FASP Reports
Step-by-Step Guide

OCFS Data Warehouse
Case Management (Build 18)
Reports

CONNECTIONS Training Project
SUNY Training Strategies Group

FASP Reports Step-by-Step Guide
OCFS Data Warehouse Case Management (Build 18) Reports

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Preface

The OCFS Data Warehouse is a repository of data retrieved from CONNECTIONS and the Child Care Review Service (CCRS). The Data Warehouse is updated regularly and can be accessed independently of those systems. The information from the two systems is organized and stored in the Data Warehouse, which makes it available as a read-only file in current point-in-time (snapshot), trend and historical views.

OCFS has designed several Data Warehouse Case Management (Build 18) Reports to provide managers and supervisors with a comprehensive set of reports that help meet their basic operational reporting and planning needs in the CONNECTIONS Case Management system.

The Data Warehouse Case Management (Build 18) Reports are comprised of two report types:

Management Summary Reports	These reports include the word "Summary" in their title, as they are intended to provide users with an overview of a particular business function by using various levels of aggregate information. As a result, managers can evaluate how their organization performed <u>during a specified report period</u>. An example of a Management Summary Report is the "FASP Status Summary" report.
	<u>Target users</u>: Managers and supervisors from Local Districts, Voluntary Agencies, and Regional Offices.
Operational Reports	Reports that do not include the word "Summary" in their title are classified as Operational Reports and provide users with a more detailed, operational view of a specific business function, <u>as of the current date</u>.
	The information contained in these reports is typically at a lower level of detail than the Management Summary Reports. These reports are more tactical and can assist supervisors and managers on a day-to-day basis. An example of an Operational Report is the "FASPs Due" report.
	<u>Target users</u>: Managers and supervisors from Local Districts and Voluntary Agencies.

This document serves as a comprehensive look at the Data Warehouse Case Management (Build 18) FASP Reports. For these reports, Local District users are able to view aggregate FASP information for any Local District, while Voluntary Agency users are able to view aggregate FASP information for any Voluntary Agency. When it comes to detailed FASP information, however, users can only see data for the child welfare cases in which someone at their District or Agency has been assigned a formal role in the FSS.

Report Background

The Family Assessment and Service Plan (FASP) serves a critical function in working with a family. The FASP is a record of past and current family functioning, as well as a record of plans to assist the family in meeting the goals of safety, permanency and well-being. The OCFS Data Warehouse Team has created a series of reports to help supervisors and managers monitor FASP activity and status, including the FASP Status Summary report, the FASPs Due report, the FASPs Due Detail reports, and the FASP Activities Series.

FASP Status Summary

Report Background	The FASP Status Summary report can help supervisors and managers monitor FASPs by providing the status of open FASPs by FASP type (Initial, Comprehensive, or Reassessment) for a particular month. The report can assist in improving the FASP process, promoting its effectiveness, and for resource planning and budgeting.
Report Purpose	Provides Local Districts and Voluntary Agencies with the number and percentage of Initial, Comprehensive, and Reassessment FASPs and their respective statuses for a specific month.
Target Users	Managers and supervisors from Local Districts, Voluntary Agencies, and Regional Offices
Classification	Management report

FASPs Due

Report Background	The FASPs Due report can help supervisors and managers track FASP activity and status by monitoring and assessing the number of outstanding FASPs at a current point-in-time.
Report Purpose	Provides Local Districts with the number and percentage of FASPs that are currently overdue or coming due within 60 days of the current date.
Target Users	Managers and supervisors from Local Districts
Classification	Operational report

FASPs Due Detail (organized by Worker or Stage ID)

Report Background	The FASPs Due Detail reports can help supervisors and managers identify FASP activity in need of attention.
Report Purpose	Provides Local Districts and Voluntary Agencies with a detailed list of FASPs that are currently overdue or coming due within 90 days of the current date.
Target Users	Managers and supervisors from Local Districts and Voluntary Agencies
Classification	Operational report

FASP Activities Series

Report Background	The FASP Activities Series can help supervisors and managers monitor FASP activity at different phases in the submittal-approval process.
Report Purpose	Provides Local Districts and Voluntary Agencies with the number of times FASPs were submitted for approval, rejected by an Approver, and approved by an Approver, as well as the length of time they were in the submittal-approval process.
	There are four reports, displaying FASPs as follows:

- Overdue FASP Activities: FASPs overdue on a specified date.
- Due FASP Activities: FASPs due during a specified date range.
- Current Pending FASP Activities: FASPs currently pending approval.
- Approved FASP Activities: FASPs approved during a specified date range.

Target Users	Managers and supervisors from Local Districts, Voluntary Agencies, and Regional Offices
Classification	Operational reports

FASP Activity Details (available via drill-thru only)

Report Background	The FASP Activity Details report can help supervisors and managers target areas of the FASP submittal-approval process in need of attention.
Report Purpose	Provides Local Districts and Voluntary Agencies with a detailed list of submission, rejection, and approval activities for a selected FASP.
Target Users	Managers and supervisors from Local Districts, Voluntary Agencies, and Regional Offices
Classification	Operational report

Current Pending FASPs – Agency Pending With

Report Background	The Current Pending FASPs – Agency Pending With report can help supervisors and managers determine which agency is next to act on a pending FASP.
Report Purpose	Provides Local Districts and Voluntary Agencies with a list of FASPs in "Pending" status, including FASP Submitter information and the name of the agency with which the FASP is awaiting action.
Target Users	Managers and supervisors from Local Districts, Voluntary Agencies, and Regional Offices
Classification	Operational report

FASPs Due Calendar

Report Background   The FASPs Due Calendar report can help supervisors and managers monitor the completion of FASPs.

Report Purpose   Provides Local Districts and Voluntary Agencies with a chronological list of Not Launched, In Process, and Pending FASPs due during a specified date range.

Target Users   Managers and supervisors from Local Districts and Voluntary Agencies

Classification   Operational report

Data Definitions

FASP Status Summary

Report Purpose	Provides Local Districts and Voluntary Agencies with the number and percentage of Initial, Comprehensive, and Reassessment FASPs and their respective statuses for a specific month.
Prompts	Upon opening the report, users are asked to select one or more values from a list of choices for the following report prompts:

- District/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Local Districts are listed alphabetically by name with ACS under "New York City DSS"; Voluntary Agencies are listed alphabetically by agency code.

- Site Code/Unit Number(s): Select the office Unit codes that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

- Group by: Select whether you want the numbers and percentages for the office Units you selected to be tallied into one overall report or displayed on separate pages.

- Stage type(s): Select the Stage types (CCR, CWS) that you want to include in the report.

- Month/Year: Select a completed month for which you want to view data.

Notes	Not counted in this report are "Plan Amendments", "rejected" FASPs (status REJT), and most "converted" FASPs. However, if a "converted" FASP is part of an open Stage and a subsequent FASP in the Stage was launched during the selected month, the "converted" FASP is counted in the Missed FASPs section of this report.

Data Item	Data Definition
Group by	The organizational level at which data within the report is grouped and displayed.
	If "Group by Agency" is selected at the prompt, data is summarized across all <u>selected</u> Units and displayed on one report page.
	If "Group by Unit" is selected at the prompt, data is displayed for each <u>selected</u> Unit on a separate report page. For Local Districts, the FASP is counted under the Unit of the Case Manager. The sum of the numbers for each Unit in the "Group by Unit" report will total the numbers in the "Group by Agency" report. For Voluntary Agencies, the FASP is counted once under the Unit of each worker that has a role. The sum of the numbers for each Unit in the "Group by Unit" report may not total the numbers in the "Group by Agency" report.

Data Item	Data Definition
LDSS/Agency Name	The name and 3-digit agency code for the Local District or Voluntary Agency selected at the report prompt. (ACS is listed alphabetically as "New York City DSS".) This report can be run for only one District or Agency at a time.
	Since this report provides only aggregate data, Local District staff can run this report for any other Local District for comparative purposes. Similarly, Voluntary Agency staff can run this report for any other Voluntary Agency.
Site Code/ Unit Number	The office Units selected at the report prompt. The drop-down list includes only the Units for the selected District/Agency that have FASPs on their caseload.
Stage Type	The Stage types selected at the report prompt. A FASP can only have a Stage type of CWS (Child Welfare Services) or CCR (Child Case Record). The user may select one or both Stage types for inclusion in the report.
Report Period	The month and year selected at the report prompt. This report can be run only for completed months since November 2005.
Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed at the end of each month.
Report Grand Total – Open FASPs	The total number of Initial, Comprehensive, and Reassessment FASPs that were already open at the start of the Report Period or opened during the Report Period. The term "open FASP" refers to a FASP with one of the following FASP statuses:
	• In Process (PROC)
	• Pending Approval (PEND)
	• Approved (APRV)
	The "Report Grand Total" reflects the totals for <u>all of the selected Units</u> in the report, even if Units are displayed on separate pages.
	The "% of Grand" column uses this number as the denominator when calculating percentages.

