

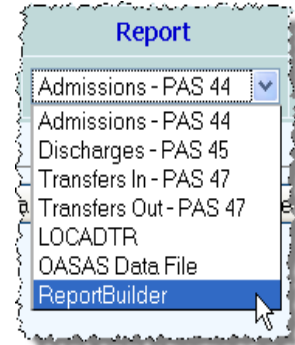


OASAS Reports

AWARDS INSTRUCTION SHEET

The AWARDS OASAS Reports feature is a powerful tool that can be used to generate the following user-customized and standard OASAS data reports:

- **Admissions – PAS 44** – Individual PAS 44 reports containing OASAS data collected for clients at admission.
- **Discharges – PAS 45** – Individual PAS 45 reports containing OASAS data collected for clients at discharge.
- **Transfers In – PAS 47 / Transfers Out – PAS 47** – Individual PAS 47 reports containing transfer data for clients who have transferred into or out of a program.



The PAS 47 reports are applicable only to those programs set up to use the optional OASAS Client Transfers feature in AWARDS. For more information on that feature, please refer to the OASAS Client Transfers instruction sheet located in the AWARDS Online Training System.

- **LOCADTR** – Individual LOCADTR reports containing data collected for clients using the LOCADTR form accessed through the face sheet.
- **OASAS Data File** – A complete file of PAS 44, 45, and 47 (when applicable) data from all OASAS programs for upload to the OASAS Client Data System (CDS).
- **ReportBuilder** – Customized detail and/or summary reports containing OASAS data collected for clients at admission and discharge.

In order for any of the above OASAS reports to be generated for a program, that program must have a PRU Number specified for it in the System Setup module, Agency Program Information, Add/Edit Entire Program feature. For more information on updating program information using that feature, please refer to AWARDS Online Help.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the OASAS Reports feature to complete common report generation tasks such as those mentioned above. Specific topics covered are:

- **Accessing OASAS Reports** – Learn how to view OASAS reports from multiple AWARDS locations. Page 2
- **Working with the OASAS ReportBuilder** – Learn to create and save unique OASAS data reports. Page 2
- **Viewing PAS Reports** – Learn to view PAS 44, PAS 45, and PAS 47 OASAS reports for individual clients. Page 7
- **Generating the OASAS Data File** – Learn to generate a complete Data File for upload to OASAS. Page 8
- **Viewing LOCADTR Reports** – Learn to view LOCADTR reports for individual clients. Page 9
- **Frequently Asked Questions** – Learn the answers to common OASAS reports questions. Page 9

ACCESSING OASAS REPORTS

The OASAS Reports feature can be accessed from several locations in AWARDs based on permissions and database setup:

OASAS Reports

- **The Discharge module** – To use this module as your access point, you must have the “Display Any Chart Record Buttons” and “Display Chart Records Discharge Button” data entry / access permissions. Additionally, your agency’s AWARDs database must have been set up behind-the-scenes to provide access from this location.

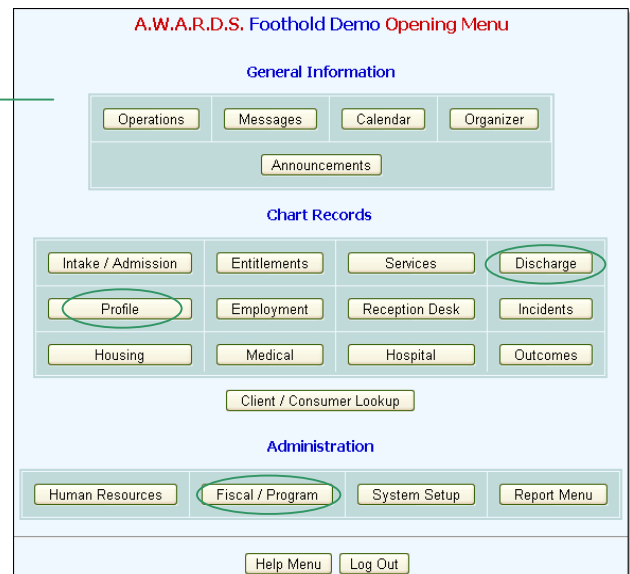
If your agency does not see the OASAS Reports button on the Discharge module’s menu page and you are interested in having it turned on in that location, please contact your Foothold client services representative.

