ReportBuilder Basics

AWARDS INSTRUCTION SHEET

AWARDS ReportBuilders are powerful reporting tools that can be used to generate customized data reports. Each ReportBuilder report can be run for a specified date range and program, and can be set to contain a variety of variables relevant to the portion of AWARDS in which that ReportBuilder is located. Additionally, ReportBuilder reports – which can conveniently be saved and shared for future use – can be set to include individual detail and/or aggregate counts for each selected variable. Report information can also be filtered, sorted, and grouped by those variables.

REQUIRED PERMISSIONS

Permissions required to use a ReportBuilder in AWARDS are as follows:

- Chart Access – You must have chart access permission to the program(s) for which a report is being run.

- Data Entry / Access – Each ReportBuilder is located in a relevant AWARDS module. You must have permission to access a module in order to use any ReportBuilders it contains. For the specific data entry/access permissions that govern access to applicable modules, please refer to "Available ReportBuilders" on page 1.

ABOUT THIS DOCUMENT

This document is intended to provide a basic overview of each available ReportBuilder, as well as to guide you through use of those ReportBuilder features common to all. Specific topics covered are:

ACCESSING AVAILABLE REPORTBUILDERS

AWARDS makes a variety of ReportBuilders available to users for the purposes of generating client-, service-, and employee-centric data reports. Each of these ReportBuilders, along with detailed information on its location and contents, is documented here by type.

For more information on using these ReportBuilders, including step-by-step instructions and configuration option details common to them all, see "Generating a Report" on page 7. Additional information specific to the individual ReportBuilders listed here can be found in AWARDS Online Help and related instruction sheets.

IMPORTANT! Please be aware that in addition to the types of information available in each ReportBuilder as detailed here, ReportBuilder reports may also include information entered in FormBuilder fields. In order for a FormBuilder field to be available as a variable when running ReportBuilder reports, that field must have been configured for inclusion on related ReportBuilders. Which ReportBuilder is "related" to a given form field is based on the form's location. For example, if a form is available for inclusion when writing progress notes, the form's field (when set to do so) will be available for inclusion when using the Progress Notes ReportBuilder. For more information on configuring form fields, please refer to AWARDS Online Help and/or the FormBuilder Instruction Sheet.

EMPLOYMENT REPORTBUILDERS

The AWARDS **Employment** module contains ReportBuilders that can be used to generate reports of basic client demographics information and detailed job interview, placement, and pay record data.

- **Education / Training Enrollments ReportBuilder** – Found in report mode of the Education/Training feature's Enrollments component in the Employment module. Used to generate reports of basic client demographics as well as client training history information.

  The label of the Education/Training feature and its components is customizable. As a result, this ReportBuilder may be named differently than noted here.

- **Education / Training Facilities ReportBuilder –** Found in report mode of the Education/Training feature's Facilities component in the Employment module. Used to generate reports of training facility information.

  The label of the Education/Training feature and its components is customizable. As a result, this ReportBuilder may be named differently than noted here.

- **Employers ReportBuilder –** Found in report mode of the Jobs feature's Employers component in the Employment module. Used to generate reports of employer information, including contact details, hiring information, available positions, and more.

- **Job Interviews ReportBuilder –** Found in report mode of the Jobs feature's Job Interviews component in the Employment module. Used to generate basic client demographics as well as client job interview data.

- **Job Placements ReportBuilder –** Found in report mode of the Jobs feature's Job Placements component in the Employment module. Used to generate basic client demographics as well as client job placement and employment verification data.

- **Pay Records ReportBuilder –** Found in report mode of the Jobs feature's Job Placements component in the Employment module. Used to generate basic client demographics, client job placement and employment verification data, and pay rate information over time.

In order to use any of the Employment module ReportBuilders, you must have chart access permission to the program(s) for which a report is being run. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Employment Button" permission.

ENTITLEMENTS REPORTBUILDERS

The AWARDS **Entitlements** module contains a ReportBuilder that can be used to generate customized reports of basic demographics and detailed entitlements information.

- **Entitlements ReportBuilder –** Found in the Entitlements module's Certified Entitlements feature in report mode. Used to generate reports of client demographic data, as well as certified entitlement record details.

In order to use the Entitlements module ReportBuilder, you must have chart access permission to the program(s) for which a report is being generated. You must also have the "Display Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Entitlements Button" permission. Additionally, unless you are in the "Entitlements Staff" or "Executive" user groups, you must have the "Entitlements Data Entry" permission.

FORMBUILDER REPORTBUILDERS

The **FormBuilder ReportBuilder** feature enables users to create ad hoc reports from any form built using the FormBuilder and, when applicable, to see a historical overview of form values.

During the process of adding fields to a form, you may have chosen to make one or more fields available when using related ReportBuilders. If so, you can also generate reports of form data using those ReportBuilders. When doing so, keep in mind that if more than one value exists for a form during the report date range used, only the latest value is included in the related ReportBuilder's contents. To see all values entered in the form over a specified period of time, use the FormBuilder ReportBuilder instead.

For *client* forms, the FormBuilder ReportBuilder tool can be accessed from within the Outcomes module FormBuilder feature, or directly from the Outcomes module menu. (The first of these two report access points is limited to use by staff with FormBuilder access, while the second is designed for use by anyone with Outcomes module access.) For *employee* forms, this tool can be accessed from within the ReportBuilders component of the Human Resources module, or from within the Outcomes module FormBuilder feature.

