

# **AES**

## **Adaptive Enterprise Solutions**

**...unlocking the dawn of better results for your organization**

### **REPORTS USER GUIDE**



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# Overview of Reports

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The following document provides detailed instruction on what reports are available in the Adaptive Enterprise Solution (AES) and how to run these reports from the application. AES is an interactive application designed to record all pertinent client and collaborative information with the goal of sharing this data throughout agencies, government organizations, etc. The goal of this document is to provide the user with the tools necessary to report on this information quickly and accurately.

There are three different report types used in the application: Management, Application, and Ad Hoc.

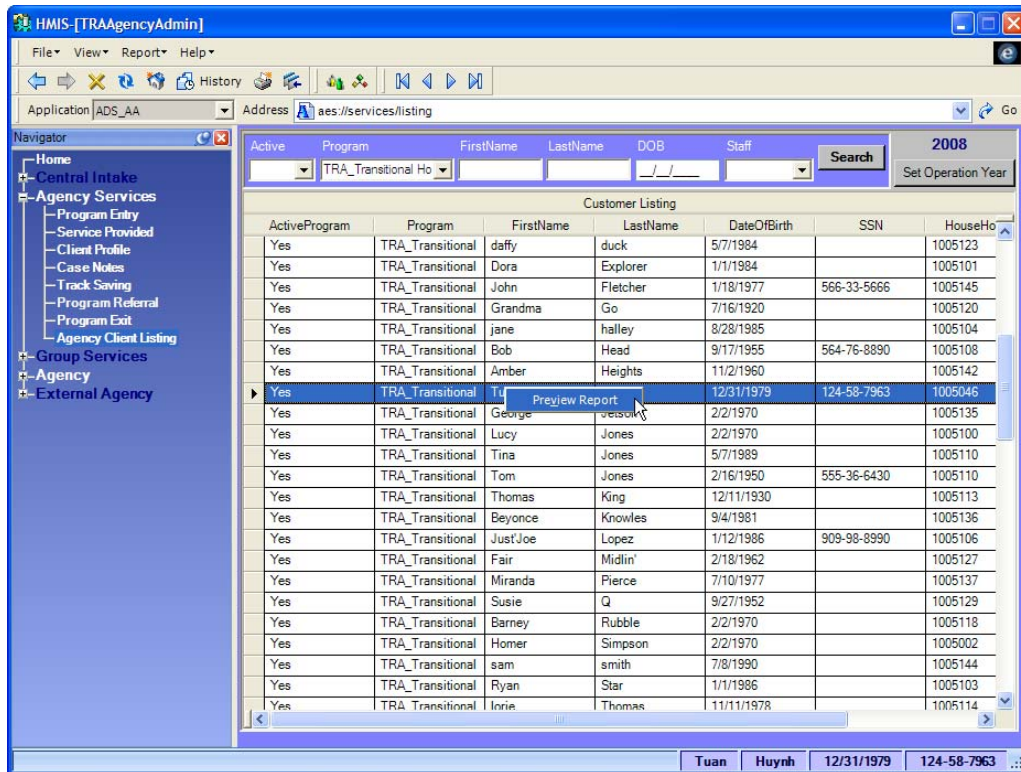
- **Application** reports run from within the system typically for one record at a time (e.g., a printout of an application or a list of Services recorded for the client).
- **Management** reports either mimic federal reporting (HMIS APR, Head Start PIR, CSBG Section G, etc.) or answer critical questions for non-profit organizations and their funders.
- **Ad Hoc** reports are reporting templates where the user dictates which fields are used in reporting. They allow greater flexibility to ask the questions you want to ask of the data.

Each report type is described in detail with examples and instructions on how to run each of these reports.

Security for reporting is created in both Security Wizard and Manager. Reports are added to a collaborative site and then to specific Applications with Security Wizard; access to the reports is added to Organizations and specific Groups within the Organization with Security Manager. Only the System Administrator or Agency Administrator can grant the rights to view and create reports.

# Application Reports

Application Reports are run from within the application itself. They are accessed by a right-click menu on various pages in the system, often the Program Entry page and the Listings page within the Services section.



## Creating an Application Report

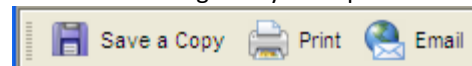
Log in to the system and navigate to the page for the desired report.

- 1 Select the record(s) to use for the report
- 2 Right click
- 3 Select PREVIEW REPORT from the menu
- 4 An Internet Browser window will open listing the available reports
- 5 Click on the desired report
- 6 A new Internet Browser window (or tab) will open showing the report

## Using the Application Report

Do not use the Browser window print function – you will print all the Adobe toolbars along with your report!