- **The Fiscal/Program module** – To use this module as your access point, you must be a member of the “Fiscal Staff” or “Executive Officer” user groups, or you must have the “Display Executive Administration Buttons” and “Display Fiscal Buttons” data entry / access permissions.
- **The Profile module** – The OASAS ReportBuilder is accessible from this point on its own (as opposed to being bundled in with the full OASAS Reports group of features as it is elsewhere). Use of the OASAS ReportBuilder from this location requires the “Display Any Chart Records Buttons” and “Display Chart Records Profile Button” data entry / access permissions.

Chart access permission to the program(s) for which reports are to be run is required regardless of which of these access points is used.

This document focuses on use of the Fiscal/Program module access point.

The OASAS Reports feature, including its ReportBuilder component, works the same regardless of where you access it from. The only difference you may notice is in the program selection lists in the various locations. When accessed from the Fiscal/Program module, the program selection list includes only those programs you have chart access to for which PRU numbers have been set. When accessed from the Discharge and Profile modules, the list includes all programs you have chart access to. If a program for which the PRU number has not been set is selected, you will receive an error when attempting to open the OASAS Reports feature. In the case of the OASAS ReportBuilder in the Profile module, the report button is only displayed after a relevant program has been selected.



WORKING WITH THE OASAS REPORTBUILDER

The OASAS ReportBuilder is used to generate user-customized reports of basic client demographics along with detailed PAS 44 and 45 data.

To generate and save an OASAS ReportBuilder report that can be re-run in the future, to generate a single-use report, or to use an existing report format to generate a report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.

2. Click **OASAS Reports**. The *OASAS Reports Settings* page is displayed. ➔

4. Click the **Report** drop-down arrow and select "OASAS ReportBuilder."

5. Click **CONTINUE**. The *Report Settings* page is displayed. ➔

This page contains date range selections, a list of any saved report formats to which you have access, and a report display setting.

6. Click the **Roster Date Range** drop-down arrow and choose which consumers are to be included in the report based on their program history. Available selections are:

- **In Program** – When this option is selected the report will only include clients with program history records indicating they were enrolled in the program at some point during the specified date range. This selection is recommended if you will be narrowing the report contents using multiple date range filters (set in step 16 below).

In this context, clients who were enrolled in the program include those who entered the program on or before the report "To" date, those who were discharged from the program on or after the report "From" date, and those who were enrolled in the program for the entirety of the report period.

- **In Program Including Pending Clients** – When this option is selected the report will include admitted and pending clients – those with an admission date OR intake date, respectively, prior to the report end date, and no discharge date (or no discharge date within the date range).

Pending clients are clients in a multi-step intake program who have had an intake processed, but who are not yet fully admitted – or clients for whom a room reservation has been made. Programs using Drop In functionality also create clients designated as pending.

- **Admitted** – When this option is selected the report will only include clients with program history records indicating they were admitted to the program at some point during the specified date range.
- **Admitted or Transferred In** – This option is available in databases that are set up to use the Transfers module. When selected, the report will include clients with program history records indicating they were either admitted to the program (via the Intake/Admission module) or transferred into the program (via the Transfers module) at some point during the specified date range.
- **Discharged** – When this option is selected the report will only include clients with program history records indicating they were discharged from the program at some point during the specified date range. Current program episodes will not be included.

- **Discharged or Transferred Out** – This option is available in databases that are set up to use the Transfers module. When selected, the report will include clients with program history records indicating they were either discharged from the program (via the Discharge module) or transferred out of the program (via the Transfers module) at some point during the specified date range.