The permissions required to use the FormBuilder ReportBuilder vary based on the location from which it is accessed. For more information on the specifics for the module and feature within which you are accessing this ReportBuilder, please refer to the relevant portion of Online Help.

HUMAN RESOURCES REPORTBUILDERS

The AWARDS **Human Resources** module contains a ReportBuilder that is employee-centric rather than client-centric.

- **Employees ReportBuilder –** Found under ReportBuilders > Employees ReportBuilder in the Human Resources module. Used to generate employee demographics and additional data from within Staff Information records.

- **FormBuilder ReportBuilder –** Found under ReportBuilders > FormBuilder ReportBuilder in the Human Resources module. Used to generate reports on employee demographics and data from any employee form located in the HR module including, when applicable, a historical overview of form values. (Also accessible from within the Outcomes module FormBuilder ReportBuilder feature.)

In order to use the Human Resources module ReportBuilder, you must have the "Display Executive Administration Buttons" data entry/access permission, and one of the three human resources permissions – "HR Data Full Access," "HR Data Read Only," or "HR Data Work Supervisees."

INCIDENT REPORTBUILDERS

The AWARDS **Incidents** module contains a ReportBuilder that can be used to generate reports of basic demographics and detailed incidents information.

- **Incidents ReportBuilder –** Found in the Incidents module in report mode. Used to generate reports of demographic data for incident participants, as well as initial incident report and incident review details.

In order to use the Incidents module ReportBuilder, you must have chart access permission to the program(s) for which a report is being generated. You must also have the "Display Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Incidents Button" permission. In addition, if you are a member of the incident review committee and must have access to full incident details, including those entered during the incident review process, you must have the "Incident Review Data Entry" permission.

INTAKE/ADMISSION REPORTBUILDERS

The AWARDS **Intake/Admission** module contains a ReportBuilder that can be used to generate reports of basic demographics and detailed intake/admission records information.

- **Intake/Admission ReportBuilder –** Found in the Intake/Admission module in report mode. Used to generate reports of demographic data for clients with program referral records, as well as detailed referral information from those records.

In order to use the Intake/Admission module ReportBuilder, you must have chart access permission to the program(s) for which a report is being generated. You must also have the "Display Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Intake/Admission Button" permission.

MEDICAL AND HOSPITAL REPORTBUILDERS

The AWARDS **Medical** and **Hospital** modules contain ReportBuilders that can be used to generate reports of basic client demographics as well as allergy, immunization, provider, hospitalization, or medications data.

- **Allergies ReportBuilder** – Found in the optional Allergies feature in report mode in the Medical module. Used to generate basic client demographics as well as client allergy information.

- **Hospitalization Episodes ReportBuilder** - Found in the Hospital module's Episodes feature in report mode. Used to generate reports of basic client demographics as well as hospitalization episodes information.

- **Immunizations ReportBuilder** – Found in the optional Immunizations feature in report mode in the Medical module. Used to generate basic client demographics as well as client immunization records.

- **Medications ReportBuilder –** Found in the Medications feature in report mode in the Medical module. Used to generate basic client demographics as well as client medication and/or prescription information.

- **Providers ReportBuilder –** Found in the Providers feature in report mode in the Medical module. Used to generate basic client demographics as well as support service providers information.

- **Vital Signs ReportBuilder –** Found in the Medical module's Vital Signs feature in report. Used to generate reports of basic client demographics as well as client vital signs information.

In order to use any of the Medical module ReportBuilders, you must have chart access permission to the program(s) for which a report is being run. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Medical Button" permission.

PROFILE / DEMOGRAPHICS REPORTBUILDERS

The AWARDS **Profile** module contains ReportBuilders that can be used to generate detailed reports of client and household demographics.

- **Demographics ReportBuilder –** Found under ReportBuilders > Demographics ReportBuilder in the Profile module. Used to generate reports of client demographics information entered at intake/admission and discharge, as well as demographics data recorded on face sheets.

- **HMIS ReportBuilder –** Found under ReportBuilders > HMIS ReportBuilder in the Profile module. (Only available when at least one program is set up in AWARDS to submit the HUD APR.) Used to generate reports of client and household member demographics information, as well as all required data collected for the HUD APR.

- **Household ReportBuilder –** Found under ReportBuilders > Household ReportBuilder in the Profile module. Used to generate client and household member demographics data.

In order to use any of the Profile module ReportBuilders, you must have chart access permission to the program(s) for which a report is being run. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Profile Button" permission.

PROGRAM-SPECIFIC REPORTBUILDERS

Some AWARDS ReportBuilders are available only to the specific program types to which they are relevant.

- **OASAS ReportBuilder –** Found under OASAS Reports > OASAS ReportBuilder in the Fiscal/Program module. (May also be accessible from within the Discharge module in some AWARDS databases.) Used to generate reports of basic demographics information for OASAS program clients, as well as OASAS data collected for clients at admission (PAS 44) and discharge (PAS 45).

  In order to use this ReportBuilder, you must have chart access permission to the program(s) for which a report is being run. To access it from its default location within the Fiscal/Program module, you must also have the "Display Executive Administration Buttons" and "Display Fiscal Buttons" permissions (unless you are a member of the "Fiscal Staff" or "Executive Officer" user groups, which have access to the necessary module automatically).

