



Interactive Reports User Manual

Interactive View

Report Results

Go Rows: All **Actions**

County

1 - 67

County : ATCHISON

Funding	Service	Unit Of Measure	AAA Customer Cou
OAA3C1	CMEL	1 MEAL	

County : CLAY

Funding	Service	Unit Of Measure	AAA Customer Cou
OAA3C1	CMEL	1 MEAL	

County : DOUGLAS

Funding	Service	Unit Of Measure	AAA Customer Cou				
OAA3B	ATCR	1 HOUR		10	35.00		
OAA3C1	CMEL	1 MEAL		772	5,333.00	772	5,333.00
OAA3C2	HMEL	1 MEAL		277	13,783.00	277	13,783.00
OAA3E	BATH	1 DOLLAR		2	212.46	-	-
OAA3E	HMKR	1 HOUR		6	119.50	-	-
OAA3E	RRRR	1 HOUR		3	131.00	-	-
SCA	ASMT	15 MINUTES		28	397.00	28	397.00
SCA	ATCR	1 HOUR		3	39.00	3	39.00
SCA	ATCRSD	1 HOUR		2	39.50	2	39.50
SCA	CMGTS	15 MINUTES		49	196.50	49	196.50
SCA	HMKR	1 HOUR		35	793.00	35	793.00
SCA	HMKRSD	1 HOUR		5	227.00	5	227.00
SCA	PEMRI	1 INSTALLATION		1	1.00	1	1.00
SCA	PERM	MONTHLY CHARGE		9	25.00	9	25.00

Actions

- Select Columns
- Filter
- Rows Per Page
- Format
- Flashback
- Save Report
- Reset
- Help
- Download

KDADS

- Sort
- Control Break
- Highlight
- Compute
- Aggregate
- Chart
- Group By

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Interactive Reports – Introduction

Introduction

Many KDADS Web Applications contain various types of reports that use the Interactive Report feature. Interactive Reports allows the user to create custom views of the report data. Some reports have pre-defined filters that can be selected without having to build custom filters.

If custom views are needed, Interactive Reports provides a variety of reporting tools to create customized reports.

Interactive Report Components

Note: The images displayed in this manual are examples of an interactive report from various KDADS Web Applications. The reports you use will have data representative of the specific application's data you are accessing. The basic components of Interactive Reports are the same regardless of the application from which it is accessed.

The screenshot shows an interactive report titled "Quality Review Response Review(s)". At the top, there are radio buttons for "Review Type" (Response Reviews selected) and "SED". Below this is a "Quality Review Period" section with radio buttons for "SFY15-Q2" (selected), "SFY15-Q1", "2014", "2013", "2013(MFP)", "2014(MFP)", and "2014(SED)".

Below the filters is a reporting toolbar with a search box, a "Go" button, a "Rows" dropdown set to "15", and an "Actions" button. Below the toolbar, it says "1 - 15 of 1606" with a dropdown arrow.

The main data area is a table with the following columns: Status, Compliance, Review Type, Review Date, Waiver, P/S, Reviewer, and Interview Date. The table contains 15 rows of data, all with "RESPONSE" as the Review Type and "10/01/2014" as the Review Date. The Interview Date column shows various dates in 2014.

Callouts on the left side of the screenshot point to specific components:

- Pre-Defined Filters (Optional component)**: Points to the "Review Type" and "Quality Review Period" sections.
- Reporting Tools (Search, Rows, Actions)**: Points to the search box, "Go" button, "Rows" dropdown, and "Actions" button.
- # of Currently Displayed Rows**: Points to the "1 - 15 of 1606" indicator.
- Report Data**: Points to the table of data rows.

Additionally, the column headings can be used to do simple sorts, filters, and other actions.

Interactive Reports – Component Descriptions

Overview

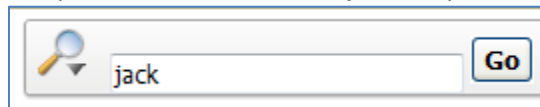
Refer to the following table for an overview of the components of the Interactive Report.

Region	Purpose
Pre-Defined Filters	<p>Not all Interactive Reports have predefined filters. The ones that do will display at the top of the page, as either radio button or checkbox selections. Radio button selections update the report data automatically. Checkboxes usually require a 'Go' button that sends a request to the application to update the report data.</p> <p>Pre-defined filters are built specific to a report's needs. Because they are unique to each report's requirements, they are not discussed further in this manual.</p>
Reporting Tools (Search / Number of Rows to Display / Actions)	<p>The <i>Search</i> field provides a way to look for a specific record. The <i>Rows</i> display defines how many rows of data will appear per page. The <i>Actions</i> button contains a variety of report control tools.</p>
Currently Displayed Rows	<p>Which group of rows of the total report are currently displaying. This information may appear above or below the report.</p>
Report Data	<p>The report data that displays is dependent on the above pre-defined filters and/or other filters/sort options that are selected.</p>

Reporting Tools - Search for Specific Record(s)

Use the **Search** field to look for a specific record. By default, the search looks in all displayed fields for the search text entered. After entering the text to search for, click on the **Go** button. The report is updated and displays only those records that contain the search term.

For example, if the Search text is 'jack,' any of the following results could be returned:



- Finds a record with the first name of Jack
- finds a record with a last name of Jackson
- finds a record with a Reviewer named BO JACK

Note: You can use the magnifying glass icon on the left side of the Search field to narrow the search to a specific column.

Continued on next page

Interactive Reports – Component Descriptions, continued

Reporting Tools - Number of Rows to Display

Change the **Rows** drop-down list to reflect the number of rows to display on the page. The currently displayed rows will show which grouping of that number is currently displayed on the report. If displaying 100 rows at a time, the currently displayed rows will show rows 1-100, then 101-200, then 201-300, etc.

The screenshot shows a reporting tool interface. At the top right, there is a 'Rows' dropdown menu currently set to '15'. A red box highlights this dropdown, and a red arrow points to the '1 - 15 of 64' indicator below the table. The table displays data for PSA : 2, with columns for Funding, County, Service, Units, and Paid. The data is as follows:

Funding	County	Service	Units	Paid
OAA3B	BUTLER	ASMT	14.00	
OAA3B	BUTLER	ATCR	15.00	
OAA3B	BUTLER	CMGTS		15.00
OAA3B	BUTLER	HMKR		156.00
OAA3B	HARVEY	ASMT	25.00	
OAA3B	HARVEY	CMGTS	10.00	
OAA3B	LINN	ASMT	8.00	
OAA3B	LINN	CMGTS	6.00	
OAA3B	SEDGWICK	ASMT	100.00	
OAA3B	SEDGWICK	ATCR	360.00	
OAA3B	SEDGWICK	CMGTS	147.00	
OAA3B	SEDGWICK	HMKR	613.75	
OAA3B	SEDGWICK	RMNR	2,908.00	
OAA3C1	BUTLER	CMEL	703.00	
OAA3C1	DECATUR	CMEL	19.00	

Note: The **Actions** > Rows Per Page control tool does the same thing.