- 1 To print the report: click PRINT in the Adobe Acrobat toolbar
- 2 To save a copy of the report: click SAVE A COPY in the Acrobat toolbar
- 3 To email the report: click EMAIL in the Acrobat toolbar



# Management or General Reports

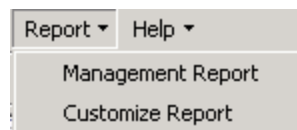
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Management reports are reports that are standard to most AES applications. The Client Demographic report is one example of a Management report; it gives a snapshot of all Clients in the system broken down by race, gender, income type, etc. See your System Administrator or Agency Administrator for a list of reports available to you.

## Creating a Management Report

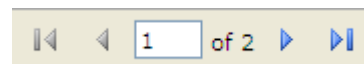
Open the Application and log in.

- 1 Make sure the correct Application Role is selected in the dropdown
- 2 Click on Report in the menu bar
- 3 Select Management Report
- 4 An Internet browser window will open with a list of the available reports
  - a The list depends on the group you log in to and what Reports have been assigned to that Group
  - b If the list includes more than one page, page numbers will appear at the lower right corner
- 5 Click on the Report to run from the list
- 6 A new Internet browser window will open for the Report
- 7 Select the Parameters
  - a Each report will have different parameters available, including
  - b Region, Agency name, Contract Number, Program name, Program Component, Activity, Resource, Start and End Dates, Case Worker, County, Operation Year, and others



The report will appear on the page.

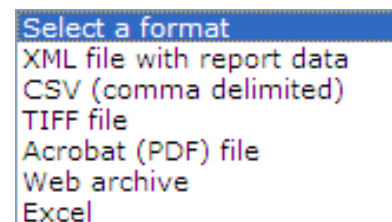
- 8 If the report is more than one page, the page designation directly above the report will show the number of pages and the arrows will turn blue allowing the User to go to the next page or the last page



## Printing a Management Report

Management reports should not be printed directly from the browser window – the entire parameter section will be printed and the report may not be formatted as well as it can be. Instead, the report should be exported to a PDF file and then printed.

- 1 Select Acrobat PDF in the Select a format dropdown
  - 2 Click EXPORT link to the right of the dropdown
- An Adobe Acrobat window will open asking if you want to open or save the report
- 3 Click OPEN to open the report in Adobe Acrobat or click SAVE to save the file without opening
    - a When printing the report in Acrobat, there is an option in their print window that allows you to *shrink to printable area* or *fit to printable area*. One of these options may work better for your printer; try it if the report seems to print with no margins



## Exporting the report to other formats

- 1 To include the report in a Word document: select TIFF file
- 2 To open the report in a spreadsheet: select Excel
- 3 To export just the data to a spreadsheet: select CSV
- 4 To open the same report at a later time in an Internet Browser window: select Web Archive
- 5 To create the report in xml language: select XML

# Ad Hoc Reports

Ad Hoc reports are customized reports based on a specific set of data fields specified by the user; for example, a range of dates or Clients in a specific Program.

The screenshot shows the AdhocReport window with the following elements:

- Report:** A dropdown menu showing "50Fields List".
- Report Query:** A text area containing the SQL query: "Select [LastName],[FirstName],[DateOfBirth],[Organization],[Gender] From [vADHOC\_BasicClientInformation] Order By [LastName] ASC".
- Title:** A text field containing "My Brilliant Report".
- Group By:** A dropdown menu.
- Display:** A dropdown menu set to "All".
- Number:** A text field set to "0".
- Date Field:** A dropdown menu.
- Start Date:** A date input field.
- End Date:** A date input field.
- Drilldown:** A checked checkbox.
- Buttons:** "Print Report", "Show Report", "Save As", "Export as Excel", "Clear", and "Close".

## ***Navigating the Ad Hoc Report popup window***

- Report Type must always be selected first
- If Reports have been created and saved, they will be available in Report Query dropdown – saving a useful Query will save much time the next instance similar information is needed
- Build New Query opens the Query popup window
- Title must be filled in for report to appear
- Group By will display the selection from the Program Grouping tab, and Display and Number must be complete for report to appear
- Date fields will be available only if a Date field was selected in the Query
- Drilldown means the data will be included in the report instead of just the summary or totals

## Report Types

### 50 Fields List

This report is a good choice when the User wants to see a lot of information about each Client, or is checking to make sure of the accuracy of the data input. Whatever is selected on the Report Grouping tab will be a separate Group and will start a new page of data.

In this example, Program was selected first, Gender was the second grouping selection.

This report is best used to export to Excel.

### Fields List

If the user wishes to view information from the system without charts, the field list is a good choice for viewing data. This is a good choice for viewing information like comment fields that do not lend themselves easily to counts or sums. Each record with the chosen fields will be listed individually.