Data Item	Data Definition
Total Open FASPs	The number of each type of FASP (Initial, Comprehensive, and Reassessment) that was already open at the start of the Report Period or opened during the Report Period.
	Adding together the "Total Open FASPs" counts from the Initial, Comprehensive, and Reassessment sections will equal the "Report Grand Total." The "% of Total Open" column uses this number as the denominator when calculating percentages.
	DATA SPECS (Existing at start of month): Data as of Date equals the last day of the month *prior* to the month selected; FASP Launch Date is *prior* to the month selected; FASP Status is In Process or Pending.
	DATA SPECS (Opened during month): Data as of Date equals the last day of the month selected; FASP Launch Date is during the month selected.
Total Open FASPs w/ No CID	The number of each type of open FASP (Initial, Comprehensive, and Reassessment) for which no 'official' Case Initiation Date exists in CONNECTIONS. For example, if a worker opens an FSI during an undetermined investigation and checks "Application signed by CPS Worker", the FSI can be progressed to an FSS, and the worker can launch the Initial FASP before any CID trigger dates have been entered. An interim CID, based on the date of the FSS opening, is used by the system until the actual CID is set based on the CID trigger dates.
	This is a subset of the "Total Open FASPs" category.
	DATA SPECS (At start of month): Data as of Date equals the last day of the month *prior* to the month selected; FASP Launch Date is *prior* to the month selected; FASP Status is In Process or Pending; CID is null/blank.
	DATA SPECS (At end of month): Data as of Date equals the last day of the month selected; FASP Launch Date is during the month selected; CID is null/blank.
Total Open FASPs w/ Approvals Due (throughout month)	The number of each type of open FASP (Initial, Comprehensive, and Reassessment) with a due date during the Report Period, <u>regardless of whether the FASP was approved or not</u>.
	This is a subset of the "Total Open FASPs" category.
	DATA SPECS: Data as of Date equals the last day of the month selected; FASP Status is *not equal to* Not Launched; FASP Due Date is during the month selected; FASP Approval Date is on or after the first of the month selected (approved) or null/blank (not approved).
Total Open FASPs Approved On-Time (throughout month)	The number of each type of open FASP (Initial, Comprehensive, and Reassessment) that had a due date during the Report Period <u>and</u> was approved on or before the due date.
	This is a subset of the "Total Open FASPs" category, as well as the "Total Open FASPs w/ Approvals Due" category.
	DATA SPECS: Data as of Date equals the last day of the month selected; FASP Due Date is during the month selected; FASP Approval Date is during the month selected and not later than the FASP Due Date.
Percent of On-Time Approvals of Open FASPs	The percent of open FASPs with approvals due during the Report Period that were approved on time:
	$$\frac{\text{Total Open FASPs Approved On-Time} \times 100}{\text{Total Open FASPs w/ Approvals Due}}$$

Data Item	Data Definition
Total Open FASPs Overdue (by end of month)	The number of each type of open FASP that was either declared late or dropped into Template status during the Report Period: • "Late FASPs" are open FASPs with a due date during the Report Period <u>and</u> either approved after the approval due date or not yet approved. The FASP must have been declared late during the Report Period to be counted. • "Templated FASPs w/ next scheduled FASP in process" are open FASPs that were dropped into an MSWord template by CONNECTIONS when the next-scheduled FASP was launched. The FASP must have been templated during the Report Period to be counted. • "Templated FASPs w/ next scheduled FASP not started" are open FASPs that were dropped into an MSWord template by CONNECTIONS after 12 months of inactivity <u>and</u> the next-scheduled FASP was not launched. The FASP must have been templated during the Report Period to be counted. This is a subset of the "Total Open FASPs" category.
Missed FASPs	The number of each type of FASP that has a status of "Not Launched" (NLNC) during the Report Period, <u>and</u> has a next-scheduled FASP launched with a status of "In Process" (PROC), "Pending Approval" (PEND), or "Approved" (APRV) during the Report Period. Since "Missed FASPs" have never been launched, they are not a subset of the "Total Open FASPs" category. Therefore, percentages are not calculated. DATA SPECS: Data as of Date equals the last day of the month selected; FASP Status equals Missed; FASP Status Effective Date is during the month selected.

FASPs Due

Report Purpose	Provides Local Districts with the number and percentage of FASPs that are currently overdue or coming due within 60 days of the current date.
Prompts	Upon opening the report, users are asked to select one or more values from a list of choices for the following report prompts:

- District/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Local Districts are listed alphabetically by name with ACS under "New York City DSS"; Voluntary Agencies are listed alphabetically by agency code.

- Site Code/Unit Number(s): Select the office Unit codes that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

- Group by: Select whether you want the numbers and percentages for the office Units you selected to be tallied into one overall report or displayed on separate pages.

- Stage type(s): Select the Stage types (CCR, CWS) that you want to include in the report.

Notes	Not counted in this report are "Plan Amendments", "Rejected" FASPs (status REJT), and most "converted" FASPs. However, if a "converted" FASP is part of an open Stage and no subsequent FASP in the Stage has been launched, the "converted" FASP will be counted in the Total FASPs Due and Total FASPs Overdue sections of this report.

Data Item	Data Definition
Group by	The organizational level at which data within the report is grouped and displayed.
	If "Group by Agency" is selected at the prompt, data is summarized across all <u>selected</u> Units and displayed on one report page.
	If "Group by Unit" is selected at the prompt, data is displayed for each <u>selected</u> Unit on a separate report page. For Local Districts, the FASP is counted under the Unit of the Case Manager. The sum of the numbers for each Unit in the "Group by Unit" report will total the numbers in the "Group by Agency" report. For Voluntary Agencies, the FASP is counted once under the Unit of each worker that has a role. The sum of the numbers for each Unit in the "Group by Unit" report may not total the numbers in the "Group by Agency" report.

Data Item	Data Definition
LDSS/Agency Name	The name and 3-digit agency code for the Local District selected at the report prompt. (ACS is listed alphabetically as "New York City DSS".) This report can be run for only one District or Agency at a time.
	The FASPs Due report is not available to Voluntary Agencies because the FASP is 'owned' by the Case Manager at the Local District, who is ultimately responsible for the timeliness of the FASP. (Voluntary Agency staff interested in overdue and coming-due FASP data can get detailed information from the FASPs Due Detail reports.)
	Since this report provides only aggregate data, Local District staff can run this report for any other Local District for comparative purposes.
Site Code/ Unit Number	The office Units selected at the report prompt. The drop-down list includes only the Units for the selected District/Agency that have FASPs on their caseload.
Stage Type	The Stage types selected at the report prompt. A FASP can only have a Stage type of CWS (Child Welfare Services) or CCR (Child Case Record). The user may select one or both Stage types for inclusion in the report.
Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed each morning, so data is accurate as of "yesterday".
Total FASPs Due	The total number of each type of FASP (Initial, Comprehensive, and Reassessment) overdue as of the "Data as of Date", or coming due within 60 days of the "Data as of Date".
	The "% of Total Due" column uses this number as the denominator when calculating percentages.
Total FASPs Overdue	The total number of each type of FASP (Initial, Comprehensive, and Reassessment) with a status of "In Process" (PROC), "Pending Approval" (PEND), or "Not Launched" (NLNC) <u>and</u> a FASP due date prior to the "Data as of Date".
	There is also a breakdown based on the number of days overdue:
	• By 1-7 days
	• By 8-14 days
	• By 15-21 days
	• By 22-30 days
	• By 31-60 days
	• By 61-90 days
	• By 90+ days
	The "% of Total Overdue" column uses these numbers as the numerator when calculating percentages.

Data Item	Data Definition
Total FASPs Coming Due	The total number of each type of FASP (Initial, Comprehensive, and Reassessment) with a status of "In Process" (PROC), "Pending Approval" (PEND), or "Not Launched" (NLNC) <u>and</u> a FASP due date no more than 60 days after the "Data as of Date".
	There is also a breakdown based on the number of days coming due:
	• Within 0-7 days*
	• Within 8-14 days
	• Within 15-21 days
	• Within 22-30 days
	• Within 31-60 days
	The "% of Total Coming Due" column uses these numbers as the numerator when calculating percentages.
	*FASPs coming due within 0 days are due on the Data as of Date.

FASPs Due Detail (organized by Worker or Stage ID)

Report Purpose   Provides Local Districts and Voluntary Agencies with a detailed list of FASPs that are currently overdue or coming due within 90 days of the current date.