Reporting Tools - Actions button

The **Actions** button contains the more feature-rich report control tools that can be used to change how the data in the report displays. The most common control tools are covered in more detail in the following chapters.

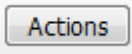











Reporting Tools – Actions

Introduction

The **Actions** button contains a variety of filtering, sorting, and layout tools that provide greater customization of the default report.

Control Tool Descriptions

The table below contains the descriptions of the control tools available through the Interactive Report **Actions** button:





Control Tool	Purpose
 Actions	Actions button – Click on the button to view the available report control tools.
 Select Columns	Select Columns – Used to modify the columns that display, and to re-order the displayed columns. Computed columns are prefixed with **.
 Filter	Filter – A detailed filter with a selection of operators to manipulate what subset of data to display.
 Rows Per Page	Rows Per Page – Used to select the number of report rows to display on the page. (Additional rows are accessed via a 'next' or '>' link on the page.)
 Format	Format – Contains the <i>Sort</i> , <i>Control Break</i> , <i>Highlight</i> , <i>Compute</i> , <i>Aggregate</i> , <i>Chart</i> , and <i>Group By</i> formatting features. See below for a description of each.
 Sort	Sort – Used to sort by multiple columns; each column can be sorted in ascending or descending order. You can also specify how to sort nulls (first or last in sorted list).
 Control Break	Control Break – Used to display the report in groups based on the columns selected. Defining a Control Break removes the column of data from the report and instead uses it as the Control Break heading. Example: <i>Control Break by waiver</i> creates a report grouped by each waiver that was in the report.
 Highlight	Highlight – Highlighting allows you to define a filter with color. The rows that meet the filter settings are highlighted using the characteristics associated with the filter.
 Compute	Compute – Computations allow you to add computed columns to your report, using functions provided within the tool.
 Aggregate	Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column in which they are defined.
 Chart	Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.
 Group By	Group By – One Group By report can be defined per saved report. You can switch between the Group By report and the original report view.

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Reporting Tools – Actions, continued

Control Tool Descriptions

continued

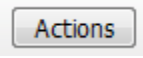
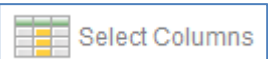






Control Tool	Purpose
 Save Report	Save Report – Saves a customized report for future use. A Reports drop-down list displays when at least one customized report is saved.
 Reset	Reset – Restores the displayed report to the default settings.
 Help	Help – Overview of Interactive Report functions.
 Download	Download – Allows the current report to be exported to a comma-delimited file (CSV). The CSV file can be opened in Excel.

The following chapters contain instructions on how to use the most common of these report control tools.

Actions – Select Columns

Select Columns to Display

Follow the steps in the table below to change the columns that display in a report.

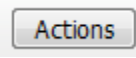
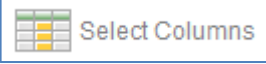
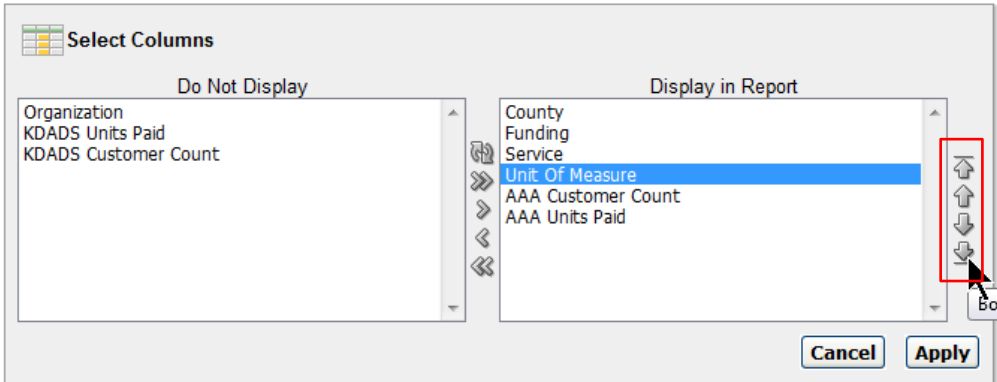

Step	Action	Result
1.	Click on the Interactive Report Actions button 	The Actions drop-down list displays.
2.	Choose Select Columns from the Actions list. 	The Select Columns control tool displays. All columns available in the report are contained in one of two 'shuttle' lists.
<p>The <i>Do Not Display</i> shuttle list contains the columns that are currently hidden. The <i>Display in Report</i> shuttle list contains the columns that are currently visible in the report.</p> <div data-bbox="414 625 1425 1018" data-label="Image"> </div> <div data-bbox="474 1060 1323 1243" data-label="List-Group"> <ul style="list-style-type: none">  -- Reset the shuttle lists to the default report layout  -- Move all columns to the 'display' shuttle list  -- Move the selected hidden column(s) to the 'display' shuttle list  -- Remove the selected columns from the 'displayed' shuttle list  -- Remove all columns from the 'displayed' shuttle list </div>		
3.	To move one or more columns from one list to the other, do one of the following: <ul style="list-style-type: none"> • Select the desired column name(s) and use one of the move icons. • Double-click on a single column name in either list. • Click the 'Move All' icon. • Click the 'Remove All' icon. 	<p>The column name(s) is/are moved from one shuttle list to the other.</p> <p>The column name moves to the other list.</p> <p>All columns are moved to the display list.</p> <p>All columns are moved to the hidden list.</p>
4.	Click on the Apply button.	The report redisplay with the new column selections.
5.	To reset the columns to their default settings, choose Select Columns from the Actions button.	The Select Columns control tool displays.
6.	Click on the Reset icon. 	The columns are reset to their default display settings.
7.	Click on Apply .	The report displays with the default column settings.