In this example, Service Comments are used to record the numbers from Vouchers

Client List							
SQL: Select DISTINCT [LastName],[FirstName],[DateOfBirth],[Age],[HeadOfHouseHold],[Ethnicity],[Race],[Disabled],							
GroupBy: Program,Gender							
DateField: ProgramDate							
trn_TransitionalHousing							
Female							
DISTINCT [LASTNAME]	FIRSTNAME	DATEOFBIRTH	AGE	HEADOFHOUSEHOLD	ETHNICITY	RACE	DISABLED
Aikens	zzRosie	11/19/1979	29	True	Non-Hispanic	Black/African-American	No
baydo	Janet	11/17/1952	56	True	Non-Hispanic	Black/African-American	No
black	zzpam	1/27/1956	52	True	Non-Hispanic	Black/African-American	No
Brown	Mary	8/16/1993	15	False	Non-Hispanic	Black/African-American	No
Christian	Jenna	9/1/2007	1	False	Non-Hispanic	White US Indian/Alaska Native	No
Christian	Sarah	1/12/1970	38	False	Hispanic	Black/African-American White	No
cox	cloe	1/1/2007	1	False	Non-Hispanic	Black/African-American	No
denise	toni	2/14/1987	21	False	Non-Hispanic	Black/African-American	No
doe	frank	10/14/1980	28	False	Non-Hispanic	Black/African-American White Asian	No
Doe	Jane	1/3/2008	0	False	Non-Hispanic	White	No
doe	jane	11/12/2007	1	True	Non-Hispanic	White	No
DOE	JAYLEEN	10/10/1982	26	True	Non-Hispanic	Asian	No
doe	john	1/1/2001	7	False	Non-Hispanic	Black/African-American	No
Doe	Karen	1/16/2007	1	False	Non-Hispanic	White	No
Dow	Janet	1/1/1991	17	True	Hispanic	White	No

Client List	
Description:	
SQL: Select DISTINCT [FirstName],[LastName],[Gender],[DateOfBirth],[ProgramDate],[ServiceComments] From [vAdhocServices] Where [Program] = 'ExampleProgramName' Order By [LastName] ASC	
GroupBy: Program	
ExampleProgramName	
DISTINCT [FIRSTNAME]	Wilma
[LASTNAME]	Flintstone
[GENDER]	Female
[DATEOFBIRTH]	12/30/1982 12:00:00 AM
[PROGRAMDATE]	9/19/2008 12:00:00 AM
[SERVICECOMMENTS]	Voucher 143589
DISTINCT [FIRSTNAME]	Barney
[LASTNAME]	Rubble
[GENDER]	Male
[DATEOFBIRTH]	1/1/1983 12:00:00 AM
[PROGRAMDATE]	3/23/2009 12:00:00 AM
[SERVICECOMMENTS]	Voucher 153457
DISTINCT [FIRSTNAME]	Abraham
[LASTNAME]	Lincoln
[GENDER]	Male
[DATEOFBIRTH]	9/24/1973 12:00:00 AM
[PROGRAMDATE]	12/22/2008 12:00:00 AM
[SERVICECOMMENTS]	Voucher 134548



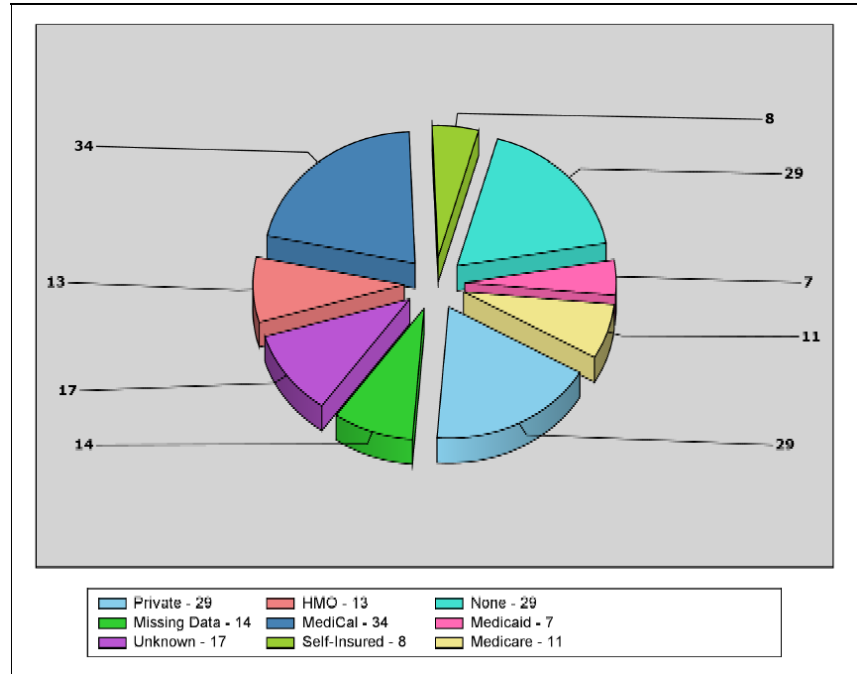


### Pie chart

The Pie Chart shows the size of items in one data series, proportional to the sum of the items.

Consider using a pie chart when you have only one data series that you want to view, almost none of the values are zero, you have less than ten categories, and the categories represent parts of the whole pie.