There are two versions of this report. Each contains the same data, but is organized in a different manner:

- The "**organized by Worker**" report is ordered alphabetically by worker name. All FASPs belonging to the same worker are grouped together. FASPs may be listed multiple times throughout the report – once for each worker that has a role in the stage. Only workers from the District/Agency selected at the prompt that have a role in the stage are included in the report. The sort order for the data in this report is as follows: Worker Name, Worker Role, Worker Agency, Case ID/Name, Stage ID, and FASP Due Date.

- The "**organized by Stage ID**" report is ordered by Case ID/Name and Stage ID. All FASPs with the same Stage ID are grouped together. Workers from all Districts/Agencies that have a role in the stage are included in the report. The sort order for the data in this report is as follows: Case ID/Name, Stage ID, FASP ID, Worker Agency, and Worker Role.

Prompts   Upon opening the report, users are asked to select one or more values from a list of choices for the following report prompts:

- District/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Local Districts are listed alphabetically by name with ACS under "New York City DSS"; Voluntary Agencies are listed alphabetically by agency code.

- Site Code/Unit Number(s): Select the office Unit codes that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

- Stage type(s): Select the Stage types (CCR, CWS) that you want to include in the report.

Notes   Not counted in this report are "Plan Amendments", "rejected" FASPs (status REJT), and most "converted" FASPs. However, if a "converted" FASP is part of an open Stage and no subsequent FASP in the Stage has been launched, the "converted" FASP will be included in the report list. The "converted" FASP is removed from the report only after the Stage is closed or a subsequent FASP is launched.

Data Item	Data Definition
LDSS/Agency Name	The name and 3-digit agency code for the Local District or Voluntary Agency selected at the report prompt. (ACS is listed alphabetically as "New York City DSS".) This report can be run for only one District or Agency at a time.
	Since this report provides detailed information, Local District staff must run this report for their own District, and Voluntary Agency staff must run this report for their own Agency.
Site Code/ Unit Number	The office Units selected at the report prompt. The drop-down list includes all the Units for the selected District/Agency, not just those Units with FASPs on their caseload.
Stage Type	The Stage types selected at the report prompt. A FASP can only have a Stage type of CWS (Child Welfare Services) or CCR (Child Case Record). The user may select one or both Stage types for inclusion in the report.
Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed each morning, so data is accurate as of "yesterday".
Worker Name	The name of each in-assigned worker from the selected District/Agency that has a role in the Stage.
Worker Role	The role that corresponds to the worker. Values may include: • FSS Case Manager • FSS Case Planner • FSS Case Worker • FSS CPS Worker / Monitor
Worker Agency	The 3-digit agency code corresponding to the worker.
Worker Site Code/Unit	The 3-digit site code and 3-digit office Unit to which the worker is in-assigned.
!	An exclamation point (!) next to a Case Name denotes that the case is marked as 'sensitive' in CONNECTIONS.
Case ID/Name	The Case ID and Case Name associated with the FASP.
Stage ID	The Family Services Stage ID associated with the FASP. There may be several FASPs listed under one Stage ID, although only one can be "In Process" (PROC) or "Pending" (PEND) at a time.
Stage Type	The Stage types associated with the FASP. The value is either CWS (Child Welfare Services) or CCR (Child Case Record).
Stage Start Date	The date the Family Services Stage was opened in CONNECTIONS.

Data Item	Data Definition
CID	The Case Initiation Date of the Family Services case, which takes on the value of the earliest of four possible dates: • Date of Application for Services • Date of CPS Indication • Date of Court Order • Date of Placement
FASP Type	A coded value representing the type of FASP that is coming due or overdue: • INI (Initial) • CMP (Comprehensive) • REA (Reassessment)
FASP Status	The status of the coming-due or overdue FASP on the "Data as of Date". Values may include: • Not Launched • In Process • Pending Only one FASP can be "In Process" (PROC) or "Pending" (PEND) at a time for a particular Stage ID, although more than one can be in a "Not Launched" status (NLNC).

FASP Due Date	The date the FASP is/was due to be approved by the Local District, based on the following guidelines:
	• Initial FASPs are due
	  ° 7 days after the CID, if the CID is the date of CPS indication
	  ° 30 days after the CID, if the CID is the date of placement, date of court order, or date of application for services
	• Comprehensive FASPs are due 90 days after the CID
	• Reassessment FASPs are due 210 days after the CID and every 6 months thereafter
	
	This date comes directly from the CONNECTIONS application.

FASP Days Due	The number of days between the "FASP Due Date" and the "Data as of Date". If the number is negative, the FASP is overdue; if the number is positive, the FASP is coming due. A value of 0 indicates that the FASP is due on the "Data as of Date."

FASP Activities Series

Report Purpose
Provides Local Districts and Voluntary Agencies with the number of times FASPs were submitted for approval, rejected by an Approver, and approved by an Approver, as well as the length of time they were in the submittal-approval process.

There are four reports, displaying FASPs as follows:

- Overdue FASP Activities: FASPs overdue on a specified date.

- Due FASP Activities: FASPs due during a specified date range.

- Current Pending FASP Activities: FASPs currently pending approval.

- Approved FASP Activities: FASPs approved during a specified date range.

Prompts
Upon opening the reports, users are asked to select one or more values from a list of choices for the following report prompts:

- Districts/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Local Districts are listed alphabetically by name with ACS under "New York City DSS"; Voluntary Agencies are listed alphabetically by agency code. Only Local Districts and Voluntary Agencies with FASP submissions appear on the prompt list.

- Site Code/Unit Number(s): Select the office Unit codes that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

- Stage Type(s): Select the Stage types (CCR, CWS) that you want to include in the report.

- Date: Select a date as follows:
  - o Overdue FASP Activities: Select one date to view FASPs that were overdue on that day.
  - o Due FASP Activities and Approved FASP Activities: Select a start and end date to view FASPs with a due date during that date range.
  - o Current Pending FASP Activities: No date prompt.

Notes
These reports focus on FASP submitters and approvers. If an agency did not submit a FASP and is not listed as an Approver on the FASP, the FASP will not appear on the agency's report – even if the agency has a worker with a role in the Stage.

FASPs must have been launched and have at least one submission to be included in this report. These reports do not include FASPs that were submitted for approval for the first time before January 1, 2006. Plan

Amendments are not included in these reports. The sort order for the data in this report is as follows: Case ID/Name, Stage ID, and FASP Due Date.

Data Item	Data Definition
LDSS/Agency Name	The name and 3-digit agency code for the Local District or Voluntary Agency selected at the report prompt. (ACS is listed alphabetically as "New York City DSS".) This report can be run for only one District or Agency at a time. Since this report provides detailed information, Local District staff must run this report for their own District, and Voluntary Agency staff must run this report for their own Agency.
Site Code/Unit Number	The office Units selected at the report prompt. The drop-down list includes only the Units for the selected District/Agency that have FASPs on their caseload.
Stage Type	The Stage types selected at the report prompt. A FASP can only have a Stage type of CWS (Child Welfare Services) or CCR (Child Case Record). The user may select one or both Stage types for inclusion in the report.
Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed each morning, so data is accurate as of "yesterday".
Case ID/Name	The Case ID and Case Name associated with the FASP.
!	An exclamation point (!) next to a Case Name denotes that the case is marked as 'sensitive' in CONNECTIONS.
Stage ID	The Family Services Stage ID associated with the FASP. There may be several FASPs listed under one Stage ID, although only one can be "In Process" (PROC) or "Pending" (PEND) at a time.
Click for details	A hyperlink, which will take users to the FASP Activity Details report for a detailed list of submission, rejection, and approval activities for a particular FASP.
FASP Type	A coded value representing the type of FASP: • INI (Initial) • CMP (Comprehensive) • REA (Reassessment)

Data Item	Data Definition

FASP Due Date	The date the FASP is/was due to be approved by the Local District, based on the following guidelines:
	• Initial FASPs are due
	   ° 7 days after the CID, if the CID is the date of CPS indication
	   ° 30 days after the CID, if the CID is the date of placement, date of court order, or date of application for services
	• Comprehensive FASPs are due 90 days after the CID
	• Reassessment FASPs are due 210 days after the CID and every 6 months thereafter
	This date comes directly from the CONNECTIONS application.