- **Outreach ReportBuilder –** Found under Outreach ReportBuilder in the Intake/Admission module in report mode. (Available only for programs designated as Outreach behind-the-scenes in AWARDS.) Used to generate reports of basic demographics for Outreach program clients as well as data on client outreach encounters.

  In order to use this ReportBuilder, you must have chart access permission to the program(s) for which a report is being run. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Intake/Admission Button" permission.

RECEPTION DESK REPORTBUILDERS

The AWARDS **Reception Desk** module contains a ReportBuilder that can be used to generate customized reports of basic client demographics and detailed reception desk data.

- **Reception Desk ReportBuilder –** Found in the Reception Desk module's Program Attendance feature in report mode. Used to generate reports of client demographic data, as well as program attendance record details.

In order to use the Reception Desk module ReportBuilder, you must have chart access permission to the program(s) for which a report is being generated. You must also have the "Display Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Reception Desk Button" permission.

SERVICES REPORTBUILDERS

Several ReportBuilders, located in the AWARDS **Services** module, are used to generate reports of basic client demographics information as well as client services data.

- **Contacts Log / Supportive Services Checklist ReportBuilder –** Found in the Services module's Contacts Log feature in report mode. Used to generate basic client demographics as well as client services data recorded using either the basic contacts log or the optional supportive services checklist.

- **Group Activities ReportBuilder –** Found in the Services module's Activities feature in report mode. Used to generate reports of basic client demographics as well as client services data recorded using group activity attendance records and, when applicable, associated group notes.

- **Group Member Status ReportBuilder** – Found in the Services module's Group Schedule Setup > Group Member Status feature in report mode. Used to generate reports of basic client demographics, as well as member information for scheduled group activities.

- **Group Notes ReportBuilder –** Found in the Services module's Group Notes feature in report mode. Used to generate basic client demographics as well as client services data recorded using group notes.

- **Group Schedules ReportBuilder –** Found in the Services module's Group Schedule Setup > Group Schedules feature in report mode. Used to generate reports of group activity schedules information.

- **Progress Notes ReportBuilder –** Found in the Services module's Progress Notes feature in report mode. Used to generate basic client demographics as well as client services data recorded in progress notes.

- **Service Contacts ReportBuilder –** Found under Services Contacts ReportBuilder in the Services module. Used to generate basic client demographics as well as client services data recorded using group notes, group activities attendance, progress notes, and the contacts log (basic or supportive services checklist versions).

In order to use any of the Services module ReportBuilders, you must have chart access permission to the program(s) for which a report is being run. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Services Button" permission.

SYSTEM SETUP INFORMATION REPORTBUILDERS

The AWARDS **System Setup** module contains a ReportBuilder that can be used to generate reports detailing program setup information.

- **Agency Programs ReportBuilder –** Found within the System Setup module's Agency Program Information feature. Used to generate reports detailing individual program setup characteristics.

In order to use the Agency Programs ReportBuilder, you must have the "Display Executive Administration Buttons" data entry/access permission AND either: a) be a member of the "Human Resources" or "Executive Officer" user groups, or b) have one of the "Permissions Data Entry" exception override permissions. In addition, unless you are in

the "Executive Officer" or "System Administrator" user groups, you must have the "Agency Program Information" exception override in order to access and report on program information.

GENERATING A REPORT

When generating a ReportBuilder report, users have the ability to start a report format from scratch, which can then be saved for later use as needed. Alternately, reports can be generated from previously saved formats created using the same ReportBuilder. To generate a report using either of these methods – each of which is described in detail here – complete the following steps:

The basic process of generating a ReportBuilder report is the same across all ReportBuilders; however, some steps may vary slightly based on the type of data being worked with. Such variations are noted within the instructions that follow.

1. Open the ReportBuilder you would like to use. Details on all available ReportBuilders and where in AWARDS they are located can be found under "Accessing Available ReportBuilders" on page 1.

   The steps that follow use the Demographics ReportBuilder, accessed from within Profile > ReportBuilder > Demographics ReportBuilder, as an example.

   An initial *ReportBuilder Settings* page is displayed. ➡

   **Sample Program
   Demographics ReportBuilder
   Settings**

   Roster Date Range:

   In Program

   From: **To:**

   01/03/2012   01/03/2013

   ☐ Provide ExportBuilder Options
   ☐ Send in AWARDS Message

   Select a saved report format:

   Leave blank to generate a report without a previously saved report format

   CONTINUE   Jump Back   Opening Menu   Help Menu   Log Out

2. Use the **Date Range** option(s) on this page to limit the report's contents by data date and/or client roster dates. Be aware that the date range(s) specified here are not included in saved report formats and must be set for each report generated.

   IMPORTANT! The specific options you see are based on the ReportBuilder you are currently working with. As a result, it may be useful to review the instructions for the relevant ReportBuilder in Online Help if you have questions about the date range setting(s) available here.

3. Leave the **Provide ExportBuilder Options** check box *unchecked*. It is NOT relevant to report generation.

   This 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 with 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 in this document detail use of ReportBuilders, and not their corresponding ExportBuilders. For more information on using ExportBuilders, please refer to AWARDS Online Help and/or the ExportBuilder Basics *instruction sheet.*

4. 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.

5. 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 (for this ReportBuilder), 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.