- The item that is selected first when selecting Report Grouping items will be used as the item to graph



### Cylinder Chart

A Cylinder chart is useful for illustrating comparisons among items; it can clarify relationships and highlight patterns in your data. Categories are organized along horizontal (x) axis, values along vertical (y) axis

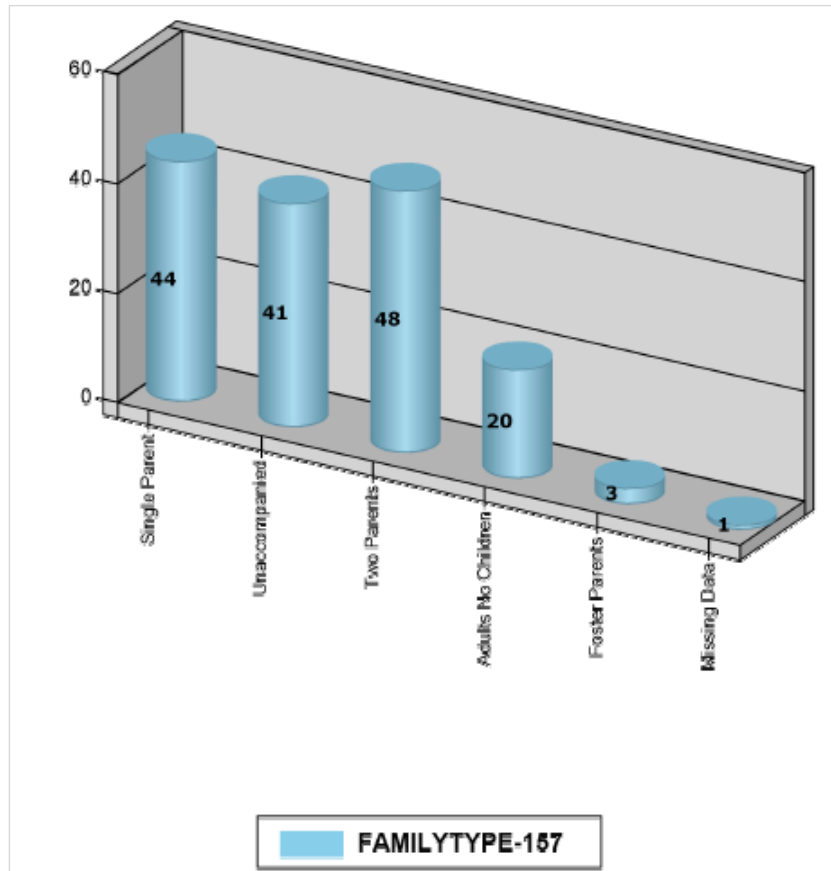
- The field that is selected first on the Report Grouping tab determines the X-Axis field

### Stacked Cylinder Chart

Show relationship of individual items to the whole, comparing the contribution of each value to a total across categories.

### Monthly Stacked Cylinder Chart

This shows the relationship of the parts, but compares it across time.



## Matrix Charts

Matrix charts show data arranged in a grid or matrix format. There are four different versions:

- 1 **Matrix Listing** just lists the data
- 2 **Matrix Count** counts the occurrences of the data
- 3 **Matrix Distinct Count** distinctly counts the occurrences of the data
- 4 **Matrix Sum** sums the data
  - The first item selected on the Select Tab is the data that will be displayed in the grid. The next four fields selected group the row level data.
  - Use up to five layers of groups for the columns, selected on the Group Reporting tab.

For example, to see the number of instances of each answer in a Profile set of questions, you could Group by:

- Program | Program Component | Activity | Caption | Answer

To see Clients who received various services, you could Group by:

- Program | Program Component | Activity

If Service Date is selected first on the Select Tab, Matrix Listing would show the date service was delivered, Matrix Count would show the number of services delivered, Matrix Distinct Count would show the number of distinct dates service was delivered. Matrix Sum would give an error, because there is nothing to add.

In the Matrix Listing example below, Service Date was selected first on the Select Tab, so it shows up in the Grid. First Name and Last name were also selected. Report Grouping selections were Program, Program Component, and Service.

trn_TransitionalHousing		TRN TransitionalHousing						
Alcohol and Drug Abuse Services	Bed	Beds	Breakfast	Case Management	Dinner	Employment Assistance	Housing Follow-up	
			10/27/2008 12:00:00 AM	10/27/2008 12:00:00 AM				
							10/22/2008 12:00:00 AM	
							11/17/2008 12:00:00 AM	
							11/3/2008 12:00:00 AM	
			11/24/2008 12:00:00 AM	11/24/2008 12:00:00 AM			11/25/2008 12:00:00 AM	
	1/7/2009 12:00:00 AM		1/7/2009 12:00:00 AM	1/7/2009 12:00:00 AM	1/7/2009 12:00:00 AM			
				10/28/2008 12:00:00 AM			11/4/2008 12:00:00 AM	

In this example, a Matrix Count report was used, Service Units was selected first on the Select Tab, so it shows in the Grid; it was grouped by Program, Program Component, and Service.