First Submission Date	The date the FASP was submitted for approval for the first time since its launch.
Final Approval Date	The date the FASP received final approval from the Local District. This field will be blank if the final approval hasn't been received. This column does not appear in the Current Pending FASP Activities report because, by definition, FASPs that are pending approval do not have a Final Approval Date.
FASP Status	The status of the FASP on the "Data as of Date". Values may include: • TEMP (Template Status) • PROC (In Process) • PEND (Pending Approval) • APRV (Approved) This column does not appear in the Current Pending FASP Activities report (where FASP Status is always PEND) or the Approved FASP Activities report (where FASP Status is always APRV).
# Submissions	The number of times the FASP has been submitted (or resubmitted) by the Case Planner or Case Manager for approval. Each submission event is counted only once, regardless of how many people the FASP has been submitted to. The count is based on activity through the Data as of Date. Example 1: A Case Planner submits a FASP to the Unit Approver, Case Manager, and a DRS worker. *It counts as one submission.* Example 2: A Case Planner submits a FASP to the Unit Approver and Case Manager. The Case Manager subsequently adds a DRS worker as an approver. *The Case Manager-DRS worker connection does not count as a submission because it is viewed as an extension of the approval process.*

Data Item	Data Definition
# Rejections	The number of times the FASP has been rejected by someone involved in the approval process. The count is based on activity through the Data as of Date.
	<u>Example</u>: A Case Planner submits a FASP to the Unit Approver and Case Manager. The Unit Approver rejects it. *It counts as one rejection, and the Case Manager's approval decision is invalidated by CONNECTIONS.*
# Approvals	The number of times the FASP has been approved by someone involved in the approval process. Each approval is counted once. The count is based on activity through the Data as of Date.
	<u>Example 1</u>: A Case Planner submits a FASP to the Unit Approver, Case Manager, and a DRS worker. The Unit Approver and DRS worker approve it, but the Case Manager rejects it. *It counts as two approvals (and one rejection).*
	<u>Example 2</u>: A Case Planner submits a FASP to the Unit Approver and Case Manager. The Unit Approver approves the FASP, but – before the Case Manager can act on the FASP – the Submitter invalidates (i.e., pulls back) the FASP submission. *The Unit Approver's approval is counted as an approval (even though it is invalidated by CONNECTIONS).*
# Approvals In Process	A value greater than 0 indicates that the FASP is currently pending approval (status=PEND) by one or more Approvers. A value equal to 0 indicates that the FASP is in process (PROC) or has already been approved (APRV); it is not awaiting action from an Approver. The count is based on activity through the Data as of Date.
	This column does not appear in the Approved FASP Activities report because, by definition, FASPs that have received a final approval do not have any Approvals In Process.
Duration in Days	<u>For FASPs with a status of Approved (APRV):</u> The duration is the number of days between the First Submission Date and the Final Approval Date. A duration of 0 means the first submission and final approval occurred on the same day.
	<u>For FASPs with a status of In Process (PROC) or Pending Approval (PEND):</u> The duration is the number of days between the First Submission Date and the Data as of Date.

Report Purpose	Provides Local Districts and Voluntary Agencies with a detailed list of submission, rejection, and approval activities for a selected FASP.
Notes	This is a drill-thru report, available only by running one of the reports in the FASP Activities Series and clicking on the "details" hyperlink corresponding to a particular FASP. The report is in chronological order by FASP Activity Date.

Data Item	Data Definition
Case ID/Name	The Case ID and Case Name associated with the FASP.
Sensitive Case	A value of 'Yes' denotes the case is marked as 'sensitive' in CONNECTIONS.
Stage ID	The Family Services Stage ID associated with the FASP. There may be several FASPs listed under one Stage ID, although only one can be "In Process" (PROC) or "Pending" (PEND) at a time.
FASP Type	A coded value representing the type of FASP: • INI (Initial) • CMP (Comprehensive) • REA (Reassessment)

FASP Due Date	The date the FASP is/was due to be approved by the Local District, based on the following guidelines:
	• Initial FASPs are due
	  ◦ 7 days after the CID, if the CID is the date of CPS indication
	  ◦ 30 days after the CID, if the CID is the date of placement, date of court order, or date of application for services
	• Comprehensive FASPs are due 90 days after the CID
	• Reassessment FASPs are due 210 days after the CID and every 6 months thereafter
	This date comes directly from the CONNECTIONS application.

Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed each morning, so data is accurate as of "yesterday".

Data Item	Data Definition
Approval Status	The FASP activity that took place on the FASP Activity Date. Submission rows (First Submission/Submitted) are shaded in blue in the report. Values may include: • <u>First Submission</u>: The FASP was submitted for approval for the first time since it was launched. • <u>Submitted</u>: The FASP was resubmitted for approval. • <u>Invalidated</u>: This approval decision was invalidated by the actions of the Submitter. An "Invalidated" row displays for each Approver that the FASP was submitted to. Note: If a FASP was approved prior to being invalidated, it is labeled as "Invalidated" (not "Approved") in this report, even though it is counted as an approval in the "# Approvals" column of the FASP Activities Series reports. • <u>Approved</u>: The FASP was approved. Note: If a FASP was approved prior to being invalidated, it labeled as "Invalidated" (not "Approved") in this report, even though it is counted as an approval in the "# Approvals" column of the FASP Activities Series reports. • <u>Rejected</u>: The FASP was rejected. • <u>Other</u>: This approval decision was not needed because an earlier Approver rejected the FASP. • <u>Pending</u>: The FASP is waiting for an approval decision.
FASP Activity Date	The date the FASP activity listed in the Approval Status column was completed. The FASP Activity Date will be blank if the Approval Status is "Other" or "Pending", and it will display the date that the FASP was invalidated if the Approval Status is "Invalidated". FASP activities are in chronological order by FASP Activity Date.
Worker Agency	The agency name of the staff member that completed the FASP activity listed in the Approval Status column. The Worker Agency will be blank when the Approval Status is "Invalidated", "Other", or "Pending" because there has been no completed FASP activity by the worker.
Worker Unit	The site code and unit number of the in-assigned staff member that completed the FASP activity listed in the Approval Status column. The Worker Unit will be blank when the Approval Status is "Invalidated", "Other", or "Pending" because there has been no completed FASP activity by the worker.
Worker Name	The name of the staff member associated with the FASP activity listed in the Approval Status column.

Current Pending FASPs – Agency Pending With

Report Background The Current Pending FASPs – Agency Pending With report can help supervisors and managers determine which agency is next to act on a pending FASP.

Report Purpose Provides Local Districts and Voluntary Agencies with a list of FASPs in "Pending" status, including FASP Submitter information and the name of the agency with which the FASP is awaiting action.

Target Users Managers and supervisors from Local Districts and Voluntary Agencies

Classification Operational report

Prompts Upon opening the reports, users are asked to select one or more values from a list of choices for the following report prompts:

- Districts/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Local Districts are listed alphabetically by name with ACS under "New York City DSS"; Voluntary Agencies are listed alphabetically by agency code. Only Local Districts and Voluntary Agencies with FASP submissions appear on the prompt list.

- Site Code/Unit Number(s): Select the office Unit codes that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

- Stage Type(s): Select the Stage types (CCR, CWS) that you want to include in the report.

Notes FASPs must have been launched and have at least one submission to be included in this report. This report does not include FASPs that were submitted for approval for the first time before January 1, 2006. Plan Amendments are not included in the report. The report is sorted by Case ID/Name.

Data Item	Data Definition
LDSS/Agency Name	The name and 3-digit agency code for the Local District or Voluntary Agency selected at the report prompt. (ACS is listed alphabetically as "New York City DSS".) This report can be run for only one District or Agency at a time.
	Since this report provides detailed information, Local District staff must run this report for their own District, and Voluntary Agency staff must run this report for their own Agency.
Site Code/Unit Number	The office Units selected at the report prompt. The drop-down list includes only the Units for the selected District/Agency that have FASPs on their caseload.

Data Item	Data Definition
Stage Type	The Stage types selected at the report prompt. A FASP can only have a Stage type of CWS (Child Welfare Services) or CCR (Child Case Record). The user may select one or both Stage types for inclusion in the report.
Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed each morning, so data is accurate as of "yesterday".
Case ID/Name	The Case ID and Case Name associated with the FASP.
!	An exclamation point (!) next to a Case Name denotes that the case is marked as 'sensitive' in CONNECTIONS.
Stage ID	The Family Services Stage ID associated with the FASP. There may be several FASPs listed under one Stage ID, although only one can be "In Process" (PROC) or "Pending" (PEND) at a time.
Click for details	A hyperlink, which will take users to the FASP Activity Details report for a detailed list of submission, rejection, and approval activities for a particular FASP.
FASP Type	A coded value representing the type of FASP: • INI (Initial) • CMP (Comprehensive) • REA (Reassessment)

FASP Due Date	The date the FASP is/was due to be approved by the Local District, based on the following guidelines:
	• Initial FASPs are due
	  ° 7 days after the CID, if the CID is the date of CPS indication
	  ° 30 days after the CID, if the CID is the date of placement, date of court order, or date of application for services
	• Comprehensive FASPs are due 90 days after the CID
	• Reassessment FASPs are due 210 days after the CID and every 6 months thereafter
	This date comes directly from the CONNECTIONS application.