   This selection list is limited to formats created using the ReportBuilder you have specifically accessed.

   ▪ **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*.

6. 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 **16**.

   If you chose to send the report to yourself via the Messages module (in step 4), 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 16.

   In all other instances, the *Options* page is displayed. ▶

   Continue with step **7**.

7. Configure the options on this page as follows, or make changes to existing selections as needed:

   When working with an existing report format the settings on this page default to those previously saved with that format.

   ▪ **Unduplicated Client Count –** By default some reports will include all clients who were enrolled in the selected program(s) at some point during the date range specified in step 2. That may result in duplicate records in instances where a client has multiple histories in a single program, or a history in multiple programs.

   When applicable to the current ReportBuilder, you will see an **Unduplicated Client Count** check box at the top of the page. Check off that option if you would like to filter out any duplicates, list each client only once in the report, and limit report contents to the most recent data for each included client.

   This option is not available/relevant for all ReportBuilders, based on the type of data being worked with. If you do not see this check box, please disregard and continue on to choosing the fields to display.

- **Choose fields to display –** The *Options* page contains a list of data variables related to the ReportBuilder you are working with, representing data collected in various AWARDS locations. Click the check box next to each variable to be included in the report, and/or use the available **Check All** option(s) as needed.

  The specific data variables you see are based on the ReportBuilder you are currently working with. As a result, it may be useful to review the instructions for the relevant ReportBuilder in Online Help if you have questions about the data variable selections.

8. Click **CONTINUE**. The *Options – Continued* page is displayed.

9. Configure or make changes to the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents. 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 report options, see "Understanding ReportBuilder Configuration Options" on page 10.

10. To save the settings made on this and the previous pages so that the report can easily be 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 only want to generate the report itself, skip to step **15**.*

11. When saving a new report, 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 all the modifications to the original format.

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

    - **Yourself –** When selected, only the user saving the report format has the ability to use or modify that format.

    - **All Staff –** When selected, all staff in the program(s) selected when accessing the ReportBuilder 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.

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

- **This Program –** When selected, the report format being saved is available for use only by the program selected when accessing this ReportBuilder.

- **All Programs –** When selected, the report format being saved is available for use by all programs, regardless of which program was selected when accessing this ReportBuilder.

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

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

15. Click **DISPLAY REPORT**. The report is generated and displayed on the *ReportBuilder* page.

*If you chose to send the report to yourself via the Messages module (in step 4), 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 **16**.*

16. 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 report contents, see page 16.

The process of generating a ReportBuilder report is now complete.

UNDERSTANDING REPORTBUILDER CONFIGURATION OPTIONS

When generating a ReportBuilder report, three types of report configuration options – each of which are detailed in the pages that follow – are available for the purposes of customizing the report contents and the way in which those contents are displayed:

- Filter Options – Page **10**   - Individual Detail Options – Page **11**   - Summary Table Options – Page **14**

These option sets are consistent across all ReportBuilders, providing you with a familiar group of tools each time you create a ReportBuilder report.

FILTER OPTIONS

ReportBuilder filter options are located at the top of the *Report Options – Continued* page. ▶

These filters enable users to adjust the scope of report contents by applying user-specified criteria to the report variables chosen on the initial *Report Options* page.

Filters are applied to the report contents regardless of whether those contents are displayed using the individual detail report options, summary tables, or both. For more information on individual detail and summary tables, please see pages 11 and 14, respectively.

To use the ReportBuilder report filters, complete the following steps:

1. In the first filter options row, click the drop-down arrow in the left-hand column and select the data variable with which the report contents are to be filtered.

The drop-down lists in this column are populated with the report variables selected on the previous Report Options page.

2. Click the corresponding drop-down arrow in the middle column and select the type of filter to be used:

Equals	Not Equal to	Greater than
Greater than or Equal to	Less than	Less than or Equal to
Contains	Does not Contain	Is Blank
Is not Blank	Between	

3. In the corresponding field(s) to the right of the filter selection, type the filter criteria. For example if, in a services ReportBuilder, "Service Type" was selected as one of the variables to be included in the report, and the report contents should contain only those services where the type is "Counseling," the filter options would be set as shown here.

> Service Type ▼ | Equals ▼ | Counseling

In most instances AWARDS completes logic checks to ensure that the filter criteria entered are logical; however, those checks are not performed when "Between" is selected as the filter type.

Report filters are not case sensitive when entering text; however, when entering dates you should always use the format mm/dd/yyyy.

4. To combine multiple filters to further refine the report results, click the **and** or **or** radio button. For example, if "Service Type" and "Gender" were selected as variables to be included in the report, and the report contents should contain only "Counseling" services that took place for male clients, the filter options would be set as shown here.

