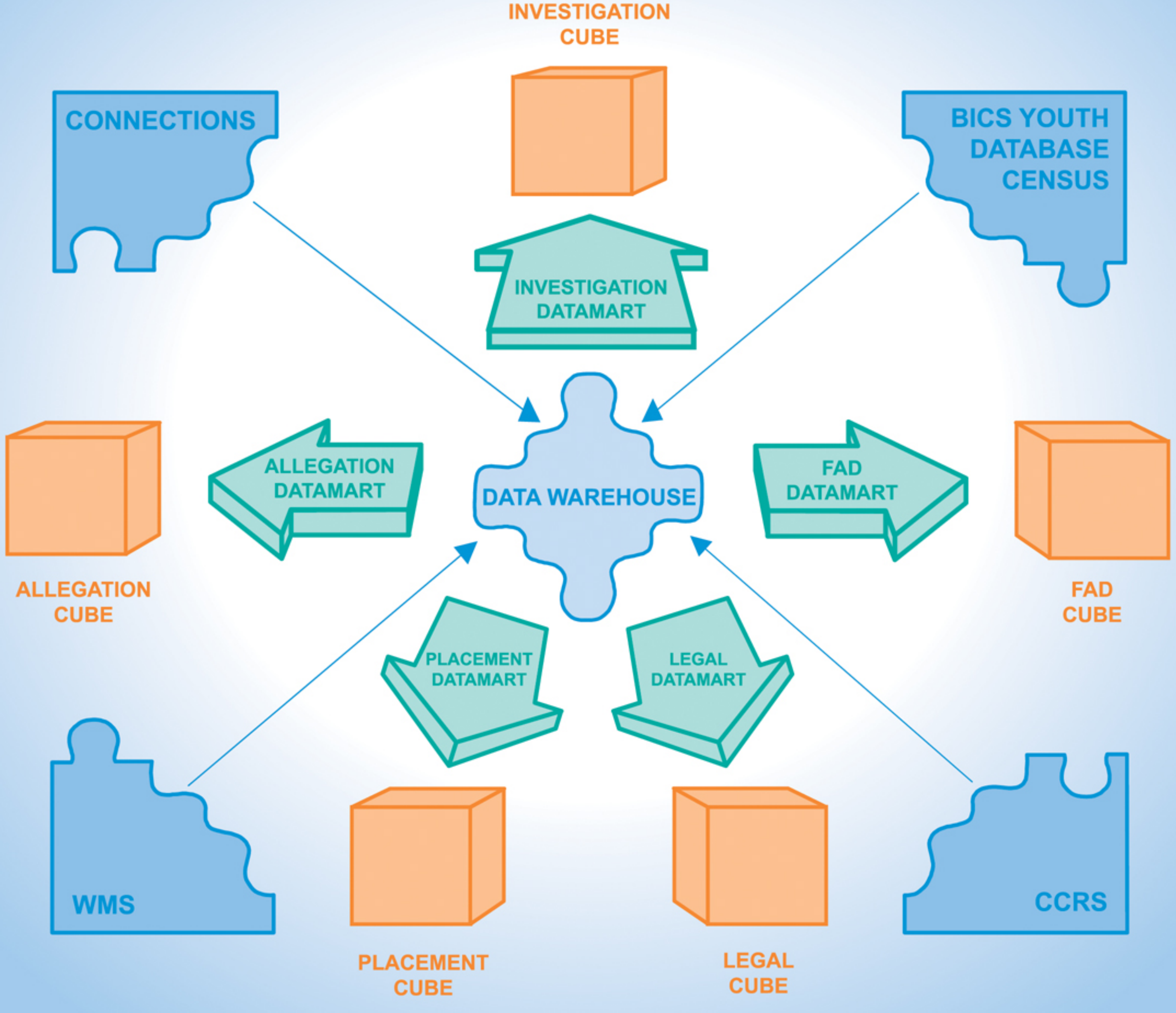
Data Warehouse Step by Step Guide
Impromptu



The New York State Office of Children and Family Services
Developed in collaboration with SUNY Training Strategies Group

OCFS Data Warehouse Reporting: Impromptu

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Module 1:
Introduction

Participant Information

As a user of the OCFS data warehouse, you will be responsible for interacting with various program and system staff to implement and support desktop ad hoc reporting for your local district or agency. Your responsibilities may include the following:

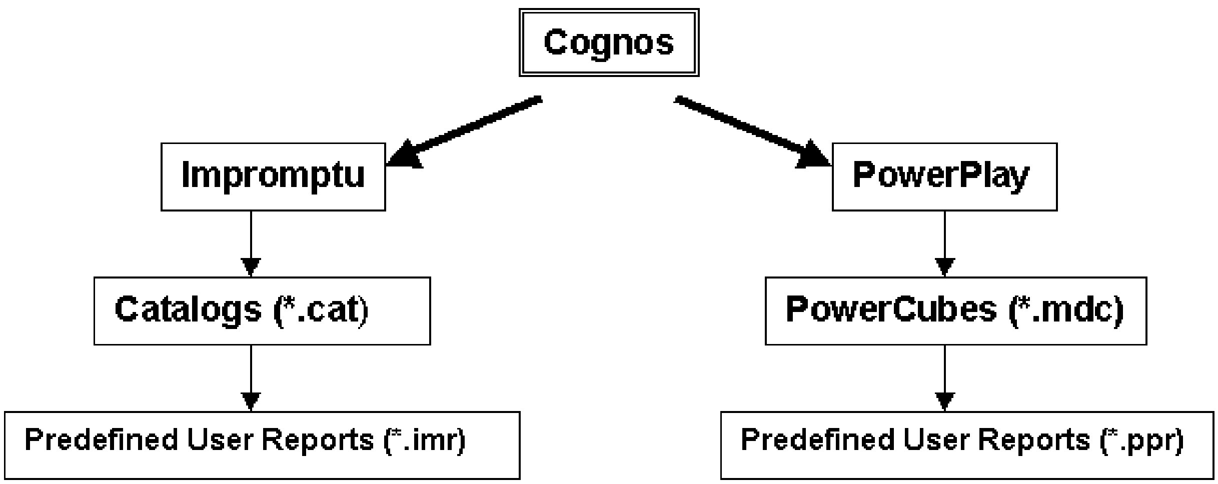
- Working with agency or district staff to define data needs for ad hoc reporting;
- Initiating and coordinating local efforts regarding data quality and data validation;
- Implementing and utilizing the Cognos reporting tools – Impromptu and PowerPlay;
- Generating predefined reports, modifying existing reports, and generating new reports from the OCFS data warehouse;
- Coordinating local efforts to schedule report generation;
- Coordinating local efforts to distribute reports, including identifying appropriate personnel to receive reports and physical distribution logistics;
- Coordinating orientation and training of appropriate staff to generate reports and access the OCFS data warehouse, where necessary;
- Sharing results and issues with other report specialists across jurisdictions as part of a users' group.

This guide provides basic step-by-step instructions for generating, modifying and creating reports from the OCFS data warehouse.

What is Cognos?

Cognos is the name of a software development company based in Canada. It is widely acknowledged to be the leading provider of business intelligence applications. Business intelligence is the term given to a category of applications and technologies for gathering, storing, sharing, analyzing, reporting and providing access to data to help users make better decisions.

The Cognos suite of data query and analysis tools was selected to meet the specific reporting needs of the local districts and voluntary agencies of the Office of Children and Family Services (OCFS). Cognos was chosen because it provides flexibility and ease of use for non-technical users to generate, modify, and create reports to support planning and operational needs. Cognos offers the same, or similar, functions as the Microsoft Office suite of products, and so offers familiarity to computer users. It also allows multiple users to access the same data source simultaneously. This allows flexibility for the local districts and agencies to retrieve data when they need it. These user-friendly, flexible tools allow report specialists to easily develop customized reports to meet the specific needs of their end users. Cognos software runs on Citrix servers, requiring an extra login procedure and some preparation prior to accessing the Data Warehouse.



What is the OCFS data warehouse?

The OCFS data warehouse is a "read-only" file, which means that users who access the data cannot change the data. The data can only be read. Users can query and analyze the data using the Cognos tools, but they cannot change the data in any way.

The OCFS data warehouse is a collection of data retrieved from the Connections and CCRS systems that users can access independently of those production systems. The data from these two diverse databases is organized and stored in the data warehouse. Data in the OCFS Data Warehouse is available in a current point-in-time snapshot. Trend or historical views are also available.

The OCFS data warehouse is refreshed, or updated, on a weekly basis. Thus, every Monday the data reflects the state of the Connections and CCRS systems as of the previous week. Any changes made in either production system during the week will not be reflected in the data warehouse until the following week, after the regularly scheduled update. A "Connections Data As Of Date" and a "CCRS Data As Of Date" have been made available in the data warehouse that reflect the dates of the last update so that users can readily see the age of the data.

The OCFS data warehouse has been organized into four separate data marts. These data marts are subsets of the larger data warehouse. The data marts are focused on a particular subject, as shown below:

- The *Investigations* and *Allegations* data marts contain information on Child Protective Services;
- The *Foster and Adoptive Home (FAD)* data mart contains information pertinent to certification dates and demographics of the individuals in the homes; and
- The *In Care* data mart contains foster care and adoption data on children who are in foster care, or have been admitted or discharged from foster care.

More information on the data warehouse can be found in the manuals located in the Public Folders in Microsoft Outlook. Instructions for accessing the Public Folders relating to the data warehouse can be found in this guide.

The purpose of the data marts is to continue the structuring and organization of the data in ways that are meaningful to users and to extract more efficiently data for analysis. The data marts are the data sources for all catalogs that, in turn, are used for all cubes and predefined report creation.

The Content of This Guide

This step-by-step guide covers ad hoc reporting from the OCFS data warehouse using Cognos Impromptu. A separate step-by-step guide covers ad hoc reporting from the OCFS data warehouse using Cognos PowerPlay. It is expected that users will have basic computer skills, including Windows point-and-click, navigation, scrolling, etc. Major objectives addressed include accessing, modifying, and managing predefined PowerPlay and Impromptu reports, as well as creating new reports in Impromptu. The material presented in the step-by-step guide reflects data in the OCFS data warehouse. Overviews of the OCFS data warehouse and Cognos, as well as a discussion of where to go for additional help, are also presented.

There are three appendices (*Appendix A, B, and C*) to this guide that contain more detailed information about the various reports, cubes and catalogs that have been made available to you. These appendices describe in more detail the New York State data you will be using. References to these appendices will be made in the appropriate modules of the guide. A glossary of OCFS data warehouse and Cognos terms is also a feature of this guide and can be found in *Appendix C.* Please refer to this glossary when you need a more complete definition of any terms used in this guide.

The OCFS Training Database

It is not feasible to use the real OCFS Data Warehouse for training purposes, since that would breach confidentiality standards. However, it is very beneficial for potential users to learn the Cognos tools using data that is familiar to them. For this purpose, the OCFS Data Warehouse Team has designed a training data warehouse that represents the same kind of data you will see in the real OCFS data warehouse.

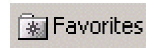
The training database is available on a Citrix network server on the Z: Drive for you to practice your skills and to try out new reporting techniques. You must login to Citrix to access the Training Database, just as you would access the production Data Warehouse database. The Training Database can be accessed with the Cognos User ID “train01” and the Password “train01.”

The material presented in the OCFS Class Manual is based on data in the OCFS Training Database.

Logging into Citrix

Instructions for logging in to Citrix to access the Cognos tools are as follows:

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

2 Click the **Favorites** button on the Internet Explorer menu bar. 

3 Select "**Data Warehouse Login**" from the drop down-list and continue to step 10.

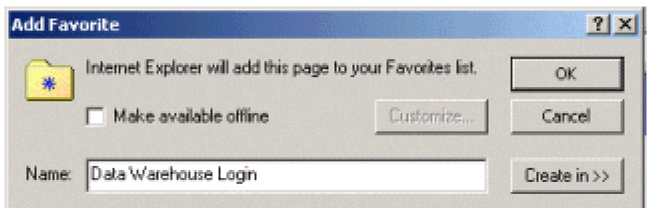
4 If "Data Warehouse Login" is not listed on the drop-down list, continue with step 5.

5 In the **Address** line at the top of the Internet Explorer screen, type http://OCFSDATAWAREHOUSE.

6 Click the **Go** button to the right of the Address box and wait for the page to load. 

7 Click the **Favorites** button on the Internet Explorer menu bar and select **Add to favorites** from the drop-down list.

8 In the Add Favorite dialog box, type "**Data Warehouse Login**" in the Name field.

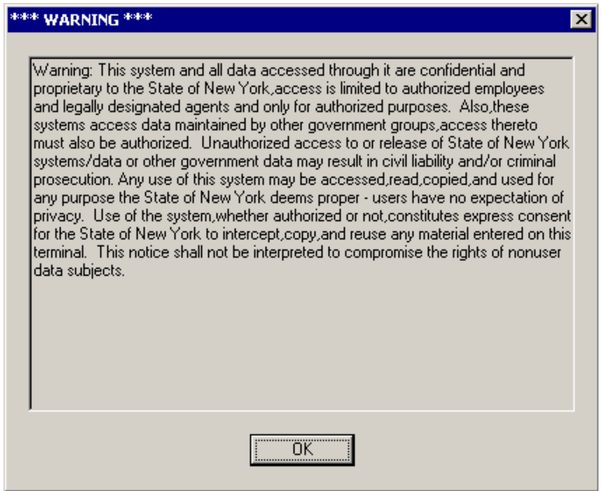


9 Click **OK** on the Add Favorite dialog box.

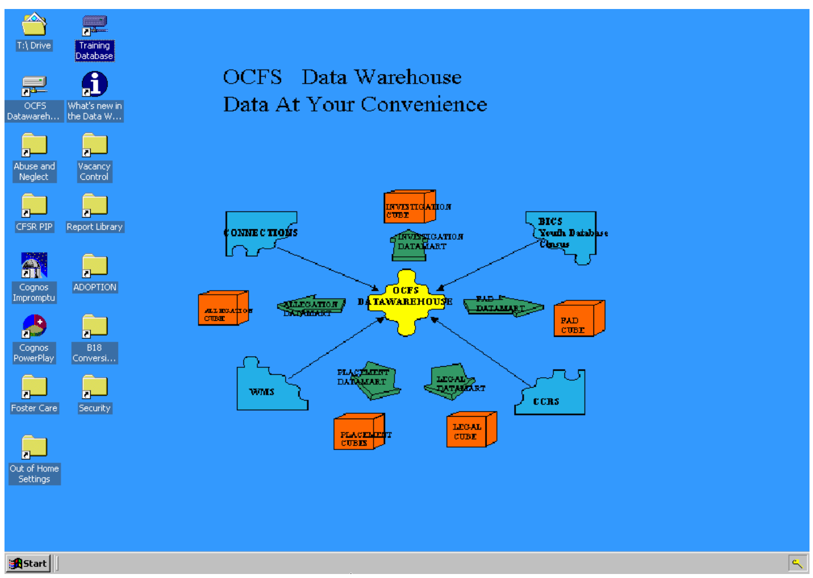
10 Enter your **NT Username**, **Password**, and **Domain** in the OCFS Data Warehouse login dialog box.

11 Click the **Logon** button at the bottom of the dialog box.

12 Click **OK** on the Confidential Warning screen.



13 The OCFS Data Warehouse welcome screen is displayed. To the left of the screen are icons for PowerPlay, Impromptu, Cognos Cubes, and Training Database.

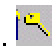


14 Double click either the PowerPlay or the Impromptu icon to launch the application.

Cognos Common Logon

The Cognos Common Logon dialog box appears the first time you open any Cognos application (Impromptu or PowerPlay). It requires you to enter a Cognos User ID and Password. When working in the OCFS data warehouse, you will use the Cognos User ID and Password assigned to you by the OCFS Data Warehouse Team. When working in the training database, you will use ‘train01’ for both the User ID and Password. After inserting the appropriate User ID and Password and clicking the Log On button, a key will be displayed in the lower right corner of your PC screen, signifying that you are logged into Cognos. 

It is not necessary to log off the Cognos Common Logon when you exit a Cognos application. You will be automatically logged off when you exit the Citrix session. However, if you log on to the Training Database using the ‘train01’ User ID and Password, you will remain logged on as such until you exit from Cognos Common Logon and will only have access to training data. If you want to access your own “live” data, you will need to exit Cognos Common Logon as “train01’ and log in with your own Cognos User ID and Password.

1. Exit from any Cognos application that you may have open (Impromptu or PowerPlay).
2. Right click on the key in the lower right corner of your PC. 
3. Select **Log Out** from the drop-down list.

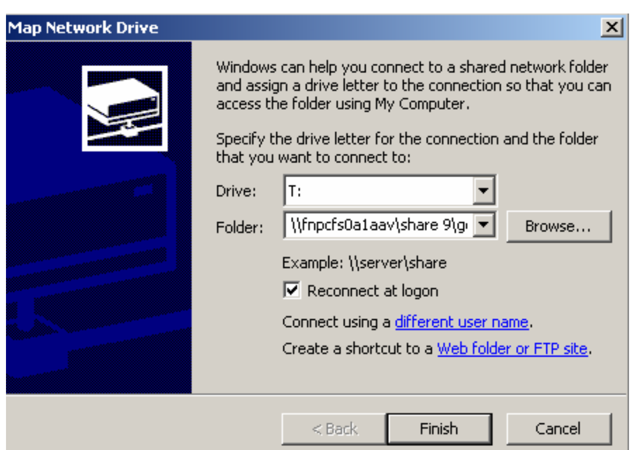
The next time you open a Cognos application (either Impromptu or PowerPlay), you will be prompted to log into Cognos Common Logon. You can now enter your regular Cognos User ID and Password to access your own “live” data.

Mapping Your T: Drive

If you wish to save any reports or files generated in the Citrix environment, you must save to the T: Drive. In Citrix, the T: Drive is automatically mapped for you. In order to access the T: Drive from your local Desktop, you must manually map to it. Since the location of the T: Drive can vary for different users, you will be provided with the location of the T: Drive in Citrix (where it has already been mapped) that corresponds to the login you are using. You must then map your PC to this location. This process must be done once on each computer you will use to access Citrix.

Instructions for mapping your PC to the T: Drive are as follows:

1. In Citrix, hold down the **Ctrl** and **Esc** keys on your keyboard simultaneously to display the local desktop Start bar.
2. Click the **Show Desktop** button at the bottom of your PC to display your local desktop. 
3. Right click the **My Computer** icon on your desktop.
4. Select **Map Network Drive…** from the drop-down list.
5. In the Map Network Drive box, select the **T:** drive by clicking the drop-down arrow  to the right of the **Drive** box. If the T: drive is already mapped elsewhere, leave the default selection in the Drive: selection box.



6 In the **Path** or **Folder** field, enter the path to your T: Drive that has been provided for you (e.g., \\fnpcfs0a1aav\share XX\userid)

7 Ensure that the **Reconnect at Logon** option in the middle of the Map Network Drive box is selected.

8 Click **Finish** at the bottom of the Map Network Drive box.

9 Close the path directory widow by clicking the '**x**' in the upper right corner of the box.

10 Close the My Computer window by clicking the '**x**' in the upper right corner of the box.

Again, you only have to complete the above task one time. Once your PC is mapped to the T: Drive, you will not have to map it again. If you move to another PC, you will have to repeat this process.

Module 2:
Getting Started in Impromptu

What is Cognos Impromptu?

Impromptu is a user-friendly data query tool that allows the user easy access to a database while shielding him/her from technical database terminology, connections, and structures. The user has the ability to retrieve data directly from the database without needing to know how to program. The Microsoft point-and-click methodology is the primary utility for creating Impromptu reports. Impromptu also offers Microsoft-style formatting capabilities that enable the user to create presentation-style reports.

Access to data through Impromptu is achieved by the creation of *catalogs*. The catalog also presents data to the user in language he/she can easily understand, instead of the technical terms used by the technical database creators. Catalogs provide access to the entire Data Warehouse or data mart, rather than to a selection of the data in summary form, such as in PowerPlay cubes.

Impromptu catalogs are comprised of *folders*, which relate to tables in a subject-specific data mart. The brief descriptions to the right of each folder give an indication as to what kind of data each folder contains. To view the contents of a folder, click the $\boxed{+}$ to the left of it. Generally speaking, you will see **FACT** folders and **DIMENSION** folders in each catalog. The FACT folders will contain actual facts or occurrences—CPS reports, allegations, resources, etc. The DIMENSION folders contain descriptive data about the facts. For example, the Foster Home Fact folder contains many codes and ID numbers, such as Worker ID, County Code, Agency ID, and Race Code. The DIMENSION folders contain descriptive data that describe the codes (e.g., Worker ID from the Fact folder, plus Worker Name from the Worker Dimension folder, provide the Worker's Name). So, you will always want to start from the FACT folder and retrieve descriptive data from the DIMENSION folders.

Each folder will contain *data items* that have been arranged in a logical order for your reporting needs. For example, the Allegation catalog contains a folder entitled "Child Dimension". This folder contains all the data fields related to alleged victims of child abuse, such as, Child Person ID, Victim Age in Years, Gender Code, Birth Date, First Name, etc. There are also folders containing information on actual allegation facts, subjects, workers and geography, all of which relate to Allegations.

Impromptu and PowerPlay differ in several respects. Impromptu is a query tool that retrieves data directly from a catalog based on the user's specific requests. PowerPlay is a data analysis tool that allows the user to explore data that has already been predefined and summarized in a cube. Impromptu catalogs allow access to all of the data while PowerPlay cubes present specific data in a summarized format.

The OCFS Data Warehouse Team has created several catalogs for your use. These catalogs are described and more specifically defined in *Appendix A.*

Accessing Impromptu

Impromptu software runs on a Citrix server. Mapping your PC to the T: Drive and logging into the server are the only steps necessary to begin. Once you have successfully logged into Citrix, you can open the Impromptu application.

If you are logged into Citrix for 30 minutes without any activity, you will be logged out and work you have not saved will be lost. Any keystroke or movement of the mouse will reset the 30-minute timer.

1. Double click the **Internet Explorer** icon on your desktop.
2. Click the **Favorites** button on the Internet Browser toolbar and select "**Data Warehouse Login**" from the drop-down listing.

Note: If "Data Warehouse Login" does not appear on the

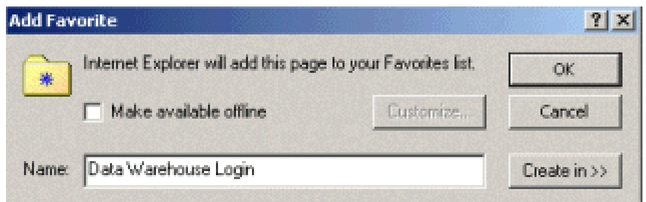
Favorites listing, do the following:

- Type the following in the **Address** line: “**http://OCFSDATAWAREHOUSE**”.

- Click the “**Go**” button and wait for the Login page to load. 

- Click the **Favorites** button on the toolbar. 

- Select “**Add to Favorites**” from the drop-down menu.
- Type “**Data Warehouse Login**” in the “**Name**:” field of the Add to Favorites dialog box.
- Click **OK**.



3 Enter your **NT User ID**, **Password** and **Domain** in the OCFS Data Warehouse login dialog box.

5 Click **Logon**.

6 Click **OK** on the Confidential Warning Screen.

7 Double click the **Impromptu Icon** to launch the application. 

Module 3:
Using Predefined Impromptu Reports

While the Impromptu tool offers you the ability to create presentation-quality ad hoc reports, several *standard* reports have already been created for your use. The Management Reporting Workgroup defined these reports as reports that would be helpful at both a management and supervisor/worker level. As noted previously, these reports will display only the data that is applicable to you; i.e., for your local district or agency. These reports are available to you in the Data Warehouse folders on the Data Warehouse Network Server, as illustrated below:

- [+] Desktop
  - [+] OCFS Datawarehouse
    - [+] DataWarehouse
      - [+] Pre-defined User Reports

Each of these reports is described in detail in *Appendix B* at the end of this manual.

Opening Predefined Reports

Once you have reviewed the available report descriptions and have determined which ones you will need to see on a regular basis, you can open the report from the Data Warehouse folder on the Data Warehouse Network Server.

1 Login to Citrix. See Module 1 for detailed instructions on the login process.

2 Double click the **Impromptu icon** on the left-hand side of the Citrix screen. 

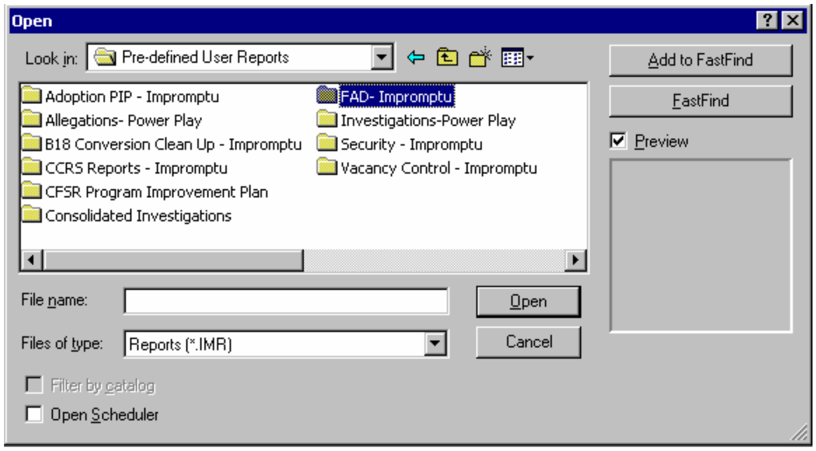
3 Click **File → Open** on the menu bar **OR** click the **Open** button on the toolbar. 

4 In the **Open** dialog box, open the file directory listing by clicking the ▼ arrow to the right of the **Look in** box.

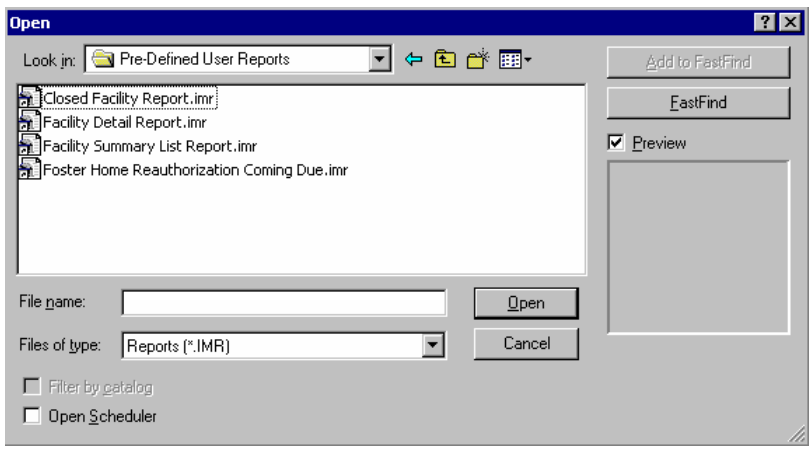
5 Navigate to the **Pre-defined User Reports** folder as follows:

- Desktop
  - OCFS Datawarehouse
    - DataWarehouse
      - Pre-defined User Reports

6 Open any of the folders ending in “Impromptu” by double clicking on it.



7 Select a report from the listing and double click on it to open it.



8 A message screen will pop up notifying you that this report is read-only and that a copy will be made. This is a security measure to prevent users from changing the user reports. Click **OK**.

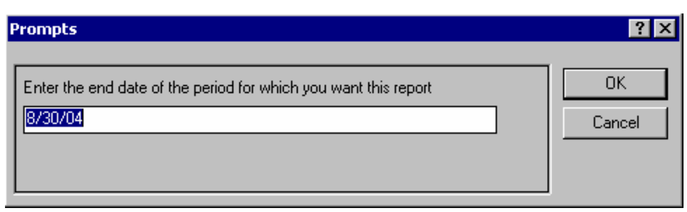
9 The **Cognos Common Logon** box will appear if you have not previously logged into a Cognos application. Enter your **Cognos User ID** and **Password** in the boxes provided. Click the **Log On** button.

In most cases, the requested report will not display immediately on your screen. Depending on the complexity of the report, it can take several minutes to run. You will see, at the bottom of the report screen in the status bar, a fish  that appears to be swimming back and forth. This indicates that Impromptu is working on your report and is retrieving the data you requested.

Completing Prompts

Some Impromptu reports have been designed to run based on user-specific parameters. In other words, you decide what information you want to see in the report. Most of the prompted reports ask for date ranges within which to select information. For example, the Foster Home Reauthorization Coming Due report asks users to enter a date. The report then retieves data on foster homes that are up for reauthorization based on that datePrompts have the effect of customizing the report to user specifications.

1. Login to Impromptu if you have not already done so.
2. Open a predefined Impromptu report with prompts (i.e., *Foster Home Reauthorization Coming Due, In Care Summary Report*).
3. Click **OK** on the “This report is read-only” message.
4. If the Cognos Common Logon dialog box displays, enter your **Cognos User ID** and **Password** in the **Cognos Common Logon** dialog box.
5. A **Prompt** dialog box is displayed. The dialog box contains requests for information and text boxes for you to enter the information. In most cases, these requests are for dates in a specific format. Your cursor is placed inside the first text box. Enter the information in the same format as displayed in the entry window (e.g., m/dd/yy, yyyy-mm-dd), and then click **OK**.



6. The report, filtered according to the date(s) you entered, is displayed on the screen. The prompt information that you entered should appear in the title of the report.

7 If you wish to see the report run based on another date, run the prompt again by selecting the Prompt button  from the Impromptu toolbar. The Prompt dialog box will appear again. You can enter new dates and click **OK** to run the report on different parameters.

The Impromptu Report Screen

Menu Bar

As you familiarize yourself with the Impromptu environment, it is important to note the basic components of the interface screen. The Cognos Impromptu menu bar is located near the top of the screen, and contains the familiar options of a Windows application (File, Edit, etc.). Additionally, there are other menu options unique to Impromptu, such as Report and Catalog, which we will explain in more depth as we explore modifying and creating reports in later modules.

Toolbar

Immediately beneath the menu bar is a toolbar that provides quicker access to the available options. These toolbar buttons are briefly explained below:

Standard Toolbar

New – Creates a new report.

Open – Opens an existing report.

Close – Closes the active report.

Save – Saves the active report.

Print – Will print the displayed report. **It is not recommended that reports be printed directly from Impromptu.**

Print Preview – Displays the current report as it will appear on the printed page. **It is not recommended that reports be printed directly from Impromptu.**

Cut – Cuts the current selection and saves it to the clipboard for pasting.

Copy – Copies the current selection to the clipboard for pasting.

Paste – Pastes the selection from the clipboard to the position of the cursor.

Undo – Clears the most recent action.

Data – Inserts a data field into the report by bringing up the **Query** Dialog box.

Query Data – Brings up the **Query** Dialog box.

Sort Ascending – Sorts the selected column in ascending order.

Total – Applies a total to the selected column.

Count – Applies a count summary on selected data elements, excluding null values.

Rank – Ranks the selected column and assigns a rank order number.

Prompt – Calls the prompt, if available, on the report.

Header – Inserts a header in the selected Group.

Footer – Inserts a footer in the selected Group.

Thumbnail – Creates a thumbnail, or a temporary copy of a limited number of rows from the report.

Snapshot – Creates a snapshot, or a permanent copy of the data stored as a part of the report.

Screen Help – Special point-and-click help feature.

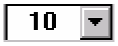
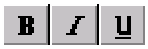
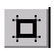
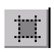
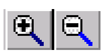
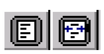
Filter – Filters the report based on the chosen criteria, or if nothing is selected, will remove all filters from the report.

Drill-Through – Where applicable, drills through to another Impromptu report.

Create PowerPlay PowerCube – Opens PowerPlay Transformer for PowerCube Creation (PowerPlay functionality).

Group – Groups the selected column by its unique values, or if nothing is selected, will remove all grouping from the report.

Format Toolbar

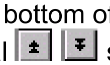
	**Font** – Drop-down box for font style on the selected values in the report.
	**Font Siz**e – Drop-down box for font size on the selected values in the report.
	**Font Color** – Drop-down box for font color on the selected values in the report.
	**Bold, Italic and Underline** – Formatting options for the selected values in the report.
	**Left, Center and Right Justification** – Formatting options for the selected values in the report.
	**Currency** – Formats the selected numerical values to standard currency format.
	**Borders** – Adds a single-line border around the selected report objects, or if nothing is selected, removes the border from the report.
	**Pattern** – Applies a pattern to the selected reports objects, or if nothing is selected, removes the pattern from the report.
	**Zoom In and Out** – On-screen viewing options for the report, zooming in and out in 25% increments.
	**Whole Page and Page Width** - Enlarges or reduces the view of the report in the report window.

