Unit 13: Reports

Version 1.6
### Document Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Release</th>
<th>Description</th>
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<tr>
<td>6/5/2012</td>
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<td>• Modified Running Reports section to include steps on how to open the report in an Excel document.</td>
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</tbody>
</table>
Table of Contents

Unit 13: Reports .................................................................................................................. 1
  Reports .................................................................................................................. 6
    Running Reports .......................................................................................... 6
  Ad-Hoc Reports ............................................................................................ 9
    Running Ad-Hoc Reports ........................................................................ 9
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.
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.

![Image of 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.

![Image of Available Views]

- DOH Fiscal Group Reports
- Municipality Fiscal Group Reports
- Municipality Program Group Reports
- DOH Program Group Reports

- My View
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.

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.

9. Selecting HTML as the Output Format will open the report in a HTML Page. Report Displays
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.
6. 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 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.