In the event that you are creating a new report format that will be saved, please be aware that the selection you make here is not saved with the report. It, along with the date range specified in step 7, must be set each time the report is run.

7. By default the report only looks for clients with program histories (of the type specified in the previous step) during the past year. In the **From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format or the available date pickers).
8. In the "Display Results As:" portion of the settings page, click a radio button to indicate whether the report's contents should include actual data values as entered/selected in AWARDS (**Values**), OASAS codes for those values (**Codes**), or both (**Codes and Values**).
9. Leave the **Provide ExportBuilder Options** check box *unchecked*. It is NOT relevant to report generation.

This option is used to provide access to an ExportBuilder corresponding to the ReportBuilder with which you are working. AWARDS ExportBuilders – which are designed for use by individuals who are familiar with export files and formats, their design, and setup – harness the power of ReportBuilder functionality and take it a step further to meet a variety of outside reporting needs. With ExportBuilders, users can create customized data reports as they would in the ReportBuilder itself, and from those reports generate export files of a number of different types – CSV, TXT, XLS, or XML. Exported files can be saved to your computer, then uploaded into other data collection systems and/or worked with in other applications as needed. Additionally, as can be done with ReportBuilders, ExportBuilder formats can be saved and shared for future use.

The instructions provided here detail use of the OASAS ReportBuilder only, not the corresponding ExportBuilder. For more information on using ExportBuilders, please click [here](#) to access the relevant portion of Online Help, or refer to the [ExportBuilder Basics](#) instruction sheet.

10. If you would like the report (both its content and an Excel file version) to be sent to your AWARDS Messages module upon its completion, click the **Send in AWARDS Message** check box. When this option is selected, you will be able to continue working in AWARDS if you so choose, rather than waiting for the report to generate. You will also be able to retain the report in your messages for reference at a later time without having to re-generate it.
11. Use the **Select a saved report format** drop-down options at the bottom of the page to specify whether you will be generating the report from scratch or using a previously saved format. Available choices are to:
 - **Use a previously saved report format** – To generate the report using a previously created and saved format, select that format from this drop-down. When using this method, you can immediately generate the report without changing any settings. Alternately, you can first review and modify the settings of the format by checking off the available **Provide option to modify settings of saved report format** check box.
 - **Start from scratch, without using a previously saved report format** – To create your own report format for single-time use or for saving and later re-use, leave the saved report format drop-down blank.
12. Click **CONTINUE**.

If you are using an existing report format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the report page. Continue with step 23.

If you chose to send the report to yourself via the Messages module (in step 10), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete, and then proceed with step 23.

In all other instances, the Options page is displayed. →

Continue with step 13.

13. The OASAS report includes all clients who were enrolled in, admitted to, or discharged from the selected program(s) during the specified date range, based on the selection made in step 6. In some cases, that may result in duplicate report records in instances where a client has multiple histories in a single program, or a history in multiple programs. To filter out those duplicates and to list each client only once in the report results, click the **Unduplicated Count** check box.

When the Unduplicated Count option is selected, only the information for the client's most recent program history is included in the report contents.

14. The Options page contains three sets of alphabetical client characteristic check boxes representing three types of data collected in AWARDS: general, PAS 44, and PAS 45.

Some selections on this page are applicable only to specific program types. When a report is run for a group of programs, selection of such variables results in data only for clients in the applicable programs. For example, the PAS 45 "Total Treatment Visits," "Group Counseling Sessions," and "Individual Counseling Sessions" variables are only applicable to Outpatient programs.

Click the check box next to each client characteristic for which data is to be included in the report. To select all options in a section (General, PAS 44, or PAS 45) click the **Check All** check box in the heading of that section.

Client characteristic selections with an asterisk (*) next to them are those for which a client may have multiple values. Multiple value fields include those that have check boxes for data entry where multiple boxes may be checked for each client, as well as instances where multiple records may have been entered for a client.