Status Bar

The status bar appears at the bottom of the Impromptu interface screen and delivers information about the catalog the report is attached to. The status bar also displays information about a command or toolbar button. In the case below, the user has the *In Care Detail Catalog* open. This is also where the fish will swim as he retrieves data for your report, to let you know that the report is running.

Getting Around in Impromptu Reports

Scrolling

Some predefined Impromptu reports cannot be fully displayed on a single screen. To view the report in its entirety, you will need to scroll up, down, left and right. The vertical scrollbar is located at the far right of the screen. The horizontal scrollbar is located at the bottom of the screen. There is also a set of "Next Page" buttons at the top and/or bottom of the vertical  scrollbar and at the far right and/or left of the horizontal scrollbar. Clicking these will advance you to the next page of the report.

Layout Views

Two different views are available in an Impromptu report. *Screen Layout* view should be used when you are inserting graphics or comments, or for viewing screen-only reports. *Page Layout* view will reduce the display of the report so that you will see the edges of the report, title, page numbers, and page headers and footers. Page Layout will display the report, as it will look when printed. You can toggle between these views by selecting **View → Page Layout**, or **View → Screen Layout** on the menu bar.

Drilling Through to Other Reports

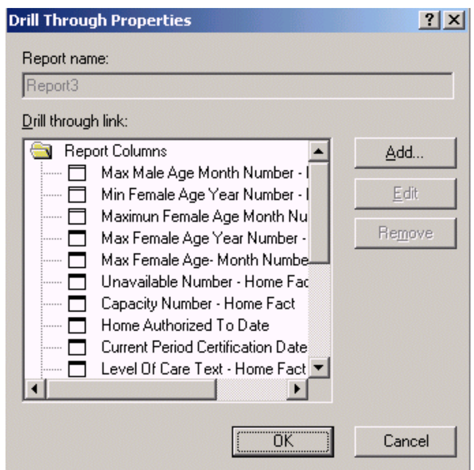
Some Impromptu reports have a feature called *Drill-Through* that allows you to drill through to another Impromptu report to retrieve different information. For instance, the Facility Detail Report drills through to the Facility Summary List Report, which provides summarized information on home members and relationships. Drill through reports are linked to their “parent” report through one of the data items on the parent report. These linking data items are highlighted in color on the parent report. The Facility Detail Report is linked to the Facility Summary List Report via Agency Code. Agency Code is highlighted in blue on the Facility Detail Report. When you drill through to another report, you will see information for only the specific data item that you drilled-through on (e.g., if you drill through on Agency Code 700, you will see details on *only* Agency 700).

To quickly see if the current report has a drill-through report linked to it, follow these steps:

1 Press **Esc** to clear any selections in the report.

2 Click and hold the **Drill-Through** button  on the toolbar. If there are drill-through links in the report, the linking data item will be highlighted. After you release the **Drill-Through** button, the highlights will disappear.

3 If there are no drill-throughs on the report, a **Drill-Through Properties** dialog box will appear. Click **Cancel** at the bottom of the box.



To Drill-Through in the report

1 Select a value that was highlighted in Step 2 above or select a value that is already highlighted on the report (e.g.,, Agency Code on the Facility Detail Report). You must select the specific item that you want to see. In other words, if you select Agency Code 700, you will drill through to the details for Agency 700. You will get details for no other Agency Code.

2 Click the **Drill-Through** button on the toolbar **OR** double click on the selected data item. The Drill-Through report will appear, with its information filtered based on the selection in the parent report.

Closing Reports and Exiting Impromptu

1 On the menu bar at the top of the screen, click **File → Close**.

2 A dialog box appears asking if you want to save changes to the report. Click **No**.

3 The report closes.

Note: If you are intending to open other predefined Impromptu reports, you must also close the catalog that was opened with your original predefined report. Otherwise, Impromptu will try to run the second requested report against the catalog opened for the first requested report. You will get query execution errors if you attempt to run a report against the wrong catalog.

To Close an Impromptu Catalog

4 On the menu bar, click **Catalog**.

5 Select **Close** from the drop-down list.

Now you can open other predefined Impromptu reports. Impromptu will automatically open the catalog to which the report is linked.

To Close Impromptu

6 Click **File → Exit** from the menu bar.

Module 4:
Modifying Impromptu Predefined Reports

Within predefined reports, you may want to make certain modifications to customize the report to fit your needs. Although the official predefined reports cannot be changed in any way, the same reports exist in the Predefined User Reports folder. The predefined reports are built against shared catalogs, which allow users to make modifications to them.

Some of the modifications that can be achieved are sorting and grouping data differently, filtering out unnecessary information, or changing titles. We will be using buttons on the toolbar as well as the **Report Query** dialog box to modify the predefined reports. The Report Query contains all of the information used to retrieve, sort, group, calculate, and filter data for a report.

Opening Impromptu Predefined Reports

1 Login to Citrix. See Module 1 for detailed instructions on the login process.

2 Double click the Impromptu icon on the Citrix desktop to open the application. 

3 Click the **Open** button on the toolbar  **OR** select **File → Open** on the menu bar.

4 In the **Open** dialog box, click the arrow  to the right of the **Look in** window

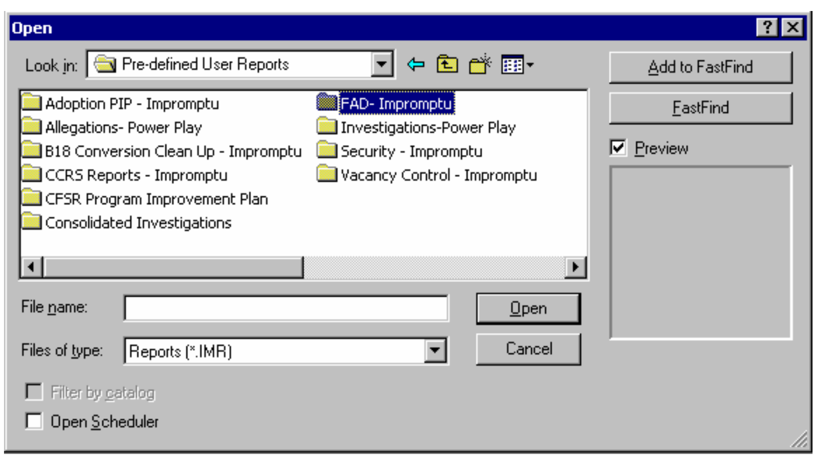
5 Select **Desktop** from the drop-down listing.

6 Double click **OCFS Datawarehouse** in the directory window.

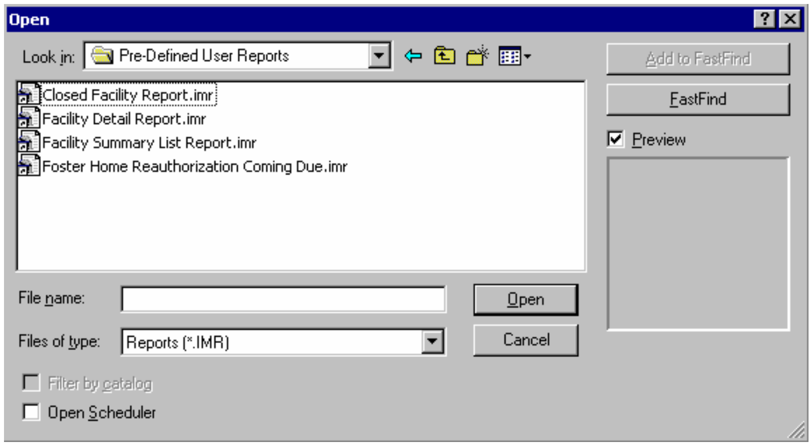
7 Double click **DataWarehouse** in the directory window.

8 Open the **Pre-defined User Reports** folder.

9 Open any of the folders ending in "Impromptu" by double clicking on it



10 Open a report from the report listing by selecting it and clicking the **Open** button.



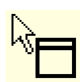
11 Click **OK** at the message notifying you that the file is read-only and that a copy will be made.

Adding and Deleting Data

Additional data items can be inserted to a predefined report and irrelevant data can be removed.

To add data to a predefined report:

1 Select **Insert → Data** on the menu bar.

2 Your cursor now appears as . Place your cursor on the report where you want the new data item to appear. If you want the new data item to appear as a column, place it in between two existing columns. When a double dotted vertical line (::) appears between the two columns, click your mouse button. If you want the new data item to appear in a title or header frame, place your cursor inside the frame. When a small quote mark (‘) appears in the frame where you want the data item placed, click your mouse button.

3 The **Query Data** dialog box appears. You can select any data item in any of the folders appearing in the **Catalog** listing on the left-hand side of the screen.

- Open a folder by clicking the + to the left of the folder.
- Add the data item by double clicking on it, OR highlighting it and clicking the button in the center of the dialog box, OR clicking and dragging it to the **Query data** listing on the right-hand side of the box.

4 Click **OK** at the bottom of the **Query** dialog box.

To delete data from a predefined report:

1 Select any value on the report you wish to delete.

2 Press the **Delete** key on your keyboard.

Deleting an item from a report does not delete it from the query. The data item remains in the **Query** dialog box until you remove it. Thus, the data item will be retrieved every time the query is run (or the report is executed), it just won't be reported. This could extend your processing time, so to be more efficient, the data items which you do not want in your report should be removed from the query.

To remove data from a query:

1 Retrieve the Query dialog box by selecting **Report → Query** on the menu bar **OR** clicking the **Query Data** button on the toolbar.

2 Highlight the data item you wish to remove in the **Query data** listing on the right side of the dialog box.

3 Press the **Delete** key on your keyboard.

4 Click the **OK** button at the bottom of the **Query** dialog box.

Note:

If at any time a command does not appear to have executed (adding/deleting data, grouping/ungrouping data, sorting/unsorting data, filters, etc.), select Report → Retrieve on the menu bar.

Sorting Data

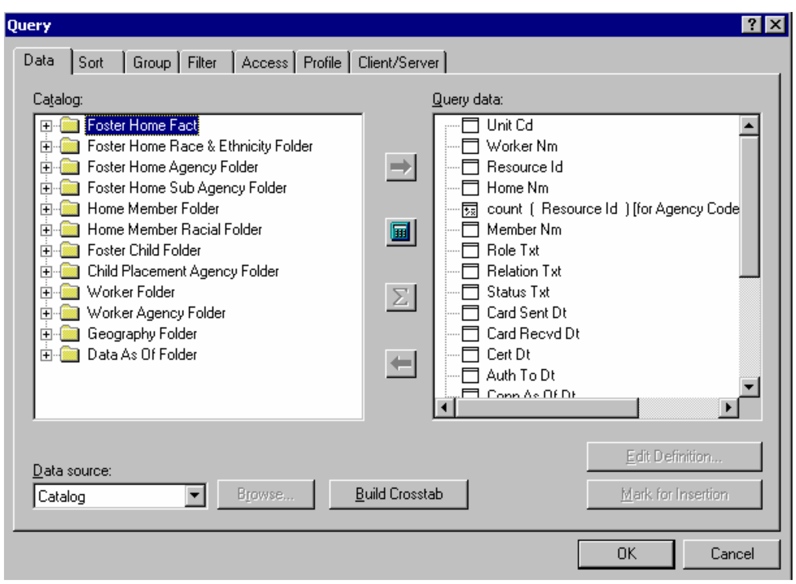
Data in Impromptu is organized into folders. The brief descriptions to the right of each folder give an indication as to what kind of data each folder contains. To view the contents of a folder, click the + to the left of it. Generally speaking, you will see **FACT** folders and **DIMENSION** folders in each catalog. The FACT folders will contain actual facts or occurrences—CPS reports, allegations, resources, etc. The DIMENSION folders contain descriptive data about the facts. For example, the Foster Home Fact folder contains many codes and ID numbers, such as Worker ID, County Code, Agency ID, and Race Code. The DIMENSION folders contain descriptive data that describe the codes (e.g.,, Worker ID from the Fact folder, plus Worker Name from the Worker Dimension folder, provide the Worker's Name).

Sorting data in the report is limited to either an ascending or descending display of numeric or text data in the report. Most predefined Impromptu reports have already been sorted based on the most logical data items. You may wish to change the sort order in some reports to better suit your needs. There is a **Sort** button on the toolbar and a **Sort** tab in the **Query** dialog box to facilitate this process.

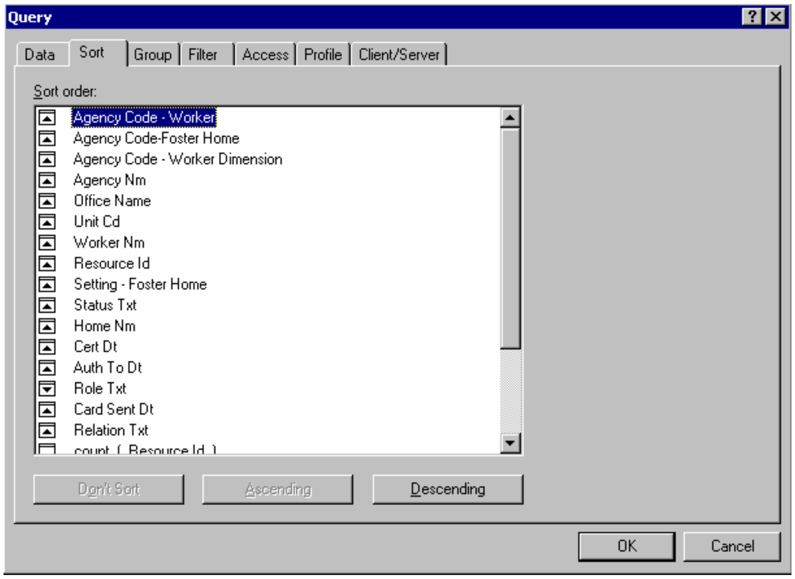
To sort data in the report

1 Open an Impromptu predefined report.

2 From the menu at the top of the screen, select **Report → Query**. The **Query** Dialog box will appear, opened to the **Data** tab.



3 Click the **Sort** tab. The **Sort Order** box displays all the data items in the report in their *sort order*. The first item on the list will have the highest sort priority; the second item will have the next highest priority, and so on.



4 Select one or more data items from the **Sort Order** box.

5 Click the **Ascending** or **Descending** buttons to specify the sort order. A small ascending or descending icon appears inside the data icon of the item you have sorted.

6 Click the **Don't Sort** button to remove the sort from a data item. ***Note: Impromptu sorts grouped data by default (see Grouping Data). You must remove grouping before you can remove sorting.***

7 You can change the sort order of the data items in the **Sort Order** box by selecting an item, and dragging it above where you wish it to reside in the sort order.

8 Click **OK** to close the **Query** Dialog box and resort the report.

To quickly sort the report on a data item using the toolbar

1 In the report, select an item in the column you wish to sort.

2 Click the **Sort** button from the toolbar.

3 The report will add an ascending sort on the column you selected.

To quickly remove the sorts on a report

1 In the report, press the **Esc** key on your keyboard to clear any selections.

2 Click the **Sort** button from the toolbar.

3 A message box displays warning that “All sort items will be deleted.” Click **Yes,** and the sorts will be removed. **Note: Impromptu sorts grouped data by default (see Grouping Data). You must remove grouping before you can remove sorting.**

Grouping Data

Grouping data in Impromptu serves to bring all like data together on the report. You can choose to group your data on any data item in your report. For example, if you have a list of CPS reports and want to see them by worker, you can group them by Worker ID. The report will then be reformatted where the Worker ID would be displayed only once, with all the CPS report records related to it displayed next to the Worker ID. A line, or break, would appear before the next Worker ID and his/her CPS report records. There is a Group button on the toolbar and a Group tab in the Query dialog box to facilitate this process. Most predefined Impromptu reports have been grouped based on the most logical data items. However, you can change the grouping if you think it necessary.

To change grouping

1 Open an Impromptu predefined report. (Follow the steps in *Module 3* for Opening Predefined Reports.)

2 From the **Report** menu, click **Query**. The **Query** Dialog box will appear. Select the **Group** tab.

3 The **Group Order** box displays all the data items in the report in their *group order*. The first data item on the list will be the one with the highest group priority; the second item will have the next highest priority, and so on. Select one or more data items you want to group.

4 Click the **Group** button. A black bar will appear at the top of the data icon indicating those data elements that are grouped.

5 Click the **Ungroup** button to remove the grouping on a data item.

6 You can change the group order of the data items in the **Group Order** box by selecting an item, and dragging it above where you wish it to reside in the group order.

7 Click **OK** to close the **Query** Dialog box and display the report.

To quickly group the report using the toolbar

1 Select a data item from one or more columns (it is not necessary to select more than one data item from a single column). The order in which you select the data item will determine the group order.

2 Click the **Group** button on the toolbar.

3 The report will display the selected column(s) grouped in the order you selected them.

To quickly remove grouping from a report

1 In the report, press the **Esc** key on your keyboard to clear any selections.

2 Click the **Group** button from the toolbar.

3 A message box will display the words “All grouped data will be ungrouped.” Click **Yes**, and all grouping will be removed.

Associating Data

You can associate a data item to a grouped data item to eliminate duplicate information in the report as long as it has a one-to-one relationship with the grouped data item. “Associating” data means linking it to a grouped data item. When you group data, the values for the grouped item are displayed only once. The records associated to the grouped item follow. Other data items, however, may repeat in the listing because they are related one-to-one to the grouped item. As in the above example, if you have Worker ID and Worker Name in your report and you grouped by Worker ID, Worker Name would be repeated for every CPS report record. To eliminate this repetition, you can associate Worker Name with Worker ID.

To associate data

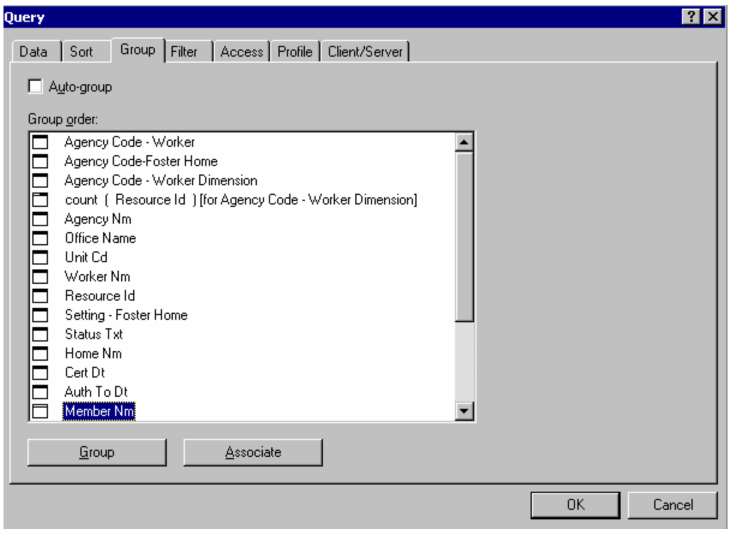
Note:

It should be noted that Impromptu issues no warning if the data item and the grouped item to which it is associated do not share a true one-to-one relationship. In the event that a one-to-one relationship does not exist, data will be missing from the report.

1. From the menu at the top of the screen, select **Report → Query**. The **Query** dialog box appears.

2. Click the **Group** tab.

3. Select the data element you want to associate to a grouped data element.



4. Click the **Associate** button. A black-and-white bar appears inside the data icon of the selected data element.

5. Click **OK** to close the **Query** dialog box and associate data in the report.

Changing Report Filters

A filter is a method of narrowing the results of a report to only that information that is relevant to you. "Filter" is Impromptu's term for the parameter or scope of your report. A filter specifies the conditions that must be met for data to be included in the report. By limiting information to a subset of the available data, a filter emphasizes the information that is important to you. Filters serve to focus a report and to minimize processing time by excluding any data that is irrelevant to the report. For example, you can filter a report on Foster Homes to show only those that have been accepted and are active. Filters can be done directly on the report workspace by using the Filter button on the toolbar. There is also a Filter tab on the Query dialog box that can be used to build more complex filters. All predefined Impromptu reports have been filtered, but you can filter, or focus, them further if required.

To filter data in the report using the toolbar button

1 Select one or more values in the report you wish to filter on.

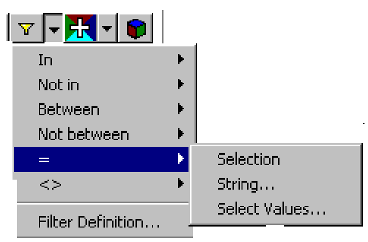
2 Click the **Filter**  button on the toolbar.

3 The report displays filtered data, based on the values you selected.

To quickly filter using the drop-down filter menu

1 Select one or more values in a column.

2 Click the drop-down arrow next to the **Filter** button on the toolbar.  A drop-down menu appears.



3 Select an operator from the drop-down menu. The operators available are as follows:

- **In** – Retrieves records with values equal to any value in an entered list of values.
- **Not In** – Retrieves records with values not included in an entered list of values.
- **Between** – Retrieves records with values inside a range of entered values.
- **Not Between** – Retrieves records with values outside a range of entered values.
- **= (Equals)** – Retrieves records with the same value as the entered value.
- **<> (Not Equal to)** – Retrieves records with any value except the entered value.
- **< (Less than)** – Retrieves records with values less than the entered value.
- **<= (Less than or equal to)** – Retrieves records with values less than or equal to the entered value.
- **> (Greater than)** – Retrieves records with values greater than the entered value.
- **>= (Greater than or equal to)** - Retrieves records with values greater than or equal to the entered value.

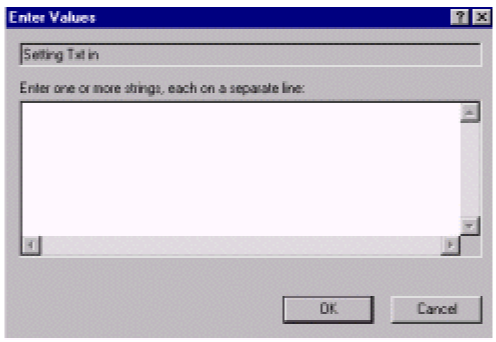
4 Point to the arrow that appears to the right of the operator to display a fly-out menu. From this fly-out menu, select one of the following based on your filter preferences:

Selection – To filter on the value or values you have selected in the report. The report will automatically be displayed.

Number – To enter one or more numbers on which to filter. The **Enter Values** dialog box will appear.

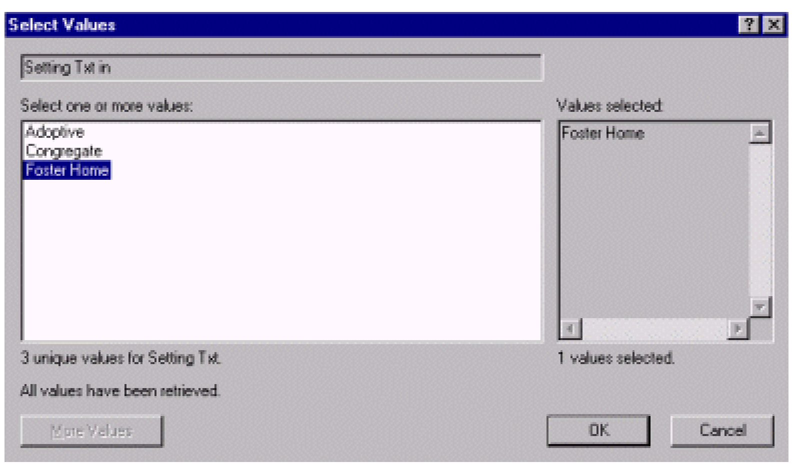
String – To enter a text string on which to filter. The **Enter Values** dialog box will appear.

- **Date** – To enter a date expression on which to filter. The **Enter Values** dialog box will appear.
- **Time** – To enter a time expression on which to filter. The **Enter Values** dialog box will appear.
- **Date-Time** – To enter a date-time expression on which to filter. The **Enter Values** dialog box will appear.
- **Interval** – To enter an interval on which to filter. The **Enter Values** dialog box will appear.



- ♦ To complete the **Enter Values** dialog box, enter the value or values you wish to use as your filter in the exact format as they appear in the database (e.g.,, if a value is in all caps in the database, it must be entered here in all caps). Click **OK** when you have completed entering values.

Select Values – To filter on your choice of a list of values that appear in the selected column in the report. A **Select Values** dialog box appears.



- To complete the **Select Values** dialog, select the value or values you wish to use as your filter from the **Select one or more values** listing on the left side of the dialog box. The value(s) that you highlight will appear in the **Values selected** window on the right side of the dialog box. Click **OK** when you have completed making your selections.

Other methods of filtering are available from the **Report → Query → Filter** tab. These methods are covered in *Module 6*: *Using the Impromptu Report Query* of this guide.

Changing Report and Column Titles

To change the titles that appear in the report:

1. Right-click on the column or report title.
2. Select **Edit** from the pop-up menu that appears.
3. Delete the existing title.
4. Type in the new title you wish to appear.
5. When you are finished, press the **Esc** key on your keyboard to take the focus off the title.

Saving Modified Reports

1. On the menu bar at the top of the screen, click **File → Save As**.
2. The **Save As** dialog box appears. Since you cannot save your modified report over the original predefined report, you will need to save the report to your **T: Drive (My Home Drive (T:)).** Open the directory listing by clicking the arrow to the right of the **Save in** window.
3. Select **Desktop** from the directory listing.
4. Select **T:\ Drive** from the directory listing.
5. Select **My Home Drive (T:)** from the directory listing and open an appropriate folder.
6. Click the **Save** button. You are returned to the report.
7. Select **File → Close** on the menu bar to close the Impromptu report.
8. Select **Catalog → Close** on the menu bar to close the Impromptu catalog.
9. To exit Impromptu and return to the Citrix desktop, select **File → Exit** on the menu bar.

Module 5:
Using the Impromptu Report Wizard

The Impromptu Report Wizard is a tool that facilitates the creation of simple list reports. It walks you through each step of creating reports, from entering a title to filtering the data. There are some limitations in using the Report Wizard; for example, you cannot filter the report using any other data than what you have selected for your report. This module provides step-by-step instructions for creating a report using the Report Wizard. *Module 6* provides detailed instructions for creating reports using the Report Query dialog box, which provides more flexibility and allows users to generate more complex reports.

Impromptu Catalogs

Before creating a new report or ad hoc query in Impromptu, you must first determine which catalog you will need to access. As discussed previously, a catalog represents your gateway to the database in Impromptu. Please refer to *Module 2: Getting Started in Impromptu* for more discussion on catalogs.

For security reasons, OCFS has chosen to use *shared* catalog types. Shared catalogs allow users to create new reports and modify existing reports. Users are not able to modify the catalog itself. Shared OCFS Catalogs are found in the Report Catalogs folder in the Data Warehouse.

Opening Catalogs

1 Double click on the **Impromptu** icon on the Citrix desktop to open the application.

2 Select **Catalog → Open** on the menu bar.

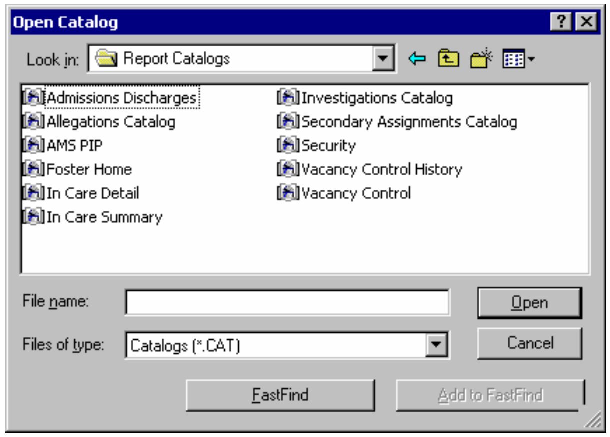
3 In the **Open Catalog** dialog box, click on the down arrow to the right of the **Look in** box to open the directory selection list.

4 Select **Desktop** from the directory listing.

5 Double click the **OCFS Datawarehouse** directory.

6 Open the **DataWarehouse** folder by double clicking it.

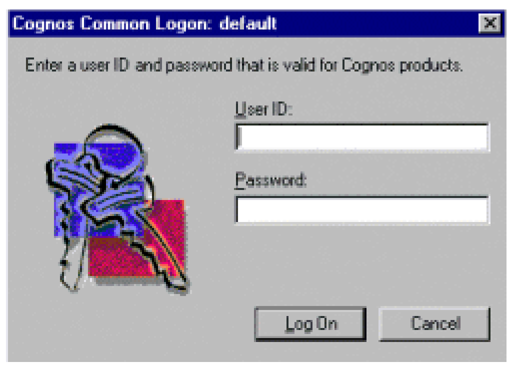
7 Open the **Report Catalogs** folder.



8 Select a catalog in the selection pane.

9 Click the **Open** button in the lower right corner of the **Open Catalog** dialog box.

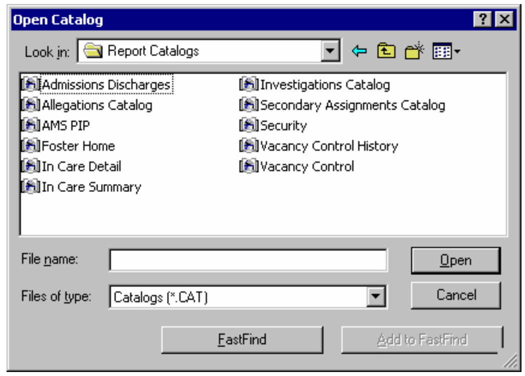
10 If the **Cognos Common Logon** entry window appears, enter your **Cognos User ID** and **Password** and click the **Log On** button



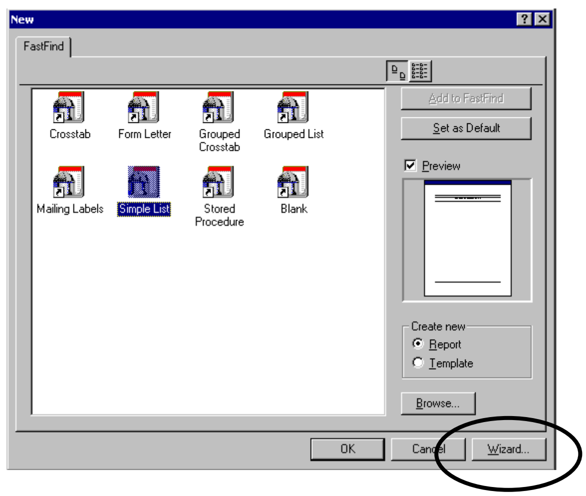
Creating a New Report

Once you've indicated that you want to create a new report and have opened a catalog, the Report Wizard dialog box opens on your computer. If Impromptu has already been opened without the Report Wizard, there are two ways to invoke the Report Wizard.

- You can click the **New** button on the toolbar . The **Open Catalog** box will appear, and you must select a catalog from which to create your report. If the **Open Catalog** box does not appear, then you already have a report catalog open and ready to use.

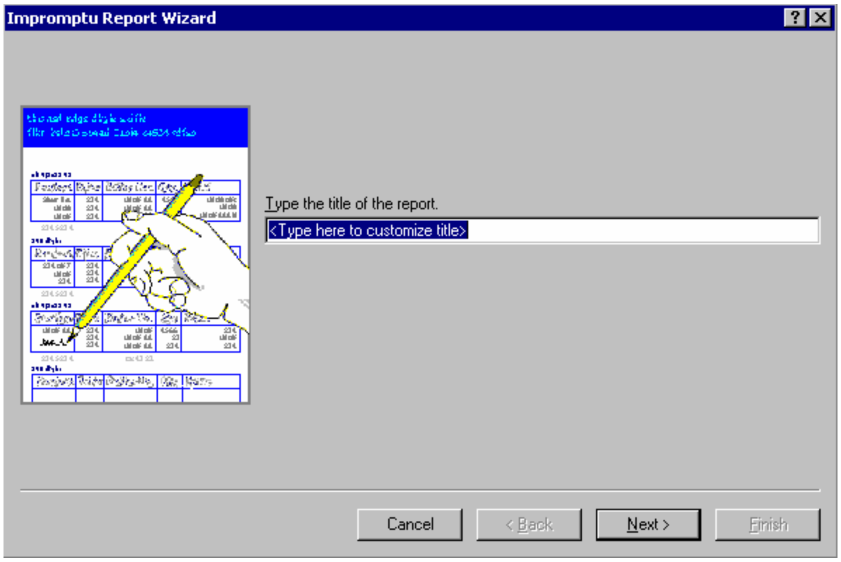


- You can select **File → New** on the menu bar, highlight the **Simple List** icon, and click the **Wizard** button at the bottom right of the dialog box.