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Actions – Select Columns, continued

Rearrange Column Order

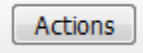

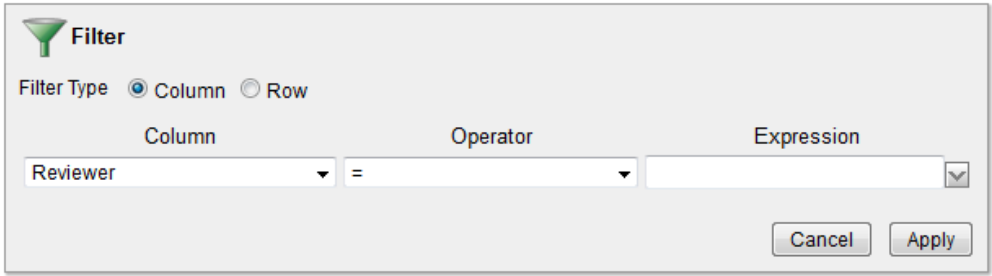
Follow the steps in the table below to change the display order of the columns in a report.

Step	Action	Result
1.	Click on the Interactive Report Actions button 	The Actions drop-down list displays.
2.	Choose Select Columns from the Actions list. 	The Select Columns control tool displays.
<div style="border: 1px solid gray; padding: 10px; margin: 10px 0;">  </div> <div style="margin: 10px 0;">  <ul style="list-style-type: none"> -- Move the selected column(s) to the beginning of the report. -- Move the selected column(s) to the left one place. -- Move the selected column(s) to the right one place. -- Move the selected column(s) to the end of the report. </div>		
3.	Select the column(s) to be moved.	The selected columns are highlighted.
4.	Click on the desired move arrow to rearrange the column(s)	The column(s) move to the new location in the shuttle list.
5.	Click on the Apply button.	The report redisplay with the new column positions.

Actions – Filter

Create a Filter Follow the steps in the table below to customize a report using the Filter control tool.

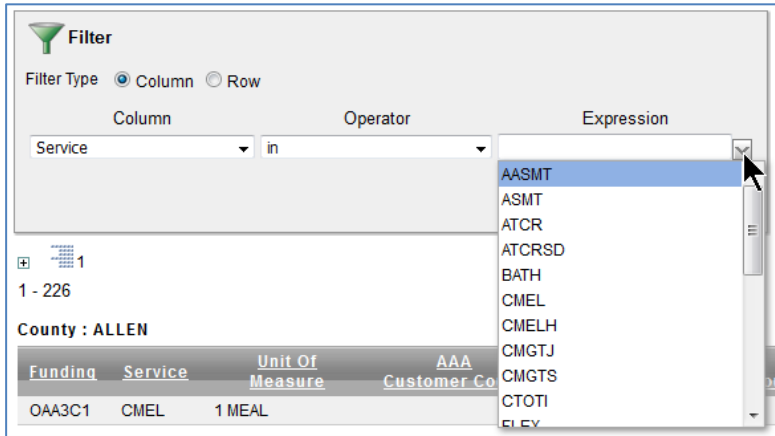
Important Note: The Expression part of a filter is case-sensitive. Example: SMITH, Smith, and smith are NOT the same.

Step	Action	Result
1.	Click on the Interactive Report Actions button 	The Actions drop-down list displays.
2.	Select Filter from the Actions list. 	The Filter control tool displays.
		
3.	Select the Column to be filtered	You can filter by both displayed and hidden columns.
4.	Select the desired Operator	Refer to the table below for the definition of the operators, and an example of its use.
<p>Note: The available operators may change depending on the column selected, based on the type of data contained in the column.</p>		
Operator	Definition	Example of Use
=	is equal to	Last Name = 'SMITH'
!=	is not equal to	Status != 'Completed'
>	is greater than	Units > '50'
>=	is greater than or equal to	Units >= '50'
<	is less than	Date < '01-JAN-16'
<=	is less than or equal to	Date <= '31-DEC-15'
is null	the field is empty	DA110 Date is null Note: a space is not a null value
is not null	the field contains at least one character	DA110 Date is not null

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Actions – Filter, continued

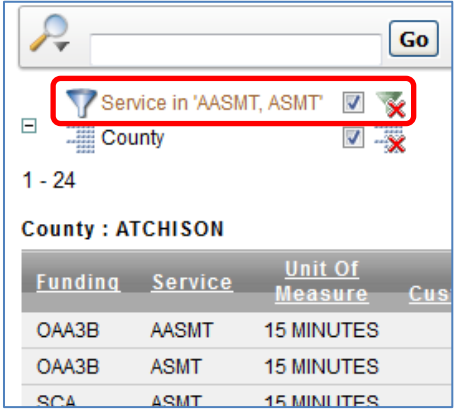
Create a Filter *continued*

Step	Action	Result																								
	<table border="1"> <thead> <tr> <th>Operator</th> <th>Definition</th> <th>Example of Use</th> </tr> </thead> <tbody> <tr> <td>like</td> <td>the field contains a matching string of characters</td> <td>First Name like '%OB%' (Note the % is a wildcard character to indicate the match is for OB, with anything (or nothing) before or after it. This example returns OBSOLETE, BOBBY, and JACOB.)</td> </tr> <tr> <td>not like</td> <td>the field contains characters that do <i>not</i> match this string</td> <td>First Name not like 'ROBERT' (Returns all names <i>except</i> ROBERT.)</td> </tr> <tr> <td>in</td> <td>the field contains at least one of the items in the Expression list</td> <td>County in 'SN,DG,JF,WB'</td> </tr> <tr> <td>not in</td> <td>the field contains everything <i>except</i> the items in the Expression list</td> <td>County not in 'JO,WY,LV'</td> </tr> <tr> <td>contains</td> <td>the field contains the character string anywhere in the entry</td> <td>Description contains 'Tablet'</td> </tr> <tr> <td>does not contain</td> <td>the field does not contain the character string</td> <td>Description does not contain 'HP'</td> </tr> <tr> <td>between</td> <td>the field entries fall between the two expressions given</td> <td>PO Date between '01-JAN-16' and '15-APR-16'</td> </tr> </tbody> </table>	Operator	Definition	Example of Use	like	the field contains a matching string of characters	First Name like '%OB%' (Note the % is a wildcard character to indicate the match is for OB, with anything (or nothing) before or after it. This example returns OBSOLETE, BOBBY, and JACOB.)	not like	the field contains characters that do <i>not</i> match this string	First Name not like 'ROBERT' (Returns all names <i>except</i> ROBERT.)	in	the field contains at least one of the items in the Expression list	County in 'SN,DG,JF,WB'	not in	the field contains everything <i>except</i> the items in the Expression list	County not in 'JO,WY,LV'	contains	the field contains the character string anywhere in the entry	Description contains 'Tablet'	does not contain	the field does not contain the character string	Description does not contain 'HP'	between	the field entries fall between the two expressions given	PO Date between '01-JAN-16' and '15-APR-16'	
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between	the field entries fall between the two expressions given	PO Date between '01-JAN-16' and '15-APR-16'																								
5.	Select or type the desired Expression .	Depending on the column being filtered, and what data are displayed in the column, the Expression field may populate a select list with the available choices for that column.																								
	Example:																									