15. Click **CONTINUE**. The Report Options – Continued page is displayed.
16. Configure the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents, and set the "Show Individual Detail" and/or "Summary Tables" options to adjust the way in which the contents are displayed.

Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various ReportBuilder report options, please refer to the [ReportBuilder Basics](#) instruction sheet, or click [here](#) to access the corresponding portion of Online Help.

17. To save the report settings made on this and the previous pages so that this OASAS report can be easily re-generated in the future, click **SAVE REPORT FORMAT**. The Save Report Format dialog box is displayed.

If it is not necessary to save the report format and you wish only to view the report contents, please skip to step 22.

18. In the **Report Format Title** field, type the name of the report.

We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

When working with a previously saved format, the title defaults to the name of the selected report format. To save the modified report format as a new format and to leave the original format unchanged, enter a new title in this field. If the default title is not changed, the modifications being saved will be applied to the original format.

Please keep in mind that only the user who originally saved a format and individuals who can save formats for all users can modify that format. Others can save modified report formats under a new name, but cannot apply the modifications to the original format.

19. Click one of the **Save Report Format for** radio buttons to determine who the report should be accessible by. Available options are:

- **Yourself** – When this option is selected, only the user saving the report format has the ability to use or modify that format.
- **All Staff** – When this option is selected, all staff in the program(s) selected in step 3 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

20. Click one of the available **Allow Report Format for** radio buttons to determine which programs this report format can be used for. Available options are:

- **This Program** – When this option is selected, the report format being saved is available for use only by the program selected in step 3.
- **All Programs** – When this option is selected, the report format being saved is available for use by all programs, regardless of which program was selected in step 3.

The "Allow Report Format for" options are only available when a single program was selected in step 3; otherwise, the format is saved for all programs by default.

21. Click **Save Report Format**. The report format is saved and the *Report Options – Continued* page is re-displayed.

22. Click **DISPLAY REPORT**. The report is generated and displayed on the OASAS Report page.

Keep in mind when viewing the report data that:

- *When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each client includes a list of the characteristic values separated by commas. Additionally, because each client may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total number of clients.*
- *When a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of*

the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.

Additionally, if you chose to send the report to yourself via the Messages module (in step 8), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete, and then proceed with step 23.

23. At this time individual detail and/or summary table content can be hidden or sorted as needed. The report can also be printed or exported to Microsoft Excel. For more information on working with ReportBuilder report contents, please refer to the [ReportBuilder Basics](#) instruction sheet, or click [here](#) to access the relevant portion of Online Help.

The process of generating an OASAS ReportBuilder report is now complete.


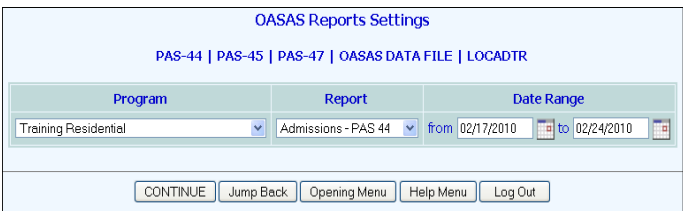

VIEWING PAS REPORTS

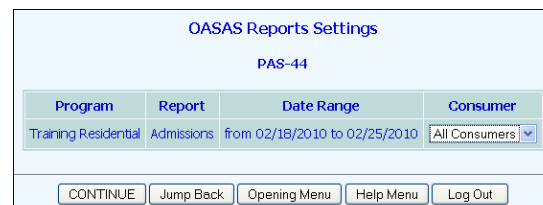
Using the OASAS Reports feature, users can generate and view the following PAS reports for individual clients:

▪ Admissions – PAS 44	▪ Discharges – PAS 45
▪ Transfers In – PAS 47	▪ Transfers Out – PAS 47

The PAS 47 reports are applicable only to those programs set up to use the optional OASAS Client Transfers feature in AWARDS. For more information on that feature, please refer to the OASAS Client Transfers instruction sheet located in the AWARDS Online Training System.