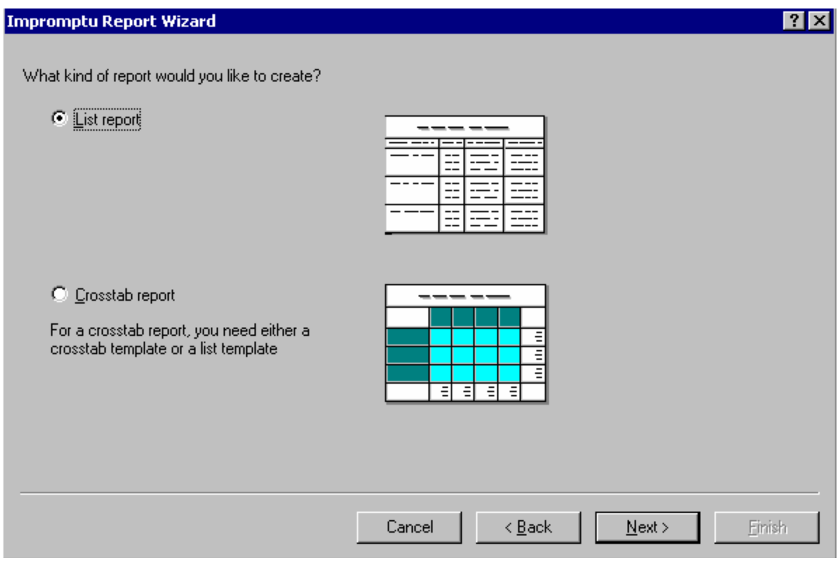


1 The Impromptu **Report Wizard** dialog box appears. The first task is to enter a title for your report. This report title will appear in bold letters in a title text box at the top of your report.

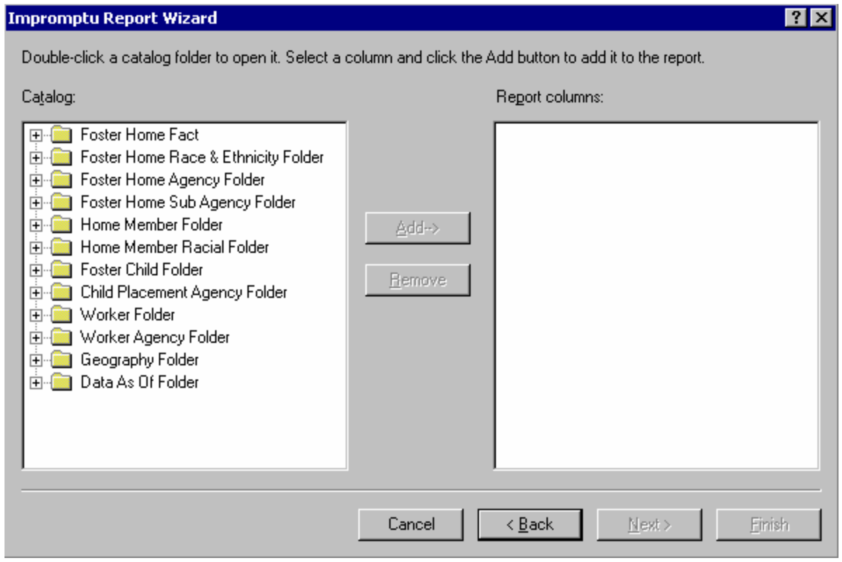
- Enter a brief but descriptive report title, e.g., “FAD Test Report”.
- Click the **Next** button at the bottom right hand side of the dialog box.



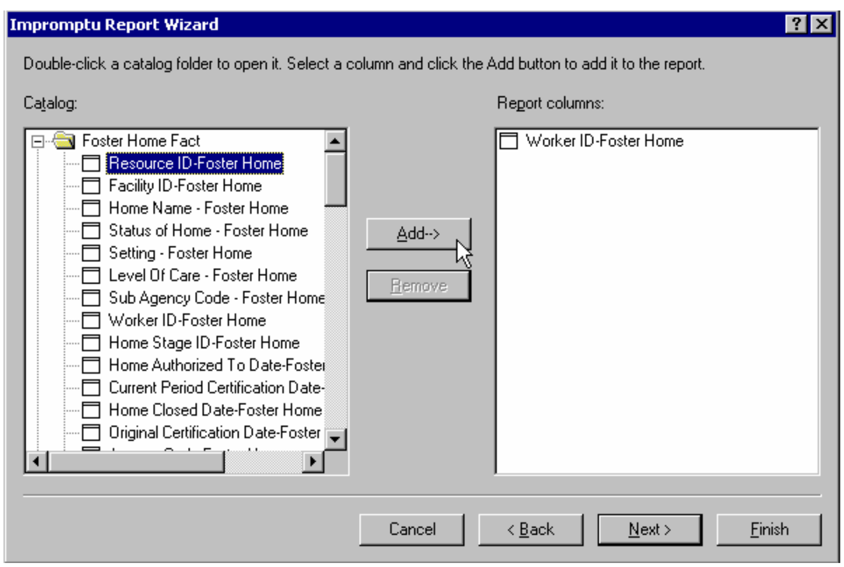
2 The second Report Wizard screen asks what kind of report you want to create. The default is a **List report**, which means that a simple report format, with columns across the top and rows along the sides, will be used. We will be confining our instructions in this module to the simple list style reports. Make sure the **List Report** radio button is selected and click the **Next** button at the bottom of the dialog box.



3 The next Report Wizard screen is used to select the data for your report. There are brief instructions at the top of the dialog box. On the left side of the box is a listing of all the folders in the catalog headed **Catalog**. On the right side of the box is a blank pane headed **Report columns**. In the middle of the screen are two buttons – **Add →** and **Remove**. To select data for your report:



- Double click any catalog folder to open it or click the plus sign ($\boxed{+}$) next to any folder to expand its contents.
- Select a data item from the folder listing.
- Click the **Add →** button or double-click the data item.
- The selected data item now appears in the Report columns listing. Repeat the above process until you have completed your data selection. When you have finished selecting data, click the **Next** button.



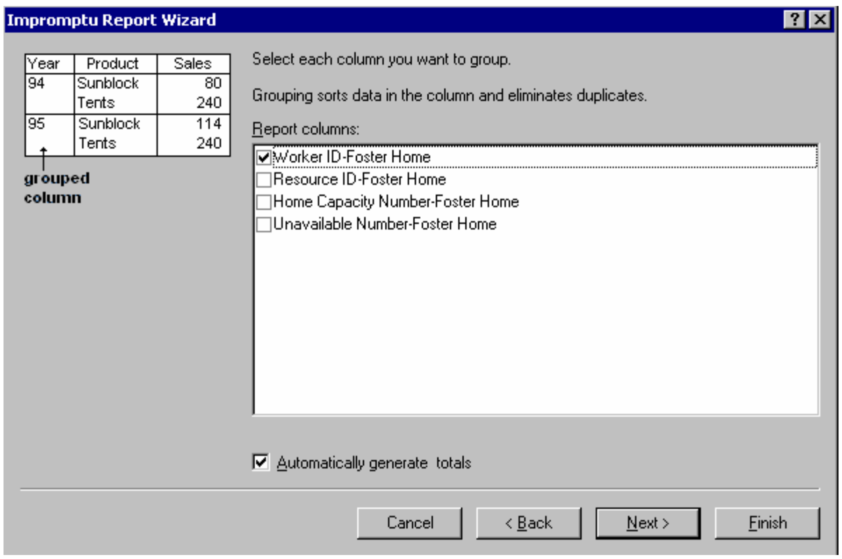
4 The fourth Report Wizard screen is the Group selection screen. Grouping data in an Impromptu report serves to bring all like data together on the report. You can choose to group your data on any data item in your report. For example, if you have a list of CPS reports and want to see them by worker, you can group them by Worker ID. The report will then be reformatted where the Worker ID would be displayed only once, with all the CPS report records related to it displayed next to the Worker ID. A line, or break, would appear before the next Worker ID and his/her CPS report records.

To select a column for grouping:

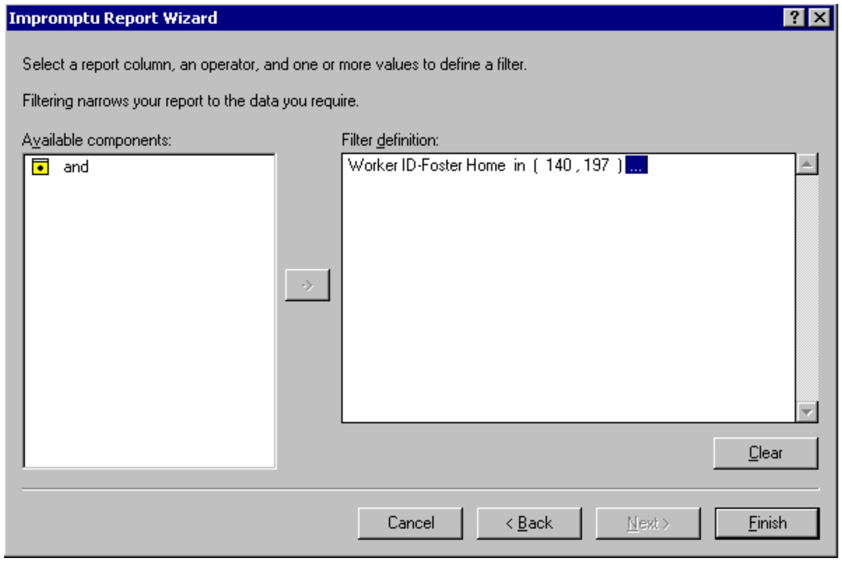
- Click in the box to the left of the column. A check mark appears in the box. ☑
- Click the **Next** button.

Note:

Beneath the Report columns window of the group selection Wizard screen is an option to automatically generate totals. The default for this option is "On" (i.e., the box is checked). If this option is left on, Impromptu will automatically total all numeric columns, including ID columns (e.g., Resource ID, Worker ID). It is recommended that this option be turned off.



5 The filter Report Wizard screen appears. "Filter" is Impromptu's term for the parameter or scope of your report. By limiting information to a subset of the available data, a filter emphasizes the information that is important to you. When constructed correctly, filters serve to focus a report and to minimize processing time by excluding any data that are irrelevant to the report. For example, you can filter a report based on specific Worker ID's to show only those records related to those workers. The purpose of the filter screen in the Report Wizard is to build a filter statement (or definition) that specifies the conditions that must be met before data is included in your report. This example specifies that the Worker ID must be either 140 or 197 in order for any data to be included in the report. To build your filter definition:



6 Select one of the Report Columns appearing on the left side of the screen (under **Available components**) that you want to use to filter your report. For example, if you only wanted to see records related to specific workers, you would be using the data item **Worker ID** in your filter.

7 Click the → button in the center of the screen to move the selected data item to the **Filter definition** box. You can also double click the item to move it to the Filter definition box.

8 Now you need to select an appropriate operator for your filter. A filter operator specifies what happens to the values on either side of the operator. In other words, how do you want to compare values for the data item?

- **In** – include records where this data item has any value in a given list of values (e.g., "**Worker ID in (1234, 6789)"** would retrieve records associated to both Worker 1234 and Worker 6789).
- **Between** – include records where this data item has a value in a given range (e.g., "**Cert To Date between 9-01-2001 and 9-30-2001"** would retrieve records were the Certification To Date was between September 1 and September 30, 2001).
- **Contains –** include records where this data item has a value containing specific data (e.g.,, "**Last Name contains 'SMI'"** would retrieve all records where the data item Last Name contained the letters SMI, such as SMITH).
- **= Equals** - include records that have the same value as the given value (e.g., "**Case ID = SD123456Z**" would retrieve just that one case record).
- **<> Not equal to** - include all records except those with the given value (e.g., **Region <> '6'** would retrieve records for all regions **except** New York City).
- **< Less than** – include all records where the data item has a value that is less than the given value (e.g., "**Intake Start Date < 1/01/2001**" would retrieve all records that occurred prior to January 1, 2001).
- **<= Less than or equal to** – include all records where the data item has a value that is less than or equal to the given value (e.g., "**Min Female Yr Number <= 6**" would retrieve records of Foster Care facilities that would accept a female age 6 or younger).

- **> Greater than** – include all records where the data item has a value that is greater than the given value (e.g., "**Investigation Close Date > 8/31/01**"would retrieve CPS Reports with close dates later than August 31, 2001).
- **>= Greater than or equal to** – include all records where the data item has a value that is greater than or equal to the given value (e.g., "**Max Male Yr Number >= 16**" would retrieve records of Foster Care facilities that would accept a male age 16 or older).

9 Select an appropriate filter operator from the list of **Available components** and click the → button in the middle of the Report Wizard screen. It now appears next to your data item in the **Filter definition** box.

10 After you have selected your filter data item and filter operator, you can enter the value(s) for your filter data item or select from a list of available values. ***Warning: The Select Values list will contain a maximum of 100 values, which in most cases will not be all the values. We will confine our discussion here to entering values.***

- To enter the value, click **number**, **string**, **date**, or **value** in the Available components listing. The purpose of selecting "number", "string", etc., is to properly format the values you enter. String data items will be enclosed in quotes (e.g., 'Smith'), number data items will be in numeric format; date data items will be formatted in yyyy-mm-dd format. ***Note: Only the data format appropriate for the data item you selected will appear in blue in the Available components listing. In other words, if you have selected a numeric data item, the word "number" will be listed. If you have selected an alphanumeric data item, the word "string" will be listed. If you have selected a date item, the word "date" will be listed.***
- An **Enter Value** dialog box appears. Enter the exact value(s) you want to use as a filter in the space provided. Values must be entered in the exact format as they are found in the database (e.g., all caps, mm/dd/yy).
- Click the **OK** button on the **Enter Value** dialog box.

12 You can enter more than one condition or filter to your report by using the "and" or "or" connections. Be careful with these because there is a big difference. "**And**" will simply add another condition to our filter. All conditions joined by "and" must be met in order for data to be returned on our report. "**Or**" adds another condition to our filter, but either condition must be met before data is returned. For example: a filter which states "Sex Cd = 'M' and Birth Dt > 01/01/60…" will result in records for all male individuals born after January 1, 1960 returned on the report. Change that filter to read "Sex Cd = 'M' or Birth Dt > 01/01/60…" and you will get records for all male individuals, regardless of their birth dates, plus all male and female individuals born after January 1, 1960. If you want to add another statement to your filter definition, you can do so by clicking "**and**" in the Available components listing and adding it to the existing filter. Then repeat the above steps to complete another filter statement.

13 When you have finished your complete filter definition, click **Finish** at the bottom of the Report Wizard screen.

The report appears on your screen.

- The title you entered in the first Report Wizard screen is at the top of the report.
- The current date appears in the upper right corner.
- The data items you selected for your report appear as columns in the report.
- The records relating to the filter definition you entered appear as rows in the report.

Date: 8/6/04

FAD Test Report

Worker ID	Resource ID	Home Capacity Number	Unavailable Number
140	20106001	0	0
	20006691	2	0
197	123772	6	0
	64376	4	0
	20144695	2	0
	20147313	2	0
	20095366	1	0
	20159634	2	0
	20179699	3	0
	20108133	2	0
	126332	6	0
	109146	6	0
	20179690	1	0
	20132155	2	0

- Scroll down to the bottom of the page. The page number is in the center of the page.

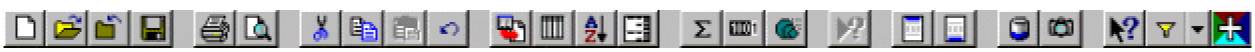
Module 6:
Using the Impromptu Report Query

Now that you have accessed the predefined user reports in Impromptu, you may have realized a need to design your own queries and reports to meet the specialized needs of your agency. This module will guide you through opening catalogs, and creating, saving and managing your own ad hoc Impromptu reports.

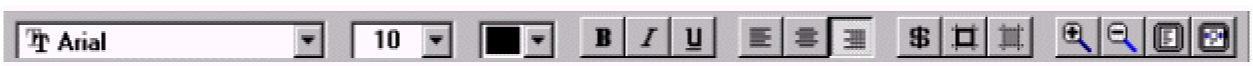
The Impromptu Screen

The menu bar at the top of the Impromptu screen has many of the same functions you are used to seeing in MS Windows applications—File, View, Tools, Help, etc. A new option is Catalog, which allows you to open and close catalogs. As discussed previously, a catalog is your gateway to the database. There are currently a number of OCFS Data Warehouse catalogs available for your use, each of which connects you to the appropriate data mart. Descriptions of these catalogs can be found in *Appendix A* of this guide.

The toolbar directly beneath the menu bar offers shortcuts to many of the Impromptu functions. The functions of these buttons will be discussed in more detail throughout this guide.



The format toolbar, beneath the Impromptu toolbar, allows you to change fonts, font styles and sizes, colors, and justification. There are additional options for currency formatting and borders.



At the bottom of the screen is a status bar, which provides information on the catalog and database you are connected to, as well as the number of records recovered in your current query. When you first open Impromptu, there will be a red 'X' through the database symbols, indicating that you are not connected to a database.

Impromptu Catalogs

Before creating a new report or ad hoc query in Impromptu, you must first determine which catalog you will need to access. As discussed previously, a catalog represents your gateway to the database in Impromptu. Please refer to *Module 5 – Using the Impromptu Report Wizard* for more discussion on catalogs.

For security reasons, OCFS has chosen to use shared catalog types. Shared catalogs allow users to create new reports and modify existing reports. Users are not able to modify the catalog itself. Shared OCFS catalogs are found in the Report Catalogs folder in the Data Warehouse.

Opening Catalogs

1 Double click on the **Impromptu** icon on the Citrix desktop to open the application. 

2 On the menu bar at the top of the Impromptu screen, select **Catalog→ Open**.

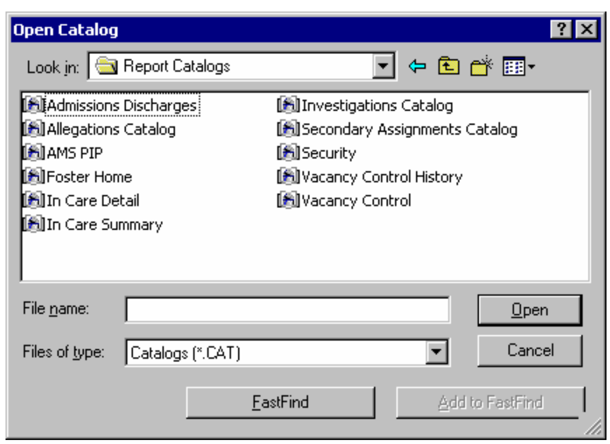
3 In the **Open Catalog** dialog box, open the directory selection list by clicking the down arrow  to the right of the **Look in** box.

4 Select **Desktop** from the directory listing.

5 Double click on the **OCFS Datawarehouse** directory.

6 Open the **DataWarehouse** folder by double clicking on it.

7 Open the **Report Catalogs** folder.



8 Select a catalog in the selection pane.

9 Click the **Open** button in the lower right corner of the **Open Catalog** window.

10 If the **Cognos Common Logon** entry window appears, enter your **Cognos User ID** and **Password** and click the **Log On** button.

If you have successfully attached to the catalog, the red **x** that displayed at the bottom of the screen will be replaced with a disk icon and the name of the catalog.

Starting a New Report

Once you've opened a catalog and are connected to a database, you can start a new Impromptu report by clicking the **New** button on the toolbar. This brings up the Impromptu Report Wizard, which is a guide that walks you through each step of creating a report, starting with the title of the report. The Report Wizard has been covered in *Module 5* of this guide. In this module, we will learn how to create new reports from scratch, without using the Report Wizard.

Turning off the Report Wizard
This process must be repeated for each Citrix session, as changes are not saved to the server.

1. Double click on the **Impromptu** icon on the Citrix desktop to open the application. 

2. On the menu bar, click **Tools**.
3. Select **Options** from the drop-down list.
4. In the **General** tab of the Options box, click off the **Use the Report Wizard to create standard reports** option.
5. Click **OK**.

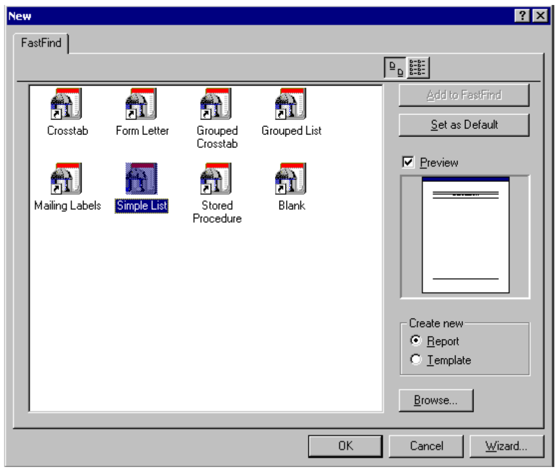
Now we can create an Impromptu report the old-fashioned way:

Selecting Data
Data in Impromptu is organized into folders. The brief descriptions to the right of each folder give an indication as to what kind of data each folder contains. To view the contents of a folder, click the + to the left of it. Generally speaking, you will see **FACT** folders and **DIMENSION** folders in each catalog. The FACT folders will contain actual facts or occurrences—CPS reports, allegations, resources, etc. The DIMENSION folders contain descriptive data about the facts. For example, the Foster Home Fact folder contains many codes and ID numbers, such as Worker ID, County Code, Agency ID, and Race Code. The DIMENSION folders contain descriptive data that describe the codes (e.g., Worker ID from the Fact folder, plus Worker Name from the Worker Dimension folder, provide the Worker's Name). So, you will always want to start from the FACT folder and retrieve descriptive data from the DIMENSION folders.

When you start a new report in Impromptu, you will be working with the **Query** dialog box. You will note that the left pane of the box is headed Catalog and the right pane is headed Query data. The right pane, or Query data side, is empty when we first open the dialog box, indicating that there is no data in the query—a blank report. Data needs to be selected from the Catalog, or left, side of the box and placed on the Query, or right, side of the box. Impromptu provides three distinct methods for selecting data, all of which will be discussed.

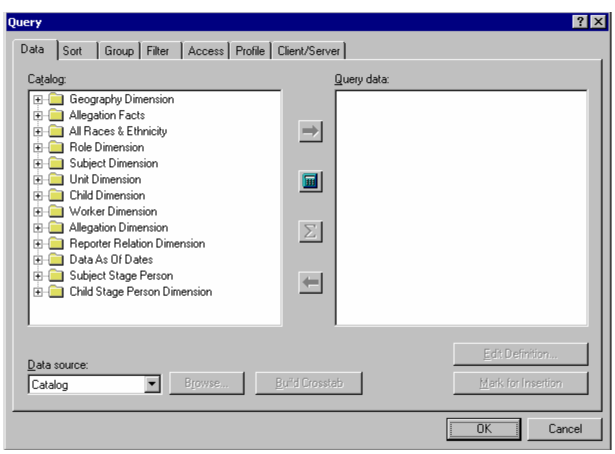
1 Once you have opened an Impromptu catalog and turned off the Report Wizard, select **File → New** from the menu bar.

- The **New** dialog box will display, requesting you to select a report template style.
- The template defaults to **Simple List**, which is the only template style we will cover in this module.



- Make sure **Simple List** is highlighted, and click the **OK** button at the bottom of the **New** dialog box.

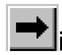
3 The **Query** dialog box will display.



4 In the **Query Data** dialog box, open a **FACT** folder on the left side of the dialog box (**Catalog** pane) by clicking on the + to the left of it.

5 Select a data item from the folder contents by clicking on it once to highlight it.

6 Add it to the **Query data** pane using **one** of the following methods:

- Click the arrow button in the center of the window (between the **Catalog** and **Query data** panes); **OR**
- Double click on the data item and it is automatically added to the **Query data** side; **OR**
- Place your cursor on the data item, hold your mouse button down, drag it to the **Query data** pane, and release your mouse button.

7 Repeat Steps 5 and 6 for all data items you want in your report.

Query Data Order
The order in which the data items appear in the Query data box is not necessarily the order in which you will see them on your report, horizontally from left to right. You should take a moment to review the order and make any changes before you run the report. The order of your query data can be rearranged by clicking and dragging the items up and down in the Query data pane.

1 Click on a data item in the **Query data** pane.

2 Hold your mouse button down and drag the data item up or down the pane.

3 Release your mouse button when your data item is in the new location.

4 Repeat the process until you are satisfied with the order of the data items.

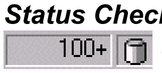
> **Note:**
>
> **Data items can also be moved on the report workspace. The Query data order dictates the order in which the data is retrieved from the database.**

Running Your Query
Once you have all of the data items you want to see, in the order in which you want to see them; you can run your query. **Note: Impromptu will run a query with a minimum of one data item selected. However, it is recommended that any required sorts, groupings, or filters be added to the query before it is run to minimize processing time.**

1 Click the  button in the lower right side of the **Query Data** box.

Report Views
The default view in Impromptu is the **Page Layout** format. So, when your report first appears, you will see it as it will look on the printed page. Unfortunately, you won't be able to see all of your data in most cases, and will need to use the **Next Page** buttons on the scrollbars to view all of the data. It is recommended that, while you continue to develop your report, you use the **Screen Layout** view. Use the Page Layout view when you have finished developing and are ready to format your report.

1 On the menu bar, click **View → Screen Layout** to switch to a screen layout view of the report. (To switch back to page layout view, select **View → Page Layout** from the menu bar.

Status Check


When you run a report, you will notice a number in the lower right corner of your screen on the status bar. This section of the status bar indicates the number of records that have been retrieved for your report. Since Impromptu retrieves only 100 records from the database at a time, a **100+** indicates that there are more than 100 records for this query. To see how many total records there are in your query (while in **Screen Layout**):

1 Use the vertical scrollbar and scroll all the way down to the end of the report; **OR**

2 Press the **End** key on your keyboard; **OR**

3 Press the **Page Down** key repeatedly until you reach the end of the report.

The number in the lower right corner of the status bar now indicates the total number of records in your query. To return to the top of your report, press the **Home** key on your keyboard.

Organizing Data

You have created a basic report and are now ready to organize your data to fit your requirements. There are a number of different things you can do to rearrange and organize the report, including:

- Ordering columns
- Setting column widths
- Sorting data
- Grouping data
- Associating data
- Creating headers and footers

Ordering columns

Once you've seen your executed query, you may wish to move columns around on the report so that it makes more sense. You can change the order in which your columns appear on the report in the following manner:

> **Note:**
>
> **Make sure you keep your cursor just below the Column Header line of your report.**

1 Click on any value in a column to highlight it.

2 Holding your mouse button down, drag the column to another location on the report.

3 When you see two vertical dotted lines appear to the right of the column next to which you want to insert the moved column, release your mouse button.

Relationship	Home Name	Worker Office Name	Unit Code	Worker Name
Child	Peters, Melvina	Hudson County Dss	001	Zimmer,Marilyn
	Spencer,Lorrie	Hudson County Dss	001	Coverdale,Claudia
	Spencer,Lorrie	Hudson County Dss	001	Coverdale,Claudia
	Spencer,Lorrie	Hudson County Dss	001	Coverdale,Claudia
Daughter/Son	Evans,Michelle	Hudson County Dss	001	Zimmer,Marilyn
	Evans,Michelle	Hudson County Dss	001	Zimmer,Marilyn
	Lawrence, Donna	Hudson County Dss	001	Zimmer,Marilyn
Foster Parent	Barnham,Debra	Hudson County Dss	001	Zimmer,Marilyn
	Barnham,Debra	Hudson County Dss	001	Zimmer,Marilyn
	Barnham,William	Hudson County Dss	001	Zimmer,Marilyn
	Coverdale, Roxanne	Hudson County Dss	001	Zimmer,Marilyn
	Coverdale, Roxanne	Hudson County Dss	001	Zimmer,Marilyn

Reposition lines for **Home Name** field

Setting column widths

Impromptu defaults the width of a column to the greater of the data item name or the longest data item in the first 20 records retrieved. Since later records may have data items longer than the default, you may have to widen some columns.

1 Highlight the header record of the column you want to widen.

2 Move your cursor to the right until it is on the line between this column and the next. Your cursor will turn into two arrows facing left and right (←→).

3 Click on the line and, holding your mouse button down, drag the line to the right until the column is the desired width.

You can shorten column widths by using the same method, dragging the line to the left instead of to the right. There is another technique that can be used to shorten column widths when the data is wider than the columns. It is called “Multi-line with word wrap” and is covered in the Formatting section at the end of this module.

Sorting data

Impromptu retrieves data as it finds it in the database. So, it may appear on your report in no particular order. This will necessitate sorting the records in some fashion to make your report user-friendlier. Impromptu provides a **Sort** button on the toolbar and a **Sort** tab in the Query dialog box. The Sort button provides only an ascending sort, while the Sort tab of the Query dialog box allows you to un-sort, sort ascending, and sort descending.

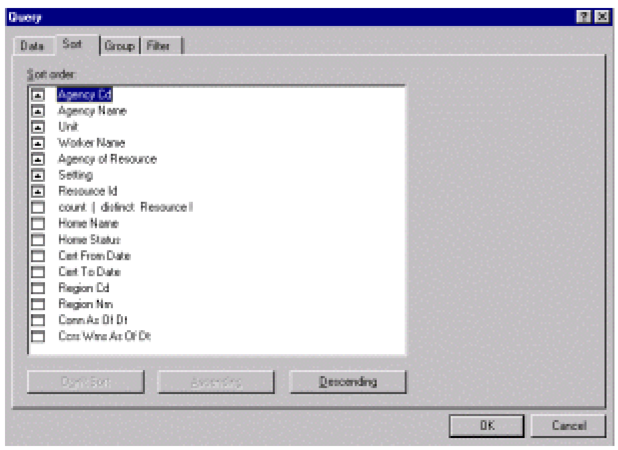
To sort in ascending order using the Sort button:

1 On your report, select any value in the column you want to sort.

2 Click the **Sort** button on your toolbar. This button sorts in **Ascending** order only, so your data will be sorted from lowest to highest value.

Sort in descending order using the Sort tab of the Query dialog box:

3 Click the **Data Query** button on your toolbar **OR** select **Report → Query** on the menu bar to bring up the Query dialog box again.



4 Click the **Sort** tab on the Query dialog box. All data items in the report are displayed in the Sort order listing. Those Items being sorted are indicated by the symbols (sorted in ascending order) or (sorted in descending order).

5 Select another data item to sort by clicking on it once in the Sort order list.

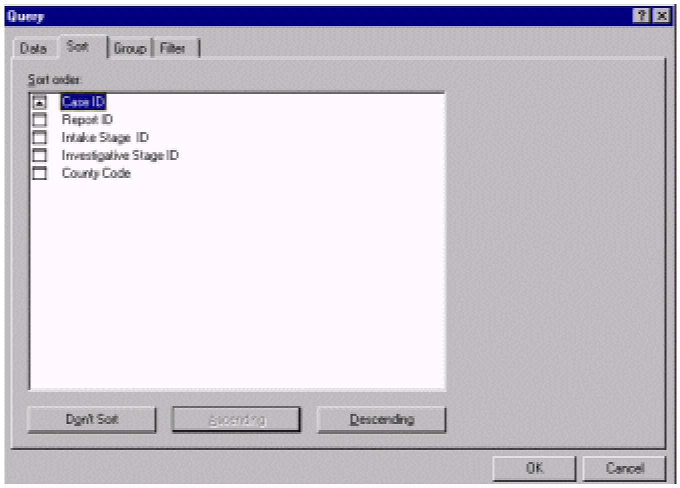
6 Click the **Descending** button on the bottom of the Sort order box.

7 Click **OK** at the bottom of the Query dialog box.

Remove a sort by using the Sort tab of the Query dialog box

1 Click the **Query Data** button on your toolbar **OR** click **Report → Query** on the menu bar to bring up the Query dialog box again.

2 In the Query dialog box, click the **Sort** tab. Note that the column you had previously sorted is at the top of the list of data items and the icon to the left of it holds a carat (^) to indicate that it is being sorted in ascending order.