First Submission Date	The date the FASP was submitted for approval for the first time since its launch.
Submitter Agency	The name and 3-digit agency code for the Local District or Voluntary Agency that submitted the FASP. The VA version of the report only displays FASPs where the Submitter Agency is the agency selected at the District/Agency prompt.

Data Item	Data Definition
Submitter Site - Unit	The Site Code and Unit Number corresponding to the Local District or Voluntary Agency that submitted the FASP.
Agency Pending With	The name and 3-digit agency code for the Local District or Voluntary Agency that is next to act on the pending FASP.

FASPs Due Calendar

Report Background	The FASPs Due Calendar report can help supervisors and managers monitor the completion of FASPs.
Report Purpose	Provides Local Districts and Voluntary Agencies with a chronological list of Not Launched, In Process, and Pending FASPs due during a specified date range.
Target Users	Managers and supervisors from Local Districts and Voluntary Agencies
Classification	Operational report
Prompts	Upon opening the report, users are asked to select one or more values from a list of choices for the following report prompts:

- District/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Local Districts are listed alphabetically by name with ACS under "New York City DSS"; Voluntary Agencies are listed alphabetically by agency code.

- Site Code/Unit Number(s): Select the office Unit codes that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

- Stage type(s): Select the Stage types (CCR, CWS) that you want to include in the report.

- Date: Select a start and end date to view FASPs with a due date during that date range.

Notes	The report can be run for historical and future dates (within the next 240 days). Plan Amendments and Approved FASPs are not included.

Data Item	Data Definition
LDSS/Agency Name	The name and 3-digit agency code for the Local District or Voluntary Agency selected at the report prompt. (ACS is listed alphabetically as "New York City DSS".) This report can be run for only one District or Agency at a time. Since this report provides detailed information, Local District staff must run this report for their own District, and Voluntary Agency staff must run this report for their own Agency.
Site Code/ Unit Number	The office Units selected at the report prompt. The drop-down list includes all the Units for the selected District/Agency, not just those Units with FASPs on their caseload.
Stage Type	The Stage types selected at the report prompt. A FASP can only have a Stage type of CWS (Child Welfare Services) or CCR (Child Case Record). The user may select one or both Stage types for inclusion in the report.

Data Item	Data Definition
Report Date	The date on which the report was run.
Data as of Date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was retrieved from CONNECTIONS. Data for this report is refreshed each morning, so data is accurate as of "yesterday".
Month/Year	The month and year associated with the due FASPs. The values are based on the start/end dates selected at the report prompt.
FASP Due Date	The date the FASP is/was due to be approved by the Local District, based on the following guidelines: • Initial FASPs are due 　° 7 days after the CID, if the CID is the date of CPS indication 　° 30 days after the CID, if the CID is the date of placement, date of court order, or date of application for services • Comprehensive FASPs are due 90 days after the CID • Reassessment FASPs are due 210 days after the CID and every 6 months thereafter This date comes directly from the CONNECTIONS application.
Case ID/Name	The Case ID and Case Name associated with the due FASP.
FASP Type	A coded value representing the type of FASP that is due: • INI (Initial) • CMP (Comprehensive) • REA (Reassessment)
FASP Status	The status of the due FASP on the "Data as of Date". Values may include: • Not Launched • In Process • Pending
Worker	The name of each in-assigned worker from the selected District/Agency that has a role in the Stage.
Worker Role	The role that corresponds to the worker. Values may include: • FSS Case Manager • FSS Case Planner • FSS Case Worker • FSS CPS Worker / Monitor

Accessing the Reports

The Data Warehouse Case Management reports are only available through the ReportNet environment, which users will enter via an Internet URL (web address). They are not available directly from the CONNECTIONS or CCRS systems. Users must have access to CONNECTIONS and the OCFS Data Warehouse to view these reports.

Those who already have access to the OCFS Data Warehouse can follow the instructions below to access the reports. Those who do not have access to the OCFS Data Warehouse should visit the Data Warehouse page on the CONNECTIONS Intranet site for instructions on requesting access to these reports and the Cognos ReportNet environment.

Logging into ReportNet

1. Double-click on the **Internet Explorer** icon on your local desktop.

2. In the Address window at the top of the screen, type the appropriate web address (see below), and press **Enter** on your keyboard. If you have a **"pop-up blocker"** turned on, you will need to turn it off.

   - Local Districts, OCFS State Staff, and Voluntary Agency Staff that are not NIS or SSL/VPN
     http://htptda0a1aspcog/crn or **http://172.16.98.26/crn** (If you use the latter web address, you may be asked to fill-out a login screen with your User ID and NT password to proceed.)

   - NIS Voluntary Agency Staff
     http://cognos.otda.state.nyenet/crn (Make sure your LAN Admin has completed the "NIS Agency Server Set-up" process posted on the Data Warehouse page of the CONN Intranet site.)

   - SSL/VPN Voluntary Agency Staff
     https://rc1.oft.state.ny.us/ocfs (Make sure your LAN Admin has followed the "SSL VPN Request for Cognos ReportNet Access" instructions posted on the Data Warehouse page of the CONN Intranet site to submit the OCFS-4827 form.)

3. If a **confidentiality warning** appears, read it and click "I Accept."

4. You should now be at the **Cognos ReportNet welcome screen**.

Note: If you do not see the Cognos ReportNet welcome screen, you have not been granted access to the Cognos ReportNet environment. Please e-mail to the Data Warehouse Team at *data.warehouse@ocfs.state.ny.us* with your full name and NT UserID, and cc your Director on the e-mail.

Adding Cognos ReportNet to your Internet "Favorites"

1. With the Cognos ReportNet welcome screen showing, click on **Favorites** from the menus at the top of the Internet Explorer screen.

2. Select **Add to Favorites** from the drop-down list.

3. In the Add Favorite dialog box, change the text in the **Name** area to "ReportNet Login," and click **OK**.

4. The next time you want to access Cognos ReportNet, open Internet Explorer, click on Favorites from the menus, and select "ReportNet Login" from the drop-down list.
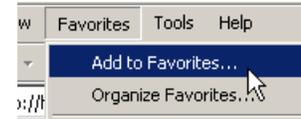
Running Pre-defined User Reports

All pre-defined user reports for the OCFS Data Warehouse are located in the Public Folders area of ReportNet. Every time you open a pre-defined report and complete the report prompts, data from the latest Data Warehouse refresh is loaded into the report. There is a "Data as of Date" in the header of each report to let you know when the last refresh occurred.

1. From the Cognos ReportNet welcome screen, click once on the **Public Folders** tab.

2. Click once on the **"OCFS DW" folder name** that contains the subject matter of the reports you are interested in viewing. For example, the folder named **OCFS DW - FASP Reports** contains pre-defined FASP reports.

You may see folders for other OCFS and OTDA projects on the Public Folders list. Only folders beginning with "OCFS DW" relate to the OCFS Data Warehouse.
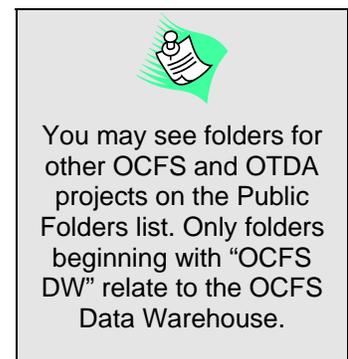
3. Click once on the appropriate **folder name**, depending on whether you work for a Local District, Regional Office, or Voluntary Agency. Separate folders have been set-up for Local District staff and Voluntary Agency staff, although the reports within the folders function in exactly the same way. You will only see the Public Folders that you have been granted access to use. For example, Local District staff may not see the "Voluntary Agencies" folder.

4. Click once on any **report name** to run the report. (Reports have the symbol ⬛▸ next to them.)

Local District FASP Report List   Voluntary Agency FASP Report List
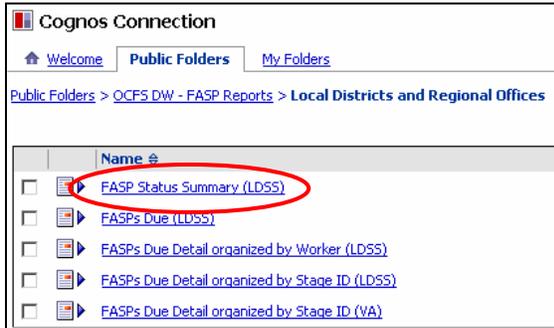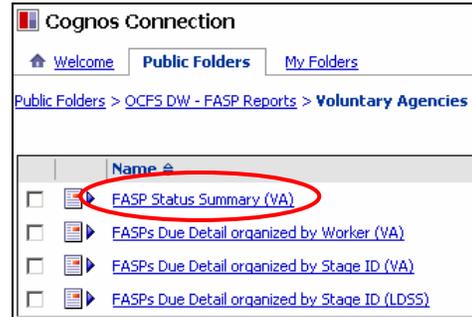
5. When the report prompt appears, make your selection(s) and click the **Next button** at the bottom of the screen. You may need to scroll downward to see the Next button. Some prompts allow you to make multiple selections by holding down the Control key on your keyboard or by using the Select All option underneath the prompt window.