To view any of these reports, complete the following steps:

- From the AWARDS Opening Menu page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
- Click **OASAS Reports**. The *OASAS Reports Settings* page is displayed. 
- Click the **Program** drop-down arrow and select the individual program associated with the client for which the report is to be run, or select a group of programs using one of the available "All" selections. 
- Click the **Report** drop-down arrow and select the PAS report to be viewed.
- The date range for the selected report defaults to the last week. Make changes to that date range as necessary by overwriting the values in the **from** and **to** fields. Keep in mind that a client's report will only be available for viewing if he/she had a status change of the selected report type during the date range specified here. For example, when working with the PAS 44 only those clients admitted during the specified date range will be available for report viewing.
- Click **CONTINUE**. The *OASAS Report Settings* page is displayed for the selected report. For example, when working with the PAS 44 the page appears as shown here. 




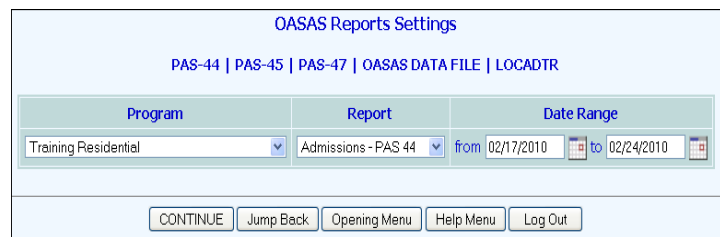
7. Click the **Consumer** drop-down arrow and select the client for which the report is to be viewed. The default value is "All Consumers."
8. Click **CONTINUE**. A page is displayed that includes a button for the selected report.
9. Click the report button to open and view the report. Note that if "All Consumers" was selected in step 7, a link to an Excel file version of the report data is displayed when the button is clicked rather than the report itself. Click that link to open the report data in Microsoft Excel.

The process of viewing a PAS report is now complete.

GENERATING THE OASAS DATAFILE

Using the OASAS Reports feature, users can generate a complete file of PAS 44, 45, and 47 (when applicable) data from all OASAS programs for upload to the OASAS Client Data System (CDS). To do so, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **OASAS Reports**. The *OASAS Reports Settings* page is displayed. 
3. Click the **Report** drop-down arrow and select **OASAS Data File**.



Note that when this selection is made the page is refreshed and the Program selection option is grayed out. This is because the Data File can only be generated for all OASAS programs, not an individual program.

4. The date range for the selected report defaults to the last week. Make changes to that date range as necessary by overwriting the values in the **from** and **to** fields. Keep in mind that a client's data will only be included in the data file if his/her status changed during the date range specified here (for example, he/she was admitted, discharged, transferred in, or transferred out).
5. Click **CONTINUE**. The *Data File for Upload to OASAS* page is displayed. This page lists:
 - The programs for which data has been included in the Data File
 - The number of admissions, discharges, and transfers (when applicable) during the report period
 - The number of admission, discharge, and transfer records containing errors that should be fixed
 - The number of admissions, discharges, and transfers included in the data file

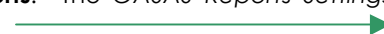


The page also includes a link for opening and downloading the Data File, downloading instructions, and a link for viewing the file data in Microsoft Excel.

6. At this time download the Data File using the **Open and Download Data File Now** link, or view the data in Excel using the **View Data in Excel File** link as needed. If it is first necessary to correct data errors, click **Opening Menu** and then access the module in which the corrections need to be made.