3 Select the same data item by clicking once on it in the Sort order list.

4 Click the **Don't Sort** button at the bottom of the box.

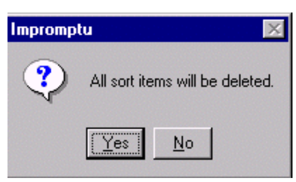
5 Click the **OK** button at the bottom of the Query dialog box.

To remove all sorts using the Sort button on the toolbar.

1 On the report workspace, press the **Escape** key on your keyboard to clear any selections.

2 Click the **Sort** button on the toolbar.

3 A message box will display notifying you that all sort items will be deleted. Click **Yes**.



Grouping Data

Grouping data in an Impromptu report serves to bring all like data together on the report. You can choose to group your data on any data item in your report. For example, if you have a list of CPS reports and want to see them by worker, you can group them by Worker ID. The report will then be reformatted where the Worker ID would be displayed only once, with all the CPS report records related to it displayed next to the Worker ID. A line, or break, would appear before the next Worker ID and his/her CPS report records. There is a Group button on the toolbar and a Group tab in the Query dialog box to facilitate this process.

Grouping data using the Group button

1 Select a data item on which to group the data in your report. Click on any value in that column or click on the column header. ***Note: You can select multiple items to group by holding down***

the Ctrl key on your keyboard and clicking on each item in succession. The items will be grouped in the order in which you selected them.

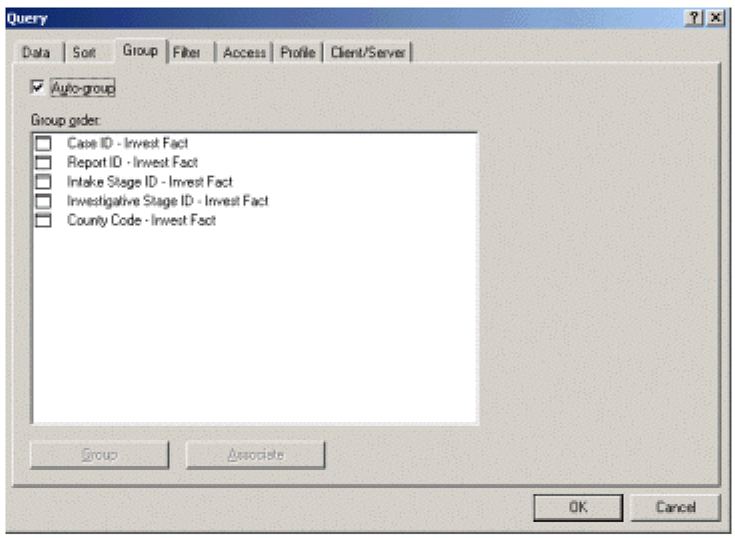
2 Click the **Group** button on the toolbar.

There is also a Group tab on the Query dialog box that can be used to group data. This feature is especially helpful if you need to do multiple grouping on your report. Groupings are executed in the same order that you invoke them. A second grouping will be within the first grouping, a third within the second within the first, etc. Grouping can be undone using the Group tab.

Grouping data using the Group tab of the Query dialog box

1 Click the **Data Query** button on the toolbar to bring up the Query dialog box.

2 Click the **Group** tab.



3 Select a data item on which to group the data in your report from the data listing.

4 Click the **Group** button at the bottom of the **Group** box.

5 Click **OK** on the **Query** dialog box to run the report.

Remove groupings from your report using the Query dialog box

1 Click the **Data Query** button on the toolbar to bring up the **Query** dialog box.

2 Click the **Group** tab.

3 Select the grouped data item in the Group order listing.

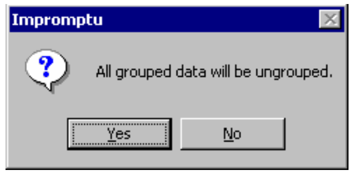
4 Click the **Ungroup** button at the bottom of the box.

*Remove all groupings from your report using the **Group** button*

5 On the report workspace, press the **Escape** key on your keyboard to clear any selections you may have on your report.

6 Click the **Group** button on the toolbar.

7 A message box will display stating, “All grouped data will be ungrouped”. Click **Yes**.



Headers
Another way of grouping in Impromptu is to create a Header. The Header function creates a header frame in the report, places the “grouped” data item in the header, and places all of the records applicable to that data item beneath the header record. There is a **Header** button on the toolbar to facilitate this process.

1. Click **View → Screen Layout** on the menu bar.
2. Select a data item on which to group your data. Click on any value in that column or click on the column header.
3. Click the **Header** button on the toolbar. 

Notice how the report has changed. The grouped item now appears above a listing of the records associated with it.

Associating Data
“Associating” data means linking it to a grouped data item. When you group data, the values for the grouped item are displayed only once. The records associated to the grouped item follow. Other data items, however, may repeat in the listing because they are related one-to-one to the grouped item. As in the above example, if you have Worker ID and Worker Name in your report and you grouped by Worker ID, Worker Name would be repeated for every CPS report record. To eliminate this repetition, you can associate Worker Name with Worker ID.

*Associating data using the **Group** tab of the **Query** dialog box*

1. Click **View → Screen Layout** on the menu bar.
2. Open the Query dialog box by clicking the **Query Data**  button on the toolbar.
3. Click the **Group** tab.
4. Select a data item by which to group your report data in the data listing and click the **Group** 

button at the bottom of the screen. ***Note that the item you grouped by is highlighted in the group order list—the top of the box to the left of it is shaded in***. 
5. Select the data item you want to associate to the grouped item by clicking on it in the group order list.

6 Click the **Associate** button at the bottom of the box.

7 Click the **OK** button at the bottom of the **Query** dialog box. ***Note that the item you associated is highlighted in the Group order listing with black-and-white shading in the box to the left of it.***

When the report runs, you will note that the item you associated to your grouped item now appears only once on the report.

Associating data when you are using a Header is a little different. You will need to use the click-and-drag method in this instance.

> **Note:**
>
> **It should be noted that Impromptu issues no warning if the data item and the grouped item to which it is associated do not share a true one-to-one relationship. In the event that a one-to-one relationship does not exist, data will be missing from the report.**

Associating data when using Headers

1 Select a data item on which to group your data. Click on any value in that column or click on the column header.

2 Click the **Header** button on the toolbar**.**

3 On the report workspace, select the data item that is to be associated to the Header item. Hold your mouse button down and drag it up to the Header frame. Drop the associated item next to the grouped item.

Clearing or "dissociating" data associations

1 Click the **Query Data** button on the toolbar to bring up the Query dialog box.

2 Click the **Group** tab.

3 The "associated" items appear on the listing underneath the grouped items to which they have been associated. The top of the box next to the associated item is only shaded in halfway.

4 Select the item you want to dissociate.

5 Click the **Dissociate** button at the bottom of the dialog box.

Filtering Reports

"Filter" is Impromptu's term for the parameter or scope of your report. A filter specifies the conditions that must be met for data to be included in the report. By limiting information to a subset of the available data, a filter emphasizes the information that is important to you. Filters serve to focus a report and to minimize processing time by excluding any data that are irrelevant to the report. For example, you can filter a report on Foster Homes to show only those that have been accepted and are active. Filters can be done directly on the report workspace by using the Filter button on the toolbar. There is also a Filter tab on the Query dialog box that can be used to build more complex filters.

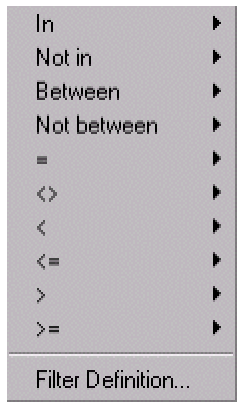
A simple filter consists of three components: A data item, a filter operator, and a value. A *data item* would be any column of your report or any data item in the Catalog. For example, if you want a report listing all CPS Reports assigned to a given worker, the data item of your filter would be Worker ID. A filter *operator* specifies what happens to the values on either side of the operator. For example, if you want a report listing all CPS reports assigned to a single worker, your filter would read "Worker ID =….", meaning that the Worker ID on the record must equal a certain number before it is to be included in the report. The third part of the filter is the *value*. Again, following the same example as above, your filter would read "Worker ID = 1234567" to produce a report for a single worker. Values must be entered in the exact format as they are found in the database.

You will have several choices for entering the actual value or values by which you want to filter. Values are entered by a direct selection on the report workspace. In other words, find the value of the data item you want to use as a filter and highlight it on the report. Values can also be selected from a list of all the values available for the selected data item. You can also enter the value into a number or text pop-up box.

Filtering a report using the Filter button

1 On the report workspace, select a data item to use as a filter. Click on any value in the column or on the column header.

2 Click the drop-down arrow to the right of the **Filter**  button on the toolbar. This brings up a listing of operators from which to choose.



3 Select one of the operators from the drop-down list:

- **In** – include records where this data item has any value in a given list of values
- **Not In** – excludes records where this data item has any value in a given list of values
- **Between** – include records where this data item has a value in a given range
- **Not Between** – excludes records where this data item has a value in a given range
- **= Equals** - include records that have the same value as the given value
- **<> Not equal to** - include all records except those with the given value
- **< Less than** – include all records where the data item has a value that is less than the given value
- **<= Less than or equal to** – include all records where the data item has a value that is less than or equal to the given value
- **> Greater than** – include all records where the data item has a value that is greater than the given value
- **>= Greater than or equal to** – include all records where the data item has a value that is greater than or equal to the given value

4 Select the method by which you will choose the value you will use as a filter:

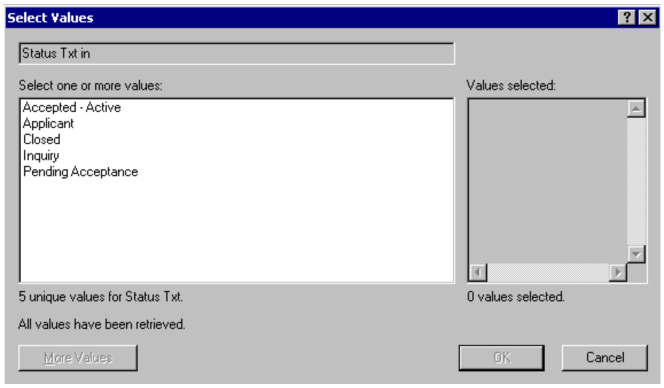
- **Selection** – your filter value will be the value you have highlighted on the report.

- **Number/String -** a number or text entry box will pop-up and you will enter the exact value in the space provided. ***Note: Values must be entered in the same format as they appear in the database.***

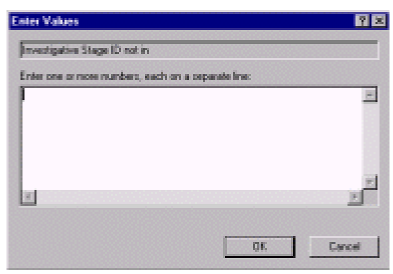
- **Select values** – a list of all the values for your filter data item will be displayed and you will make your selection from that list. ***Note: Please be aware that there is a limit to the number of values that will be shown in this list. In most cases, only the first 100 values will be shown, so you will not be seeing the entire list of available values.***

5 Enter or select the value you want to use as a filter.

- If you choose **Select Values**, a **Select Values** dialog box will display, listing all of the available values for the data item selected. Select each value you wish to use in the **Select one or more values:** listing box and it will then be listed in the **Values selected** box. When you have finished making your selections, click the **OK** button at the bottom of the dialog box.



- If you choose **Number/String**, an **Enter Values** dialog box is displayed. Enter the values you want to use as a filter. The values must be entered in the exact format as they are found in the database. When you have finished, click the **OK** button at the bottom of the box.



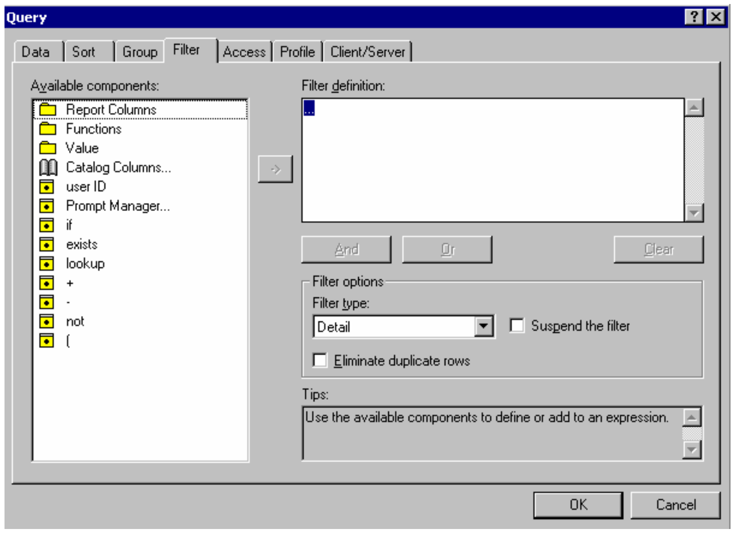
6 Your report will be returned with the filter applied.

There is a **Filter** tab on the **Query** dialog box that can also be used to construct filter expressions. The method is much the same as selecting data—you select data items and operators from the **Available components** listing on the left side of the screen and place them in the **Filter definition** box on the right side of the screen. All of the data items in your report are available for your use in a folder called **Report Columns**. In addition, all the items in the catalog are available in a folder called **Catalog Columns**. So, you can use a data item that isn't even in your report to build a filter.

Filtering reports using the Filter tab in the Query dialog box

1 Click the **Data Query** button on the tool bar to bring up the Query dialog box.

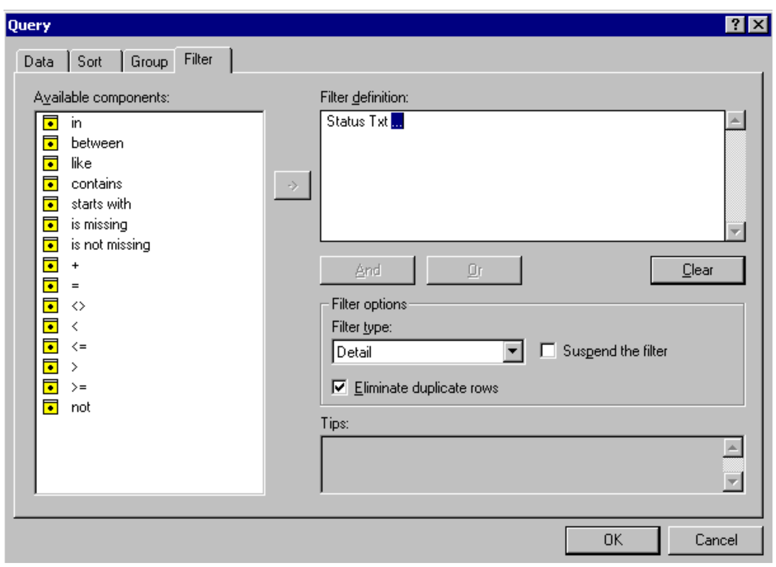
2 Click the **Filter** tab.



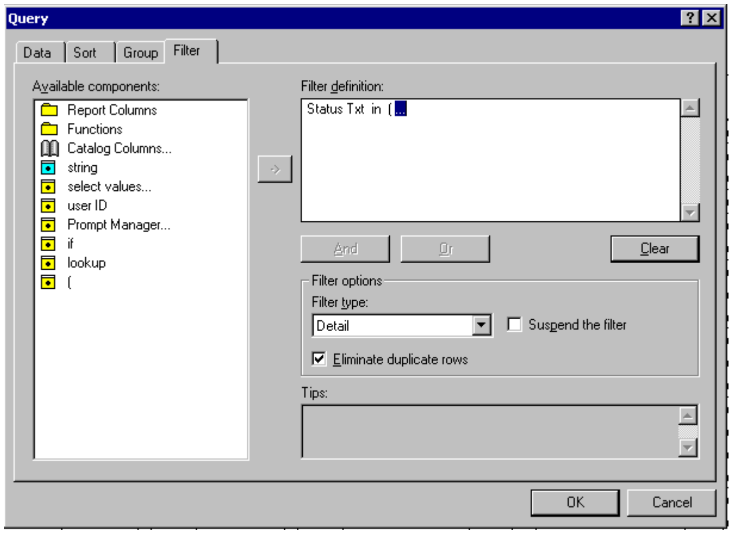
3 Open the **Report Columns** folder (or the **Catalog Columns** folder) in the **Available components** listing by double clicking it.

4 Select a data item to use in your filter expression by clicking on it once to highlight it. Move it to the **Filter definition** box by clicking the arrow button  between the **Available components** window and the **Filter definition** window. You can also double click it to move it, or click and drag it over to the **Filter definition** box.

5 Now the appropriate operators appear in the **Available components** window of the **Query** box. Select an operator and move it to the **Filter definition** window by double clicking it, clicking the arrow button , or clicking and dragging it over.



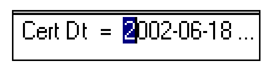
6 Now you have to indicate what kind of value you will be entering. The **blue text** in the **Available components** listing indicates the type of value that is appropriate for the data item you've chosen. It will be a **number**, **string**, or **date** value. Double click on the blue value-type item to move it to the **Filter definition** box. The purpose of selecting a value type is to format the value correctly in the Filter definition box.



7 Now you can enter the value you want to use as your filter. If the data item is an alphanumeric field, you will have chosen the value type of "**string**" and two single **quotation marks** will appear in the **Filter definition** box. Your cursor will be flashing between the two quote marks, so just type your value in there. If the data item is a **date** field, today's date will automatically appear in the **Filter definition** box in **yyyy-mm-dd** format. Type over that date field. If the data item is a **number** field, a **zero** will appear in the Filter definition box. Just type the numeric value you want over the zero.

"string"

"number"



"date"

8 When you have completed your filter expression, click the **OK** button at the bottom of the **Query** dialog box. Your report will now re-run with the filter applied.

Complex Filters

Complex filters consist of more than one simple expression; e.g., "Worker ID = XXXXX and Intake Start Date between yyyy-mm-dd and yyyy-mm-dd". Complex filters are built in the same way as simple filters with the addition of "and" or "or" between the filter expressions. Complex filters can be built on the report workspace, using the Filter button and drop-down box, or they can be built manually in the Filter tab of the Query dialog box.

Again you are cautioned to note the difference between the "and" and "or" connectors. "**And**" will simply add another condition to your filter. All conditions joined by "and" must be met in order for data to be returned on our report. "**Or**" adds another condition to our filter, but only one condition must be met before data is returned. For example: a filter which states "Sex Code = 'M' and Birth Date > 01/01/80…" will result in records for all male individuals born after January 1, 1980 returned on the report. Change that filter to read "Sex Code = 'M' or Birth Date > 01/01/80…" and you will get records for all male individuals, regardless of their birth dates, plus all male and female individuals born after January 1, 1980.

*Building a complex filter using the **Filter** button*

1 Select the data column you want to use to build the first part of your filter by clicking on any data item in the column or by clicking the column header on the report.

2 Click the drop-down arrow to the right of the **Filter** button on the toolbar. 

3 Select a filter operator from the drop-down list.

4 Select the method by which you will choose a value for your filter expression from the drop-down list.

5 Select or enter the value you will use to filter your report.

6 To build the second part of your expression, select the data column you want to use by clicking on any data item in the column or by clicking the column header on the report.

7 Click the drop-down arrow to the right of the **Filter** button on the toolbar. 

8 Select a filter operator from the drop-down list.

9 Select the method by which you will choose a value for the second filter expression.

10 Select or enter the value you will use in the second filter expression.

*Building a complex filter using the **Filter** tab of the **Query** dialog box*

1 Click the **Data Query** button on the toolbar to bring up the **Query** dialog box. 

2 Click the **Filter** tab.

3 In the **Available components** listing (left side of the Filter box), open **Report Folders** or **Catalog Folders** by double clicking it.

4 Select the data item you will use for the first part of your filter expression and move it to the **Filter definition** window by double clicking on it, or by using the arrow button  in the center of the dialog box.

5 Select a filter operator from the **Available components** listing and add it to your expression (via double-clicking, click and drag, or ).

6 Select the data type (**string, number, date**) in blue text from the **Available components** listing and add it to your filter expression.

7 Enter the value(s) you will use in your filter in the **Filter definition** box.

8 In the **Available components** listing, select '**and**' and add it to your Filter expression.

9 Open the **Report Folders** or **Catalog Folders** in the **Available components** listing and select the data item you will use in the second part of your filter expression.

10 Add the data item to your filter expression by double-clicking, using the arrow button , or clicking and dragging it to the **Filter definition** box.

11 Select a filter operator from the **Available components** listing and add it to your filter expression.

12 Select the data type from the **Available components** listing and add it to your filter expression (e.g., string, date, number).

13 Enter the value you will use in the second part of your filter expression.

14 Click **OK** at the bottom of the **Filter** dialog box to run the report.

Adding Calculations to Your Report

Totals and Counts

Totals and counts can be added to your report directly on the report workspace. There are **Total** and **Count** buttons on the toolbar to facilitate this process. The **Total** button provides a sum of a selected column. If the report data has been grouped, subtotals will be provided automatically for each group. The **Count** button will provide a count of the number of items in a selected column. This feature is useful if you need the number of CPS reports or the number of allegations per report.

Totaling a column

1 Select a column for which you need a total by placing your cursor above the column header. When your cursor turns into an arrow ⇩, click once to highlight the entire column.

2 Click the **Total** button on the toolbar. Σ

Footer records have been placed in the report with subtotals for each grouping. At the bottom of the report is a footer record with the grand total for the report.

Adding counts to your report

When performing a count calculation on your report, remember to select a "unique" identifier to count. For example, when performing a count on children, you should select the unique CIN ID rather than Child Name, since two children could have the same name, but would not have the same CIN ID.

1 Select any value in the column for which you need a count (i.e., the number of items in the column) by placing your cursor above the column header. When your cursor turns into an arrow ⇩ click once to highlight the entire column.

2 Click the **Count** button the toolbar.

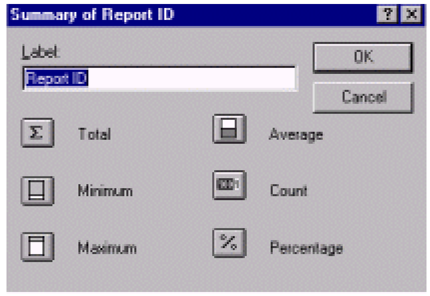
Footer records have been placed in the report containing subtotals of the count for each group. There is a footer record at the bottom of the report with the total count for the report.

Summaries

Σ There is a Summary icon in the center of the **Query Data** dialog box that can be used to add various summary calculations to your report in the data selection stage. You must first select the data item for which you require a summary in the **Catalog data** box, and then click the **Summary** button. A **summary** dialog box is displayed and you can select from six different types of summaries, as described below:

- **Total** will sum up all of the data items and return a total for all of them.
- **Minimum** will return the minimum value of the selected data items.
- **Maximum** will return the maximum value of the selected data items.
- **Average** will return the average number value of all the data records selected by totaling the values and dividing by the number of records.
- **Count** will return the total number of items selected, disregarding the number values.
- **Percentage** will return the percentage of the total value for each of the selected data items.

The difference between the **Summary** dialog box and the **Total** and **Count** buttons is that the Summary option adds an entirely new column to your report, with the requested summary calculation for each record in your report. This may not make sense for total calculations, but is logical for percentage calculations.

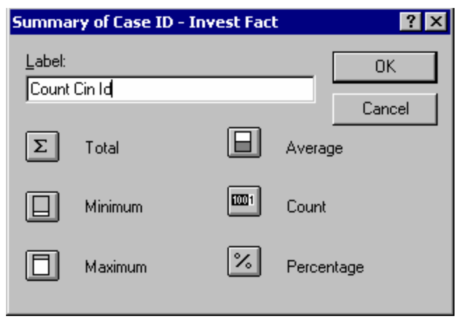


1 Open the **Query** dialog box, and select a data item for which you want to provide a Summary calculation in the **Catalog** data listing by clicking on it once to highlight it.

2 Click the **Summary** button in the center of the **Query** dialog box. Σ

3 The **Summary** dialog box appears. Type a title for your summary calculation in the **Label** box. This will be the column header for your new column. It defaults to the data item name, but you can delete that and add your own title.

4 Select from **Total**, **Minimum**, **Maximum**, **Minimum**, **Average**, **Count** and **Percentage** by clicking on the appropriate button.



5 Click the **OK** button in the upper right hand corner of the dialog box.

6 Group your report by a specific data item using the **Group** tab.

7 Place a filter on your report, if required, using the **Filter** tab.

8 Click the **OK** button in the **Query** dialog box to run the report.

A separate column containing the summary calculation you requested has been added to the report.

Column Calculations

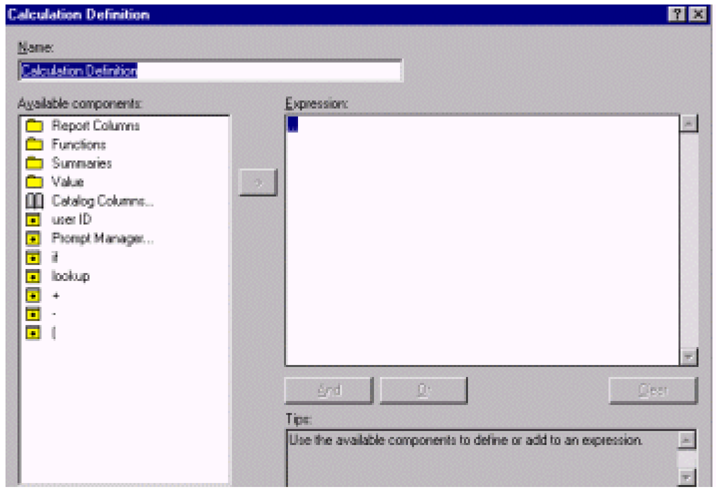
You can create new columns by performing calculations on the columns of your report. A **Calculation Definition** dialog box is provided for your use in creating calculations. The box can be called up from the **Query** dialog box using the **Calculate** button in the center of the box, or from the report workspace using the **Insert → Calculation** command on the menu bar. The **Calculation Definition** box is virtually the same as the **Filter definition** box in that components are provided on the left side and a definition box is provided on the right side. You move components from the left to the right by double-clicking them, or by using the arrow button in the middle. Add, subtract, multiply, and divide are the operators you will be using most. Both **Report Folders** and **Catalog Folders** are available for your use in selecting data items for your calculation.

Creating a calculated column using the Insert command

1 On the menu bar, click **Insert → Calculation** on the menu bar.

2 Your cursor turns into an downward arrow. Place the arrow in between the two columns where you want your calculated column to appear and click your mouse button.

3 The **Calculation Definition** dialog box is displayed. Enter a name for your calculation in the **Name** box. If you do not enter a name, the title will default to the calculation expression itself.



4 Open the **Report Folders** or **Catalog Folders** in the **Available components** listing by double clicking on it.

5 Select a data item to start your calculation expression. Double click on it to add it to the **Expression** window or use the arrow button in the center of the window.

6 The **Available components** window now displays operators (+, -, *, /) for adding, subtracting, multiplying, and dividing. Select one of these and add it to the **Expression** window by double clicking on it or by using the arrow button in the center.

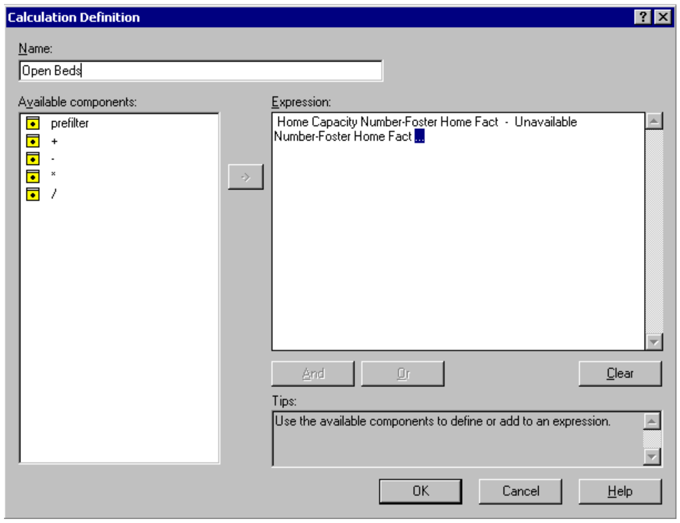
7 If you are using another data item to complete your expression (i.e., adding one column to another, subtracting one column from another column, multiplying one column by another column, or dividing one column by another column), then open the **Report Folders** or **Catalog Folders** by double-clicking on it. Then select the data item you need from the listing and add it to the **Expression** window by double-clicking it or by using the arrow button in the center.

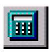
Note:

The Tips box beneath the Expression window gives a brief description of what the operator selected will do. Just click on any operator and read the description of it in the Tips box.

8 You can also use a static number to complete your expression; e.g., to develop an average monthly CPS reports processed number, take the total number of CPS reports processed and divide by 12. In this instance, select **Value** in the **Available components** listing, and then add **number** to the **Expression** box.

9 When you have completed your expression, click **OK** at the bottom of the **Calculation Definition** dialog box.



Another method of adding calculations to your report is from the **Query** dialog box. There is a **Calculate** button  in the center of the dialog box, between the Catalog data listing and the Query data listing. While selecting data for your report, you can click the **Calculate** button. The **Calculation Definition** dialog box will appear. You can build your calculation expression using the steps described above.

Functions

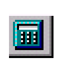
Functions are predefined formulas that you can use to reformat or manipulate data items. Functions are considered calculations in Impromptu; in other words, you will use them in building expressions in the **Calculation Definition** dialog box. There is a folder called **Functions** in the **Available components** window of the **Calculation Definition** dialog box. To open the folder, you double click on it. A listing of available functions is displayed. In order to learn what a function does, click on it and a brief description will appear in the Tips box in the lower right corner of the window. Some examples of functions are:

- **Age** – Calculates an age by subtracting a specified date from today's date (i.e., today – date of birth = age of child)
- **Datetime-to-Date** – Returns the system datetime (in yyyymmdd format) in more legible date format (yyyy-mm-dd)
- **Today** – Returns the current date according to the date set on your computer

The **Tips** box also provides the syntax, or format, that the calculation must take to work properly. For example, the age function syntax is *age (date_exp)*, which means it should read *age (Date of Birth)* if you are calculating the age of a child.

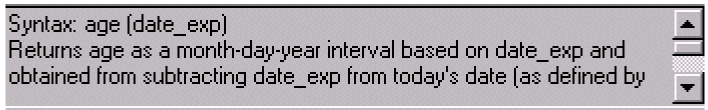
Functions are also available to you in the **Filter** dialog box and you can use them in building filter definitions. For example, if you want to get a listing of foster homes whose certifications will expire within the next 90 days, you could insert a filter that read "Cert Date <= Today + 90".

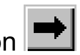
Using a function to build a calculation

1. Click the **Calculate** button in the center of the window. 
2. In the **Calculate Definition** dialog box, type a Name for your calculation in the **Name** box (e.g., Age).

3. Open the **Functions** folder in the **Available components** listing by double-clicking it.

4. Select a function from the listing. Place your cursor on the function in the listing and look at the **Tips** box in the lower right section of the box. The **Tips** box gives a brief description of what the function does and also provides the **syntax**, or format, that the expression must take. If you are using the age function, you will need to add “age” to your **Expression** window, then add the date on which you want to calculate an age, such as the Date of Birth.



5. Add the function to the **Expression box** by double clicking it or by using the arrow button  in the center.

6. Complete the expression following the syntax outlined in the Tips section. If you are calculating age, you must now add the date to your expression by double clicking on it from the **Reports Folders** listing of your **Available components** box.

7. When you have finished your calculation expression, click the **OK** button at the bottom of the **Calculation Definition** window.

8. Click **OK** on the **Query** dialog box to run the report.

Using a Function in a Filter

1. Click the **Filter** tab.

2. In the **Available components** listing, select the data item you will use in your filter by opening the **Report Columns** or **Catalog Columns** folder and adding the data item to the **Filter definition** box.

3. Select an operator from the **Available components** listing (i.e., **=, >, <, >=, <=, <>**) and add it to your Filter definition.

4. Open the **Function** folder in the **Available components** listing and select a function from the list. Add it to your Filter definition. For example, Cert Date <= (Today + 90).