> Service Type ▼ | Equals ▼ | Counseling
> and Gender ▼ | Equals ▼ | Male

It is not possible to combine "and" and "or" filters. As a result, the filter combination selection made in this step applies to all of the filter options set for the report.
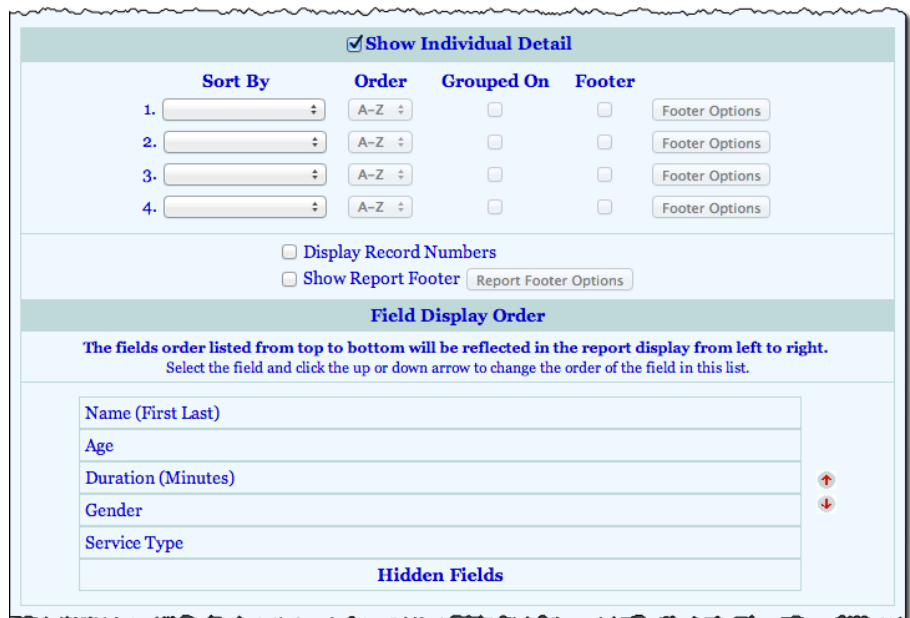
5. When setting the filter options initially, up to four filters can be added. If it is necessary to add more, click the **Add Additional Filters** link. Using that link, four additional filters can be added, up to a total of eight.

The process of setting the ReportBuilder filter options is now complete.

INDIVIDUAL DETAIL OPTIONS

The ReportBuilder individual detail options are located in the middle of the *Report Options – Continued* page.

These options enable users to adjust the way in which report contents are displayed on the page. Specifically, when the report content is displayed with individual detail, the report includes a column for each data variable and a row for each client record (after filters are applied, if applicable). The

☑ **Show Individual Detail**

	Sort By	Order	Grouped On	Footer	
1.		A–Z ⇕	☐	☐	Footer Options
2.		A–Z ⇕	☐	☐	Footer Options
3.		A–Z ⇕	☐	☐	Footer Options
4.		A–Z ⇕	☐	☐	Footer Options

☐ Display Record Numbers
☐ Show Report Footer Report Footer Options

Field Display Order

The fields order listed from top to bottom will be reflected in the report display from left to right.
Select the field and click the up or down arrow to change the order of the field in this list.

Name (First Last)
Age
Duration (Minutes)
Gender
Service Type

Hidden Fields

total record count is also displayed beneath the report table.

Once you choose to include individual detail in the report, you can apply sort options to control the order in which the rows of data are displayed, and field options to control the order in which the columns of data are displayed. You can also group the data by variable, and add sum and total information when appropriate.

The individual detail report options can be used alone, or in combination with the summary table report options described under "Summary Table Options" on page 14. If the individual detail report options are not used, summary table selections must be made before the report can be generated.

To use the ReportBuilder individual detail options, complete the following steps:

1. Click the **Show Individual Detail** check box. The *Report Options – Continued* page is refreshed to display additional individual detail options.

2. If the rows of report data should be numbered, click the **Display Record Numbers** check box.

   This check box and the other individual detail table-related options mentioned in the steps that follow are not available on the Report Options – Continued *page until step 1 has been completed.*

3. To sort the rows of individual detail by one of the data variables chosen on the previous page, click the **Sort By** drop-down arrow and select that variable. For example when, in a services ReportBuilder, the report is sorted by "Service Type" the contents would be displayed as shown here.

Name (First Last)	Age	Duration (Minutes)	Gender	Service Type
Summer Sun	41		Male	Child Welfare
Figo Amigo	41	30	Male	Counseling
Summer Sun	41	30	Male	Education
Summer Sun	41	30	Male	Other Service Type
Summer Sun	41	30	Male	Other Service Type
Cat Nap	29	30	Female	Other Service Type

   The sort by drop-down lists are populated with the variables selected on the previous Report Options *page.*

4. Click the corresponding **Order** drop-down arrow and indicate whether the sort is to be ascending ("A-Z") or descending ("Z-A").

5. If report data should also be grouped by the variable selected in step 3, check the corresponding **Grouped On** check box. When checked, any records included in the report that contain like data for this variable are displayed together, with the variable itself listed once per value and occupying the left-most column; for example, if sorted and grouped on "Service Type," the report would display as shown here.

Service Type	Name (First Last)	Age	Duration (Minutes)	Gender
Child Welfare	Summer Sun	41		Male
Counseling	Figo Amigo	41	30	Male
Education	Summer Sun	41	30	Male
Other Service Type	Summer Sun	41	30	Male
	Summer Sun	41	30	Male
	Cat Nap	29	30	Female

   When this option is used, sorting the report with the column headers of the actual data tables is unavailable.

6. To include subtotal rows of data for each "grouped on" variable, click the corresponding **Footer** check box. Click the **Footer Options** button that is then displayed to view the *Footer Options* box.