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Actions – Filter, continued

Create a Filter *continued*

Step	Action	Result
6.	Click on the Apply button.	The filtered report displays.
7.	The filter criteria display at the top of the report.	 <p>Note: The County control break criterion is a default report setting. It was already in place when the filter was created.</p>

Edit a Filter

Follow the steps in the table below to edit a filter.

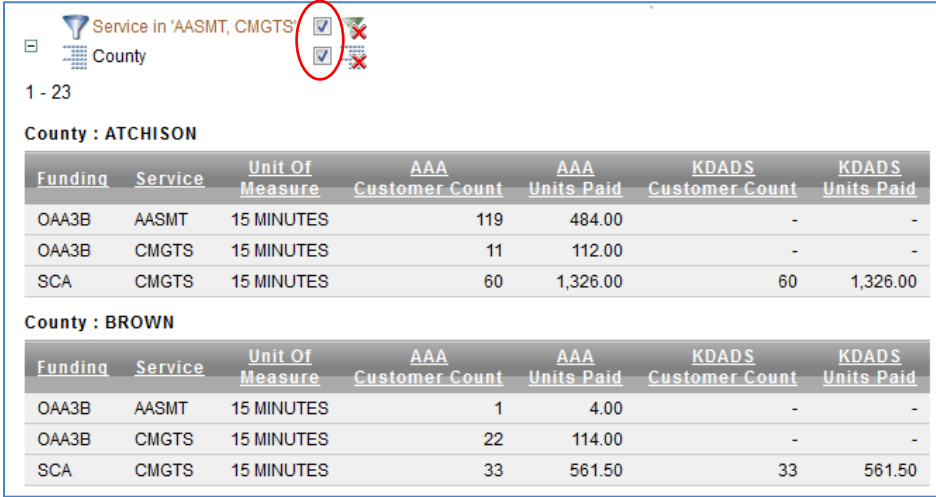


Step	Action	Result
1.	Click on the filter criteria link at the top of the report.	The Filter control tool displays with the previously defined settings.
2.	Make the desired changes and click on the Apply button to save the changes.	The report redisplay with the updated filter.

Continued on next page

Actions – Filter, continued

Remove/Delete a Filter

Follow the steps in the table below to temporarily remove a filter, and to permanently delete a filter.

Step	Action	Result
	 <p>The screenshot shows a filter interface for 'Service in 'AASMT, CMGTS''. There are two checkboxes, both of which are checked. To the right of each checkbox is a delete icon (a square with an 'X'). A red circle highlights the top checkbox and its delete icon. Below the filter controls, there are two tables of data for 'County : ATCHISON' and 'County : BROWN'. Each table has columns for Funding, Service, Unit Of Measure, AAA Customer Count, AAA Units Paid, KDADS Customer Count, and KDADS Units Paid.</p>	
1.	Turn the filter on and off using the checkbox. 	Checked – filter is on Unchecked – filter is off
2.	Permanently remove the filter by clicking on the delete icon. 	The filter is deleted and the report redisplay the unfiltered data.

Multiple filters can be created for a report, and each filter can be individually turned on or off.

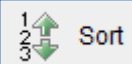
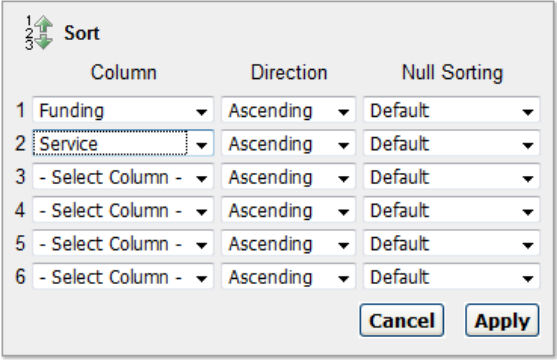
Actions – Format|Sort


Overview

To select any action from the Format list, do not click on Format, but rather *hover* over the Format option. A list of Format options displays, from which you can then *click* on the specific Format control tool to run.

How to

Follow the steps in the table below to customize a report using the Sort control tool.

Step	Action	Result
1.	Select Format Sort from the Actions button. 	The Sort control tool displays.
2.	Define the Sort: <ul style="list-style-type: none"> Select the desired sort order, using up to six columns. Select the sort direction (Ascending or Descending) for each column. Select whether Null (blank) fields should always display first or last in the list. 	
3.	Click on Apply .	The sorted report displays.


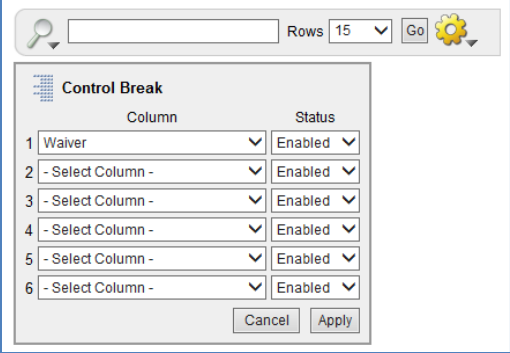
Funding 	Service	# of Customers	Avg Mo Units	Total Mo Units
OAA3B	ATCR	37	9	341
OAA3B	CMGTS	48	3	144
OAA3C1	CMEL	5,123	35	178,804
OAA3C2	AASMT	2	2	4
OAA3C2	HMEL	674	30	20,528
SCA	ASMT	2	22	43
SCA	ATCR	10	14	139
SCA	ATCRSD	6	9	55
SCA	CMGTS	140	3	420
SCA	HMKR	81	16	1,329
SCA	HMKRSD	19	23	444
SCA	PEMRI	3	1	3
SCA	PERM	52	1	52

1 - 13

Note: The initial sort column displays an icon after the column-heading label, indicating an ascending or descending sort.