5. Click **OK** at the bottom of the **Filter definition** box to run the report.

Formatting Your Report

Impromptu offers many options for formatting your report. You must be in Page Layout view to effect any formatting changes that you make. Some of the features available are:

- Changing column titles
- Changing fonts, font styles, and font sizes
- Changing data formats
- Using page setup to change margins, page size, etc.
- Using multi-line with word wrap
- Data alignment and sizing
- Inserting Titles, Page numbers, etc.

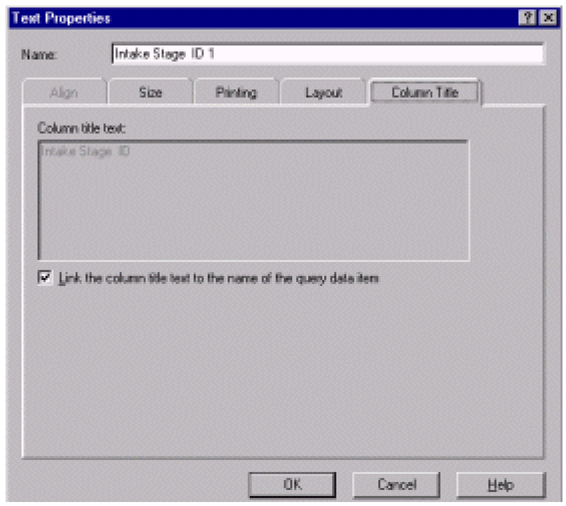
Changing column titles

If the column header (or data item name) is not user-friendly or is too long, you can change it by using one of the following methods:

Please remember that report titles, column titles, and data items must be formatted separately.

1. Click into (i.e., double click on) the column header to invoke edit mode and delete the existing column title. Enter the column name of your choice; **OR**

2. Right click on the column header. Select **Edit** from the drop-down menu. Delete the existing column title and enter a new one.



Changing fonts, font styles, and font sizes

Column headers must be formatted separately from report data.

1. Highlight the column(s) in your report that you want to change. Changes made to any item in a column will be carried over to all items in the column. If you want to change fonts on multiple columns, use your **Shift** or **Ctrl** keys to highlight the columns.

2. Right click and select **Format** from the drop-down menu. (Note: You can also select **Format →** **Font** from the menu bar to get to the Font tab.)

3. In the **Font** tab, you can change the font, font style and font size.

4. Click **OK** to close the Format dialog box.

Changing data formats

The default data format in Impromptu is General. You may want to format numeric data with commas and decimal points, or even as currency. Remember that you only need to reformat one data item in a column and the change is carried forward to all items in the column.

1. Click on a data item that you want to reformat.

2. Right click and select **Format** from the drop-down menu. (Note: You can also select **Format →** **Data** from the menu bar to get to the Data tab.)

3 In the **Data** tab, open the selection listing by clicking the arrow to the right of the **Positive** window.

4 Select a format from the listing and click **OK** to close the Format dialog box.

Page setup

As with any Microsoft-style product, you can change your page size and margins in the **Page Setup** option from the **File** menu.

1 Select **File → Page Setup** on the menu bar.

2 Change margins using the **Left**, **Right**, **Top**, and **Bottom** windows.

3 Change the page layout from Portrait to Landscape in the **Page orientation** section.

4 There is a "**Fit to Page**" option at the bottom of the window that can be very useful. However, be careful with this because Impromptu will attempt to fit all records on one page and you could end up with some very small print.

5 When you have finished making your changes, click **OK**.

Multi-line with word wrap

Sometimes you may have some very long text items that take a lot of space on your report. You can set this item to wrap around to a second line, and thus save space horizontally across your page. This option is found in the **Text Properties** box. Multi-line with word wrap can also be used in column and report titles.

1 Select the data item you want to word-wrap.

2 Right click and select **Properties** from the drop-down list.

3 Select the **Layout** tab.

6 Select the **Multi-line with word wrap** option.

7 Click **OK**.

Data alignment and sizing

You can align data items vertically and horizontally in a header or title. You can also specify a size for a column or set it to be dynamic (it changes to fit the data). These options are also found in the **Text Properties** box.

1 Click **View → Page Layout** on the menu bar.

2 Select the data item you want to align.

3 Right click and select **Properties** from the drop-down list.

4 Select the **Align** tab. Use the arrows on the horizontal placement boxes to align your data to the left, at center, or to the right of any column in the report. Use the arrows on the vertical placement boxes to align your data to the top, bottom or center of the selected data box.

5 Select the **Size** tab. Use the arrows on the horizontal placement boxes to adjust the width of any column in the report. Use the arrows on the vertical placement boxes to adjust the height of any row in the report.

6 Click **OK**.

Inserting Titles
Impromptu reports have a default title bar at the top of each report in **Page Layout**:

<Type here to customize title>

1 Place your cursor on the default title and right click.

2 Select **Edit** from the drop-down menu.

3 Your cursor is now placed inside the title bar. You can delete the default title and enter in your own title text.

Module 7:
Managing Impromptu Reports

This module will cover all the skills you will need to print, distribute and save your Impromptu reports. There are a number of options in Impromptu for saving your reports in other file formats such as Excel files, ASCII files, text files, and PDF files (viewable in Adobe Acrobat). You can also e-mail reports you have saved to your T: Drive from your local desktop. There are some things to consider when printing reports, too, since you will not in most cases want to print an entire report and should not print reports directory from Impromptu in Citrix. All of these options are discussed below.

Saving Impromptu Reports

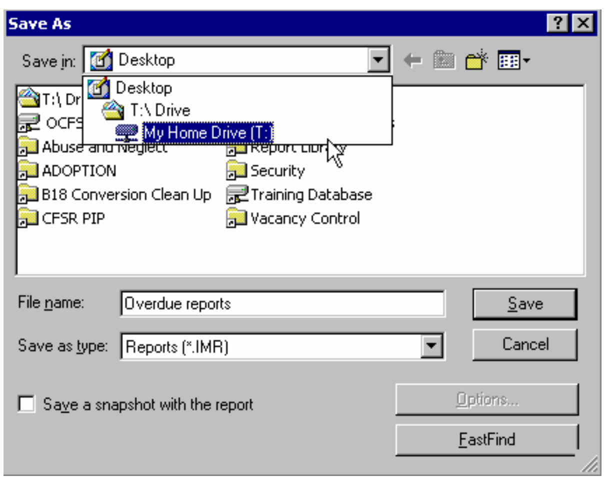
As has been noted previously, you cannot save modified predefined reports over the original reports in the Data Warehouse folder. If you make modifications to a report and want to save the modified version, you can save it to your T: Drive to prevent corrupting the original report. Of course, you will need to save reports that you create with unique names. Follow the steps below to save modified and new reports.

1 Login to Impromptu and open a catalog.

2 Create a new report or make modifications to a predefined user report.

3 Select **File → Save As** on the menu bar.

4 A **Save As** dialog box is displayed on your screen.



5 Open the list of file directories by clicking the  arrow to the right of the **Save in** window.

6 Select **My Home Drive (T:)** and an appropriate folder from the directory selection list.

7 Type a report title in the **File name** window.

8 Click the **Save** button in the lower right hand corner. 

Saving Impromptu Reports as Other File Types

Impromptu offers a variety of file types for your use in managing and distributing reports. If you need to further manipulate the data, or add more data to it, you can save the report as an Excel file. You can choose to save as an Excel file with or without format. If you save with format, you retain all fonts, borders, patterns, and styles that you used in your Impromptu report.

You can save reports as ASCII files if you need to import it to another application (Excel, Access) or if you need to send it to a colleague who does not have the Impromptu or Excel applications. If you need to import the report data into a word document, you can also save it as a text file.

You can also e-mail Impromptu reports from Microsoft Outlook after you have saved them to your T: Drive. Another means of distributing reports to colleagues who do not have access to Citrix is to publish them to HTML so that others can view them in Internet Explorer.

There is another option available for saving your report in PDF (Adobe Acrobat) format, which is excellent for saving reports in presentation format and printing reports, but does not allow for much manipulation. Since it is not recommended that reports be printed in Citrix, you will need to save your reports to your T: Drive in PDF format, then print them from Acrobat Reader on your desktop.

All of these options are discussed below:

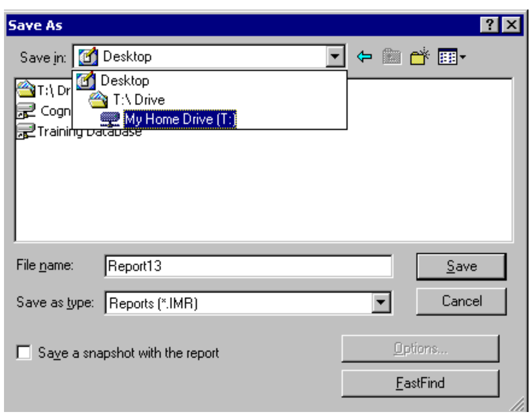
To save Impromptu reports as Excel files

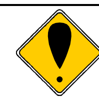
1 Click **File → Save As** on the menu bar.

2 In the **Save As** dialog box, open the directory listing by clicking the arrow to the right of the **Save in** box.

3 Select **My Home Drive (T:)**

4 Open an appropriate folder.

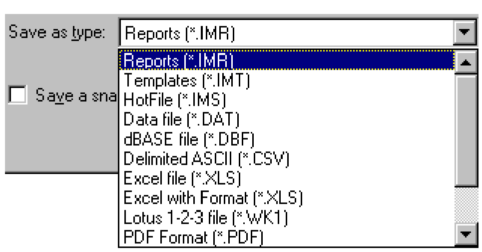




It is a good idea to filter your report to retrieve the minimum amount of data needed to fit your requirements. Saving large amounts of unnecessary data in Excel format drains system resources and is much harder to manipulate.

5 Enter a name for your file in the **File name** box.

6 Open the file type listing by clicking the arrow to the right of the **Save as type** box.



It is always helpful to assign names to files that are easily recognizable to you. Remember that file names can be as long or as short as you like.

7 Select **Excel file [*.XLS]** or **Excel with Format [*.XLS]** from the listing. Excel with Format retains the same fonts, borders, patterns and styles that you used in your Impromptu report.

8 Click the **Save** button in the lower right corner of the box.

You can now login to Excel from your local desktop, and open the file you just created.

1 Press the **Windows** key on your keyboard.

2 Select **Programs** → **Microsoft Excel** from the **Start** menu.

3 In Excel, select **File** → **Open** on the menu bar.

4 In the Open dialog box, open the directory listing by clicking the arrow to the right of the **Look in** window.

5 Navigate to your **T: Drive** and open the appropriate folder.

6 Select the Excel file you saved and click the **Open** button.

To save Impromptu reports as ASCII files
ASCII stands for American Standard Code for Information Interchange. This is the code that makes it possible for just about every computer to understand the letter "A" (and all the other letters) as a letter "A". The ASCII text file, although simple and limited, is understood by virtually all computers.

1 Select **File** → **Save As** on the menu bar.

2 In the Save As dialog box, open the directory listing by clicking the arrow to the right of the **Save in** window.

3 Select **My Home Drive (T:)** from the directory listing.

4 Open an appropriate folder.

5 Type a name for your file in the **File Name** box.

6 Open the file type listing by clicking the arrow to the right of the **Save as type** box.

7 Select **Delimited ASCII [*.CSV]** from the listing.

8 Click the **Save** button in the upper right corner of the Save As dialog box. Save

To save Impromptu reports as PDF files
PDF stands for Portable Document Format, which means that all formatting made to your document will "travel" with the document. Remember, all Connections computers have the Adobe Acrobat Reader software required to view and print the PDF files.

1 Select **File** → **Save As** from the menu bar.

2 In the Save As dialog box, open the directory listing by clicking the arrow to the right of the **Save in** box.

3 Select **My Home Drive (T:)** from the drop-down listing**.**

4 Open an appropriate folder.

5 Enter a name for your file in the **File name** box.

6 Open the file type listing by clicking the arrow to the right of the **Save as type** box.

7 Select **PDF Format [*.PDF]** from the listing.

8. Click the **Save** button in the upper right corner of the **Save As** dialog box.

You can now login to Acrobat Reader from your local desktop, and open the PDF file you just created:

1. Press the **Windows** key on your keyboard to return to your desktop.
2. Select **Programs → Acrobat Reader** from the **Start** menu.
3. In Acrobat Reader, select **File → Open** on the menu bar.
4. In the Open dialog box, open the directory listing by clicking the arrow to the right of the **Look in** window.
5. Navigate to your **T: Drive** and open the appropriate folder.
6. Select the PDF file you just saved and click the **Open** button.

Saving Impromptu reports as text files
Text files can be opened in Microsoft Word or any other word-processing application. Thus, you can use the text file for any word-processing operation, such as mail merges.

1. Select **File → Save As** from the menu bar.
2. In the Save As dialog box, open the directory listing by clicking the arrow to the right of the **Save in** box.
3. Navigate to **My Home Drive (T:).**
4. Open an appropriate folder.
5. Enter a name for your file in the **File name** box.
6. Open the file type listing by clicking the arrow to the right of the **Save as type** box.
7. Select **Text file [*.TXT]** from the listing.
8. Click the **Save** button in the upper right corner of the **Save As** dialog box.

Sending Impromptu Reports via E-mail

You can send an Impromptu report to a colleague using Microsoft Outlook from your local desktop. Remember that a file saved as an *.imr file type will require your colleague to access the Impromptu application to open it. Reports must be e-mailed from the local desktop, so must first be saved to the T: Drive before leaving your Citrix session.

In order to e-mail an Impromptu report, you must be on your local desktop. Your local desktop can be accessed with a Citrix session open, or after completing a session working with Impromptu. Both *.imr (Impromptu reports) and other file types can be saved and e-mailed to other users. If you are unsure whether your intended recipient can access Citrix, the file type recommended is *.PDF (Portable Document Format). Every Connections computer has Adobe software installed and can open and print this file type.

Having completed formatting of your report:

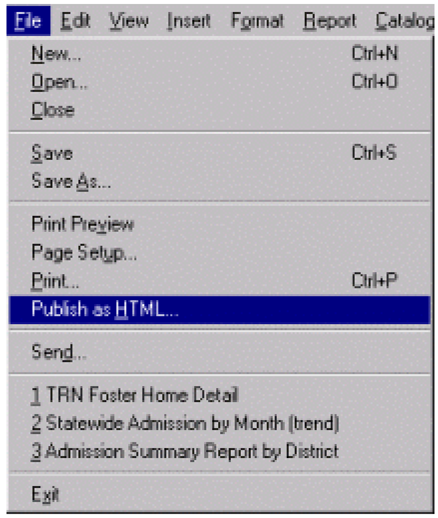
1. Select **File → Save as.**

2. In the Save As dialog box, open the directory listing by clicking the down arrow to the right of the **Save in** window.
3. Navigate to **My Home Drive (T:).**
4. Open an appropriate folder**.**
5. Open the file types listing by clicking the down arrow to the right of the **Save as Type** window.
6. Select **PDF Format [*.PDF]**.
7. Type a name in the **Name** field.
8. Click the **Save** button.
9. Press the **Windows** key on your keyboard in order to return to NT.
10. Click **Start → Programs → Microsoft Office → Microsoft Office Outlook 2003**, or double click on your email icon if there is a shortcut on your local desktop.
11. In Outlook, select **File → New → Mail Message.**
12. Enter the recipient's e-mail address in the **To:** field.
13. Type an appropriate subject in the **Subject** field.
14. Enter a message (e.g., "Here is the report I promised you. Open it with Adobe Acrobat Reader.").
15. Click **Insert → File**.
16. In the Insert File dialog box, navigate to your **T: Drive**.
17. Open an appropriate folder.
18. Select the report you wish to e-mail.
19. Click **Insert**. (More than one report can be sent at one time by repeating the Insert command.)
20. Click the **Send** button on the Outlook toolbar to send your message and attached report.

Publishing Impromptu Reports to HTML Format

You can save Impromptu reports in HTML Format for viewing inside a web browser, like Internet Explorer. This format can be used in a local intranet, so that specified users can access the report through typical browser commands, like links. Presently, OCFS does not support a local intranet for publishing reports, however this functionality should be noted.

1. Select **File → Publish as HTML**… on the menu bar.



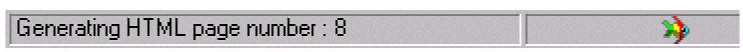
2 In the **Publish As HTML** dialog box, open the directory listing by clicking the drop-down arrow to the right of the **Save in:** box.

3 Navigate to **My Home Drive (T:)** and open an appropriate folder.

4 Enter a name for your report in the **File Prefix** box.

5 Click **Publish**.

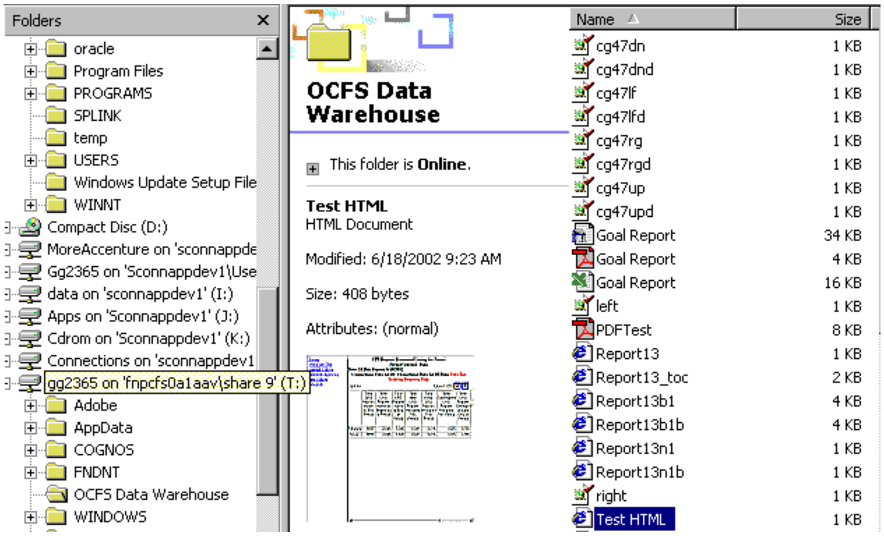
The status bar at the bottom of the screen will indicate the report is being published.



6 To view your report in **Internet Explorer**.

- Press the **Windows** key on your keyboard to return to your desktop. 
- Select **Programs → Internet Explorer** from the Start menu.
- In the **Address** line, type in the name of your report, including the directory path

OR find the file in **Windows Explorer** (choose the Main File only), and double-click.



Folders
oracle
Program Files
PROGRAMS
SPLINK
temp
USERS
Windows Update Setup File
WINNT
Compact Disc (D:)
MoreAccenture on 'sconnappde
Gg2365 on 'Sconnappdev1\Use
data on 'sconnappdev1' (I:)
Apps on 'Sconnappdev1' (J:)
Cdrom on 'Sconnappdev1' (K:)
Connections on 'sconnappdev1
gg2365 on 'fnpcfs0a1aav\share 9' (T:)
Adobe
AppData
COGNOS
FNDNT
OCFS Data Warehouse
WINDOWS
OCFS Data Warehouse
This folder is Online.
Test HTML
HTML Document
Modified: 6/18/2002 9:23 AM
Size: 408 bytes
Attributes: (normal)
Name
Size
cg47dn 1 KB
cg47dnd 1 KB
cg47lf 1 KB
cg47lfd 1 KB
cg47rg 1 KB
cg47rgd 1 KB
cg47up 1 KB
cg47upd 1 KB
Goal Report 34 KB
Goal Report 4 KB
Goal Report 16 KB
left 1 KB
PDFTest 8 KB
Report13 1 KB
Report13_toc 2 KB
Report13b1 4 KB
Report13b1b 4 KB
Report13n1 1 KB
Report13n1b 1 KB
right 1 KB
Test HTML 1 KB

Printing Impromptu Reports

Due to the limitations of the Citrix environment, reports should not be printed directly from Impromptu. Printing may not work correctly from the Citrix window, so reports should be saved as a file type that can be opened and printed on the local desktop. PDF format (Portable Document Format) is recommended for this purpose. Because an Impromptu report is often larger than what appears on your PC screen, it is important that you specify exactly what you want to print. It is recommended that you save a copy of a report you have modified or created, as *.IMR (Impromptu report format) prior to saving as any other file type, so that you do not lose your original report.

After completing the formatting of your report in Impromptu:

1 Select **File → Save As** on the menu bar.

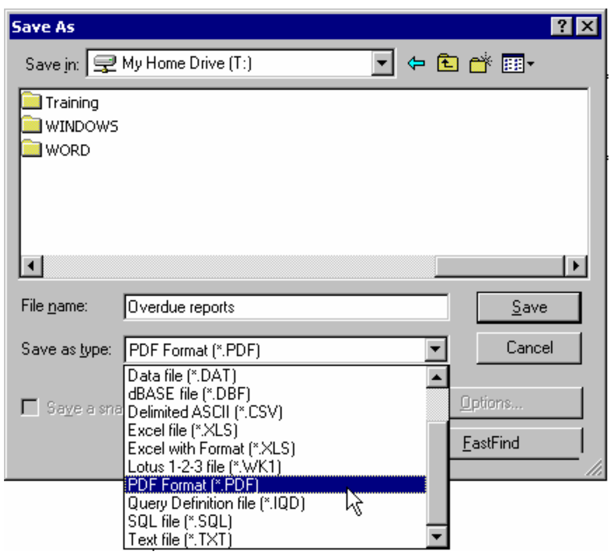
2 In the Save As dialog box, open the directory listing by clicking the arrow to the right of the **Save in** window.

3 Navigate to your **T: Drive**.

4 Open the file types listing by clicking the arrow to the right of the **Save As Type** window.

5 Select **PDF Format [*.PDF]** from the file types listing.

6 Type a name in the **Name** field.



7 Click the **Save** button. 

8 Press the **Ctrl** and **Esc** keys on your keyboard simultaneously to return to NT.

9 Click **Start → Programs → Adobe Acrobat Reader**.

10 In Adobe Acrobat Reader, select **File → Open.**

11 In the Open dialog box, open the directory listing by clicking the arrow to the right of the **Look in** window.

12 Navigate to your **T:Drive** and select the PDFcopy of your report.

13 When the report is open in Acrobat Reader, select **File → Print** on the menu bar.

14 Enter the page numbers of the report you wish to print in the **Print** dialog box.

15 Verify your printer selection.

16 Click **Print**.

Module 8:
Advanced Impromptu Features

Crosstabs

Impromptu crosstab reports display summary information from a list report in a compact table of columns and rows. A crosstab shows the value for the combination of each row and column, enabling you to gain a different perspective of the data and view more information without the need to scroll. For example, if you needed to track the number of overdue CPS reports by worker by month, a crosstab report can be easily designed to extract the information. The sample report below displays the months as columns, the workers as rows, and the number of overdue CPS reports in each cell. Cell is the intersection of a column and a row that contains a single value.

Worker Name	1/1/02 12:00AM	2/1/02 12:00AM	3/1/02 12:00AM	4/1/02 12:00AM	5/1/02 12:00AM	Total
Barnham,Brenda	0	0	1	2	2	5
Barnham,Holly	0		0	0	1	1
Barnham,Michael	2	2	2	1	1	8
Coverdale,Christine	3	4	1	1	3	12
Coverdale,Michelle	1	1	4	4	6	16
Coverdale,Robert	0	0	0		0	0
Doe,Julie	5	2	0			7
Doe,Patricia	0	0	1	1	1	3
Doe,Ron	2	4	4	4	4	18
Fletcher,Stacia	4	5	5	4	4	22
Grimsby,Jana	1	1	2	3	3	10
Harding,Andrew	1	0	0	0	1	2

Crosstab reports can be built using the Report Wizard or the **Query** dialog box. Both procedures will be reviewed in this guide so that users can determine which method is more convenient for them.

Building crosstabs using the Report Wizard:

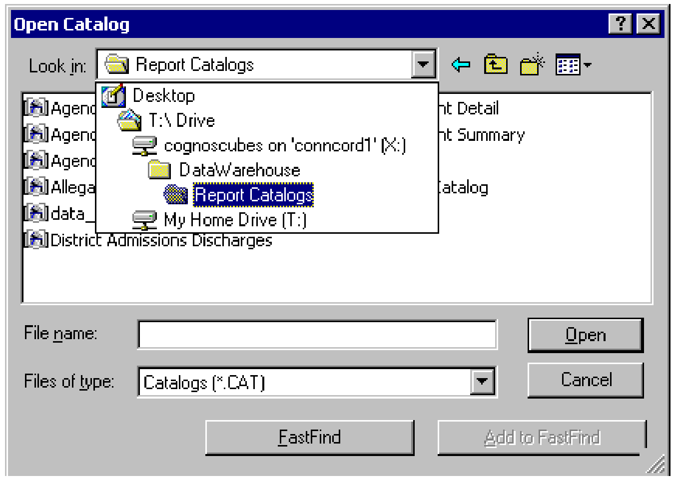
1 Login to Citrix and open the Cognos Impromptu application.

2 Click the **New** button on the toolbar. 

3 In the Open Catalog dialog box, navigate to the **OCFS Datawarehouse/DataWarehouse/Report Catalogs** directory.

4 Select a catalog in the selection window.

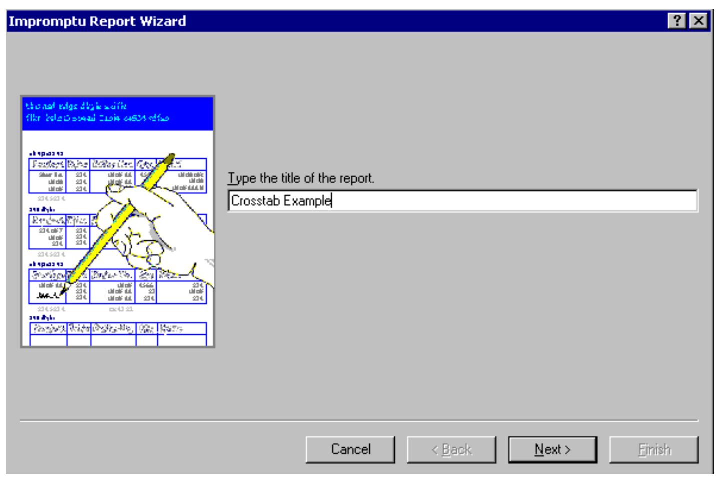
5 Click the **Open** button.



6 Enter your **Cognos User ID** and **Password** into the appropriate windows of the **Cognos Common Logon** dialog box.

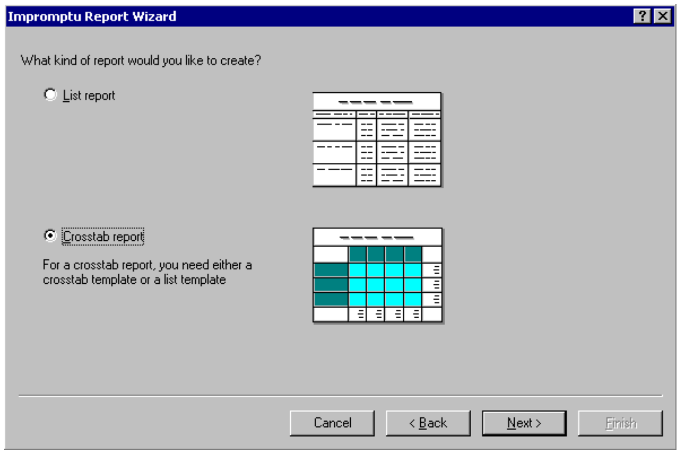
7 Click the **Log On** button.

8 The first Report Wizard screen appears. Enter a title for your crosstab report in the **Type the title of the report** window.



9 Click the **Next** button.

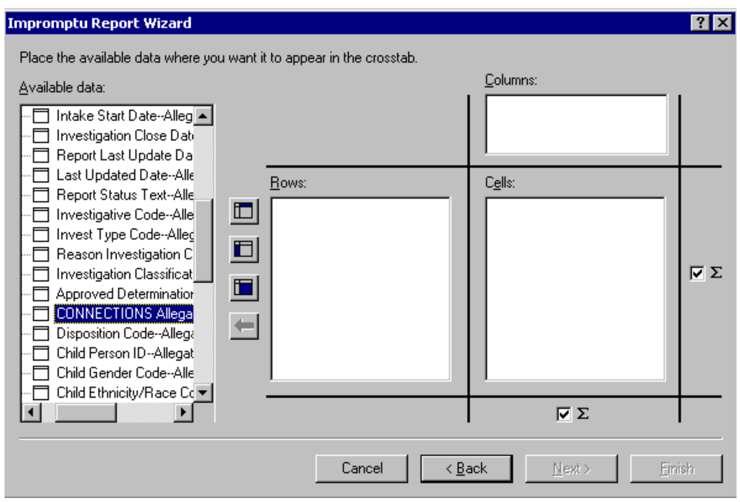
10 Click the **Crosstab report** option on the second Report Wizard screen.

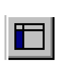
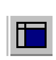


11 Click the **Next** button.

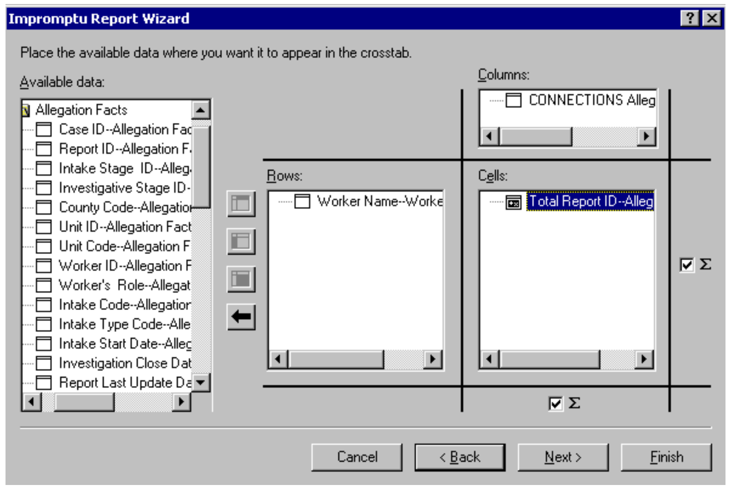
12 The third Wizard screen asks you to place the available data (i.e., all of the data items in the catalog) where you want to see it on the crosstab (i.e., columns, rows, cells).

- Open an appropriate folder in the **Available data** window by clicking the + to the left of the folder.
- Select the data item you want to see as columns on your report by clicking on it once to highlight it.
- Click the **Column**  button in the center of the screen.



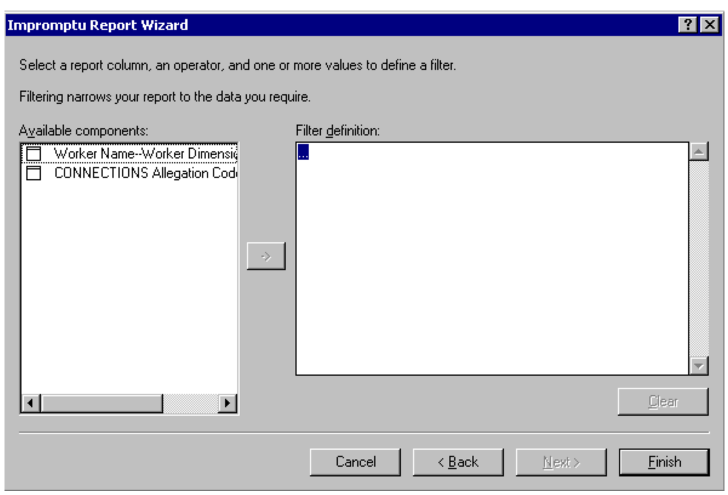
- Select the data item you want to see as rows in your report by clicking on it once to highlight it.
- Click the **Row** button  in the center of the screen.
- Select the data item you want to see as cells in your report by clicking on it once to highlight.
- Click the **Cell** button in the center of the screen. 
- Click the **Next** button at the bottom of the screen.

Note: *Impromptu automatically summarizes the data item you select as your cell value. In most* *cases, Report Wizard will total the data item. Totals are not appropriate for most OCFS Data Warehouse data, where unique ID codes should be counted rather than totaled. Unfortunately, the Report Wizard does not provide an opportunity to change the summarization method. You can, however, run the report and then change the total to a count.*



13 The fourth Wizard screen asks you to define a filter. One of the limitations of the Report Wizard is that it offers only the **Report Columns** on which to build a filter. You do not have **Catalog Columns**, **Functions**, or any of the other components normally available in the **Query** dialog box.