The Matrix Sum report may give different numbers; this report is counting all instances of each service, the Sum report would add the number of service units (1 count of Case management may equal 60 minutes, so the 60 will be counted on the sum report).

Service Count						
Description:						
SQL:						
Select [ServiceUnits],[ProgramComponent],[ID] From [vAdhocServices] Where [Program] = 'DOHEmergencyServices' And [LastName] Like 'E%' And ([Service] = 'Bed Night' Or [Service] = 'Case Manager' Or [Service] = 'Meal')						
GroupBy:						
Program,ProgramComponent,Service						
						Total
DOHEmergencyServices						
Education						
Bed Night	Case Manager	Meal				
2000037	Education	6	1	6		13
2000127	Education	18	1	18		37
2000284	Education	7	1	7		15
2000304	Education	1	1	1		3
2000458	Education	4	1	4		9
2000466	Education	1	1	1		3
2000491	Education	2	1	2		5
2000536	Education	51	1	51		103
2000546	Education	5	1	5		11
2000596	Education	1	1	1		3
2000649	Education	2	1	2		5
2000683	Education	2	1	2		5
2000701	Education	1	1	1		3
2000816	Education	1	1	1		3
2000867	Education	36	1	36		73
2000914	Education	1	1	1		3
2000939	Education	18	1	18		37
2000975	Education	1	1	1		3
2000980	Education	1	1	1		3
2000985	Education	13	1	13		27
2001094	Education	1	1	1		3
2001143	Education	1	1	1		3
2001281	Education	1	1	1		3
Total		175	23	175		373
Total		175	23	175		373

In the next example of a Matrix Listing, Answer is selected first, so it shows in the grid, then Caption, Last name, First name. Report Grouping = Program, Service, Service Date.

After being exported to Excel, formulas could easily be added to show the percentage difference from the first month to the last, or to add all items together and compare the totals.

Description:

SQL:  
 Select [Answer],[Caption],[LastName],[FirstName] From [vAdhocQuestions] Where [Program] = 'DOHEmergencyServices' And [Service] = 'Assessment' And [LastName] = 'flintstone' And [FirstName] = 'fred' Order By [QuestionOrder] ASC  
 GroupBy:  
 Program,Service,ServiceDate

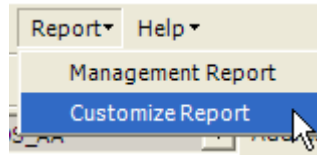
				DOHEmergencyServices		
				Assessment		
				3/3/2009 0:00	4/5/2009 0:00	5/3/2008 0:00
	Fred	Fintstone	Housing	1	2	2
	Fred	Fintstone	Income (Area Median Income)	2	2	2
	Fred	Fintstone	Income (Federal Poverty Level)	1	2	3
	Fred	Fintstone	Income (Self-Sufficiency Standard)	2	3	3
	Fred	Fintstone	Legal	2	3	3
	Fred	Fintstone	Life Skills (Financial Matters)	0	3	3
	Fred	Fintstone	Life Skills (Household Management)	1	2	2
	Fred	Fintstone	Life Skills (Human Relations)	1	2	2
	Fred	Fintstone	Life Skills (Setting Goals & Resourcefulness)	1	3	3
	Fred	Fintstone	Mental health	0	2	2
	Fred	Fintstone	Parenting	1	2	2
	Fred	Fintstone	Physical Health	1	3	3
	Fred	Fintstone	Safety	1	2	3
	Fred	Fintstone	Substance Use	1	3	3

## Creating the Ad Hoc Report

### Open Adhoc Report s

Log in to the system

- 1 Click on Report in the menu bar
- 2 Select Customize Report



The Adhoc Report window will open

- 3 To create a report from an EXISTING Query, go to *Create Report from an Existing Query*
- 4 To create a report from a NEW query, go to *Create Report from a New Query*

### Create a Report from an Existing Query

- 1 Select Report type in Report dropdown
- 2 Select Category of Report
- 3 Select Report in Report Query dropdown
- 4 Click LOAD button
- 5 Change Title if needed
- 6 This Report may be edited – click the EDIT QUERY button instead of BUILD NEW QUERY and go to *Create a Report from a New Query* below
- 7 The selections on this page may also be changed, go to *Finish Ad Hoc Parameters*
- 8 Click SHOW REPORT button to view report to open in Internet Browser or EXPORT AS EXCEL to open in Excel Report will open in either Internet Browser window or Excel window.

