW_CHILD_PROFILE
CHILDOOB	CHILDOOB	HYMDS	VIEW_CHILD_PROFILE
CHILDFIRSTNAME	CHILDFIRSTNAME	A30V	VIEW_CHILD_PROFILE
CHLDKEY	CHLDKEY	P20	VIEW_CHILD_PROFILE
CHLDLASTNAME	CHLDLASTNAME	A50V	VIEW_CHILD_PROFILE
CHLDMEDICADCN	CHLDMEDICADCN	A30V	VIEW_CHILD_PROFILE
CHLDNAME	CHLDNAME	A80V	VIEW_CHILD_PROFILE
CHLDREFERENCENUMBER	CHLDREFERENCENUMBER	A30V	VIEW_CHILD_PROFILE
CHLDSMOTHERDOB	CHLDSMOTHERDOB	HYMDS	VIEW_CHILD_PROFILE
CHLDSN	CHLDSN	A12V	VIEW_CHILD_PROFILE
CLINICALJUDGEMENTFLAG	CLINICALJUDGEMENTFLAG	A1	VIEW_CHILD_PROFILE
COREEVALPROVIDERINPI	COREEVALPROVIDERINPI	A30V	VIEW_CHILD_PROFILE
COREEVALPROVIDERREFNUM	COREEVALPROVIDERREFNUM	A18V	VIEW_CHILD_PROFILE
COREEVALPROVIDERREGNAME	COREEVALPROVIDERREGNAME	A50V	VIEW_CHILD_PROFILE
COREEVALPROVIDERSSNEN	COREEVALPROVIDERSSNEN	A18V	VIEW_CHILD_PROFILE
COREEVALPROVIDERTYPE	COREEVALPROVIDERTYPE	A150V	VIEW_CHILD_PROFILE
COREEVALSERVICEAUTHKEY	COREEVALSERVICEAUTHKEY	P20	VIEW_CHILD_PROFILE
CPSEELIGBLECODE	CPSEELIGBLECODE	A10V	VIEW_CHILD_PROFILE
CPSEMEETINGCODE	CPSEMEETINGCODE	A10V	VIEW_CHILD_PROFILE
CPSEMEETINGDATE	CPSEMEETINGDATE	HYMDS	VIEW_CHILD_PROFILE

The Selection Criteria tab is used to determine whether data will only be displayed if it meets certain criteria. For example, a report might be based on a calendar year and dates in the Reporting Object would be compared to determine if it should be displayed.



The Report Options tab defines how the report will be presented and what format the data on the report will be provided to the user. The report itself can generate data to multiple file formats including .pdf, .xls, and .html. The user is directed to the **WebFocus**’ website for more detailed information on how to use **Report Assistant**.