Actions – Format | Control Break

Create a Control Break Follow the steps in the table below to customize a report using the Control Break control tool.

Step	Action	Result
1.	Select Format Control Break from the Actions button. 	The Control Break control tool displays.
2.	Select the Column(s) at which the data will break. Note: If a Control Break should not be enabled immediately, the Status can be changed to 'Disabled.' The control break status can be turned on later using the Control Break criteria listed at the top of the report.	
3.	Click on the Apply button.	The new layout displays, with the report grouped by the enabled control breaks selected in step 2. The Control Break column is removed from the resulting report, since the Control Break title <i>is</i> that column:

County is removed as a report column since it is now the Control Break title.

County	Funding	Service	AAA Customer Count	
ALLEN	OAA3C1	CMEL	1	1 M
ATCHISON	OAA3B	AASMT	119	15 M
ATCHISON	OAA3B	ASMT	10	15 M
ATCHISON	OAA3B	ATCR	10	1 H
ATCHISON	OAA3B	CMGTJ	9	15 M
ATCHISON	OAA3B	CMGTS	11	15 M
ATCHISON	OAA3B	HMKR	14	1 H
ATCHISON	OAA3B	MAID	11	1 D
ATCHISON	OAA3C1	CMEL	121	1 M
ATCHISON	OAA3C2	CMELH	5	1 M
ATCHISON	OAA3C2	HMEL	173	1 M

County : ALLEN		AAA Customer Count	
Funding	Service		
OAA3C1	CMEL	1	1 M
County : ATCHISON		AAA Customer Count	
Funding	Service		
OAA3B	AASMT	119	15 M
OAA3B	ASMT	10	15 M
OAA3B	ATCR	10	1 H
OAA3B	CMGTJ	9	15 M
OAA3B	CMGTS	11	15 M
OAA3B	HMKR	14	1 H
OAA3B	MAID	11	1 D
OAA3C1	CMEL	121	1 M
OAA3C2	CMELH	5	1 M
OAA3C2	HMEL	173	1 M
OAA3E	RRRR	2	1 H

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Actions – Format|Control Break, continued

Create a Control Break *Continued*

Step	Action	Result																									
4.	The control break criteria display at the top of the report.	<p>1 - 226</p> <p>County : ALLEN</p> <table border="1"> <thead> <tr> <th>Funding</th> <th>Service</th> <th>AAA Customer Count</th> <th>U</th> <th>Me</th> </tr> </thead> <tbody> <tr> <td>OAA3C1</td> <td>CMEL</td> <td>1</td> <td>1</td> <td>MEAL</td> </tr> </tbody> </table> <p>County : ATCHISON</p> <table border="1"> <thead> <tr> <th>Funding</th> <th>Service</th> <th>AAA Customer Count</th> <th>U</th> <th>Me</th> </tr> </thead> <tbody> <tr> <td>OAA3B</td> <td>AASMT</td> <td>119</td> <td>15</td> <td>MINU</td> </tr> <tr> <td>OAA3B</td> <td>ASMT</td> <td>10</td> <td>15</td> <td>MINU</td> </tr> </tbody> </table>	Funding	Service	AAA Customer Count	U	Me	OAA3C1	CMEL	1	1	MEAL	Funding	Service	AAA Customer Count	U	Me	OAA3B	AASMT	119	15	MINU	OAA3B	ASMT	10	15	MINU
Funding	Service	AAA Customer Count	U	Me																							
OAA3C1	CMEL	1	1	MEAL																							
Funding	Service	AAA Customer Count	U	Me																							
OAA3B	AASMT	119	15	MINU																							
OAA3B	ASMT	10	15	MINU																							

Multiple control breaks can be created for a report, and each control break can be individually turned on or off.

Remove/Delete a Control Break

Follow the steps in the table below to temporarily remove a control break, and to permanently delete a control break.

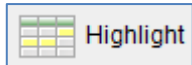
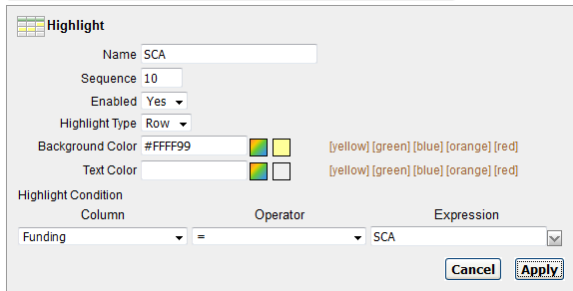
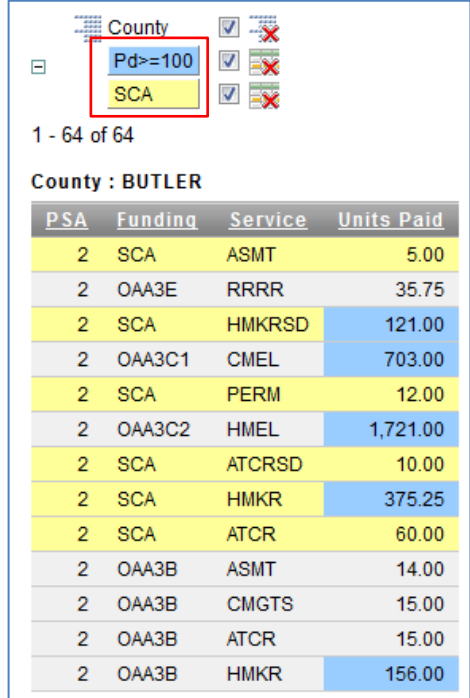
Step	Action	Result
1.	Turn the control break on and off using the checkbox.	Checked – control break is on Unchecked –control break is off
2.	Permanently remove the control break by clicking on the delete icon.	The control break is deleted and the report redisplay the data with the column reinserted into the report.

Multiple control breaks can be created for a report, and each control break can be individually turned on or off.

Actions – Format | Highlight

Create a Highlight

Follow the steps in the table below to customize a report using the Highlight control tool.