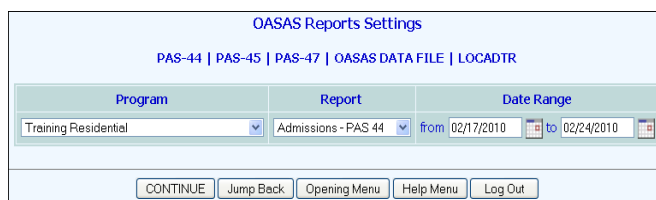
The process of generating an OASAS Data File is now complete.

VIEWING LOCADTR REPORTS

Using the OASAS Reports feature, users can generate individual LOCADTR reports containing data collected for clients using the LOCADTR form accessed through the face sheet. To do so, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **OASAS Reports**. The *OASAS Reports Settings* page is displayed. 
3. Click the **Program** drop-down arrow and select the individual program associated with the client for which the report is to be run, or select a group of programs using one of the available "All" selections.
4. Click the **Report** drop-down arrow and select **LOCADTR**.
5. The date range for the selected report defaults to the last week. Make changes to that date range as necessary by overwriting the values in the **from** and **to** fields. Keep in mind that a client's report will only be available for viewing if he/she was on the census of the selected program in the date range specified here.
6. Click **CONTINUE**. The *OASAS Reports Settings* client selection page is displayed. 
7. Click the **Consumer** drop-down arrow and select the client for whom the report is to be viewed.
8. Click **CONTINUE**. The *OASAS Reports* page is displayed. 
9. Click **LOCADTR Report** to view the report.

The process of viewing a LOCADTR report is now complete.





FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the OASAS Reports feature can be a useful reference when you have your own questions about the functionality.

ARE THE CONTENTS OF REPORTBUILDER REPORTS LIMITED TO INFORMATION FOR ACTIVE CONSUMERS?

Which consumers are included in the report contents is based on the program history type chosen on the initial report settings page using the **Roster Date Range** selection option. Specifically, when "In Program" is chosen, the report will only include clients with program history records indicating they were enrolled in the program at some point during the specified date range. When "Admitted" is chosen the report will only include clients with program history records indicating they were admitted to the program at some point during the specified date range. And when "Discharged" is chosen the report will only include clients with program history records indicating they were discharged from the program at some point during the specified date range. Current program episodes will not be

included. "Admitted or Transferred In" and "Discharged or Transferred Out" are additional options available in databases set up to use the Transfers module.

CAN I LIMIT ACCESS TO THE REPORTBUILDER SO THAT REPORTS CAN ONLY BE RUN ONCE A MONTH?

No. At the present time such limitations are not possible.

HOW ARE "INDIVIDUAL COUNSELING SESSIONS" AND "GROUP COUNSELING SESSIONS" CALCULATED ON THE PAS-45?

The number of individual counseling sessions on the PAS-45 is determined by the count of progress notes and contacts log entries of at least 25 minutes, between the admission date and OASAS last treated/discharge date, and written by a counselor with a caseload in the program.

The number of group counseling sessions on the PAS-45 is determined by the count of group notes written by a counselor with a caseload in the program of at least 60 minutes in duration.

HOW IS "MONTH RETENTION" REPORTBUILDER DATA CALCULATED?

The month retention is the number of full months in the program from admission date to discharge date, or to the current date if the client has not yet been discharged.

WHAT RECORDS WILL A TRANSFERRED CLIENT HAVE IN THE OASAS DATA FILE?

A client who has been transferred from one program to another and then discharged from the transferring-in program has three records in the OASAS Data File:

- A PAS 44 for admission to the initial (transferring-out) program

The PAS 44 for a transferred client is not available under the transferring-in program, only under the transferring-out program. The client's entry to the transferring-in program is recorded in the PAS 47.

- A PAS 47 for transfer to the next (transferring-in) program
- A PAS 45 for discharge from the agency

The PAS 45 for a transferred client is not available under the initial transferring-out program, only under the transferring-in program. The client's exit from the transferring-out program is recorded in the PAS 47.

WHO CAN SAVE REPORT FORMATS FOR OTHER USERS?