   Footer Options

   ☐ Records Count
   ☐ Distinct Count

	Sum	Avg
Age	☐	☐

   Close

7. Click the check box next to available count and/or sum and average options as needed.

   - **Records Count –** When checked, a count of records is displayed as a footer beneath each grouped value. For example, when the "Records Count" option is selected when grouped by "Service Type," the report displays as shown here.

   - **Distinct Count** – When checked, a count of distinct values (the count of values that appear) for the grouped on field will display.

Service Type	Name (First Last)	Age	Duration (Minutes)	Gender
Child Welfare	Summer Sun	41		Male
Total: 1				
Counseling	Figo Amigo	41	30	Male
Total: 1				
Education	Summer Sun	41	30	Male
Total: 1				
Other Service Type	Summer Sun	41	30	Male

   - **Sum / Avg –** Available for numeric or currency values only.

When "Sum" is checked a sum of grouped values is included. When "Avg" is checked, an average is included of the sum divided by the count for the corresponding number of groups under the chosen grouping variable.
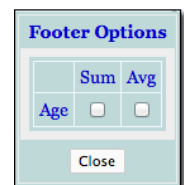
Sum / Avg and count options can be used individually or in combination. When all necessary selections have been made, click **Close**.

Selecting the "Footer" option WITHOUT specifying related count and/or sum/avg selections results in a blank row beneath each group in the report. This can be used to help visually separate each of the grouped on values.

8. Repeat steps 3 through 7 as needed for a total of up to four sort by/grouped on selections.

   If fewer than four data variables were chosen on the Report Options *page, the number of available sort by options equals the number of selected variables.*

9. When the report contains numeric variables for which summary data would provide meaningful results, click the **Show report footer** check box. Click the **Report Footer Options** button that is then displayed to view the *Footer Options* box. ⟶

10. Click the check box next to available **Sum** and/or **Avg** options as needed. When Sum is checked, variables for which a sum has been included are totaled at the bottom of the report. Averages, if selected, will be listed below any totals. They are calculated by dividing the sum by the total count of records for the variable in question.

    When all necessary selections have been made, click **Close**.

11. If you have chosen to include a data variable in the report for grouping purposes, but do not want to see the associated individual detail, click the **Hide details rows** check box. When this option is checked, only "grouped on" data/cells and subtotal footer rows are included in the rows of report content, and in the corresponding Excel file version of the data. Individual detail that would otherwise be shown in the report when grouped on/footer options have been selected will be excluded.

12. To adjust the order of the columns of individual detail in the report contents, click a variable in the "Field Display Order" portion of the page to highlight it.

    If more than eight variables were chosen on the Report Options *page, the "Field Display Order" portion of the page is not automatically populated with those variables. To view the variables list so that the order of the columns can be adjusted, click* **Show Ordered Field List** *before completing this step.*

    Please keep in mind that if the "Grouped On" option has been used for one or more of the "Sort By" variables, those variables are automatically displayed as the first columns in the table, regardless of what is specified here.

13. Use the up and down arrow icons to the right of the "Field Display Order" section to move the highlighted variable up or down in the list, or drag and drop the variable to the desired list position.

    The field display order listed from top to bottom here is reflected in the report data columns display from left to right.

    To hide a field from the report contents entirely, move it beneath the available "Hidden Fields" row. By doing so you can still filter your report contents on that variable, but keep its individual detail from being a part of the report if it is not necessary to include it.

Any fields for which the Grouped On or Footer options were set in steps 5 or 6 are always included in the report content even if it is specified here that they should be "hidden;" otherwise, the report content will not display properly.

14. Repeat steps 12 and 13 as needed.

The process of setting the individual detail report options is now complete.

SUMMARY TABLE OPTIONS

The ReportBuilder summary table options are located at the bottom of the *Report Options – Continued* page.

These options enable users to include aggregate counts of selected report variables. They also allow for customization of how those counts are displayed, and the types of information they contain.

The summary table report options can be used alone, or in combination with the individual detail report options described under "Individual Detail Options" on page 11. If the summary table report options are not used, individual detail selections must be made before the report can be generated.

To use the ReportBuilder summary table options, complete the following steps:

1. To include summary data / aggregate data in the report contents for one or more data variables, click the corresponding check boxes in the "Summary Tables" portion of the page, or click the **Check All** check box to select all variables. The report contents will include a separate summary table for each selected variable, with aggregate counts of each.

   The summary tables check boxes list is composed of the data variables selected on the previous Report Options page; however, several variable data fields are not available for selection as part of a summary table, regardless of whether they were selected on the previous page. These characteristics – which vary from ReportBuilder to ReportBuilder but typically include things such as client name, client ID, times, social security numbers, notes, and so on – are excluded because they have values that are unique to each client or record, and are unlikely to generate any meaningful summary data.

   For example, when using a services ReportBuilder, if "Gender" and "Service Type" are selected as summary table options and the report is generated, the report contents will include a separate summary table for each, with aggregate counts of each variable as shown here.

2. To total each column and/or row in the summary table, click the **Show each column's total** check box and/or **Show each row's total** check box, respectively.

   These "total" check boxes and the other summary table-related options mentioned in the steps that follow are not available on the Report Options – Continued *page until one or more summary tables are chosen in step 1.*

3. To include in the summary table the percentage of report records out of the total record count that have the data in each column or row, click the **Show each column's percentage** check box and/or **Show each row's percentage** check box, respectively.