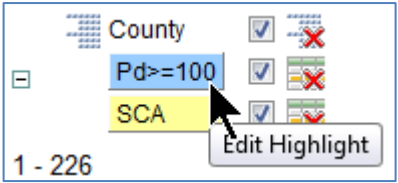
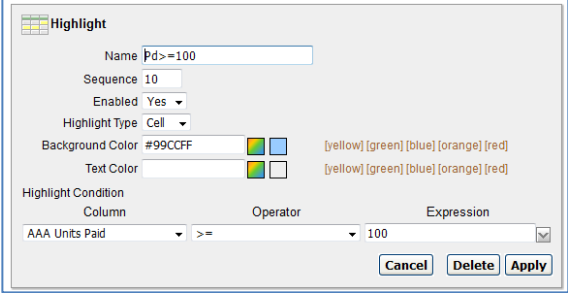
Step	Action	Result
1.	Select Format Highlight from the Actions button. 	The Highlight control tool displays.
2.	Select the criteria for the highlight display. <ul style="list-style-type: none"> Name – description of the purpose of the highlight Enabled – Yes or No Highlight Type – the whole row or just the cell in the selected column Background Color Text Color (leave blank for black) Highlight Condition - define the filter for the highlight 	
3.	Click on Apply .	The highlighted report displays.
4.	To create additional highlights, repeat steps 1-3. As seen in the example, the name given to the highlight is significant, as it indicates in the highlight criteria display why the row is highlighted.	Example of a row highlight (yellow) and a cell highlight (blue): 

Continued on next page

Actions – Format | Highlight, continued



Edit a Highlight

Follow the steps in the table below to edit a highlight.

Step	Action	Result
1.	<p>Edit a highlight by clicking on the highlight criteria link at the top of the report.</p> 	<p>The Highlight control tool displays with the previously defined settings.</p> 
2.	<p>Make the desired changes and click on the Apply button to save the changes.</p>	<p>The report redisplay with the updated highlight.</p>

Remove/Delete a Highlight

Follow the steps in the table below to temporarily remove a highlight, and to permanently delete a highlight.

Step	Action	Result
1.	<p>Turn the highlight on and off using the checkbox. </p>	<p>Checked – highlight is on Unchecked – highlight is off</p>
2.	<p>Permanently remove the highlight by clicking on the delete icon. </p>	<p>The highlight is deleted and the report redisplay the data without highlighted filters.</p>

Multiple highlights can be created for a report, and each one can be individually turned on or off.

Actions – Format | Group By

Overview

You can define one Group By report per saved report. Once defined, you can switch between the group by and report views using the View buttons to the right of the Search bar.



To create a Group By report, you select:

- the columns on which to group (up to 3 columns can be selected)
- the columns to aggregate along with the function to be performed (average, sum, count, etc.)
- the columns to use for sorting (up to 3 columns can be selected)

Original Report Example

This is an example of the original version of the KMS-0085 KAMIS Report.

KMS 0085 - Unduplicated Customer Count Receiving Services by PSA Report Results

1 - 26 of 26

Service : ASMT

PSA	Funding	Number of Persons Served
2	OAA3B	201
2	SCA	294
		495

Service : ATCR

PSA	Funding	Number of Persons Served
2	OAA3B	114
2	OAA3E	21
2	SCA	66
		201

Service : ATCRSD

Continued on next page

Actions – Format|Group By, continued

Group By Report Example

This is an example of the same report, but it groups the total number of persons served by Funding only, leaving out the PSA identifier.

KMS 0085 - Unduplicated Customer Count Receiving Services by PSA Report Results

Go [Menu] [Menu] Rows All [Actions]

Service [Check] [X]
Edit Group By

1 - 6 of 6

Funding	Total Served
OAA3C1	1,201
SCA	1,079
OAA3E	98
OAA3C2	1,686
OAA3B	700
CTOFED	48

1 - 6 of 6

Group By

Group By Column: 1 Funding | 2 - Select Column - | 3 - Select Column -

Functions	Column	Label	Format Mask	Sum
1 Sum	Number of Persons Served	Total Served	999G999G999G999G990	<input checked="" type="checkbox"/>
2 - Select Function -	- Select Column -			<input type="checkbox"/>
3 - Select Function -	- Select Column -			<input type="checkbox"/>

[Cancel] [Delete] [Apply]

Define a Group By Report View

Follow the steps in the table below to define a Group By report.

Step	Action	Result
1.	Run/access the desired Interactive Report.	The Interactive Report displays.
2.	Select Group By from the Format Actions button.	The Group By control tool displays.
3.	Select up to three columns on which to group by.	The report is reformatted based on these selections.
4.	Select the Column(s) to aggregate, and the Function(s) to use.	Totals and other calculations can change based on these selections.
5.	Optional – create a Label for the aggregate column.	The aggregate column label displays as defined here.
6.	Optional – select a Format Mask to format the aggregate number.	The number is formatted as selected.
7.	Click on the Apply button.	The Group By selections are saved and the new report displays.

Continued on next page

Actions – Format|Group By, continued

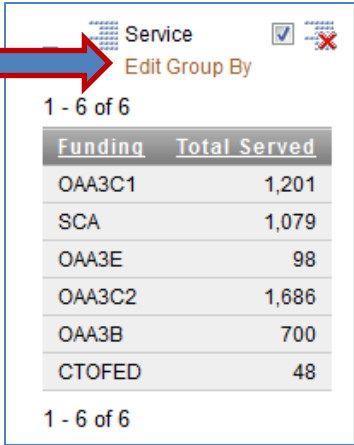
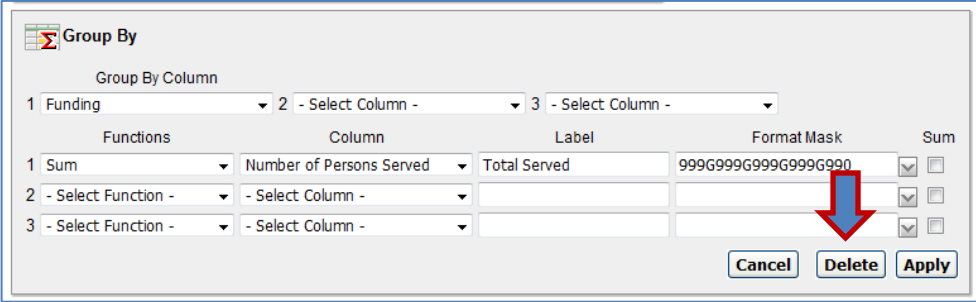
Switch Between Views

After creating a Group By report, that view automatically displays. Use the appropriate button to select the desired report view:



Delete Group By View

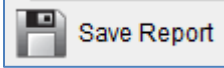
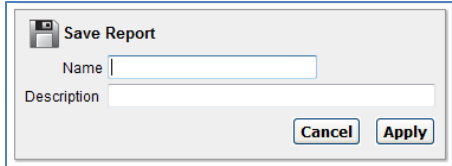
Follow the steps in the table below to delete the Group By view of a report.