In a single-agency AWARDS database, members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by other agency users. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

WHY AREN'T ALL SELECTED CHARACTERISTICS AVAILABLE AS SUMMARY TABLE OPTIONS IN THE REPORTBUILDER?

In the summary tables portion of the second page of report settings (the page viewed after the report variables have been selected), the check boxes list is comprised of the client characteristics selected on the previous *Report Options* page; however, several characteristic data fields are not available for selection as part of a summary table, regardless of whether they were selected on the previous page. For example, name (first, last, middle, and alias), date of birth, social security number and client ID. These characteristics are excluded because they have values that are unique to each client, and as such are unlikely to generate any meaningful summary data.

WHY DO FUNCTIONS SUCH AS "COUNT" NOT WORK WHEN VIEWING SUMMARY TABLE INFORMATION FOR REPORTBUILDER REPORTS IN EXCEL?

Those cells in the Excel version of the ReportBuilder reports for which functions will not work are noted as such with a green triangle in the top right corner. If you click on a cell that has one of these green triangles in it, an exclamation point is displayed. Click the exclamation point for an explanation of why the function is not available. In the case of the summary portion of the ReportBuilder report the functions such as "count" do not work in many cases because the number values are stored as text rather than numbers.

The summary information included in the ReportBuilder report is provided so that the types of manual calculations that can be completed using Excel functions are unnecessary. In the event that a manual calculation is still required, you will need to convert the text values to numbers. To do so, click the exclamation point mentioned above and select the corresponding option.

WHY DO THE PAS 45 AND CONTACTS LOG REPORTS DIFFER IN THE NUMBER OF SERVICES PROVIDED?

Total treatment visits on the PAS 45 counts the number of dates on which there were contacts log records and/or progress notes between the admission date and OASAS last treated/discharge date. Individual counseling sessions on the PAS 45 counts the number of contacts log records and progress notes with a duration of 25 minutes or more between the admission date and the OASAS last treated/discharge date. The contacts log report includes all contacts that occurred for the client based on dates, options, and filters set for the report. If the contacts log report is not set to count services in the same way the PAS 45 does, the service count will not match.

WHY DOESN'T MY REPORT YIELD ANY RESULTS WHEN I APPLY A DATE FILTER WHILE USING THE REPORTBUILDER?

When filtering on a date be sure that the date is entered using mm/dd/yyyy format. If a different format is used the report filter will not work properly.

WHY DON'T I SEE THE "ADD ADDITIONAL FILTERS" LINK WHEN USING THE REPORTBUILDER?

If the add additional filters link is not displayed, it is an indication that you have reached the maximum number of filters for a given report – eight. No additional filters can be added in such cases, and so the link is hidden.

WHY IS A CHANGE I MADE TO A CLIENT'S RECORD NOT IMMEDIATELY REFLECTED IN THE REPORTBUILDER?

When reports in AWARDS are not immediately displaying information updated in the same database login session, it can be indicative of a memory cache issue. To get around this, press **<CTRL+R>** while viewing the report page, or click your browser's refresh icon.

WHY ISN'T INDIVIDUAL DETAIL OR SUMMARY TABLE SORTING I DO ON THE REPORT PAGE OF A REPORTBUILDER REPORT REFLECTED IN THE EXCEL VERSION?

Changing the sort order of an individual detail or summary table on the report page overrides any sorting for those tables specified in the report settings or in a saved report format. However, the functionality is designed so that such changes do not impact the contents of the Excel file version of report data, nor are they saved when a report format is saved. If it is necessary to sort the data in the Excel file, Excel has extensive sorting functionality for that purpose.

WILL REPORTBUILDER OPTIONS (SUCH AS FILTERS) WORK EVEN IF THE REPORT IS SET TO DISPLAY CODES ONLY?

Yes. The filters will work the same way no matter what is being shown in the report – values, codes, or a combination of the two.