Pre-defined reports can be run for only one District or Agency at a time. To view data for more than one District or Agency, you need to run the report multiple times.

6. Continue filling-out the report prompts until the Next button no longer appears, which means that you have reached the last prompt for the report.

7. Once you have completed all the report prompts, click the **Finish button** to run the report. A spinning cube will appear on the screen as your report processes, and the report will eventually display in the Report Viewer.
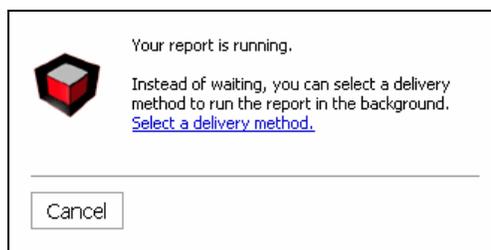
Re-Prompting Reports

To re-run the same report and select different information at the prompts, click once on the **Run button** at the top of the Report Viewer screen. Do not use the Back button on the Internet Explorer toolbar. [See Appendix C for more information on the Report Viewer toolbar.]

Changing Your Report View – HTML, PDF, Excel format

All pre-defined user reports open in HTML format. Once the report is open on the screen, you can use the **toolbar buttons** at the top of the Report Viewer screen to change the format of your report to PDF or Excel format. [See Appendix C for more information on the Report Viewer toolbar.]

Returning to the Pre-defined Report List

To close a report and return to the pre-defined report list in the Public Folders, click once on **Return** in the upper right corner of the Report Viewer screen. Do not use the Back button on the Internet Explorer toolbar. [See Appendix C for more information on the Report Viewer toolbar.]

Saving Reports and Report Data

Reports can be saved in a variety of different ways in ReportNet: (1) save the report to the My Folders area to maintain you prompt values and refresh automatically when opened; (2) save the report as a static report view to the My Folders area; or (3) save the report as a static PDF, Excel, or HTML file to your local computer.

Saving a Report to Maintain Prompt Values

A pre-defined report can be saved, so that it maintains the prompt values and refreshes with the latest data when opened. This allows users to avoid completing the report prompts when the report is run.

See Appendix A for more information on the Public Folders and My Folders toolbars.

1. Locate the report you want to save in the **Public Folders**.

2. Place a **check mark** in the box to the left of the report name.

Public Folders > OCFS DW - FASP Reports > **Local Districts and Regional Offices**

		Name ⬘
☐		FASP Status Summary (LDSS)
☐		FASPs Due (LDSS)
☑		FASPs Due Detail organized by Worker (LDSS)
☐		FASPs Due Detail organized by Stage ID (LDSS)
☐		FASPs Due Detail organized by Stage ID (VA)

3. Click once on the **Copy button** on the Public Folders toolbar.

4. Click on the **My Folders tab** at the top of the screen to navigate to the My Folders area.

5. From the My Folders area, click once on the **Paste button** on the My Folders toolbar.

6. When the report appears in the My Folders area, click once on the Set Properties button on the Report List toolbar to the right of the report name. [See Appendix B for more information on the Report List toolbar.]

More...

7. From the Set Properties page, click on the **Run options** tab at the top of the screen.

8. Check the **Specify the format** box at the top of the screen, and choose a format type for your report.

9. Uncheck the **Prompt for values** box at the bottom of the screen.

10. Click on the **Set the prompt values** hyperlink, and complete the prompts for your report. Click on the Finish button when done. These are the prompts that will be used every time you run the report from the My Folders area.

11. Click OK on the **Set Properties** page to save your settings. The report will now run using data from the latest refresh and the prompts you specified.

General | **Run options** | Permissions

Select the default options to use when this entry runs.

Format:
☑ Specify the format:
  HTML
  Orientation:
  (Default)
  Paper size:
  (Default)

Language:
☐ Specify the language:
  English (United States)

Prompt values:
No values saved
Set the prompt values...
☐ Prompt for values

Saving a Static Report View to My Folders

Every time you open a pre-defined report, the latest data from the Data Warehouse is loaded into the report. If you want to keep a snapshot of the report data for a particular point in time, you can save a static report view to the My Folders area. The report view is stored on the ReportNet server and does not take any space on the user's local computer.

1. With a report open on your screen, click once on the **Save the report as a report view** button at the top of the Report Viewer screen.

2. When the **Save as report view** screen appears:

   a. Enter a filename for your report view in the **Name** area.

   b. In the Location area, select the **My Folders** radio button.

   c. Click **OK** to save the report.
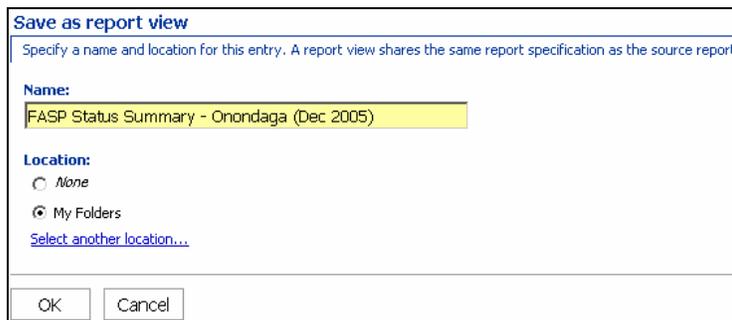
3. The report has been saved to the My Folders area of ReportNet. To access the report from the My Folders area, return to the pre-defined report list and click on the My Folders tab.
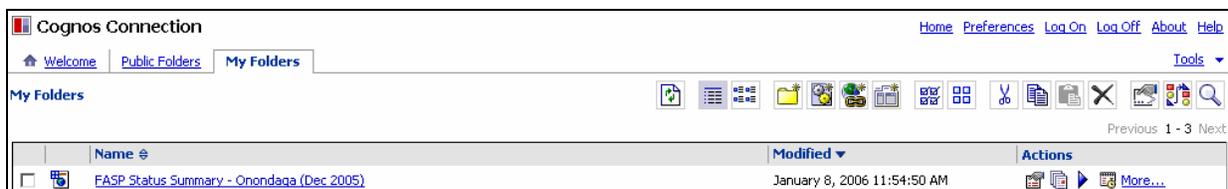
Saving a Static Report to the Local Computer

Another option for saving a static version of the report data is to save a static PDF, Excel, or HTML file to the local computer. This allows users to manipulate (e.g., modify, e-mail) the file like they would any file on their computer. Users should set-up a on the computer ahead of time where they will store saved ReportNet files.

> See Appendix C for more information on the Report Viewer toolbar, which allows you to change the report format to PDF, Excel, or HTML.
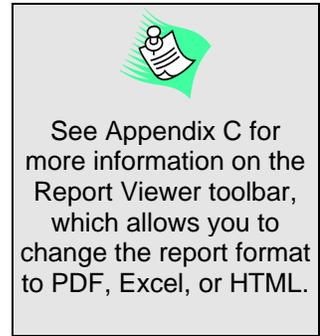
To save the report data as a PDF file:

1. Click once on the **View in PDF format** button in the upper right corner of the Report Viewer screen. It may take a minute for the PDF file to generate. [If the "File Download" dialog box appears, see Appendix D for additional steps to view and/or save ReportNet reports as PDF files.]

2. Click on the **Save button** on the PDF toolbar.

3. When the **Save a Copy** dialog box appears:

   a. Use the **Save in** window to navigate to the location on your local computer where you want to save the PDF file.

   b. In the **Object name** area, type a filename for the PDF file.

   c. Make sure the **Save as type** is set to Adobe PDF Files (*.pdf).

   d. Click the **Save** button.
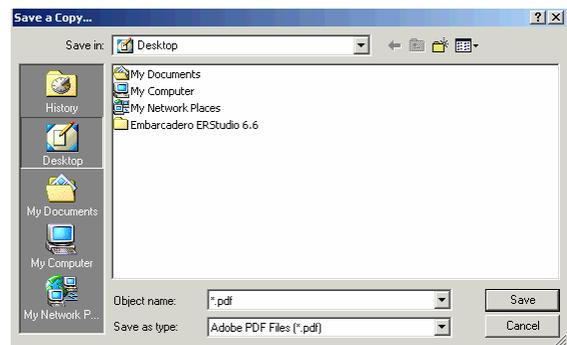
4. A PDF version of the report has been saved to your local computer.

To save the report data as an Excel file:

The following set-up needs to be done prior to the first time you save reports in Excel format. You may have to close out of Cognos ReportNet and Internet Explorer in order for the setting change to take effect. You should only need to do this set-up once:

- From your local desktop (outside of Cognos ReportNet), go to:

  Start button → Programs → Accessories → Windows Explorer.