### Create a Report from a New Query

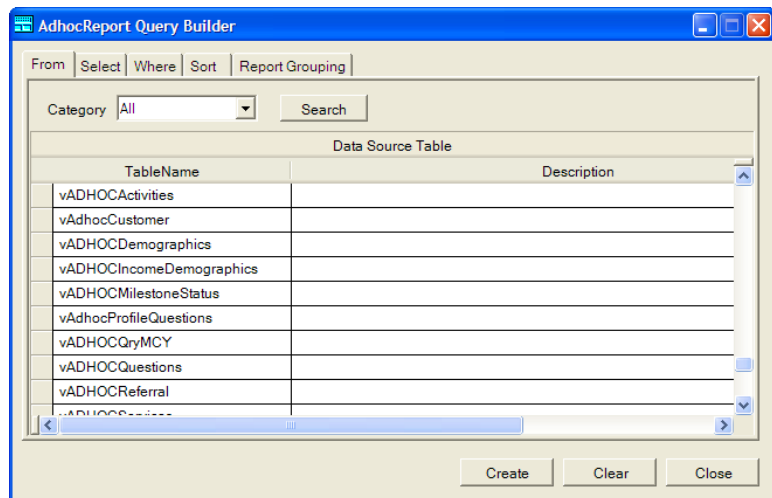
- 1 Select Report type in Report dropdown
- 2 Click BUILD NEW QUERY button

Popup Query window will open with five tabs at the top:



- **From** selects the Table which determines what items are available for the report
- **Select** determines the items to appear on the report and in what order (across the top)
- **Where** filters the number of items searched to those that match the selected parameter(s) (not required)
- **Sort** determines the order that matching items appear on the page of the report (not required)
- **Report Grouping** determines which item(s) to group by – each group will start a new section of the report, this also defines the X-axis parameter for a Cylinder report and defines the columns in a Matrix report

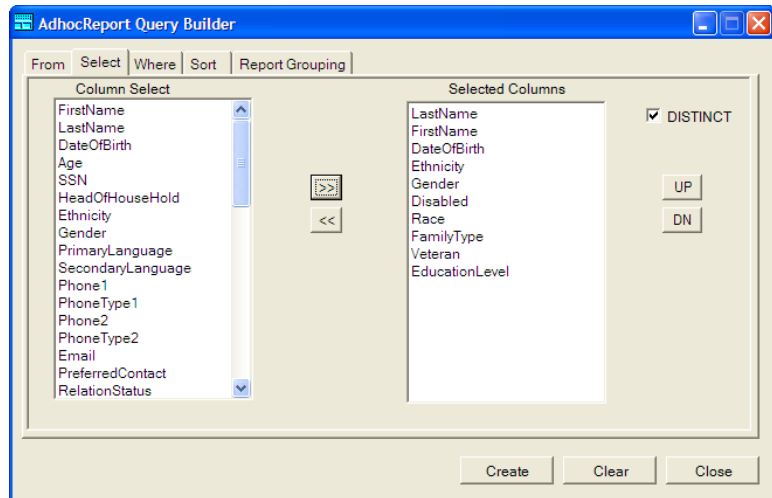
### FROM TAB

- 3 Select the Table to use for the report
  - a The Table determines what items are available for the report on the other tabs
  - b Each Table has different selections available
  - c Only one Table may be used at a time
  - d Columns can be widened to see entire Table Name or rest the cursor on a Table Name to see the entire name revealed in a Tool Tip



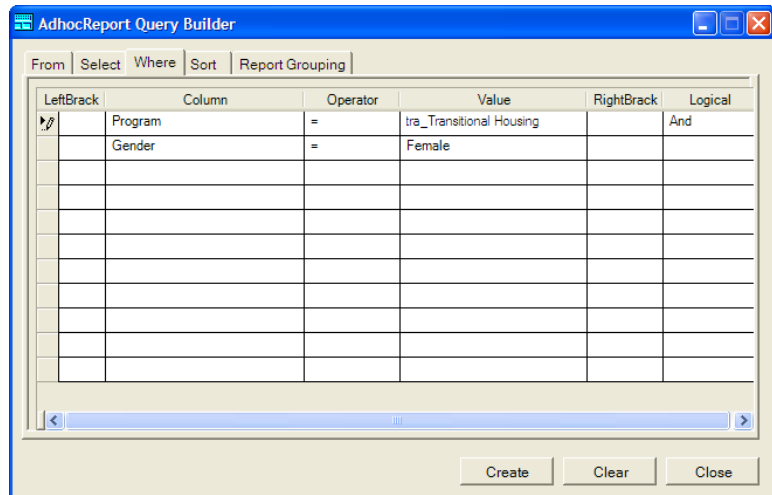
## SELECT TAB

- 4 Select first item to appear on the report in the Column Select box
- 5 Click double right arrow button 
  - a Use double left arrow to remove an item from the Selected Columns box on the right 
- 6 Repeat for additional items
  - a Items will appear in order selected, use UP and DOWN buttons to change item order
  - b 50 fields list report allows 50 items, most others allow only six
  - c For Matrix charts, 1<sup>st</sup> item selected will be what appears in the grid boxes, another 4 items may be selected
  - d It can be useful to select a date field here (Program Date, Service Date) to use as a date parameter later
- 7 If a list or count is desired of the number of instances that have *unique* combination of the criteria, with no repetition, click to create a checkmark in the DISTINCT checkbox in upper right corner