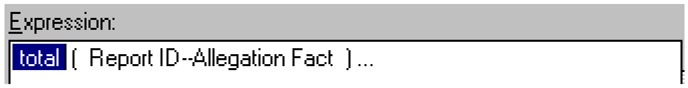
- If the **Report Columns** contain data items that can be used to define a filter, build a filter for your report (refer to *Module 6* of this guide for detailed instructions).
- If the **Report Columns** do not contain the data items you need to build a filter, run the report without a filter. You can then invoke the **Query** dialog box and add a filter later.



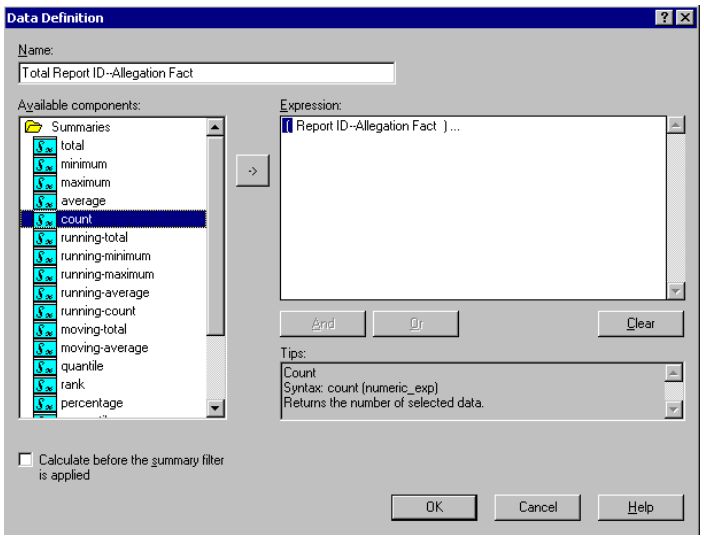
14 Click the **Finish** button at the bottom of the Wizard screen.

15 If the cell figures do not represent the values you wanted to see (e.g., totals of ID numbers rather than counts), they can be changed.

- Right click on any cell value on the report.
- Select **Data Definition** from the drop-down list.
- In the Expression window of the Data Definition dialog box, click on the summarization method (i.e., total) at the beginning of the expression.



- Press the **Delete** key on your keyboard.
- Open the **Summaries** folder in the Available components listing.
- Double click the summarization method you need in the report (e.g., count).



- Delete the **[<column or calculation>]** by placing your cursor over each piece of the Expression and pressing the **Delete** key on your keyboard.

- Click the **OK** button at the bottom of the **Query** dialog box.

16 If you were not able to filter your report in the Report Wizard, you can do so now in the **Query** dialog box

- Click the **Query Data** button on the toolbar. 

- Click the **Filter** tab.
- You now have all of the components to build a filter, including **Catalog Columns**. Refer to *Module 6* of this guide for detailed instructions on building a filter.
- Click the **OK** button at the bottom of the **Query** dialog box.

Your crosstab report should now contain the data you originally wanted. Even though the Report Wizard does not provide the ideal opportunities for structuring a crosstab, you can always correct the report using the **Query** dialog box.

Date: 7/25/02

Crosstab Example

Worker Name--Worker Dimension	CDRG	CHTS	EDNG	EMOT	EXCP	IFCS	INGD	LABW	LMED	LSUP	PDRG	SWDS	SXAB	XOTH	Total
Barnham,Brenda			1				3								4
Barnham,Holly				3	1		5				1		4		14
Coverdale,Christine			1				6				1				8
Coverdale,Michelle						1	11	1	1	8	2			2	26
Coverdale,Robert					1		10	1	1	2	2	1			18
Doe,Patricia							12		1		12			3	28
Doe,Ron					2			1							3
Fletcher,Stacia		1					4	1							6
Grimsby,Jana			1			16	24			3	12			3	59
Harding,Andrew			2		2		7	2			1				14

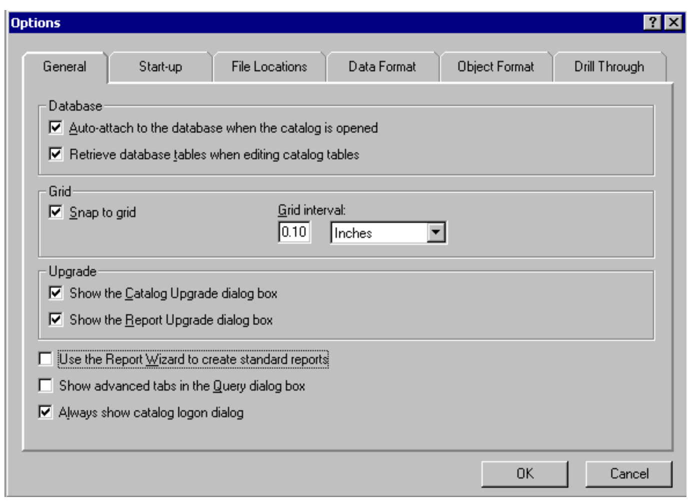
Building crosstabs using the Query dialog box:

1 Login to Citrix and open the Impromptu application.

2 Select **Tools → Options** on the menu bar.

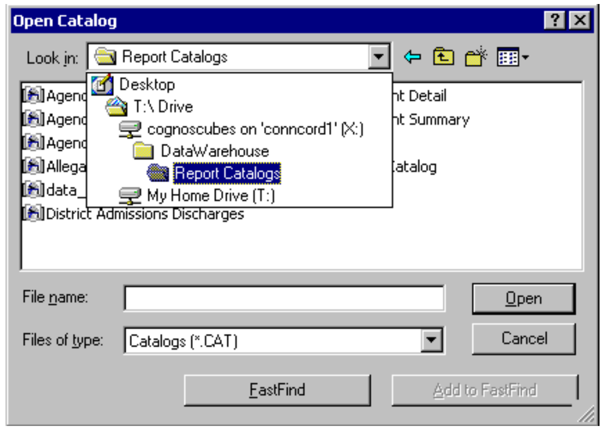
3 Deselect the **Use the Report Wizard to create standard reports** option.

4 Click **OK** on the **Options** dialog box.



5 Click the **New** button on the toolbar. 

6 In the **Open Catalog** dialog box, navigate to the **OCFS Datawarehouse/DataWarehouse/Report Catalogs** directory.

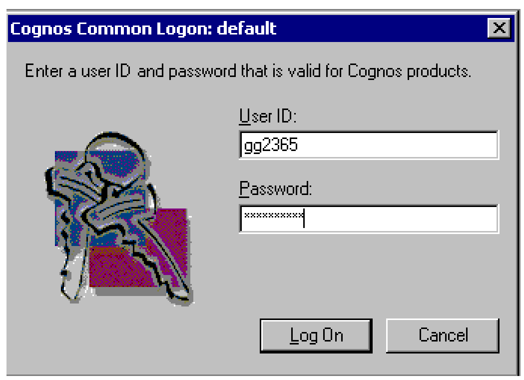


7 Select an appropriate catalog in the selection window.

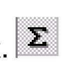
8 Click the **Open** button.

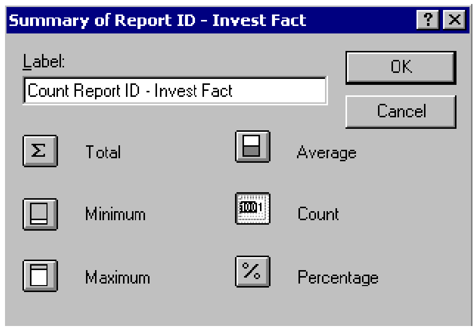
9 Enter your **Cognos User ID** and **Password** in the appropriate windows of the **Cognos Common Logon** dialog box.

10 Click the **Log On** button.

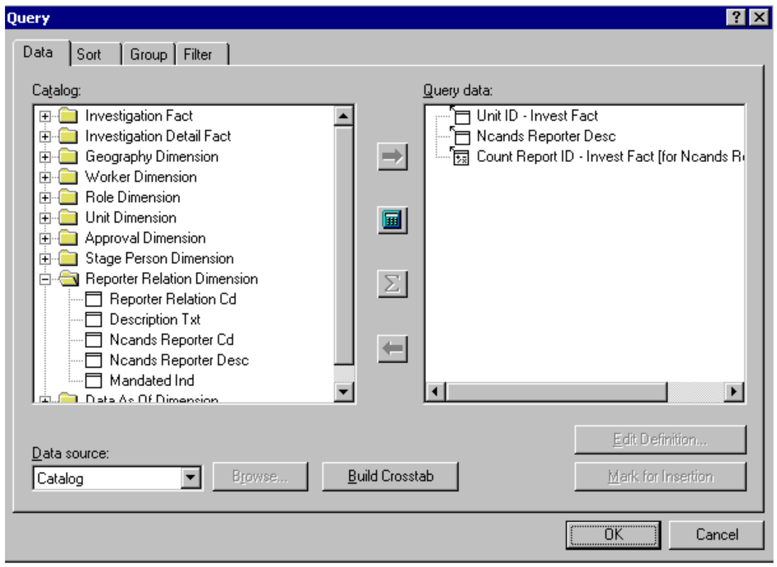


11 Select the data items you want to see in your crosstab:

- Select the data item you want to see as rows first and add it to your Query data.
- Select the data item you want to see as columns second and add it to your Query data.
- Select the data item you want to see as values by clicking on it once.
- Click the **Sum** button in the center of the **Query** dialog box. 
- In the **Summary** dialog box, click the summarization method you want to use (e.g., count).
- Click the **OK** button on the **Summary** dialog box.



12 Click the **Build Crosstab** button in the lower center of the **Query** dialog box. 

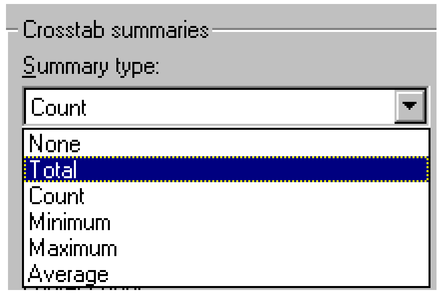


13 If necessary, move data items from columns to rows or vice versa by clicking on the item, holding your mouse button down and dragging them from the columns window to the rows window, or vice versa.

14 If you want to see a summary row and/or column on your crosstab:

- Click on the data item in the **Cell** window.
- Click the **Summarize** button beneath the cell window,
- In the **Summarization** dialog box,

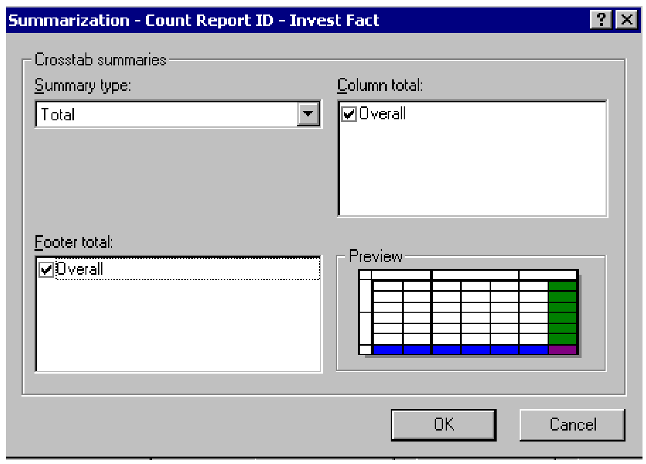
  a. Click the arrow  to the right of the **Summary type** window.



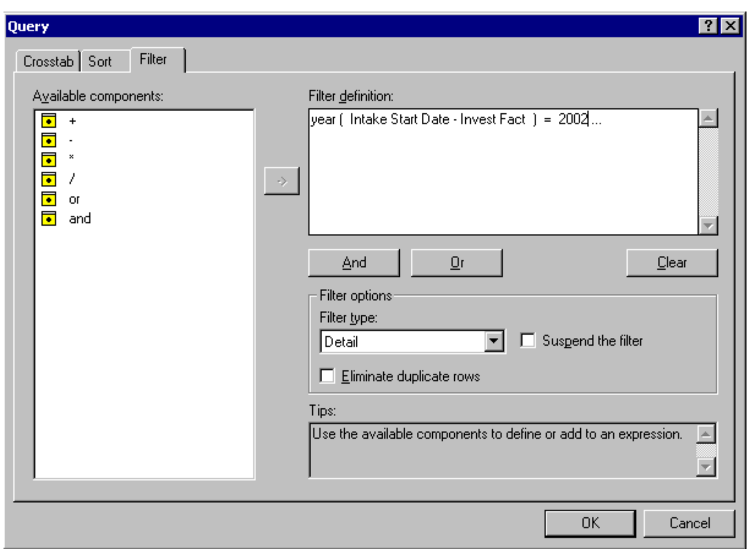
b. Select the appropriate summary type from the drop-down list.

c. Click the box to the left of **Overall** in the **Column total** window to get a summary column.

d. Click the box to the left of **Overall** in the **Footer total** window to get a summary row.



15. Click the **Filter** tab. Note that you have all of the components normally available to build a filter, including Catalog Columns. Refer to *Module 6* of this guide for detailed instructions on building filters.



16. Click the **OK** button on the **Query** dialog box to run the report.

Ncands Reporter Desc	9221110	9226850	90952159	90954009	90954169	90955169	90956009	93950159	Total
Anonymous or Unknown Reporters	3	1	1	7		6	2	1	21
Education Personnel	3		1			3	4		11
Friends and Neighbors			1	1			1		3
Legal, Law Enforcement or Criminal Justice Personnel				4		1	1		6
Medical Personnel	1		1	1	1		1	1	6
Mental Health Personnel	1					1	1		3
Other	6		6	6		1	1		20
Other Relatives	2		5	3		2	1		13
Parents	2	1	1	5		2	1		12
Social Services Personnel			6	5		5	4		20
Substitute Care Providers							1		1
	18	2	22	32	1	21	18	2	116

Prompts

A prompt is a dialog box that asks the user to enter information when a report is opened. A report can contain several prompts, which it uses to filter the report to retrieve only the data you want.

To create prompts, we will be using the Prompt Manager, which is a dialog box used to create, edit, and store prompts for the currently active report. The **Prompt Definition** dialog box is what we will use to actually name and define the prompt. The Prompt Manager is not available in the Impromptu Report Wizard, so you will be building your report using the **Query** dialog box.

There are several types of prompts. A Type-in prompt requires the user to type in information. A Picklist prompt requires the user to select items from a list. A picklist can include data items from the catalog, from another report, or from a file in delimited ASCII format.

The prompt data are generally used in filters, so we will review how to add a prompt into a report filter.

Type-in prompts:

Type-in Prompts are the easiest prompts to set up. You need only enter a name and a message on the **Prompt Definition** dialog box. You may also need to change the data type that is to be entered. However, the user is required to enter the data, which must be entered in the exact same format as it is found in the database. If your users are not familiar with the data, type-in prompts may not be the most effective prompt type to be using.

Type-in prompts are generally used for date prompts, where the user is required to add a date or a range of dates.

1. Login to Citrix and open the Cognos Impromptu application.
2. Select **Tools → Options** on the menu bar.
3. In the General tab of the Options dialog box, deselect the **Use the Report Wizard to create standard reports** option.
4. Click **OK** on the **Options** dialog box.
5. Click the **New** button on the toolbar.
6. In the **Open Catalog** dialog box, navigate to the **OCFS Datawarehouse/DataWarehouse/Report Catalogs** directory.

7 Select an appropriate catalog in the selection window. Refer to *Appendix A* for complete descriptions of the OCFS DataWarehouse catalogs.

8 Click the **Open** button on the **Open Catalog** dialog box.

9 Enter your **Cognos User ID** and **Password** in the appropriate windows of the **Cognos Common Logon** dialog box.

10 Click **Log On**.

11 Select the data items you want to see on the report. Refer to *Module 6* of this guide for detailed instructions on Selecting Data.

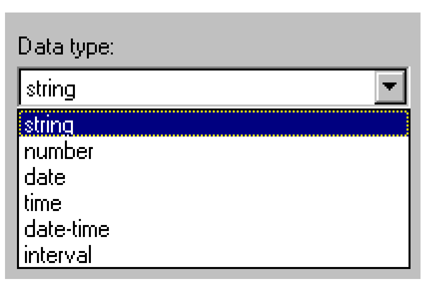
12 Click the **Group** tab and group those data items you want to see grouped in your report. Refer to *Module 6* of this guide for detailed instructions on Grouping Data.

13 Click the **Sort** tab and sort those data items you want sorted in your report. Refer to *Module 6* of this guide for detailed instructions on Sorting Data.

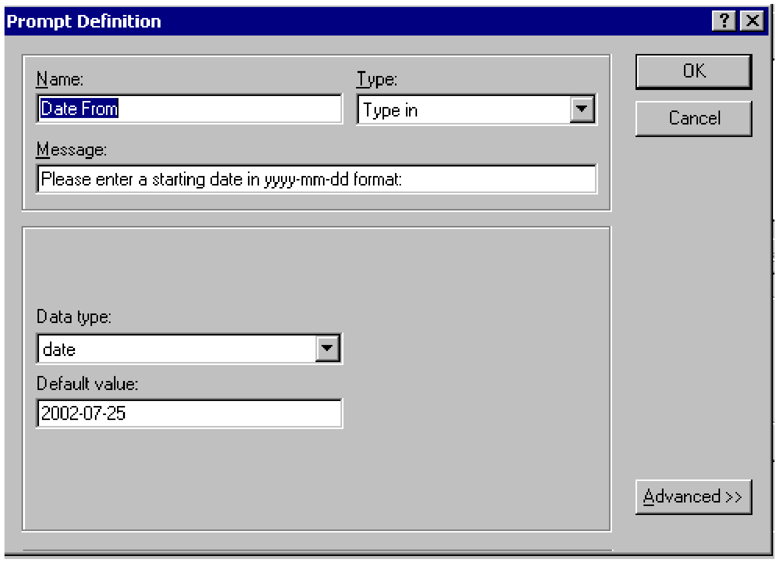
14 Click the **Filter** tab and enter a filter for your report. Refer to *Module 6* for detailed instructions on Filtering Data.

15 To insert prompts into your filter:

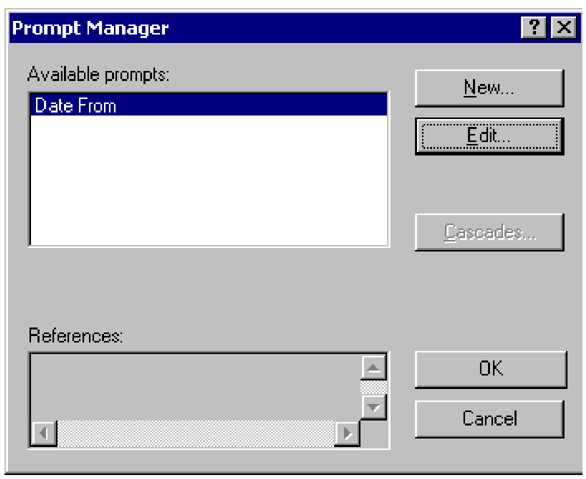
- Start out with the data item you want to use as the basis for your prompt (e.g., Home Authorized To Date). Double click the data item to add it to the Filter definition.
- Select an operator from the Available components listing (e.g., between).
- Click **Prompt Manager** in the Available components listing.
- Type a name for your prompt in the **Name** window (e.g., “Date From”) of the **Prompt Definition** dialog box.
- Type a message for the user in the **Message** box (e.g., “Please enter a start date”).
- Check the **Data type** to make sure it’s appropriate for the prompt (e.g., date). To change the data type, click the arrow  to the right of the **Data type** window and select the appropriate type from the drop-down listing.



- Click **OK** on the **Prompt Definition** box.



- Select the correct prompt in the **Available prompts** window of the **Prompt Manager** dialog box.
- Click **OK** on the **Prompt Manager** dialog box.

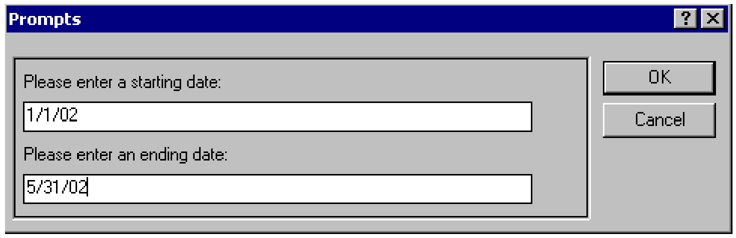


- If the filter is complete, click **OK** on the **Query** dialog box.
- If the filter is not complete, follow the steps above to complete it. You can enter any number of prompts in a single report, as in the example below, which uses two prompts to define a date range for the Home Authorized To Date to determine the homes whose certification will be expiring within a specified range of time.

- Click **OK** on the **Query** dialog box.

16 Complete the **Prompt** dialog box.

- Note: Date prompts should be completed using the same format as the default dates which appear in the dialog window. In other words, if the default date is in m/d/yy format, then the user's entry should be in m/d/yy format.



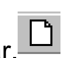
Catalog Picklist Prompts:
Picklist prompts require a more involved set-up, but are the easiest for users to complete. The user is presented with a list from which to select data items on which to run the report. Catalog picklists display all the values for a selected data item from which the user selects one or more values.

1 Login to Citrix and open the Cognos Impromptu application.

2 Select **Tools → Options** on the menu bar.

3 In the **General** tab of the **Options** dialog box, deselect the **Use the Report Wizard to create standard reports** option.

4 Click **OK** on the **Options** dialog box.

5 Click the **New** button on the toolbar. 

6 In the **Open Catalog** dialog box, navigate to the **OCFS Datawarehouse/DataWarehouse/Report Catalogs** directory.

7 Select an appropriate catalog. Refer to *Appendix A* for detailed descriptions of the OCFS Data Warehouse catalogs.

8 Click the **Open** button on the **Open Catalog** dialog box.

9 If the **Cognos Common Logon** dialog box appears, enter your **Cognos User ID** and **Password** in the appropriate windows.

10 Click the **Log On** button.

11 Select the data items you want to see on your report. Refer to *Module 6* for more detailed instructions on selecting data.

12 Click the **Group** tab. Refer to *Module 6* for more detailed instructions on grouping data.

13 Click the **Sort** tab. Refer to *Module 6* for more detailed instructions on sorting data.

14 Click the **Filter** tab and insert prompts into your filter.

- Select the data item you want to use as the basis for your filter. For example, if you want to develop a report on children in care, but you want to allow the user to run the report based on the Goal, you would select Goal to start your filter.

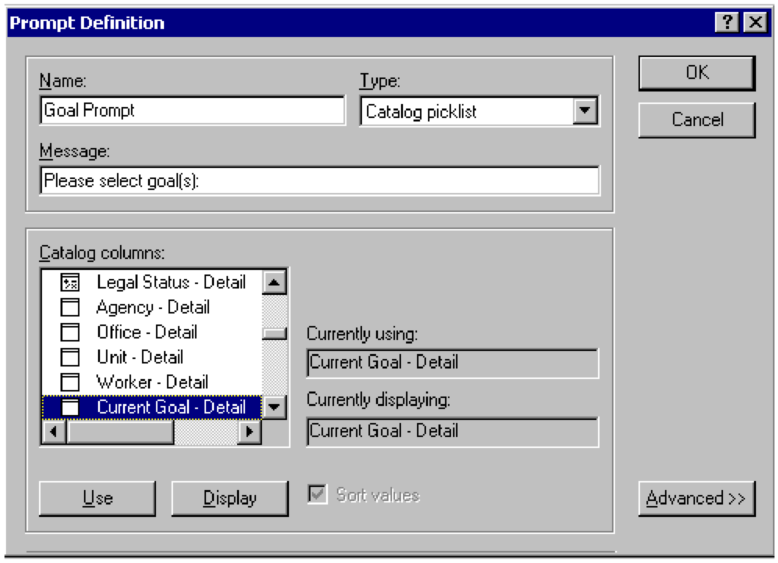
- Select an operator for your filter. As in the above example, if you want to run the report on only one specific goal, you would add the **equal sign (=)** to your filter. If you want the user to be able to run the report on several goals, you would add **in** to the filter.
- Double click **Prompt Manager** in the Available components listing.
- Type a name for your prompt in the **Name** window (e.g., “Goal”).
- Click the arrow  to the right of the **Type** window.
- Select **Catalog picklist** from the drop-down list.
- Enter a message for the user in the **Message** box (e.g., “Please select Goal(s):”).
- Open an appropriate folder in the **Catalog columns** window by double clicking it.
- Select a data item from the folder listing.

    i. If this data item is the one to be used to compare values in the database, click the **Use** button beneath the **Catalog columns** window. The item is displayed in the **Currently using** window.

    ii. If you want to use one data item, but display another data item to the user, select the display item in the folder listing and click the **Display** button. The item is displayed in the **Currently displaying** window.

The Use/Display feature in picklist prompts is especially useful when using code data items. Users may not know the definitions of the codes. You can use the Code item to retrieve the data, but display the Description item to the user. Numerical data items are better choices for use, since numerical searches require less processing time. For example, racial codes are found in **Fact folders**, but their descriptions are found in the **Ethnicity Dimension folder**. You can use the Ethnicity Cd in your prompt, but display Ethnicity Desc Txt to the user.

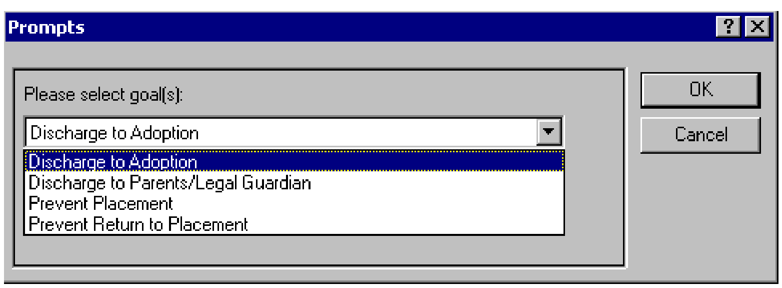
    iii. If the same data item is to be used and displayed, select the data item in the Catalog columns window and click the **Use** button beneath the window. The data item will appear in both the **Currently using** and **Currently displaying** windows.



- Click **OK** on the **Prompt Definition** dialog box.
- Click **OK** on the **Prompt Manager** dialog box.

15 Click **OK** on the **Query** dialog box.

16 To open the catalog picklist in the **Prompt** dialog box, click the arrow  to the right of the prompt window.



- To select more than one value on the picklist, hold your **Ctrl** key down and click on each value.

17 Click **OK** on the **Prompt** dialog box to execute the query.

Report Picklist Prompts:

Report picklist prompts require a separate Impromptu report to be created first. It is important that the picklist report be saved in the same directory or folder as the report using the picklist. Report picklists are especially useful when you need to manipulate the data in some way. For example, if you want to present the user with a list of Child CIN's with the child's name from which to select, you could develop an Impromptu report with that information and use it as a prompt for a more detailed report.

1 Login to Citrix and open the Cognos Impromptu application.

2 Select **Tools → Options** on the menu bar.

3 On the **General** tab of the **Options** dialog box, deselect the **Use the Report Wizard to create standard reports** option.

4 Click **OK** on the Options dialog box.

5 Click the **New** button on the toolbar. 

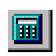
6 In the **Open Catalog** dialog box, navigate to the **OCFS Datawarehouse/DataWarehouse/Report Catalogs** directory.

7 Select an appropriate catalog in the selection window. Refer to *Appendix C* of this guide for detailed descriptions of the OCFS Data Warehouse catalogs.

8 Click the **Open** button.

9 Select the data items for your report.

10 Define calculated columns for your report:

- Click the **Calculate** button  in the center of the **Query** dialog box.
- Type a name for your calculation in the **Name** window of the **Calculation Definition** dialog box.
- Build your calculation. For example, if you wanted to present users with a list of Child CIN's and Child Names, you would select Child CIN and Child Name as data items on your report. The calculation (Child CIN + Child Name would be built as follows:
    - Double click **Report Columns**.
    - Double click **Child CIN**.
    - Double click **string**.
    - Enter **space – dash – space** between the two quote marks in the **Expression** window.
    - Press the **Enter** key on your keyboard.
    - Double click the **plus sign (+).**
    - Double click **Report Columns**.
    - Double click **Child Name.**
- Click **OK** in the Calculation Definition dialog box.

11 If you want a specific sort in your report, click the **Sort** tab and select the data item you want to sort by, and then click **Ascending** or **Descending**. Generally speaking, prompt reports provide lists from which users select values for use in filtering reports. Such lists can be sorted to make it easier for users, but they should not be grouped. For example, on the Child CIN-Child Name example, we could sort numerically by Child CIN.

- Select **Child CIN** in the Sort order window.

- Click the **Ascending** button beneath the **Sort order** window.

12 Click the **Filter** tab of the **Query** dialog box and build a filter for your report, if necessary. Refer to *Module 6* for detailed instructions on building filters.

13 Click **OK** on the **Query** dialog box.

14 Click **File → Save As** on the menu bar.

15 In the **Save As** dialog box, navigate to an appropriate folder on your T: Drive. You will have to save the report using this report picklist in the same folder.

16 Type a name for your report in the **File name** window. Make it easily recognizable as a Report Picklist report (e.g., “Prompt Report”).

17 Click the **Save** button.

18 Select **File → Close** on the menu bar.

19 Click the **New** button on the toolbar. 

20 Select data for your report. Refer to *Module 6* of this guide for detailed instructions on selecting data.

21 Click the **Sort** tab. Refer to *Module 6* of this guide for detailed instructions on sorting data.

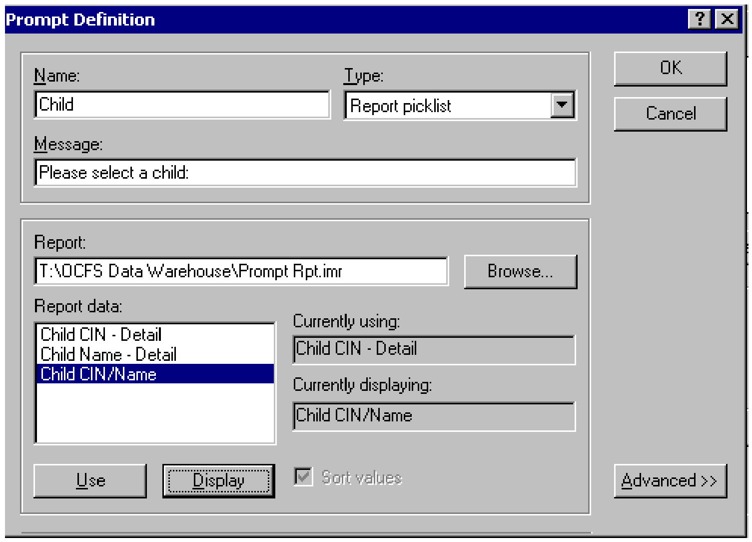
22 Click the **Group** tab. Refer to *Module 6* of this guide for detailed instructions on grouping data.

23 Click the **Filter** tab.

24 Build a filter using a report picklist prompt. For example, using the Child CIN-Child Name report picklist:

- Open the **Report Columns** folder in the Available components listing.
- Select **Child CIN** and add it to your filter. Note: You can use **Catalog Columns** to retrieve data items not appearing on your report.
- Double click the **equal sign (=)** in the Available components listing.
- Double click **Prompt Manager** in the Available components listing.
- Type a name for your prompt in the **Name** window of the **Prompt Definition** dialog box (e.g., “CIN/Name”).
- Click the arrow  to the right of the **Type** window.
- Select **Report picklist** from the drop-down list.
- Enter a message for the user in the **Message** window (e.g., “Please select a child”).
- Click the **Browse** button to the right of the **Report** window.
- In the **Open** dialog box, navigate to the folder on your T: Drive where you saved your picklist report.
- Select the picklist report in the selection window.
- Click the **Open** button.

- Select **Child CIN** in the **Report data** window.
- Click the **Use** button beneath the **Report data** window.
- Select **Child CIN/Name** in the **Report data** window.
- Click the **Display** button beneath the **Report data** window.
- Click **OK** on the **Prompt Definition** box.

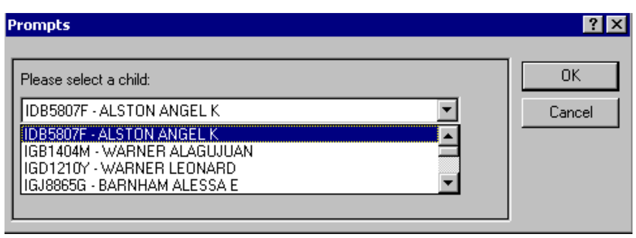


- Click **OK** on the **Query** dialog box.