- From the menus at the top of the screen, select **Tools → Folder Options**.

- Click on the **File Types** tab.

- When the list of registered file types appears, scroll down and highlight **XLS Microsoft Excel Worksheet**.

- Click the **Advanced** button.

- Remove the check mark in the **Browse in same window** box.

- Click **OK** to close the Edit Folder Type window.

- Click **Close** to close the Folder Options window.

- Select **File → Close** to close the Windows Explorer window.

- Go into Cognos ReportNet, and open the report that you want to save as an Excel file.

1. With the report on your screen, click once on any of the three **View in Excel format** buttons in the upper right corner of the Report Viewer screen. We recommend the **View in Excel 2000 single sheet format** button. It may take a minute for the Excel file to generate.

2. It may look like there is no data in the Excel spreadsheet. Reformatting the file will fix that:

   a. Highlight the entire spreadsheet by clicking on the **Select All button** in the upper left corner of the Excel worksheet.

   b. With the entire spreadsheet highlighted on your screen, select **Format → Row → Autofit** from the menus at the top of the Excel screen.

3. Select **File → Save as** from the menus at the top of the Excel screen.
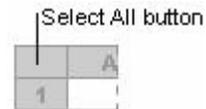
4. When the **Save As** dialog box appears:

   a. Use the **Save in** window to navigate to the location on your local computer where you want to save the Excel file.

   b. In the **File name** area, type a filename for the Excel file.

   c. Change the **Save as type** area to Microsoft Excel Workbook (*.xls).

   d. Click the **Save** button.
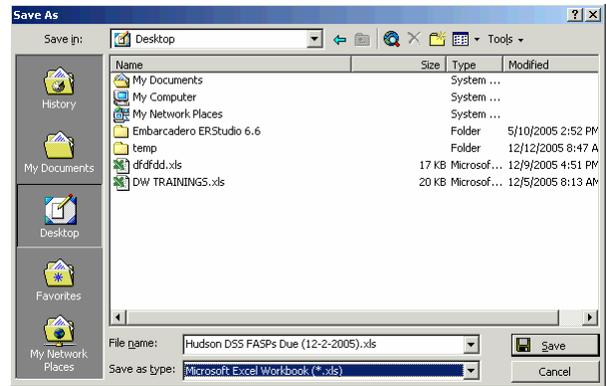
5. An Excel version of the report has been saved to your local computer. The Excel file may maintain calculations that were being used in the ReportNet report. If these calculations are based on dates, the numbers in the Excel file are subject to change each time you open it.

To save the report data as an HTML file:

Note: Saving the report in HTML format will save only the report page that you have open on your screen. If your report contains multiple pages, you will need to repeat this save process for each page of the report.

1. Pre-defined reports are set to open in HTML format, so the **View in HTML format** button in the upper right corner of the Report Viewer screen should already be selected. If it is not shaded in gray, click once on the View in HTML button.

2. Select **File** → **Save as** from the menus at the top of the Internet Explorer screen.

3. When the **Save Web Page** dialog box appears:

   a. Use the **Save in** window to navigate to the location on your local computer where you want to save the HTML page.

   b. In the **File name** area, type a filename for the HTML file.

   c. Make sure the **Save as type** area is set to Web Page, HTML only (*.htm, *.html), and leave the **Encoding** area as is.

   d. Click the **Save** button.
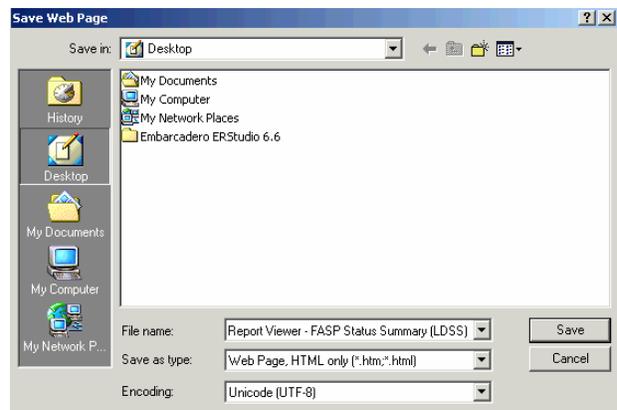
4. An HTLM version of the report page has been saved to your local computer.

Printing Reports

If you have already saved the report as a PDF, Excel, or HTML file, it is easiest to open the saved file on your local computer and print from there. Otherwise, you can print reports directly from ReportNet in PDF, Excel, or HTML format by following the instructions in this section.

To print the report in PDF format:

1. Click once on the **View in PDF format** button in the upper right corner of the Report Viewer screen. It may take a minute for the PDF file to generate. [If the "File Download" dialog box appears, see Appendix D for additional steps to view and/or save ReportNet reports as PDF files.]

2. Click on the **Print button** on the PDF toolbar.

To print the report in Excel format:

1. Complete the Excel set-up instructions in the "To save the report data as an Excel file" section, if you haven't already done so.

2. Click once on any of the three **View in Excel format** buttons in the upper right corner of the Report Viewer screen. We recommend the **View in Excel 2000 single sheet format** button. It may take a minute for the Excel file to generate.

3. It may look like there is no data in the Excel spreadsheet. Reformatting the file will fix that:

   a. Highlight the entire spreadsheet by clicking on the **Select All button** in the upper left corner of the Excel worksheet.

   b. With the entire spreadsheet highlighted on your screen, select **Format → Row → Autofit** from the menus at the top of the Excel screen.
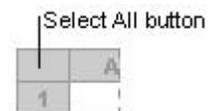
4. Excel files print best when formatted properly, so you may need to:

   a. Adjust the column widths.

   b. Use the **File → Page Setup** menu to set the page orientation to Landscape.

   c. Use the **View → Page Break Preview** menu to adjust the page breaks.

5. Click on the **Print button** on the Excel toolbar.

To print the report in HTML format:

Note: Printing the report in HTML format will print only the report page that you have open on your screen. If your report contains multiple pages, you will need to repeat this print process for each page of the report.

1. Pre-defined reports are set to open in HTML format, so the **View in HTML format** button in the upper right corner of the Report Viewer screen should already be selected. If it is not shaded in gray, click once on the View in HTML button.

2. HTML files print best when formatted properly, so you may need to use the **File → Page Setup** menu at the top of the Internet Explorer screen to set the page orientation to Landscape.

3. Click on the **Print button** on the Internet Explorer toolbar.

E-mailing Reports

If you have already saved the report as a PDF, Excel, or HTML file, it is easiest to e-mail the saved file from your local computer in the same way you would e-mail any file from your local computer. You can also e-mail a hyperlink to the report view directly from ReportNet:

1. **Save the report** that you want to e-mail as a report view to the My Folders area by following the instructions in the "Saving a Report View" section. This will maintain the report prompts in the report view, allowing the recipient to open the report without first having to complete the report prompts.

2. Return to the Public Folders list, and click on the **My Folders tab** to view your saved report views.

3. **Run the report view** that you want to e-mail by clicking once on the report name.

4. With the report view open on your screen, click once on the **Send the report by email** button at the top of the Report Viewer screen.

5. At the **Set email options** screen:

   a. Type the recipient's **e-mail address** in the upper right window. Do <u>not</u> use any of the preset distribution lists that display.

   b. Modify the **Subject** line of the e-mail, if desired.

   c. Type a message to the recipient in the **Body** window.

   d. Place a check mark in the **Include a link to the report** box.

   e. Click OK.

6. An e-mail with a hyperlink to the report view will be sent from CRNService@dfa.state.ny.us.

Logging Off ReportNet

1. Close any reports by clicking **Return** in the upper right corner of the Report Viewer screen.

2. From the welcome screen or the Public Folders screen, click **Log Off** in the upper right corner.

3. Close the Internet browser.

Ad Hoc Reporting

The ad hoc reporting capability is currently available for FASPs. Users who want to create their own reports in ReportNet must request and be assigned a software license for Query Studio (entry- and intermediate- level users) or Report Studio (advanced-level users). To request a software license, email Jennifer Gordon at *jennifer.gordon@ocfs.state.ny.us*. More information on ad hoc reporting is available at *http://www.trainingspace.org/cognos*.

For those with an ad hoc reporting license, the following FASP packages are available for use:

- OCFS DW – FASP Admin: Contains summary information on FASPs for all Districts (if you work for a Local District) or all Agencies (if you work for a Voluntary Agency).

- OCFS DW – WDFASP Admin: Contains detailed information on FASPs and workers for your District/Agency.

- OCFS DW – SUBFASP Admin: Contains detailed information on FASP submissions and approvals for your District/Agency.