Step	Action	Result
1.	Display the Group By view of the report.	
2.	Click on the Edit Group By link located above the report. 	The Group By edit screen displays.
3.	Click on the Delete button.	The original report displays, and the Group By view icon is no longer available.
		

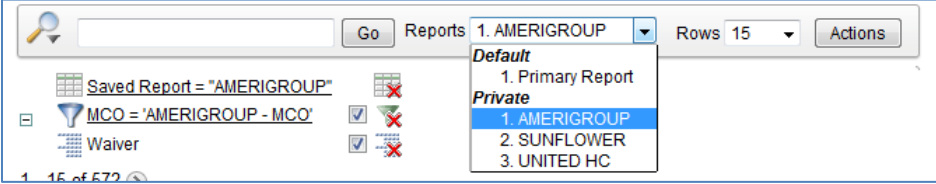
Actions – Save Report

Save a Customized Report

Follow the steps in the table below to save a customized Report.

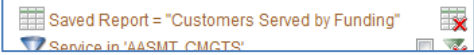
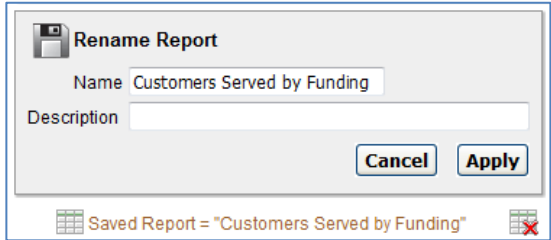
Step	Action	Result
1.	Create the filters, sorts, highlights, etc., as desired to create a customized report.	The customized report displays.
2.	Select Save Report from the Actions button. 	The Save Report control tool displays. 
3.	Enter a Name for the new report.	Required
4.	Enter a Description for the new report.	Optional
5.	Click on the Apply button.	The Search Bar now displays a new 'Reports' drop-down list, containing the default Primary Report, and any saved reports.

In this example, three separate customized reports were saved, named AMERIGROUP, SUNFLOWER, AND UNITED HC. The Primary Report is the original (default) view of the report.



Edit a Saved Report

Follow the steps in the table below to edit a saved report.

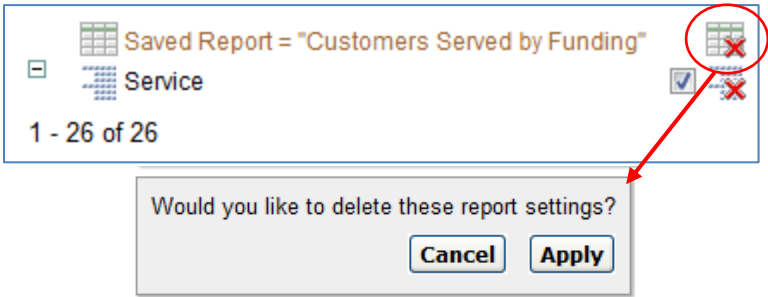
Step	Action	Result
1.	Select the saved report from the Reports drop-down list.	The report displays.
2.	Make the desired changes to the report.	
3.	Click on the Saved Report = 'Report Name' criteria link above the report. 	A 'Rename Report' screen displays, with the existing Report Name. 
4.	Click on the Apply button.	Any changes made to the report will be re-saved under the same report name.

Continued on next page

Actions – Save Report, continued

Delete a Saved Report

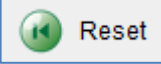

Follow the steps in the table below to delete a saved report.

Step	Action	Result
1.	Select the saved report from the Reports drop-down list.	The report displays.
2.	Click the delete icon next to the Saved Report="(report name)" criteria link located above the report.	A dialog box will display confirming deletion of the report.
		
3.	Click on the Apply button.	The report is deleted and the saved report is removed from the Reports drop-down list.
<p>Note: When the last saved report is deleted, the Reports drop-down list will disappear from the Search Bar.</p>		

Actions – Reset

How To

Follow the steps in the table below to reset the Primary (default) Report back to its default settings. Resetting the report removes all filters, sorts, highlights, etc. that were applied, and cannot be undone.

Step	Action	Result
1.	If not already displayed, select the Default (Primary Report) from the Reports drop-down list	The Primary Report, with any unsaved changes, displays.
2.	Select Reset from the Actions button. 	The Reset control tool displays.
3.	Click on Apply to reset the report. 	Any customizations that you created will be deleted and the original report format displays.

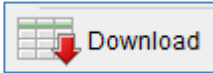
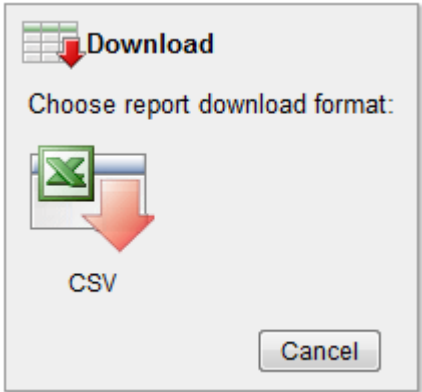
Actions – Download

Overview

The Download tool exports a report's data to a CSV (comma-separated value) file that can then be opened in a spreadsheet application like Microsoft Excel.

How To

Follow the steps in the table below to download a report's data to a CSV file.

Step	Action	Result
1.	Display the desired report to be downloaded.	The data displays in the Interactive Report format.
2.	Select Download from the Actions button. 	The Download control tool displays.
3.	Click on the CSV Icon.	
4.	A prompt/dialog box will display asking if you want to Open or Save the file. If you can open the file directly into Excel, do so and skip to step 8. If you only get the Save/Save As option, continue with step 5.	The browser you are using may display or word the question/dialog box in different ways. You may have both a Save and Save as option – choose Save as. Note: If the file saves without prompting for a name, it most likely was saved to your Downloads folder. The download location is controlled by your browser settings and can be changed (for all downloads) if desired.
5.	The Save As dialog box displays. Navigate to the location you want to save the file to and enter the desired File name .	When naming the file, do not change the Save as type and do not add a different file extension.
6.	Click on the Save button.	The file is saved to the drive/folder location you selected.
7.	Browse to the File Location and Open the file in Excel.	The file converts the delimited columns into Excel format.
8.	Choose File > Save as... in Excel and save the file as an Excel workbook (.xlsx) file.	The .csv extension changes to .xlsx and the file is now in Excel format, allowing you to take advantage of the formatting options available in Excel.