## WHERE TAB

- 8 Use brackets only if using both And & Or statements (*see examples below*)
- 9 Select the item to use for matching in the Column dropdown
- 10 Select an Operator
  - a = means the item matches the Value exactly
  - b <>, >, <, >=, <= are used with numbers
  - c LIKE is useful if the entire name is not known, or if there are multiple possibilities. Enter at least one character and % (wildcard)
- 11 Value is what to match
  - a It must be entered exactly in order to find matches (NO typos!)
    - Column: select Gender
    - Operator: select =
    - Value: enter Female
- 12 To add a second parameter, in the Logical column select AND or OR and then add a second parameter in the next row
  - a AND will find all items that match ALL the parameters
  - b OR will find all items that match any one or more of the parameters
  - c If using both, brackets may be needed, see example below



Brackets group what will be counted together. For example, if you wanted to see all Clients who were Female and had received either Assessment A or Assessment B:


Gender = Female AND (Service = Assessment A OR Service = Assessment B) is different than  
 (Gender = Female AND Service = Assessment A) OR Service = Assessment B


The second example could possibly count Males who had received Assessment B.

## SORT TAB

13 Select the item to sort by in the Column Select box

a I.E., to list all Client names alphabetically, select Last Name

14 Click double right arrow button 

a Use double left arrow button to remove item from Selected Columns box on right 

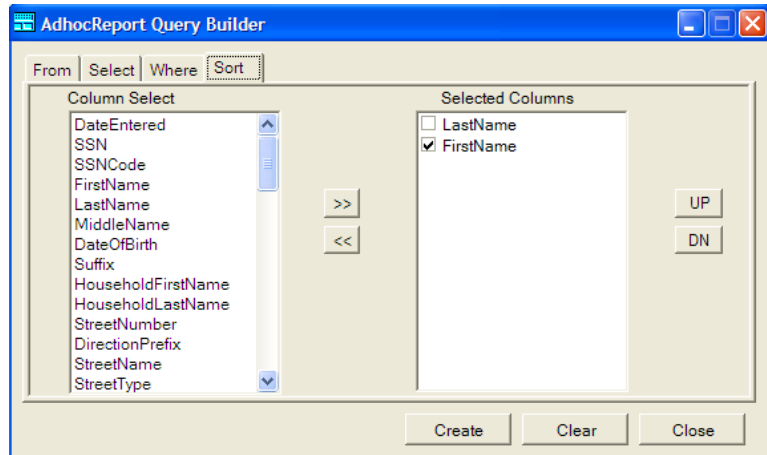
15 Repeat for additional parameter

16 Items will be sorted in order shown; to change order, use UP or DOWN buttons

a In this example, Items will be sorted by last name, within each last name, items will be sorted by first name

17 Sort order is ascending

a To change to descending order, click to create a checkmark in the box next to the sort name




## REPORT GROUPING TAB


18 Select item in Columns Select box on left to group report – Items selected here will determine how report is grouped; each Group will start a new section or page of the report

a Group also determines what will be used for the X-Axis for a Cylinder report and what will be graphed in a Pie Chart

b More than one item may be selected, in this example each combination of Program and Gender will be a separate group and page in the report

c For Matrix charts, this defines the columns, up to 5 may be selected

19 Click double right arrow button 

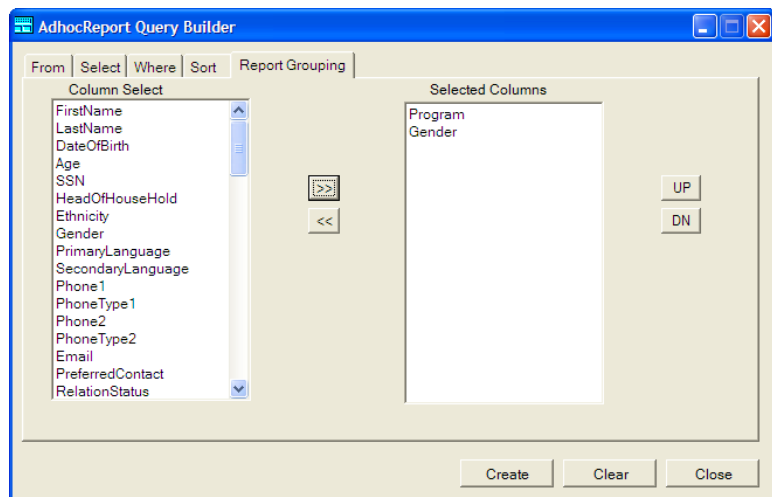
a Use double left arrow button to remove item from Selected Columns box on right 

20 Click CREATE to create the report when finished

a After selecting a Table on the FROM tab, the other tabs can be completed in any order

b Only FROM, SELECT and REPORT GROUPING are required

21 Go to *Finish Ad Hoc Parameters*





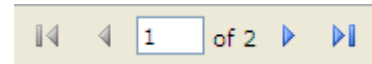
## Finish Ad Hoc Parameters

- 1 Enter Title for report
  - a Title is required
- 2 Select Group will fill in automatically from the tab
- 3 Select Display
  - a This determines which group matches to display
  - b Top = top number of groups
  - c Bottom = Bottom number of groups
  - d All = show all matches
- 4 Number of Group
  - a If ALL selected above, enter 0
  - b If Top or Bottom selected above, enter # of matches to display

Date Field will be available only if a Date field was selected on the SELECT tab, this is useful to limit the time parameters of the report.