25 Click **OK** on the **Query** dialog box.

26 To open the report picklist, click the arrow  to the right of the prompt window.

27 Select an item from the list (use your **Ctrl** key to select more than one item, providing **in** was used in the filter).



28 Click **OK** on the **Prompt** dialog box.

If/Then/Else Conditional Statements

If/Then/Else refers to a conditional statement used to manipulate data. In other words, data is not in the format you want to see it in on the report. For example, the OCFS Data Warehouse is full of codes. Instead of displaying codes on the report, perhaps you'd rather display the descriptions of the codes. You can manipulate that data using the If/Then/Else conditional statement.

If/Then/Else statements are formatted by stating a condition, what happens if the condition is met, and what happens if the condition is not met. If the condition is true, then one operation is performed; if the condition is false, then another operation is performed. For example, if the Activity Cd in the Admissions and Discharges Catalog is 'M910', then that denotes an admission. Any other Activity Cd is considered a discharge. We can convert the Activity Cd to read 'Admission' or 'Discharge' with the statement:

if (Activity Cd = 'M910') then ('Admission') else ('Discharge')

In other words, if the Activity Code on the record is M910, then print the word "Admission" in the column. If the Activity Code is anything other than M910, then print the word "Discharge" in the column.

If/Then/Else conditional statements are considered calculations in Impromptu, so you must use the Calculate feature to build the statement. Also, If/Then/Else statements are not available in the Report Wizard.

Assuming you have started a new report in Impromptu and now want to add the If/Then/Else referenced above:

1. Click the **Calculate** button in the center of the **Query** dialog box.
2. Type a name for your calculated column in the **Name** window of the **Calculation Definition** dialog box.
3. Double click **if** in the **Available components** listing.
4. Now build the "true" statement inside the parentheses. Using the above example:
   a. Double click **Report Columns** (**Catalog Columns** if the data item needed is not on your report) in the Available components listing.
   b. Double click **Activity Cd** to add it to the Expression.
   c. Double click the **equal sign (=).**
   d. Double click **string**.
   e. Type "**M910**" between the two quote marks in the **Expression** window.
   f. Press the **Enter** key on your keyboard.
   g. Double click the **closing parenthesis)** in the **Available components** listing.
5. Now enter what you want to have happen if the preceding statement is true. As in the above example, if the Activity Code on a record is M910, we want the word "Admission" to appear in the column:
   a. Open the **Value** folder in the Available components listing.
   b. Double click **string** to add it to the Expression.
   c. Type "**Admission**" between the two quote marks in the **Expression** window.
   d. Press the **Enter** key on your keyboard.
   e. Double click the **closing parenthesis)** in the **Available components** listing.

6 Now enter what is to happen if the preceding statement is not true. As in the example, if the Activity Code is anything but M910, we want the word “Discharge” to appear in the column:

a. Double click the **opening parenthesis** (in the **Available components** listing).

b. Double click **string**.

c. Type “**Discharge**” between the two quote marks in the **Expression** window.

d. Press the **Enter** key on your keyboard.

e. Double click the **closing parenthesis)** in the **Available components** listing.

7 Click **OK** on the **Calculation Definition** dialog box.

8 Click **OK** on the **Query** dialog box to execute the query.

You can now use this calculated column like any other column in the report. You can group, sort, or use it as a header.

Cin Id	Child Nm	Activity Dt	Child Status Cd	Age Nbr
Admission				
FQH9751Q	SPENCER JR RUSSELL J	8/1/97 12:00AM	08	19
FQA4867N	JESSUP RUTH	10/1/98 12:00AM	08	17
FHI1265T	SPENCER AMANDA R	2/19/97 12:00AM	08	15
FHB6720Y	KENNEDY SHAKEETA	12/2/97 12:00AM	04	16
FHE2350G	WARNER JR DARYL J	4/28/98 12:00AM	08	18
FTE5427M	DOE JANEL	6/19/97 12:00AM	08	16
FZE3416H	OWENS MARGARET J	11/21/97 12:00AM	07	19
FWB8125L	ALSTON AMY L	3/27/97 12:00AM	04	15
FWB8125L	ALSTON AMY L	6/7/99 12:00AM	07	18
FDC8128H	ROSS JASON	11/17/97 12:00AM	04	15
FDF3224Q	LAWRENCE CHARLES L	6/25/98 12:00AM	04	15
FDJ6313L	DOE AMY	6/22/01 12:00AM	08	19

Summary Filters

Filters can be applied to summary data items using the Summary filter function in Impromptu. We have been using detail filters, which apply one or more conditions to each row of data. If the conditions are true for a row, that row is retrieved for the report; if the conditions are not true, the row is not retrieved. Summary filters are applied to summary data items only. For example, if you develop a summary calculation that counts the number of CPS reports per unique Case ID, you could then apply a summary filter against that count to retrieve only those counts that are 3 or higher per Case ID. Summary data items (such as counts, totals, etc.) are not available for use in detail filters.

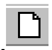
Using the above example, the following instructions should be followed to apply a summary filter in a report:

1 Login to Citrix and open the Cognos Impromptu application.

2 Select **Tools → Options** on the menu bar.

3 On the **General** tab of the **Options** dialog box, deselect the **Use the Report Wizard to create standard reports** option.

4 Click **OK** on the **Options** dialog box.

5 Click the **New** button on the toolbar. 

6 In the **Open Catalog** dialog box, navigate to the **OCFS Datawarehouse/DataWarehouse/Report Catalogs** directory.

7 Select an appropriate catalog in the selection window (e.g., Investigations Catalog).

8 Click the **Open** button.

9 Select the data items for your report (i.e., from the Investigation Fact folder – Case ID).

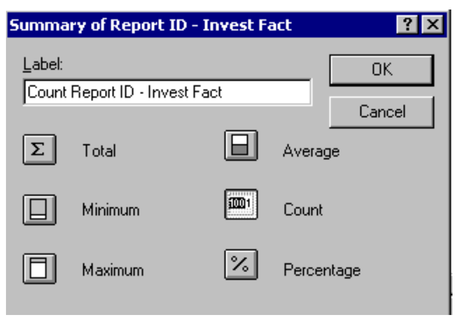
10 Add a summary data item to your report. For example, in the example above:

   a. Select **Report ID** in the **Catalog** window by clicking on it once.

   b. Click the **Sum** button in the center of the dialog box. 

   c. In the **Summary of Report ID** dialog box, click **Count**.

   d. Click **OK** on the **Summary** dialog box.



11 Click the **Filter** tab.

12 In the **Filter options** section of the dialog box, click the arrow  to the right of the **Filter Type** window.

13 Select **Summary** from the drop-down list.

14 Double click **Report Columns** in the **Available components** listing.

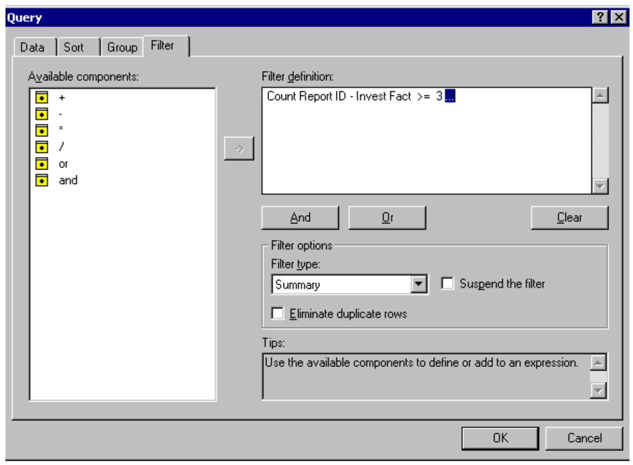
15 Select the summary data item you created in step 10 (i.e., Count Report ID) and add it to your filter definition.

16 Select an appropriate operator (=, <>, <, <=, >, >=) and add it to your filter.

17 Double click **number** in the **Available components** listing.

18 Type a number over the default zero in the filter definition.

19 Press the **Enter** key on your keyboard.



20 Click **OK** on the **Query** dialog box to run the report.

Case ID - Invest Fact	Count Report ID - Invest Fact
3296290	3
11232890	3
16276860	3
24278950	3
30288570	3
36283950	3
42250370	3
47256330	3
48215590	3
50239930	3
57247500	3
59215590	4
59980621	3
64213520	4
86232410	4
88260230	3

Appendix A:
Impromptu Catalogs

Appendix A1:
Allegations Catalog

This catalog contains all CPS investigation information with allegation details.

Geography Folder

Describes the counties associated to investigations and allegations. See Geography Folder, page 25 for details.

Allegation Facts

Contains detailed data of actual allegations.

All Races & Ethnicity Folder

Contains details of the race and ethnicity codes and their descriptions

Role Folder

Contains descriptions of all roles played by victims, subjects, reporters, and workers

Subject Folder

Contains demographic information for the perpetrator [subject] assigned to investigations and allegations

Unit Folder

Contains demographic details about the units associated to investigations and allegations

Child Folder

Contains demographic information on the victim in allegations and investigations

Worker Folder

Describes the individual workers assigned to investigations and allegations

Allegation Folder

Contains descriptions of specific allegations of child abuse/neglect

Reporter Relation Folder

Describes the role of the reporter of the alleged child abuse/maltreatment

Data As of Date Folder

Provides the dates on which the Allegations data mart was updated with data from the CONNECTIONS and CCRS systems. See Data As Of Folder, page 35 for detailed information.

Subject Stage Person Folder

Contains descriptive details of the subject in each Stage of a case

Child Stage Person Folder

Contains descriptive details of the child in each Stage of a case

Appendix A2:
Foster Home Catalog

Foster Home Agency Folder

Provides descriptive details for the agency with which the resource is associated

Foster Home Sub Agency Folder

Provides descriptive details for the sub-agency with which the resource is associated

Geography Folder

Provides descriptive details of the counties associated to foster and adoptive care. See Geography Folder, page 25 for details.

Foster Home Fact

Contains detailed data for all resources designated as foster home care facilities

Worker Folder

Provides descriptive details for the workers associated with Foster and Adoptive Homes

Foster Home Race & Ethnicity Folder

Provides descriptive details on the race or ethnicity of the Resource

Home Member Racial Folder

Provides descriptive details on the race or ethnicity of the members of the Resource

Home Member Folder

Provides descriptive details about the members of foster homes

Foster Child Folder

Provides descriptive about the foster child

Child Placement Agency Folder

Provides descriptive details about the agency which placed the child

Worker Agency Folder

Provides descriptive details of the agency to which the worker belongs

Data As Of Date Folder

Provides the latest dates on which the data warehouse was updated with CONNECTIONS and CCRS data See Data As Of Folder, page 35 for detailed information.

Appendix A3:
Investigations Catalog

Geography Folder

Provides descriptive details of the counties associated to foster and adoptive care. See Geography Folder, page 25 for details.

Worker Folder

Describes the individual worker associated with investigations

Role Folder

Contains descriptions of all roles played by victims, subjects, reporters and workers

Unit Folder

Contains demographic details about the units associated to investigations and allegations

Investigation Detail Folder

Contains detailed data for actual CPS Reports

Approval Folder

Contains the details of approvals made on CPS Reports and Stages

Stage Person Folder

Contains descriptive details of the various individuals in each Stage of a case

Investigation Fact Folder

Contains detailed data for actual CPS Reports

Reporter Relation Folder

Contains descriptive details of the individual who reported the case

Data As Of Date Folder

Provides the latest dates on which the OCFS Data Warehouse was updated with data from operational systems. See Data As Of Folder, page 35 for detailed information.

Appendix A4:
CCRS Related Catalogs

Admissions and Discharges Summary Catalog

This catalog can be used to obtain aggregate and child specific information on children in the custody of the local Commissioner of Social Services admitted or discharged from foster care during a user-defined time period. This catalog contains the last five full years of data plus the current year to date.

Summary

Total number of children whose records include an M910 for admissions (or M990, M999 for discharges) movement code.

Case Folder

Contains current CCRS case-level information, including WMS Case address

Child Folder

Contains current information for all children

Movement Folder

Contains all movement activity (M910, M990 or M999) codes for a child

Activity Detail Fact Folder

Contains detailed data for admissions and discharges.

Geography Folder

Provides descriptive details of the counties associated to foster care cases. See Geography Folder, page 25 for details.

Race & Ethnicity Folder

Provides descriptive details of racial origin and ethnicity.

Facility Folder

Contains detailed information on facilities from CAPS RESOURCE.

Agency Folder

Provides descriptive details of agencies associated with admissions and discharges within the Child welfare and foster care systems. See Agency Folder, page 10 for detailed information.

Data As Of Folder

Provides the latest date on which the OCFS data warehouse was updated. See Data As Of Folder, page 35 for detailed information.

In Care Detail Catalog

This catalog can be used to obtain aggregate and child specific information on children **currently** in the custody of the local Commissioner of Social Services.

Agency Folder

Provides descriptive details of agencies associated to admissions and discharges. See Agency Folder, page 10 for detailed information.

Detail Folder

Contains detailed information about placements and legal activities.

Case Folder

Contains current CCRS case-level information, including address.

Child Folder

Contains one record for each child who is currently in placement.

Facility Folder

Contains detailed information on facilities from CAPS RESOURCE.

Case Individual Folder

Contains current detailed information for individuals associated to a case.

Movement Folder

Contains detailed information on movement activities.

In Care Detail Fact Folder

Contains detailed information on the placements of children.

Geography Folder

Provides descriptive details of the counties associated to placement cases. See Geography Folder, page 25 for details.

Legal Folder

Contains legal activity details for children.

Legal Modifier A Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Legal Modifier B Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Legal Modifier C Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Legal Modifier D Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Ethnicity Folder

Provides descriptive details of racial origin and ethnicity.

Data As Of Folder

Provides the latest date on which the OCFS data warehouse was updated. See Data As Of Folder, page 35 for detailed information.

In Care Summary Catalog
This catalog can be used to obtain legal and placement aggregate and child specific information on children in the custody of the local Commissioner of Social Services during a user-defined time period. This catalog contains the last five full years of data plus the current year to date.

Summary Folder

Contains aggregate demographic and location information for children who have been in care at some point in the past 5 years.

In Care Summary Fact Folder

Contains child-level information on placements for the past 5 years.

Geography Folder

Provides descriptive details of the counties associated to foster care cases.) See Geography Folder, page 25 for details.

Disposition Lookup Folder

Please consult your CCRS Coding Guide for specific information concerning these variables.

Agency Folder

Provides descriptive details of agencies associated to admissions and discharges. See Agency Folder, page 10 for detailed information.

Facility Folder

Contains detailed information on facilities from CAPS RESOURCE.

Race and Ethnicity Folder

Provides descriptive details of racial origin and ethnicity.

Movement Folder

Contains detailed information about movements.

Case Folder

Contains current CCRS case-level information, including address.

Child Folder

Contains current information for all children.

Data As Of Folder

Provides the latest date on which the OCFS data warehouse was updated. See Data As Of Folder, page 35 for detailed information.

CCRS Services Report Catalog

This catalog is used to obtain all service case information concerning children who have been in placement or are currently in placement.

Data As Of Folder

Provides the latest date on which the OCFS data warehouse was updated.

Key Dates and Derivations
This folder contains Key dates for the children in placement. These dates include Time in Care at Discharge, Most Recent Admission, Most Recent Discharge, ASFA Time in Care etc.

Child Folder

Contains current information for all children.

Case Individual Folder
Contains current detailed information for individuals associated to a case

Case Folder
Each item in this folder contains either CCRS or WMS Case Data. This is one record per case in this folder.

Service Assessment Folder
Contains all service assessment information for the child

Child's Current Agency Info Folder

Contains detailed information on the Agency associated with the child's current placement. Agency data is from Connections. In Connections Agencies are coded '05' in the CD_RSRC_TYPE column on the CAPS Resource table.

Child's Current Facility Info Folder

Contains detailed information on the child's current facility from CAPS RESOURCE.

Movement Folder

Contains all movement activity (M910, M990 or M999) codes for a child

Movement Facility Info Folder

Contains detailed information on facility associated with the Movement Code from CAPS RESOURCE.

Movement Facility's Owner Agency Info Folder

Contains detailed information on the owner Agency of the Facility associated with the movement code. Agency data is from Connections. In Connections Agencies are coded '05' in the CD_RSRC_TYPE column on the CAPS Resource table.

Legal Folder

Contains legal activity details for children.

Legal Modifier A Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Legal Modifier B Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Legal Modifier C Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Legal Modifier D Folder

These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.

Adoption Folder

Contains all adoption activities.

Goal Folder

Contains all goal (G000, G100, G200, G250, G400, G600, G700, G800, G850, G900, G903, G912, G918, G920 & G999) activities.

Geography Folder

Provides descriptive details of the counties associated to a case.

Activity Detail Fact Folder

Contains all activity details for the child

In Care Detail Fact Folder

This folder contains child specific information on children **currently** in the custody of the local Commissioner of Social Services.

In Care Summary Fact Folder

This folder contains child specific information on children in the custody of the local Commissioner of Social Services during the last five full years plus the current year.

FOLDER DEFINITIONS

Agency Folder

Contains detailed information on all Agencies in Connections. In Connections Agencies are coded '05' in the CD_RSRC_TYPE column on the CAPS Resource table.

This folder is included in all CCRS related and Out of Home settings catalogs

Agency ID — Unique identification number assigned to the agency by New York State. This data element from NBR_RSRC_AGENCY_ID

Agency Contact Name — Name of the agency contact person. This data element from NM_RSRC_CONTACT

Agency Certification Date — The date on which the agency was certified (licensed). This data element from DT_RSRC_CERT

Agency Authorization To Date — The date on which the agency's authorization expires. The only time an agency's authorization will expire is when the agency is new and on probation. After the first re-authorization then the agency remains open until closed. This data element from CD_RSRC_CERT_BY

Agency Close Date — The date on which the agency was closed. This data element from

Agency Type Code — This code indicates whether the Agency is a District (D) or Voluntary Agency (V). This data element from CD_RSRC_AGENCY_TYPE

Agency Status Code — The operational status of the agency (active or Inactive). This data element from CD_RSRC_STATUS

Agency Name — Name of the agency. This data element from NM_RESOURCE

Agency Address Line 1 — first line of the agency's address. This data element from ADDR_RSRC_ST_LN_1

Agency Address Line 2 — Second line of the agency's address. This data element from ADDR_RSRC_ST_LN_2

Agency City Address — city in which the agency is located. This data element is from ADDR_RSRC_CITY

Agency NYC Community District Code — community board district code that is generated by the geo-coding interface on the FAD and Resource director address windows. Community district is calculated for new York city addresses only. This data element is from ADDR_RSRC_CMNTY_DIST

Agency State Code — abbreviated code for the state in which the agency is located. This data element is from CD_RSRC_STATE

Agency Zip Code — numeric ZIP code for the agency. This data element is from ADDR_RSRC_ZIP

Agency Address County Code — County in which the Agency is physically located. This data element is from CD_RSRC_CNTY

Agency Phone Number — phone number for the agency. This data element is from NBR_RSRC_PHONE

CCRS Child Folder
This folder contains one record for each child who has ever been in placement. This folder is included in all CCRS-related catalogs.

Child CIN ID — System-generated number that uniquely identifies an individual child in CCRS

Child Name — The name of the child.

Child Sex Code — Sex of the child.

Child Charge Indicator — Indicates the government (state or federal) assuming fiscal responsibility for the child and why.

Child JD/PINS Indicator — Indicates a child adjudicated as a JD (Juvenile Delinquent) or PINS (Person In Need of Supervision). The code is necessary for post-authorization claiming purposes.

Child Location Code — Indicates physical location of the child.

Child District Agency Plan ID — The district or agency with planning responsibility for the child.

Child Individual Status Code — Indicates the status of each individual who has significance to the case (not limited to the applicant and recipients).

Child Status Code — Indicates the current status of the child.

Child Original School District ID — Identifies the school district in which the child resided at the time of first placement.

Child Current School District ID — Identifies the child's current school district while in placement or receiving preventive services.

Child Auth Agency 1 ID — Identifies the controlling corporate unit or entity of one or more child-care facilities.

Unit 1 ID — Identifies the unit within the agency to which the child's case belongs.

Worker 1 ID — Identifies the worker assigned to the child's case.

Worker Function 1 Code — Identifies the casework function associated with each district or agency worker with responsibility for the child's case.

Auth Agency 2 ID — Identifies the controlling corporate unit or entity of one or more child-care facilities.

Unit 2 ID — Identifies the unit within the agency to which the child's case belongs.

Worker 2 ID — Identifies the worker assigned to the child's case.

Worker Function 2 Code — Identifies the casework function associated with each district or agency worker with responsibility for the child's case.

Auth Agcy 3 ID — Identifies the controlling corporate unit or entity of one or more child-care facilities.

Unit 3 ID — Identifies the unit within the agency to which the child's case belongs.

Worker 3 ID — Identifies the worker assigned to the child's case.

Worker Function 3 Code — Identifies the casework function associated with each district or agency worker with responsibility for the child's case.

Auth Agcy 4 ID — Identifies the controlling corporate unit or entity of one or more child-care facilities.

Unit 4 ID — Identifies the unit within the agency to which the child's case belongs.

Worker 4 ID — Identifies the worker assigned to the child's case.

Worker Function 4 Code — Identifies the casework function associated with each district or agency worker with responsibility for the child's case.

Auth Agency 5 ID — Identifies the controlling corporate unit or entity of one or more child-care facilities.

Unit 5 ID — Identifies the unit within the agency to which the child's case belongs.

Worker 5 ID — Identifies the worker assigned to the child's case.

Worker Function 5 Code — Identifies the casework function associated with each district or agency worker with responsibility for the child's case.

Plan Type Code — Identifies the plan type for the latest service assessment done for the child. It expresses the relationship of a specific plan to the mandatory plan submittal sequence.

Child Facility ID — Identifies the facility where the child is currently placed.

Child Facility Type Code — Identifies the type of facility where the child is currently placed.

Child Claiming Category Code — Identifies the appropriate federal or state category denoting the federal title or state allocation from which the cost of services is reimbursed.

Service Recipient Eligibility Category Code — Identifies the categorical relationship, income eligibility, or financial ineligibility of an individual member of a services family unit or case designated for purposes of services financial eligibility.

Child's CCRS Case Status Code — Status of the CCRS case.

Service Type Code — Identifies the type of service as defined in Title XX and annual CASSP available to eligible individuals displaying a need.

Child's CCRS Case District ID — The state-assigned code identifying the local social services district currently controlling the child's case.

Acct Number — The child's social security number.

Birth Date — The child's date of birth.

Plan Date — Date on which the latest service assessment plan for the child was completed, as indicated by the current planning worker.

Individual Next Plan Date — Date on which the next service plan for the child is due.

Facility Date — Date on which the child was admitted to the facility.

Transaction Date (TID) — Date on which a specific record was entered.

Track Start Date — The date on which the child, or someone acting on his/her behalf, requested adoptive, foster care, and/or preventive services.

Track Close Date — Date on which adoptive, foster care, and/or preventive services for the child were closed.

Child's Case Initiation Date (CID) — Date on which the child's case was first initiated.

Child's Case Authorization Period Start Date — The period-from date for which the child's case has been authorized.

Child's Case Authorization Period End Date — The period-to date for which the child's case has been authorized.

Agency ID — Identifies the agency with primary responsibility for the child's case.

Child Goal Code — The current permanency-planning goal from the child's current service assessment.

Child Race Code — Identifies the racial origin of the child.

Child Ethnicity Indicator — Identifies whether the child is of Hispanic origin.

Child Current Legal Status Code — Current legal status of the child, based on legal activity.

Child Current Age Number — Child's current age in years, based on the date of birth.

Child's Sibling Count — Number of the child's siblings in the CCRS case.

Child Siblings in Placement — Number of the child's sibling currently placed in foster care.

Child Line Number — The line number of the CCRS application on which the child is listed.

Child CCRS Case ID — The district-assigned number that uniquely identifies the child's case within the district or responsible state agency.

Case Name — The name by which the child's case is currently identified (usually Line 1 of the CCRS application).

CCRS Case Folder
Each column can contain either CCRS or WMS Case Data. There is one record per case in this folder. This folder is included in all CCRS-related catalogs

Case ID — The district-assigned, 10-digit case number that uniquely identifies the case within the district, or responsible state agency. Can contain Alpha Characters; in counties where a case number for one case type may be duplicated for another case type, the inclusion of an A for ADC, or H for HR, or M for MA etc may have been used to make the number unique within the district. This data element is taken from 01_050_CASE_NO.

Case District ID — The state-assigned district code that identifies the local social services district currently controlling the input transactions for the case. This data element is taken from 01_010_JUR_TRNSCTNL_RESP.

Case Office ID — Identifies the office within a district that has responsibility for the case, often referred to as satellite offices, district offices, IM centers, etc. This data element take from 01_020_local_office

Case Unit ID — Used within a district to identify the unit currently responsible for the case. This data element taken from 01_030_resp_unit

Case Worker ID — Used within a district to identify the worker currently responsible for the case. From 01_040_resp_worker

Case CCRS Status Code — Indicates the status of the case. This data element is from 36_003_CCRS_CASE_STATUS calculation if 36_003_ccrs_case_status = 01 then "Y" else if 02 then "N"

Case CCRS Indicator — Indicates the presence of CCRS information. This data element is from 023_490_ccrs_ind

Codes

C	CCRS Involvement in Case	**N**	Delinquent (JD) Remand
D	Day Treatment Services	**O**	Neglect Remand (non CPS)
E	Direct Intensive Preventive Service Program (PEG)	**P**	PINS Remand; Q= Delinquent (JD) Commitment/Placement
F	Home Aide From Emergency Children's Services (ECS)	**Q**	Delinquent (JD) Commitment/Placement
G	Home Aide From Emergency Children's Services (ECS)	**R**	PINS Commitment/Placement
H	Purchased Preventive Services	**S**	Delinquent (JD) Placement NYS/DFY for Replacement with SSC
I	Family Services (Direct)	**T**	Court-Ordered Evaluation (docket code other than "N" neglect)
J	Foster care Services	**U**	Court-Ordered Investigation
K	Maternity Shelter	**V**	Court-Ordered Supervision
L	Foster care-Emergency Children's Services	**W**	Closed Case Service
M	PINS Warrant	**X**	Home Evaluation
		Y	Referral for Services to Other Community or Social Service Agency

Case Initiation Date (CID) — The date on which the case was first initiated. This data element from 36_183_CID

Case Transaction Date(TID) — The date on which a particular entry was made. From 36_001_TRANSACTION_DATE

Case Original WMS Application Date — Date on which application was received for assistance and/or care, as defined by the program for which application is made. This data element is from 36_090_applctn_date

Case Name — The name by which the child's case is currently identified (usually Line 1 of the WMS application) from 01_070_case_name

Case Street Address — Street of the residential address from the WMS case

Case City Address — City of the residential address from the WMS case

Case State Code — State of the residential address from the WMS case

Case Z**ip Code —** Postal ZIP code of the residential address from the WMS case

In Care Detail Fact Folder

Contains detailed information about placements. This folder is included in the In Care/Legal Summary and Detail Catalogs

CIN ID	System-generated number that uniquely identifies an individual child in CCRS
Child Name	Name of the child.
Case ID	The district-assigned number that uniquely identifies the case within the district, or responsible state agency, associated with the child
District ID	State-assigned code identifying the local social services district currently controlling the case.
Current Facility ID	Identifies the facility in which the child is currently placed.
Worker ID	Identifies the worker currently responsible for the child's case.
Unit ID	Identifies the unit currently responsible for the child's case.
Office ID	Identifies the office currently responsible for the child's case.
Agency ID	Identifies the agency from the most recent placement of the child.
Sex Code	Sex of the child.
Race Code	Racial origin of the child.
Ethnicity Ind	Indicates whether the child is of Hispanic origin.
Goal Code	Code for permanency-planning goal from the child's latest service assessment.
Goal Text	Text description of the permanency-planning goal from the child's latest service assessment.
Child Status Code	Child's current status in CCRS.
Current Legal Status Code	Identifies the child's current legal status.
Current Facility Type Code	Type of facility in which the child is currently placed.
Current Age Number	Child's current age in years.
Current Age Group Text	Age range in which the child belongs.
Sibling Count	Number of siblings in the child's case.
Sibling Placed Count	Number of the child's siblings who are currently in foster care.
ASFA Time In Care Number	Current length of time in months that the child has spent in care, based on ASFA guidelines.
Foster Care Admission Date	Date of the most recent placement for the child.
Facility Admission Date	Date on which the child entered care at the current facility.

Agency Admission Date	Date on which the child entered care at the current agency.
Birth Date	Child’s date of birth.
Next Hearing Date	Date scheduled for the child’s next court hearing.

Case Individual Folder

Contains current detailed information for all individuals associated to the Services case of a child in placement. This folder is included in the In Care/Legal detail and CCRS Services Report Catalogs.

District ID	State-assigned code identifying the local social services district currently controlling the case.
Zip Code	Zip code of the individual
Middle Initial Name	Middle initial of the individual's name.
Line Number	The line number of the CCRS application on which the individual appears.
Sex Code	Sex of the individual.
WMS Individual Status Code	Current status of the individual in WMS.
CCRS Individual Status Code	Current status of the individual in CCRS.
Location Code	Code indicating physical location of the individual.
Race Code	Racial code for the individual.
Religion Code	Code for the religion of the individual.
Prim Lang Code	The primary language, if other than English, of the individual.
Track Indicator	Indicates that the individual is being tracked in CCRS.
Relationship Line 1 No Text	Line number of each child's mother, father, or significant other person.
Relationship Qualifier 1 Code	The relationship of the associated line number to the child on whose line it appears.
Relationship Line 2 No Text	Line number of each child's mother, father, or significant other person.
Relationship Qualifier 2 Code	The relationship of the associated line number to the child on whose line it appears.
Relationship Line 3 No Text	Line number of each child's mother, father, or significant other person.
Relationship Qualifier 3 Code	The relationship of the associated line number to the child on whose line it appears.
Birth Date	Date of birth of the individual.
Transaction Date	Date on which a record was entered.
First Name	First name of the individual.
Last Name	Last name of the individual.
Facility Case Name	If the child's status is '04' or '06', then this field contains the name of the facility in which the child has been placed; otherwise it contains the name of the case.
Facility Type Code	If the child's status is '04' or '06', this field contains the type of facility in which

	the child has been placed; otherwise, it is blank.
Line 1 Address	Address line 1 for the individual.
Line 2 Address	Address line 2 for the individual.
City Address	City in which the individual resides.
State Code	State in which the individual resides.

Movement Folder
Contains detailed information on movement activities. This folder is included in the In Care/Legal Detail, Agency or District Admissions/Discharge Summary, CCRS Services Ad Hoc Catalogs.

CIN ID	System-generated number that uniquely identifies an individual child in CCRS
Transaction Date	Date on which a movement activity took place.
Activity Number	A unique sequence number assigned to each movement activity in a child's case. The oldest activity is assigned the value 1. This guarantees uniqueness for similar movement activities being entered on the same day.
Location Code	Indicates the physical location of the child associated with an activity.
Case ID	The district-assigned case number that uniquely identifies the case within the district, or responsible state agency, associated with an activity.
District ID	The state-assigned code identifying the local social services district currently controlling the case.
Activity Modifier A Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier B Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier C Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier D Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Agency ID	Identifies the agency that entered the activity.
Unit ID	Identifies the unit within the agency that entered the activity.
Worker ID	Identifies the worker that entered the activity.
Child Status Code	A derived status associated with each type of movement activity.
Effective Date	The date on which a movement activity became effective.

Legal Dimension
Contains legal activity details for children. This folder is included in the In Care/Legal Detail and CCRS Services Report Catalogs

CIN ID	System-generated number that uniquely identifies a child in CCRS.
Worker ID	Identifies the caseworker that entered the activity.
Activity Date	Date on which the legal activity occurred.
Activity Code	The four-character CCRS activity code.
Activity Number	A sequence number that uniquely identifies the separate activities within a child's case. The oldest activity is assigned the value 1. This guarantees uniqueness for similar legal activities occurring on the same day.
Update Date	The date on which a record is updated.
Location Code	Code identifying the physical location of the child associated with this activity.
Case ID	The district-assigned number that identifies the case within the district, or responsible state agency, associated with this activity.
District ID	The state-assigned code that identifies the local social services district currently controlling the case.
Activity Modifier A Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier B Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier C Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier D Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Agency ID	Code identifying the agency that entered the activity.
Unit ID	Code identifying the unit within the agency that entered the activity.