Reporting Tools – Column Heading Features

Introduction

An alternative to (though less powerful option than) using the control tools found in the Actions button is using a report's column headings to do some basic report customization.

Column Heading Features

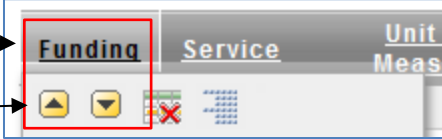

The column headings of an Interactive Report can be used to customize the report using simple sort, filter, and other reporting tools. These tools are not as full-featured as the Reporting Tools found in the Actions button.

Column-specific reporting tools:

- Simple sort – can only sort on one column
- Simple filter – can be used on multiple columns, but only with the 'equal to (=)' operator
- Simple control break – can be used on multiple columns
- Delete column – can be used on multiple columns
- Search – search for a specific item in the column

Simple Sort

Follow the steps in the tables below to do a simple sort.

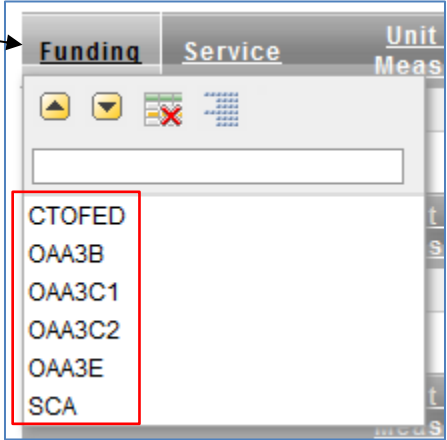
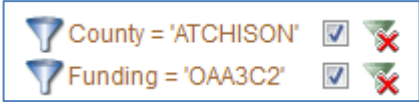

Step	Action	Result
1.	Run the desired Interactive Report.	The Report displays.
2.	Click on the column heading of the column to be sorted.	The column heading drop-down list displays.
	<p>Selected column heading →</p> <p>Ascending/Descending Sort Order icons →</p> 	
3.	<p>Click on the desired sort order</p>  <p>Ascending Descending</p>	The information in the table redisplay, sorted by the column selected.
<p>Note: A simple sort can only be done on one column. Sorting by an additional column will cancel the previous sort. If you wish to sort by more than column, use the Format Sort reporting tool.</p>		

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Reporting Tools – Column Heading Features, continued

Simple Filter

Unlike the simple sort, simple filtering can be done on more than one column. Follow the steps in the tables below to do a simple filter.

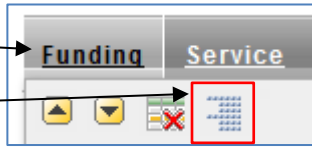


Step	Action	Result
1.	Run the desired Interactive Report.	The Report displays.
2.	Click on the column heading of the column to be filtered.	The column heading drop-down list displays.
	<p>Selected column heading</p> <p>Unduplicated column entries to choose from</p> 	
3.	Click on the item to be used as the filter.	The information in the report is updated, displaying only records that match the filtered column item.
4.	To filter the data on additional columns, repeat steps 1-3.	The amount of information may be reduced further by the additional filter.
	<p>The filter criteria are displayed above the report.</p> 	
5.	Turn filters on and off using the checkbox. <input checked="" type="checkbox"/>	Checked – filter is on Unchecked – filter is off
6.	Permanently remove filters by clicking on the delete icon. 	The filter is deleted.

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Reporting Tools – Column Heading Features, continued

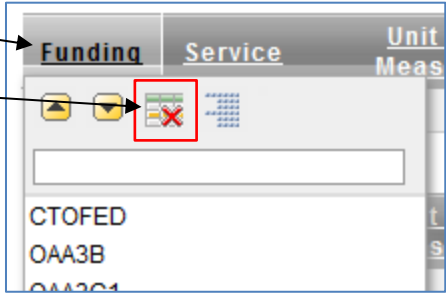
Simple Control Break

Follow the steps in the table below to create a Control Break using a single column.

Step	Action	Result
1.	Run the desired Interactive Report.	The Report displays.
2.	Click on the column heading of the column to use as the Control Break.	The column heading drop-down list displays.
	<p>Selected column heading →</p> <p>Control Break icon →</p> 	
3.	Click on the Control Break icon.	The Control Break is automatically created and the Control Break criteria displays above the report.
		
4.	Delete the Control Break by clicking on the delete icon. 	The Control Break is deleted and the column returns to the report.

Delete a Column

Follow the steps in the table below to delete a column from a report.

Step	Action	Result
1.	Run the desired Interactive Report.	The Report displays.
2.	Click on the column heading of the column to be deleted.	The column heading drop-down list displays.
	<p>Selected column heading →</p> <p>Delete Column icon →</p> 	
3.	Click on the Delete Column icon.	The information in the report redisplay, minus the deleted column.
4.	To delete additional columns, repeat steps 1-3.	The information in the report redisplay, minus the additional deleted column(s).
5.	To bring the column back you must either Reset the report, or use the Actions > Select Columns control tool.	Resetting the report cancels <i>all</i> customizations made to the report.

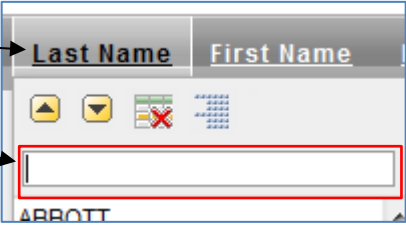
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Reporting Tools – Column Heading Features, continued

Search in a Column

Unlike the main report Search tool, which searches for data in *any* column of a displayed report, the column heading Search tool only searches in the selected column. Use the Search tool to find if an entry exists in the column, and if desired, filter the column by selecting the found entry. This tool is handy when searching for a unique entry such as a person's name, as it avoids the cumbersome task of scrolling through a long list of names.

Follow the steps in the table below to search for a specific entry in a column.

Step	Action	Result
1.	Click on the column heading of the column to be searched.	The column heading drop-down list displays.
	<p>Selected column heading</p> <p>Column Search tool</p>	
2.	Type the desired character string to search for in this column.	The text displays in the Search box, and the list of entries filters as the text is typed.
Note: To filter the report by the column entry found, select the found item.		