Additional Resources

ReportNet Quick Tours

Computer-based tutorials are available to help you learn more about the ReportNet application. Click on the red "Quick Tours" button in the bottom left corner of the Cognos ReportNet welcome screen and select from the list provided.
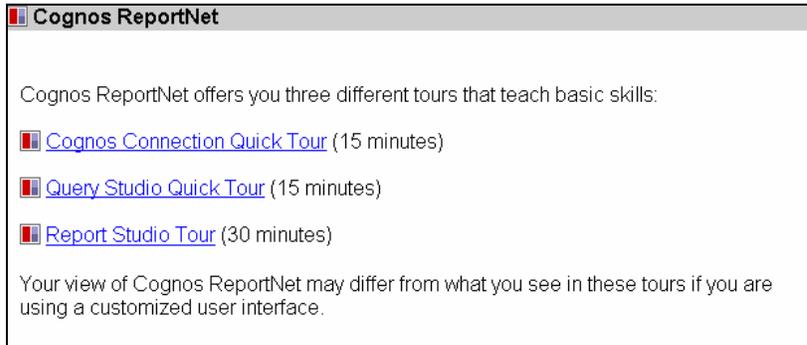
Cognos Help

The Cognos Help tool can be accessed from any screen within ReportNet by clicking on the Help hyperlink in the top right corner.

Computer-Based Training Video

A computer-based training video containing information about the OCFS Data Warehouse Case Management (Build 18) Reports is available on by request. To request a ReportNet training CD by mail, please contact the SUNY Training Strategies Group at (518) 443-5940.

Contact Us

The Office of Children and Family Services (OCFS) Data Warehouse is committed to providing information and tools to the Districts and Voluntary Agencies working with the children and families of New York State.

For more information, contact the Data Warehouse Team at *data.warehouse@ocfs.state.ny.us*.

Appendix A - The Public Folders & My Folders Toolbars

The following buttons are available at the top of the Public Folders and My Folders screens. You can hold your cursor over each button in the application to see its function.

Button	Function	Description
	Refresh	Refresh the screen to account for recent updates to the Public Folders or My Folders screen.
	List View	Display the Public Folders or My Folders files as a simple list of entry names.
	Details View	Display the Public Folders or My Folders files as entry names and detailed information, such as the date last modified.
	New Folder	Create a new folder on the Public Folders or My Folders screen.
	New Job	Create a new job.
	New URL	Create a new Web link.
	New Page	Create a new page.
	Select All	Select all entries.
	Deselect All	Deselect all entries.
	Cut	Cut the selected entries.
	Copy	Copy the selected entries.
	Paste	Paste entries to current folder.
	Delete	Permanently remove selected entries.
	Set Properties	Set properties for My Folders. [Note: This button is only available on the My Folders toolbar.]
	Order	Specify the folders and entries to be shown at the beginning of the list and specify their display order.
	Search	Search entries in whose name, description, or both, match the string entered in the search criteria.

Appendix B - The Report List Toolbar

The following buttons are available alongside Public Folders and My Folders report list. They can be used to perform operations on Data Warehouse reports prior to running them. You can hold your cursor over each button in the application to see its function.

Button	Function	Description
	Set Properties	Specify Properties of an entry.
	Run with Options	Select how you want to run and receive your report.
	Open with Report Studio	Open the report in Report Studio.
	Create a report view	Create a Report View of this report.
	Schedule	Schedule a report.

The More… button will reveal the following additional buttons:

	Copy	Copy the report.
	Create a shortcut to this entry	Create a shortcut to this report.
	Create a report view of this report	Create a Report View of this report.

Appendix C - The Report Viewer Toolbar

The following buttons are available at the top of the Report Viewer once you run a report. You can hold your cursor over each button in the application to see its function.

Return About

| Button	Function	Description
	Save the report	Save the current report as a report output. This option is only available if you run a report from My Folders.
	Save the report as a report view	A report view shares the same report specification as the source report, but other properties such as prompt values, schedules, languages, and output formats are independent of the source report.
	Send the report by email	Send the report to e-mail recipients.
	Run	Re-run the report by returning the user to the report prompt screen(s).
	View in HTML format	(Hypertext Markup Language) This is the default view for pre-defined OCFS Data Warehouse reports.
	View in PDF format	(Portable Document Format) Users must have Adobe Acrobat installed on their computers to use this option.
	View in Excel 2000 single sheet format	(Microsoft Excel 2000) All report pages will display on a single Excel worksheet. Users must have Excel 2000 or a more recent version on their computer to use this option.
	View in Excel 2000 multi-sheet format	(Microsoft Excel 2000) Each report page will display on a separate Excel worksheet. Users must have Excel 2000 or a more recent version on their computer to use this option.
	View in Excel 2002 format	(Microsoft Excel 2002) Each report page will display on a separate Excel worksheet. Users must have Excel 2002 on their computer to use this option.
	View in CSV format	(Comma Separated Value File) All data for the report is displayed in one long record, or line. Traditionally used to transfer data between different programs.
	View in XML format	(Extensible Markup Language) Converts the report into a programming language.
Return	Return to report list	Takes you back to the Public Folders report list.
About	About Cognos ReportNet	Cognos ReportNet copyright information.

Appendix D - Troubleshooting PDF Files

If the "File Download" dialog box appears when you try to view or save the report in PDF format, complete the following steps:

1. Click the **Open button** on the File Download dialog box. [To save the report in PDF format without viewing it, click the **Save button** and skip to Step 6.]
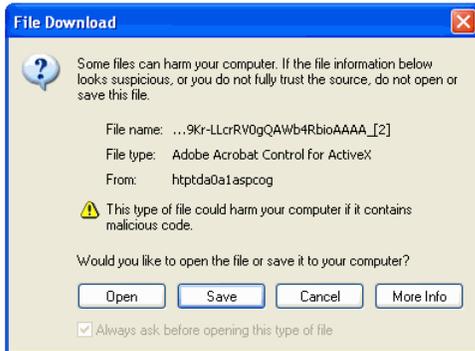
2. At the dialog box that states "Windows cannot open the file", make sure the **Select the program from a list** radio button is selected, and click OK.
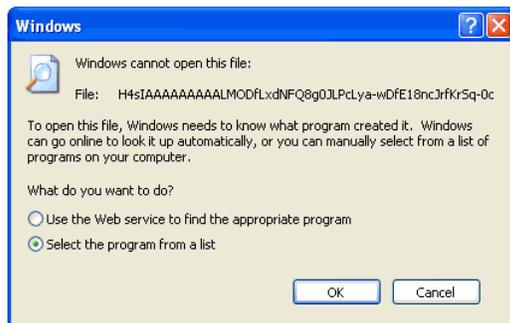

3. When the Open with dialog box appears, select **Adobe Acrobat** from the "Programs" list, and click OK.
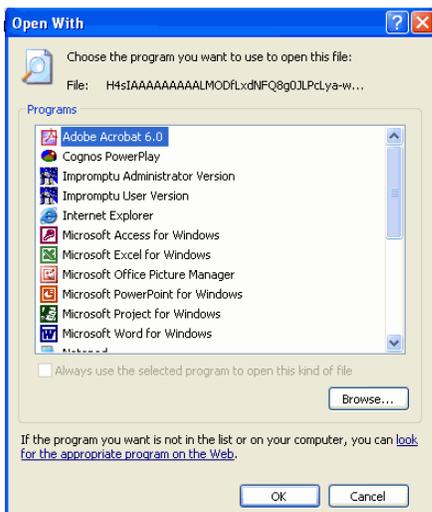
4. The report should open in a separate window as a PDF file.

5. To save the PDF file to your local computer, select **File → Save as** from the menus at the top of the PDF toolbar.

6. When the **Save As** dialog box appears:

    a. Use the **Save in** window to navigate to the location on your local computer where you want to save the PDF file.

    b. In the **File name** area, type a filename for the PDF file.

    c. Make sure the **Save as type** is set to Adobe PDF Files (*.pdf) or Adobe Acrobat document.

    d. Click the **Save** button.

7. A PDF version of the report has been saved to your local computer.

8. At the Download Complete dialog box, click the **Close** button.
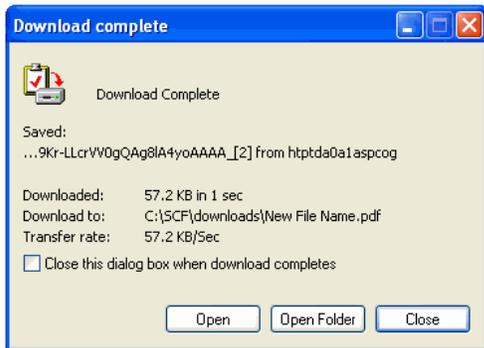
9. Click on the **View in HTML format** button to return to the HTML version of the report. Give the report a few seconds to appear on the screen.