4. To group the summary table information by a selected variable, click the first **Grouped By** drop-down arrow and select the variable by which the summary table report results are to be grouped.

    For example, if a report is generated with the "Service Type" summary table option checked and with "Gender" as the Grouped By selection, the report contents will appear as shown here.

    The grouping options described here in steps 4, 5, and 6 are only applicable when more than one summary table is available for inclusion in the report.

	GENDER	
SERVICE TYPE ↓	Female	Male
Child Welfare	5	1
Counseling	0	3
Education	0	3
Employment	1	2
Job Training	0	1
Other Service Type	1	6

5. To group the summary table information by a second variable as well, click the second **Grouped By** drop-down arrow and select that variable. When a second grouping selection is made, subgroups are created under the primary grouping level in the report contents.

    For example, if a report is generated with the "Service Type" summary table option checked, "Gender" as the primary grouping, and "Age" as the secondary grouping, the report contents will appear as shown here.

	GENDER									
	Female					Male				
SERVICE TYPE ↓	AGE				TOTAL	AGE			TOTAL	
	16	29	41	45	58		41	50	52	
Child Welfare	1	0	1	1	2	5	1	0	0	1
Counseling	0	0	0	0	0	0	3	0	0	3
Education	0	0	0	0	0	0	3	0	0	3
Employment	0	0	0	0	1	1	0	1	1	2
Job Training	0	0	0	0	0	0	1	0	0	1
Other Service Type	0	1	0	0	0	1	4	0	2	6

6. If one or both "Grouped By" selections have been made, click the **Grouping Levels Display** drop-down arrow and select one of the available options to indicate how the summary table fields and grouped by selections should be positioned in the summary tables:

    ▪ **Columns –** When this option is selected, the summary table fields are rows in the summary tables, while any grouped by selections are displayed as columns across the top of the tables.

    ▪ **Rows –** When this option is selected, the summary table fields are displayed as columns in the summary tables, while any grouped by selections are displayed as rows in the tables. For example, if the sample report shown in step 5 is set to use "Rows" instead of "Columns," the report contents will appear as shown here.

    The default value is "Columns."

    This option is only applicable when one or more "Grouped By" selections have been made.

		SERVICE TYPE					
GENDER	AGE	Child Welfare	Counseling	Education	Employment	Job Training	Other Service Type
Female	16	1	0	0	0	0	0
	29	0	0	0	0	0	1
	41	1	0	0	0	0	0
	45	1	0	0	0	0	0
	58	2	0	0	1	0	0
	TOTAL	5	0	0	1	0	1
Male	41	1	3	3	0	1	4
	50	0	0	0	1	0	0
	52	0	0	0	1	0	2
	TOTAL	1	3	3	2	1	6

7. To adjust the order in which the summary tables are displayed on the report, click **Show Summary Tables Display Order** to make additional summary table-related options available on the page as shown here.

    This option is only applicable when more than one summary table is available for inclusion in the report.

Summary Tables Display Order

Select the field and click the up or down arrow to change the order of the summary tables in this list.

Hide Summary Tables Display Order

Age

Duration

Gender

Service Type

8. To adjust the order of the summary tables on the report page, click a variable in the "Summary Tables Display Order" portion of the page to highlight it. Drag and drop the highlighted variable into the desired list position, or use the up and down arrow icons to the right of the list to move the variable up or down. Repeat this step as needed.

The process of setting the summary table report options is now complete.

WORKING WITH REPORT CONTENTS

After a ReportBuilder report is generated and displayed in AWARDS, several common tasks can be performed using the report's contents. These tasks, described in the pages that follow, are the same regardless of which specific ReportBuilder you are using:

- Showing / Hiding Content – Page **16**
- Printing – Page **17**
- Previewing Related Records – Page **17**

- Sorting – Page **16**
- Exporting to Excel – Page **17**

SHOWING / HIDING CONTENT

In some cases you may have chosen to include a data variable in the report for filtering or grouping purposes, but do not necessarily want to see the associated individual detail. Likewise, you may choose to include percentages or totals for summary tables, but do not want that information shown for all tables. In such instances you can adjust which columns/rows are displayed on the report page, as well as whether individual detail is shown or hidden.
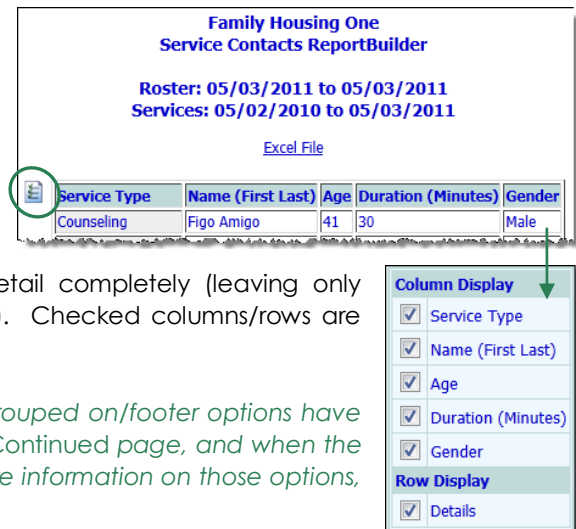
To show/hide ReportBuilder report content, click the show/hide icon to the left of the table you would like to alter.

The show/hide icon is not included in print versions of the report.