- 5 Select Date Field to use
  - 6 Select Start Date
  - 7 Select End Date
  - 8 If the report should show details on all matches instead of just the summary number, click to create a checkmark in the Drilldown checkbox
  - 9 When finished with parameters, click SHOW REPORT or EXPORT TO EXCEL
- The report will open in a new Internet Browser window or in Excel.

- 10 If using Internet Explorer and the report is more than one page, the page designation directly above the report will show the number of pages and the arrows will turn blue allowing the User to go to the next page or the last page



The report can also be printed without opening it by clicking PRINT REPORT, this report will print the same as if you select export to Acrobat (PDF) file on the report page and then print.

## Save a Query for later use

Once a query has been created and is useful, it can be saved and easily run again with current data.

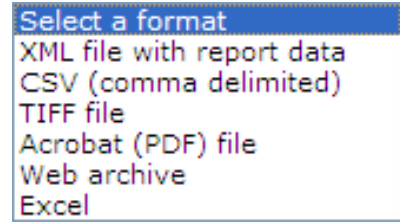
- 1 Click SAVE AS
- 2 In popup window, click to create checkmarks for Groups to have access to this report
  - a Click SELECT ALL to select all displayed groups
  - b Click CLEAR ALL to clear all checkmarks
- 3 Enter Report Name
  - a This is not the Title of the report
  - b This name will be displayed in the Report Query dropdown
- 4 Click OK when finished

Select	GroupID
<input checked="" type="checkbox"/>	RPTAgencyAdmin
<input checked="" type="checkbox"/>	trn_SuperAdmin
<input checked="" type="checkbox"/>	trn_TransitionalHousing
<input checked="" type="checkbox"/>	trn_UserGroup
<input checked="" type="checkbox"/>	trnAgencyAdmin

### Printing an Ad hoc Report

Ad hoc reports should not be printed directly from the browser window – the top line section will be printed and the report may not be formatted as well as it can be. Instead, the report should be exported to a PDF file and then printed.

- 1 Select Acrobat PDF in the Select a format dropdown
- 2 Click EXPORT link to the right of the dropdown



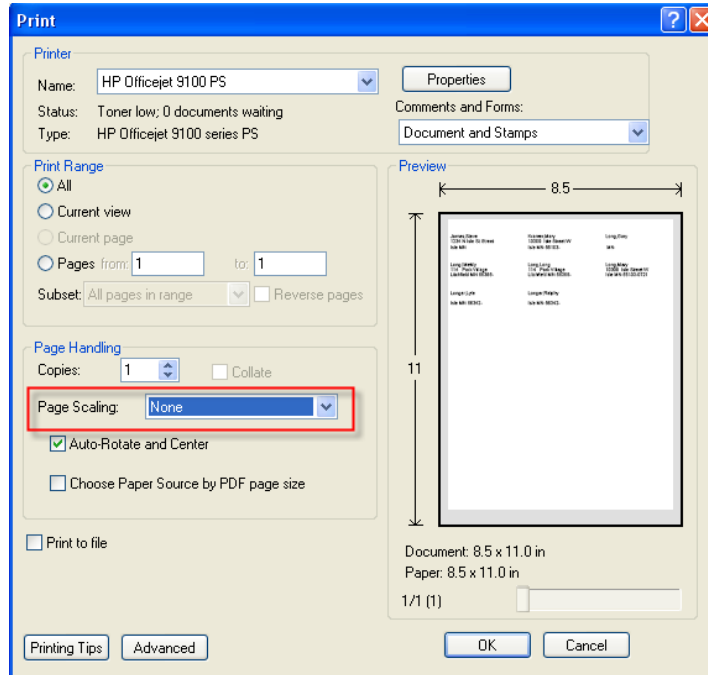
An Adobe Acrobat window will open asking if you want to open or save the report

- 3 Click OPEN to open the report in Adobe Acrobat or click SAVE to save the file without opening
  - a When printing the report in Acrobat, the Print Scaling option in their print window allows you to *shrink to printable area* or *fit to printable area*. One of these options may work better for your specific printer

### Print a Report for Mailing Labels

If creating Mailing Labels, specific items need to be set on the Print popup

- 1 Set Page Scaling to NONE



### Exporting the report to other formats

- To include the report in a Word document: select TIFF file
- To open the report in a spreadsheet: select Excel
- To export just the data to a spreadsheet: select CSV
- To open the same report at a later time in an Internet Browser window: select Web Archive
- To create the report in xml language: select XML