The *Column/Row Display* pop-up for that table is displayed. Check or uncheck columns for that table as needed, and/or uncheck the row display "Details" option to hide individual detail completely (leaving only "grouped on" data/cells and subtotal footer rows, if applicable). Checked columns/rows are displayed, unchecked are hidden.

The option to hide individual detail rows is only available when grouped on/footer options have been selected under "Individual Detail" on the Report Options – Continued *page, and when the "Hide details rows" option found there was NOT selected. For more information on those options, see page 11.*

Please keep in mind that showing/hiding columns and/or rows of individual detail or summary tables from the report page does not impact the contents of the Excel file version of the report data. If you would like row detail to be excluded from the Excel file, you must check off the **Hide details rows** option on the Report Options – Continued page. Column detail for specific variables cannot be excluded from the Excel file.

SORTING

Click the heading of any individual detail or summary table column to sort the table contents by that variable. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press **<SHIFT>** and click on the second column heading.

When "Grouped On" has been selected as an individual detail option under report settings, sorting is NOT available.

When sorting is used, an ⬆ or ⬇ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (⬆) or descending (⬇) order. In this example, the table is being sorted alphabetically by client name from A to Z.

Changing the sort order of an individual detail or summary table does not impact the contents of the Excel file version of the report data.

PRINTING

To print the report, click **File** on the Internet browser's menu bar, and select **Print.** Adjust the printer settings as necessary, and then click **Print** to complete the printing process. (These steps may vary from browser to browser.)

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.

EXPORTING TO EXCEL

To export the contents of the report to Microsoft Excel, click the **Excel File** link at the top of the page.

PREVIEWING RELATED RECORDS

If you are using the Incidents ReportBuilder or the FormBuilder ReportBuilder a preview icon is displayed to the right of each row of data in the report contents.

To view a read-only printable version of the complete record/form from which a specific row of report data was pulled, click the corresponding preview icon. The record/form opens in a secondary window. Be sure to close that window when viewing is complete.

As noted above, the preview functionality is limited to use with the Incidents and FormBuilder ReportBuilders.

FREQUENTLY ASKED QUESTIONS

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

HOW DO I DELETE A SAVED REPORT FORMAT?

A saved report format can be deleted if it is one you originally created. If you have the ability to save report formats for other users, you also have the option to delete the format even if it is one you did not personally create. To do so in either instance, complete the following steps:

1. Open the ReportBuilder in which the format to be deleted was originally saved.

2. From the report format drop-down option at the bottom of the page, select the format to be deleted.

3. Click the **Provide option to modify settings of saved report format** check box.

4. Click **CONTINUE.**

5. Click **CONTINUE.**

6. Click **DELETE REPORT FORMAT** at the bottom of the page.

7. Complete the deletion process by clicking **OK** on the confirmation dialog box that is subsequently displayed.

WHAT IS THE DIFFERENCE BETWEEN "HIDING" FIELDS AS PART OF A REPORT'S SETTINGS OR USING THE SHOW/HIDE ICON ON THE REPORT ITSELF?

There are three primary differences between these two methods of "hiding" detail information from a ReportBuilder's contents. First, when you hide fields as a part of a report's settings that configuration is saved when the report format is saved, and it is also applied to the Excel file version of the report. Conversely, any information hidden using the show/hide icon is applicable only to that specific viewing, and does not carry over to the Excel file or to the report format if saved.

Second, while you can hide individual detail for a field in a report's settings and still use that field for filtering of the report's contents, the same is not true for fields that have been used for grouping and/or footer information purposes. In such cases you would need to use the show/hide icon on the report itself, as hiding it via the report's settings is not permitted (because it would cause display issues).

And third, the show/hide icon allows you to hide detail that is a part of summary tables. The hidden fields option that is a part of a report's settings can only be applied to individual detail.

WHO CAN SAVE REPORTBUILDER 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 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 program, client, and household member 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. These characteristics vary from ReportBuilder to ReportBuilder, but commonly include items such as name (first, last, middle, and alias), date of birth, client ID, and notes. These characteristics are excluded because they have values that are unique to each individual or record, and as such are unlikely to generate any meaningful summary data.

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

Those cells in the Excel version of 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 ReportBuilder reports 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 ReportBuilder reports 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 DOESN'T MY REPORT YIELD ANY RESULTS WHEN I APPLY A DATE FILTER?

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?

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 A REPORTBUILDER REPORT?

There are two possible causes when ReportBuilder reports are not immediately displaying information updated in the same database login session. First, it may 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.

Second, when using some ReportBuilders (such as the HMIS or Demographics ReportBuilders) if the report's results include fewer than 5,000 records, the data comes from the live database and should reflect what's currently in records. If the report's results include more than 5,000 records though, the data comes from the previous night's database backup, and it is exported to a data file rather than displayed on the screen. As a result, any changes made to records between the time of the backup and when the report was run will not be reflected in the report data.

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

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.

WHY ISN'T THERE ALWAYS A "PROGRAM" REPORT VARIABLE WHEN RUNNING A REPORTBUILDER FOR A GROUP OF PROGRAMS?

In areas that share data records across programs (for example, allergies and medications), no specific program history is attached to a record. Instead, records are attached to the client, regardless of program assignment. As a result, a "Program" variable is not available for inclusion in the report contents when working with such records.