Legal Modifier A Folder
(These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.)

Activity Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Desc Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Text	These variables contain specific information associated with each activity

code. *Consult your CCRS Coding Guide.*

Legal Modifier B Folder
(These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.)

Activity Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Desc Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*

Legal Modifier C Folder
(These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.)

Activity Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Desc Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*

Legal Modifier D Folder
(These variables contain specific information associated with each activity code. Consult your CCRS Coding Guide.)

Activity Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Desc Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Code	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*
Activity Modifier Text	These variables contain specific information associated with each activity code. *Consult your CCRS Coding Guide.*

In Care Summary Fact

Contains child-level information on placements. This folder is included in the In Care/Legal Summary Catalog

CIN ID	System-generated number that uniquely identifies an individual in CCRS.
Legal Disposition Code	Legal disposition for a child as of the latest update.
Office ID	Identifies the office currently responsible for the child's case.
Unit ID	Identifies the unit currently responsible for the child's case.
Worker ID	Identifies the caseworker currently responsible for the child's case.
Report Date	Month-end date for which the child's information is current.
Case ID	The district-assigned number that uniquely identifies the case within the district, or responsible state agency, associated with the child.
District ID	State-assigned code that identifies the district currently controlling the child's case.
Facility ID	Identifies the facility in which the child resided as of the Report Date.
Sex Code	Sex of the child.
Race Code	Identifies the racial origin of the child.
Ethnicity Indicator	Indicates whether the child is of Hispanic origin.
Goal Code	Permanency-planning goal from the child's latest service assessment as of the Report Date.
Child Status Code	Child's status in CCRS as of the Report Date.
Facility Type Code	Identifies the type of facility in which the child resided as of Report Date.
Age Number	Child's age in years as of the Report Date.
Age Group Text	Text grouping based on age as of the Report Date.
Time In Care Number	Length of time the child has spent in care as of the Report Date, expressed in months.
Goal Text	Text description of the permanency-planning goal.
Goal	Identifies the permanency-planning goal from the child's most recent service assessment as of the Report Date.
Ethnicity	Identifies whether the child is of Hispanic origin.
Race	Identifies the racial origin of the child.
Facility Type	Text description of the type of facility in which the child resided as of the Report Date.
ASFA Time In Care Number	Length of time in months the child has spent in care based on ASFA guidelines
ASFA Group Text	Text grouping based on ASFA Time In Care Number.
Legal Status Code	Legal status of the child as of the Report Date.

Facility Folder
Contains detailed information on all Facilities in Connections. In Connections all facilities are coded ‘06’ in the CD_RSRC_TYPE column on the CAPS Resource table.

This folder is included in all CCRS related catalogs.

Facility/Vendor ID — Identification number assigned to each facility by New York State. This data element is from NBR_RSRC_VID. Vendor ID is 8 characters in length and the values may contain both alpha and numeric characters. Many of these numbers were converted from CCRS.

Facility Contact Name — Name of the contact person for the facility This data element is from NM_RSRC_CONTACT

Facility Certification Date — The date on which the facility was certified or licensed for the current certification period. This data element is from DT_RSRC_CERT

Facility Authorization To Date — The date on which the facility’s certification expires. This data element is from DT_RSRC_AUTH_TO

Facility Close — date on which the FAD home or facility was closed (license cancelled). This data element is from DT_RSRC_CLOSE_EFFECTIVE

Facility Type — This is the Level of Care (LOC) provided by the facility. The LOC is defined by who licensed the facility, the number of clients it can accommodate, and the type of service it provides. The type/LOC of a facility is also used to calculate the commodity codes sent to BICS. This data element is from CD_RSRC_FACIL_TYPE

Facility Status Code — The operational or license status of the facility; active or inactive. This data element is from CD_RSRC_STATUS and a calculation is done which changes "01" to "Y" (active), and "02" to "N" (inactive).

Facility Owner Agency Code — Identifies the agency that “owns” or operates the facility. This data element is from NBR_RSRC_AGENCY_ID

Facility Capacity Number — The maximum number of children to whom the facility will be able to provide care. This data element is from NBR_RSRC_FACIL_CAPACITY

Facility Name — Name of the facility. This data element is from NM_RESOURCE

Facility Address Line — Line 1 of the primary address (physical location) of the facility This data element is from ADDR_RSRC_st_ln_1

Facility Address Line — Line 2 of the primary address (physical location) of the facility This data element is from ADDR_RSRC_st_ln_2

Facility Address City — City of the primary address (physical location) of the facility This data element is from ADDR_RSRC_CITY

Facility Address State — State of the primary address (physical location) of the facility. This data element is from CD_RSRC_STATE

Facility Address Zip Code — Postal zip code of the primary address (physical location) of the facility. This data element is from ADDR_RSRC_ZIP

Facility Address County Code — The county of the primary address (physical location) in which the facility is located. This data element is from CD_RSRC_CNTY

Facility Phone Number — Telephone number of the facility This data element is from NBR_RSRC_PHN

Facility NYC Community District Code — Community district is calculated for New York City addresses only. This data element is from ADDR_RSRC_CMNTY_DIST

Elements available but not currently used in any catalog.

Facility Resource ID — A unique 8-digit number that identifies a Resource. This data element is from ID_RESOURCE

Facility Sub Agency Code — This data element is from CD_RSRC_SUB_AGENCY. Sub Agency primarily applies to NYC (A66) created Foster or Adoptive Homes. The sub agency code is populated with the NYC "800" level decode appropriate to the home when it is created. Sub agency allows users to search and sort Foster or Adoptive homes by the "800" code.

Geography Folder
(Describes the counties associated to case information. This folder is included in all CCRS, Allegation, Investigation and Out of Home Settings Catalogs.

Upstate Downstate Text	Descriptive text assigned to each county indicating whether it is part of New York City ("Downstate") or part of the rest of New York State ("Upstate"). Long Island, even though it is across the river from New York City, is considered "Upstate".
FIPS Code	Federal Information Processing Standards code assigned to the county.
County Code	Unique three-digit code assigned to each county in the Connections system.
County Name	Full name of the county (e.g., Albany, Montgomery, etc.)
Region Code	Unique code identifying the New York State region to which the county belongs (one of six in the state).
Region Name	Full name of the region: 1 Buffalo Region 2 Rochester Region 3 Syracuse Region 4 Albany Region 5 Yonkers Region 6 New York City Region 7 Statewide Agencies 8 Regional Offices
State Text	Name of the state to which the county belongs (New York).
Other State Agency	Indicates whether the agency is other than an OCFS agency.
IAB Indicator	Indicates whether the county is considered a Regional Office for the purposes of investigating IAB cases.
Comparable Group Code	Indicates which of three groups of comparable counties to which this county belongs. Counties are grouped based on how closely they relate to each other with respect to the following variables: Children less than 22 years old Urbanicity (all non-rural housing units divided by all housing units) Families with children with income less than 125% of the poverty level.

Allegation Facts Folder
Contains detailed data of actual allegations. This folder in included in the Allegation Catalog.

Case ID	The unique number assigned to each case by the district that identifies the case within the district or responsible state agency.
Reporter Relationship Code	Identifies the role played by the individual reporting the allegation *(see Reporter Relationship Folder for codes)*.
Report ID	Unique identification number assigned to each CPS Report in the CONNECTIONS system.
Intake Stage ID	Unique identification number assigned to the Intake stage of each CPS Report in the CONNECTIONS system.
Investigative Stage ID	Unique identification number assigned to the investigative stage of each CPS Report in the CONNECTIONS system.
County Code	Unique three-digit code assigned to each county in the CONNECTIONS system.
Unit ID	Unique identification number of the unit to which the report has been assigned.
Unit Code	Unique code assigned to the unit to which the report has been assigned.
Worker ID	Unique identification number of the worker to whom the report has been assigned.
Worker's Role	Code identifying the role the assigned worker is to play on this report (i.e., PR = Primary, SE = Secondary).
Intake Code	Code identifying the intake stage of the report (i.e., "INT").
Intake Type Code	Code identifying the type of report (i.e., "INI" – Initial, "SUB" – Subsequent, "ADD" – Additional Information).
Intake Start Date	The report start date.
Investigation Close Date	The date on which the investigation was closed.
Report Last Update Date	The date on which the report was updated last.
Last Updated Date	The date on which the Allegation Fact table was last updated.
Report Status Text	Indicates the status of the report (i.e., "Open", "Closed").
Investigative Code	Code identifying the investigative stage of the report (i.e., "INV").
Invest Type Code	Code identifying the type of report (i.e., "INI" – Initial, "SUB" – Subsequent, "ADD" – Additional Information).

Reason Investigation Closed Code	Code identifying the reason for closing the investigation.	
	5	Allegation(s) already investigated
	10	Law Enforcement agreed to investigate
	15	Preliminary investigation of an anonymous report
	23	Assessment only
	25	Other
	30	Close – No credible evidence
	35	Close – Unable to contact
	40	Close – Service completed
	45	Withdrawal
	55	Subcare – Protective Placement
	60	Close
	64	Open – Court ordered services
	65	Open – Court ordered services
	66	Open – Court ordered supervision
	67	Open – Court ordered supervision
	68	Open – Voluntary services
	69	Open – Voluntary services
	70	Open – Voluntary Placement
	71	Open – Voluntary Placement
	72	Open – Court ordered placement
	73	Open – Court ordered placement
	80	Close – Refuse service/unable to take legal action
	81	Close – No services required
	83	Close – Lost contact
	84	Workload constraints – Close
	85	Close
	86	Non-family Investigation
	88	Close – Only child died
	97	Closed to Merge
	99	Reclassification

Investigation Classification Code	Indicates the type of investigation conducted: • CPD – CPS Report investigation involving Foster Care/Day Care providers • CPF – CPS Report investigation involving Family members • CPI – CPS Report investigation involving Institutional abuse • I & R – Information and Referral • NCP – Non-CPS Report investigation • NON – Non-Report • SPC – Special Request
Approved Determination Code	Indicates the determination made and approved on the CPS Report (IND = Indicated, UNF = Unfounded)
Allegation Code	Identifies the specific abuse/maltreatment being alleged (*see Allegation Folder for codes*).
Disposition Code	Indicates what determination has been made concerning the allegation of abuse (SUB = Substantiated, UNS = Unsubstantiated).
Victim Person ID	Unique identification number assigned to all children in the CONNECTIONS system.
Victim Gender Code	Identifies the sex of the child or victim (F = Female, M = Male, U = Unknown).
Victim Race/Ethnicity Code	Identifies the race or ethnicity of the child (*see All Races & Ethnicity Folder for codes*).
Victim's Age at Intake	Age in months of the victim on the Intake Start Date.
Subject Person ID	Unique identification code assigned to every subject (alleged perpetrator) in the CONNECTIONS system.
Subject Gender Code	Identifies the sex of the subject (F = Female, M = Male, U = Unknown).
Subject Ethnicity/Race Code	Identifies the race or ethnicity of the subject (*see Ethnicity Folder for codes*).
Subject Age at Intake	Age in years of the subject on the Intake Start Date.
Age of Report Number	Number of days between the Intake Start Date and the Close Date of the CPS Report. If the report is not closed, it is the number of days between the current date and the Intake Start Date.

Race & Ethnicity Folder

(Contains details of the race and ethnicity codes and their descriptions. This folder is included in all CCRS, Allegation, and Out of Home Settings Catalogs.

Race Code Code assigned to specific races.

Race Descriptive Text Description of the race or ethnicity.

AA	African-American
AC	African-American-Caucasian
AH	African-American-Hispanic
AN	Native American/Alaskan Native
AP	Asian/Pacific Is-Caucasian
AS	Asian/Pacific Islander/Oriental
BO	Black (Other)
CW	Caucasian (White/Non-Hisp)
HC	Hispanic-Caucasian
HL	Hispanic/Latino/Puerto Rican
HO	Hispanic/Oriental
NA	Native African
OB	Oriental/Black
UN	Unable to Determine
XX	Other

Race Type Broad groupings of racial codes (American Indian or Alaska Native, Asian, Black or African American, Other, Unknown, White).

Ethnicity Indicator Indicates whether the race is considered to be of Hispanic or Latino origin (Y = Yes, N = No)

Allegation Role Folder

(Contains descriptions of all roles played by victims, subjects, reporters, and workers. This folder is included in the Allegation Catalog.

Role Code Code identifying the role.

AB	Abused Child
AS	Alleged Subject
CA	Confirmed Abused
CM	Confirmed Maltreated
CS	Confirmed Subject
HM	Historical Manager
HP	Historical Primary Worker
MA	Maltreated Child
MG	Case Manager
NA	Non-confirmed Abused
NM	Non-confirmed Maltreated
NO	No Role
NS	Non-Confirmed Subject
PC	Primary Child
PR	Primary
RP	Reporter
SE	Secondary
SR	Source
SS	Sustained Subject
SU	Suspect
UK	Unknown
VI	Victim

Role Description Text Description of the role.

All Roles Text “ALL Roles”

Allegation Subject Folder

(Contains demographic information for the perpetrator [subject] assigned to investigations and allegations. This folder is included in the Allegation Catalog.

Subject Person ID	Unique identification number assigned to every subject in the CONNECTIONS system.
Approximate DOB Indicator	Indicates whether the subject's date of birth has been estimated in the report due to lack of information (Y = Yes, N = No).
Gender Code	Indicates the sex of the subject (F = Female, M = Male, U = Unknown).
Status Code	Not being used at this time.
Religion Code	Code indicating the religion practiced by the subject (if any).

BP	Protestant
CJ	Jewish
DE	Eastern Religion
EN	None
FP	No Preference
IS	Islam
RC	Catholic
UN	Unknown
XX	Other

Birth Date	Date on which the subject was born. Note: *If Approximate DOB Indicator is Y, this date is an estimate.*
First Name	First name of the subject.
Middle Name	Middle name or initial of the subject.
Last Name	Last name of the subject.
City	City in which the subject resides.
Street	Street address of the subject.
Zip Code	Postal ZIP code of the subject's address.

Allegation Child Folder

Contains demographic information on the victim in allegations and investigation. This folder is in the Allegation Catalog

Child Person ID	Unique identification number assigned to all children in the CONNECTIONS system.
Child Age In Years	Calculation of child's age based on his/her date of birth.
Approx. DOB Indicator	Indicates whether the date of birth for this victim is estimated due to lack of information.
Gender Code	Indicates the sex of the victim (F = Female, M = Male, U = Unknown).
Status Code	Current status of the victim in the CONNECTIONS system (A = Active, I = Inactive, M = Merged).
Religion Code	Code indicating the religion practiced by the victim (if any).

BP	Protestant
CJ	Jewish
DE	Eastern Religion
EN	None
FP	No Preference
IS	Islam
RC	Catholic
UN	Unknown
XX	Other

Birth Date	Date on which the victim was born. *Note: If the Approximate DOB Indicator is Y, then this is an estimated date.*
First Name	First name of the victim.
Middle Name	Middle name or initial of the victim.
Last Name	Last name of the victim.
Street	Street address of the victim.
City	City in which the victim resides.
Zip Code	Postal ZIP code of the victim's address.

Allegation Folder
Contains descriptions of specific allegations of child abuse/neglect. This folder is included in the Allegations Catalog.

Allegation Code Code assigned to a specific allegation of child abuse/maltreatment.

Allegation Text Description of specific allegations of child abuse/maltreatment.

Allegation Group Text Groupings of specific allegations used for reporting purposes as defined by NCANDS (National Child Abuse and Neglect Data System).

Allegation Group Text	Allegation Code	Allegation Text
Medical Neglect	LMED	Lack of Medical Care
Neglect or deprivation of necessities	EDNG	Educational Neglect
	IFCS	Inadequate Food, Clothing, Shelter
	INGD	Inadequate Guardianship
	LSUP	Lack of Supervision
	MITT	Malnutrition, Failure to Thrive
Other	ABAN	Abandonment
	CDRG	Child's Drug/Alcohol Use
	INCC	Inappropriate Custodial Conduct
	PDRG	Parent's Drug/Alcohol Misuse
	XOTH	Other
Physical Abuse	BURN	Burns, Scalding
	CHTS	Choking/Twisting/Shaking
	EXCP	Excessive Corporal Punishment
	FATL	DOA/Fatality
	FRAC	Fractures
	IINJ	Internal Injuries
	LABW	Lacerations, Bruises, Welts
	PONX	Poisoning, Noxious Substances
	SWDS	Swelling/Dislocation/Sprains
Psychological or emotional maltreatment	EMOT	Emotional Neglect
	ISOL	Inappropriate Isolation/Restraint
Sexual Abuse	SXAB	Sexual Abuse

Reporter Relationship Folder

Describes the role of the reporter of the alleged child abuse/maltreatment. This folder is included in the Allegation and Investigation Catalogs.

Reporter Relationship Code CONNECTIONS code for the role of the incident reporter.

Reporter Description Text Text describing the CONNECTIONS Reporter Relationship Code:

AA	Substance Abuse Counselors
AD	Attend Teacher
AG	Community Agency
AN	Anonymous
AS	Physician's Asst.
AT	Attorney
AU	Aunt/Uncle
BF	Biological Father
CC	Concerned Citizen
CO	Cousin
CR	Clergy
CS	Christian Science Practitioner
CT	Court
CW	Child Care Worker
DA	Daughter/Son
DC	Day Care Fac./Prov.
DH	Dental Hygienist
DI	Director
DS	DSS Worker
DT	District Attorney
DV	Detective
EM	EMS/EMT
FM	Other Family member
FP	Foster Parent
FR	Friend
FV	Family Viol. Shelter
GC	Grandchild
GN	Guidance Counselor
GP	Grandparent
GU	Guardian
IS	Institutional Staff
LA	Law Enforcement
MC	ME/Coroner
MF	Medical Fac. Staff
MH	Mental Health Prof.
MO	Mother
NE	Neighbor
NN	Niece/Nephew
NR	Nurse
OS	Other Shelter
PA	Parent
PB	Probation Officer
PH	Public Health
PN	Principal
PO	Police Officer
PS	Parent Substitute
PY	Psychologist/ Psychiatrist
PZ	Physician
SA	Other St. Agency
SB	Sibling
SC	School Personnel
SW	Social Worker
TC	Teacher
TP	Therapist
UH	Unrelated Home member
UK	Unknown
XX	Other

NCANDS Reporter Code Code used by the National Child Abuse and Neglect Data System for incident reporter roles.

NCANDS Reporter Type Description of the NCANDS Reporter Code.

Mandated Indicator Indicates whether this type of reporter is required by law to report incidents of child abuse/maltreatment (Y = Yes, N = No).

Data As Of Date Folder
Provides the dates on which the Allegations data mart was updated with data from the CONNECTIONS and CCRS systems

This folder is included in all OCFS Data Warehouse catalogs

CONNECTIONS Data As Of Date	Date on which the data mart was updated with CONNECTIONS data.
CCRS/WMS Data As Of Date	Date on which the data mart was updated with CCRS and/or WMS data.

Foster Home Member Ethnicity Folder

Provides descriptive details on the race or ethnicity of the members of the Resource. This folder is included in the Out of Home Settings Catalog

Ethnicity Code	Two-letter code identifying the ethnicity of the home member *(refer to Ethnicity Dim for codes)*.
Ethnicity Desc Txt	Text describing the ethnicity of the home member.
Ethnicity Type	Broad groupings of ethnicity codes (American Indian or Alaska Native, Asian, Black or African American, Other, Unknown, White).
Hispanic Latino Ind	Indicates whether the race is considered to be of Hispanic or Latino origin (Y=Yes, N=No).

Foster Home Facts Folder
(Contains detailed data for all resources designated as foster home care facilities. This folder is included in the Out of Home Settings Catalog.

Foster Home Resource ID	Unique identification number assigned to every resource in the CONNECTIONS system.
Foster Home Vendor ID	Unique identification number of the facility associated to the resource. This is the CCRS Facility ID
Foster Home Name	Full name by which the resource is known.
Foster Home Worker ID	Unique identification number of the worker with whom the foster home is associated.
Foster Home Stage ID	A unique integer that identifies the resource as the stage.
Foster Home Setting	Describes the type of resource (i.e., Foster Home or Congregate).
Foster Home Level Of Care	Describes the level of care provided by the resource, including Agency Boarding Home, Approved Relative Foster Home, Certified Foster Home, Group Home, Group Residence, Institution
Foster Home Status	Status of the home.
Foster Home Authorized To Date	Date to which the resource is authorized.
Foster Home Certification Date	Date on which the resource was certified.
Foster Home Close Date	Date on which the resource was closed.
Foster Home Original Certification Date	Date on which the resource was originally certified.
Foster Home Agency Code	Three-digit identification code for the agency with which the home is associated.
Foster Home Original Agency Code	The original agency code for the home.
Foster Home Inquiry Source Code	Code which captures how the inquirer learned about the F/A Home program.
Foster Home Close Reason Code	Code identifying the reason for closing the home.
Foster Home Language	Language spoken in the home.
Foster Home Religion	Religion practiced in the home.
Foster Home Ethnicity	Code indicating the ethnicity of the home (please refer to Ethnicity Dim for codes).
Foster Home Emergency Program Type Indicator	Indicates whether a resource provides emergency program services.

Foster Home Hard To Place Program Type Indicator	Indicates whether a resource provides “hard to place” program services.
Foster Home HIV AIDS Program Type Indicator	Indicates whether a resource provides HIV+/AIDS program services.
Foster Home Maternity Program Type Indicator	Indicates whether a resource provides maternity program services.
Foster Home Mother and Child Program Type Indicator	Indicates whether a resource provides Mother/Child program services.
Foster Home Refugee Assistance Program Type Indicator	Indicates whether a resource provides Refugee Assistance program services.
Foster Home Regular Program Type Indicator	Indicates whether a resource provides regular program services.
Foster Home Sex Offender Program Type Indicator	Indicates whether a resource provides sex offender program services
Foster Home SILP Program Type Indicator	Indicates whether a resource provides Supervised Independent Living Program services.
Foster Home Special Needs Behavioral Program Type Indicator	Indicates whether a resource provides Special Needs Behavioral program services
Foster Home Special Needs Medical Program Type Indicator	Indicates whether a resource provides Special Needs Medical program services.
Foster Home Therapeutic Program Type Indicator	Indicates whether a resource provides therapeutic program services.
Foster Home Diagnostic Reception Center Program Type Indicator	Indicates whether a resource provides Diagnostic Reception Center program services.
Foster Home RTC Program Type Indicator	Indicates whether a resource provides Residential Treatment Center program services.
Foster Home Capacity Number	Maximum licensed capacity of the resource.

Foster Home Unavailable Number	The number of places currently unavailable in the resource.
Foster Home Maximum Female Month Number	The maximum age in months at which the resource will accept female children.
Foster Home Maximum Female Year Number	The maximum age in years at which the resource will accept female children.
Foster Home Minimum Female Month Number	The minimum age in months at which the resource will accept female children.
Foster Home Minimum Female Year Number	The minimum age in years at which the resource will accept female children.
Foster Home Maximum Male Month Number	The maximum age in months at which the resource will accept male children.
Foster Home Maximum Male Year Number	The maximum age in years at which the resource will accept male children.
Foster Home Minimum Male Year Number	The minimum age in years at which the resource will accept male children.
Foster Home Minimum Male Month Number	The minimum age in months at which the resource will accept male children.
Foster Home Address Line 1	First line of the home's street address.
Foster Home Address Line 2	Second line of the home's street address.
Foster Home Address City	City in which the home is located.
Foster Home Address Zip Code	Postal ZIP code for the home.
Foster Home Address State	Two letter code for the state in which the resource is located.
Foster Home Address County	Three-digit code for the county in which the home is located.
Foster Home NYC Community District	Community district code of the resource (New York City only).
Foster Home Phone Number	Phone number for the home.
Foster Home Phone Extension	Phone extension number for the home.
Foster Home Sub Agency Code	This data element is from CD_RSRC_SUB_AGENCY. Sub Agency primarily applies to NYC (A66) created Foster or Adoptive Homes. The sub agency code is populated with the NYC "800" level decode appropriate to the home when it is created. Sub agency allows users to search and sort Foster or Adoptive homes by the "800" code.

Foster Home Member Folder
(Provides descriptive details about the members of foster homes. This folder is included in the Out of Home Settings Catalog.

Member ID	Unique CONNECTIONS identification number assigned to an individual who is a member of a foster home.
Member Name	Full name of an individual who is a member of a foster home.
Resource ID	Unique CONNECTIONS resource identification number of the foster home.
Facility ID	Unique Connections facility identification number of the foster home.
Approx Dob Ind	Indicates whether a foster home member's date of birth has been estimated.
Sex Code	Identifies the gender of a foster home member.
Ethnicity Code	Identifies the ethnicity of a foster home member *(refer to Ethnicity Folder for codes)*.
State Code	Identifies the state in which a foster home is located
County Code	Identifies the county in which a foster home is located.
Agency Code	Code assigned to that agency that owns a foster home.
Birth Date	Date on which a foster home member was born. *Note: If the Approx Dob Ind is "Y", then this date is estimated.*
Card Sent Date	The date on which fingerprint cards of a foster home member were sent to the Department of Criminal Justice Services (DCJS) for a criminal background check.
Card Recvd Date	The date on which a response is received from the DCJS.
Zip Code	Postal ZIP code of a foster home address.
Phone Number	Telephone number of a foster home.
City Address	City in which a foster home is located.
Language Txt	Language spoken at a foster home.

Amer Sign	Hindi	Other
Chinese	Italian	Polish
Creole	Japanese	Portuguese
English	Korean	Portuguese
French	Multiple	Spanish
German	Nat Am Lan	Vietnamese
Hebrew		

Marital Status Txt Indicates the marital status of a foster home:

Child, not applicable	Separated	Single, never MA
Widowed	Unknown	Divorced
Unmarried Couple	Legally Separated	Married

Relation Txt Identifies the relationship of individuals living in a foster home:

Absent Parent	Foster Child	Administrator
Foster Parent	Attorney	Friend
Aunt/Uncle	Godparent	Child
Grandchild	Child Care Worker	Grandparent
Clergy	Guardian	Community Agency
Institutional Non-Prof.	Mother	Court
Concerned Citizen	Cousin	Niece/Nephew
Neighbor	Non-custodial Parent	Day Care Fac./Prov.
Daughter/Son	Other Family member	Other
Non-relative	Parent	Parent Substitute
Other Shelter	School Personnel	Sibling
Psychiatric Staff	Spouse	Step-Parent
Son	Step Sibling	Teacher
Unknown	Unrel. Home mem	

Religion Txt Religion primarily practiced by a foster home member:

Catholic	Jewish	Other
Eastern Religion	None	Protestant
Islam	No Preference	Unknown

Role Txt Identifies the principal and collateral relationships in a foster home (Collateral, Principal).

Street1 Address The first line of the street address of a foster home.

First Name First name of an individual who is a member of a foster home.

Last Name Last name of an individual who is a member of a foster home.

Middle Name Middle name of an individual who is a member of a foster home.

Street2 Address Second line of the foster home's street address.

CPS Investigations Approval Folder

(Contains the details of approvals made on CPS Reports and Stages. This folder is included in the Investigation Catalog.

Report ID	Unique identification number assigned to all CPS Reports in the CONNECTIONS system.
Approval Description Text	Text description of the approval made to a CPS Report or Stage.
Approval ID	Unique identification number assigned to the individual with approval responsibility for a case.
Case ID	Unique identification number assigned to all CPS Reports in the CONNECTIONS system.
Person ID	Unique identification number assigned to the primary worker on a CPS Report.
Approval Status Code	Status of the approval on a CPS Report.

CPS Investigations Fact Folder

(Contains detailed data for actual CPS Reports. This folder is included in the Investigation catalog.

Report ID	Unique identification number assigned to all CPS Reports in the CONNECTIONS system.
Report Relation Code	Code identifying the relationship of the individual who reported the case.
Unit ID	Unique identification number of the unit to which the primary worker on the case is "in" assigned.
Case ID	Unique identification number assigned to all cases in the CONNECTIONS system.
Worker ID	Unique identification number assigned to the primary worker on a case.
Worker Role Code	Code identifying the role played by the primary worker on a case.
County Code	Code identifying the county to which the primary worker on a case belongs.
Intake ID	Unique identification number assigned to the Intake Stage of a case.
Intake Code	Code identifying the Intake Stage of a case (i.e., "INT").
Intake Type Code	Code identifying the type of intake for a case.
Intake Start Date	The date on which the case is opened as an Intake on the CONNECTIONS system.
Investigation ID	Unique identification number assigned to the Investigation Stage of a case.
Investigation Code	Code identifying the Investigation Stage of a case (i.e., "INV").
Investigation Type Code	Code identifying the type of investigation for a case.
Investigation Close Date	Date on which the Investigation Stage of a case is closed.
Investigation Reason Closed Code	Code identifying the reason an Investigation Stage is closed.

5	Allegation(s) already investigated	68	Open – Voluntary services
10	Law Enforcement agreed to investigate	69	Open – Voluntary services
15	Preliminary investigation of an anonymous report	70	Open – Voluntary Placement
23	Assessment only	71	Open – Voluntary Placement
25	Other	72	Open – Court ordered placement
30	Close – No credible evidence	73	Open – Court ordered placement
35	Close – Unable to contact	80	Close – Refuse service/unable to take legal action

40	Close – Service completed	81	Close – No services required
45	Withdrawal	83	Close – Lost contact
55	Subcare – Protective Placement	85	Close
60	Close	86	Non-family Investigation
64	Open – Court ordered services	88	Close – Only child died
65	Open – Court ordered services	97	Closed to Merge
66	Open – Court ordered supervision	99	Reclassification
67	Open – Court ordered supervision		

Investigation Classification Code Code identifying the type of investigation conducted:

CPD	CPS Report investigation involving Foster Care/Day Care providers	CPF	CPS Report investigation involving Family members
CPI	CPS Report investigation involving Institutional abuse	I & R	Information and Referral
NCP	Non-CPS Report investigation	NON	Non-Report
SPC	Special Request		

Approved Determination Code Code identifying the determination made on a case (“IND”=Indicated, “UNF”=Unfounded).

Last Updated Date Date on which the CPS Report was last updated.

Report Name Name of the CPS Report or case.

Case Open Indicator Indicates whether the CPS Report or case is open.

CPS Investigations Stage Person Folder

(Contains descriptive details of the various individuals in each Stage of a case. This folder is included in the Investigation Catalog.

Report ID	Unique identification number assigned to each CPS Report in the CONNECTIONS system.
Stage Person Link Date	Latest date on which the CPS Report was updated.
Case ID	Unique identification number assigned to each case in the Connections system.
Person ID	Unique identification number assigned to the individual associated to the CPS Report.
Person Role Code	Code identifying the role played by the individual in the CPS report.
Person Relation Code	Code identifying the relationship of the individual in the CPS report.

CPS Investigations Detail Folder
(Contains detailed data for actual CPS Reports. This folder is included in the Investigation Catalog.

Report ID	Unique identification number assigned to all CPS Reports in the CONNECTIONS system.
Report Date	The Intake Start Date for a specific CPS Report.
Rep Tot Open Count	Total number of CPS Reports currently open in the CONNECTIONS system (i.e., INV-stage reports with no Close Dates).
Rep Beg Open Count	The total number of CPS Reports active as of midnight on the first day of the period covered.
Rep End Open Count	The total number of CPS reports that were active as of midnight on the last day of the period covered.
Rep Last day Overdue Count	The total number of CPS reports that were still active at the end of period where the number of days between the Intake Start Date and the Period End Date is greater than 60 days.
Rep Tot Open Days	Total number of days a CPS Reports was open at any time during the period covered.

CPS Investigations Reporter Relationship Folder

(Contains descriptive details of the individual who reported the CPS case. This folder is included in the Allegation and Investigation Catalogs.

Reporter Relation Code

Code identifying the relationship of the reporter in the case:

AA	Substance Abuse Counselors	DT	District Attorney	NR	Nurse
AD	Attend Teacher	DV	Detective	OS	Other Shelter
AG	Community Agency	EM	EMS/EMT	PA	Parent
AN	Anonymous	FM	Other Family member	PB	Probation Officer
AS	Physician's Asst.	FP	Foster Parent	PH	Public Health
AT	Attorney	FR	Friend	PN	Principal
AU	Aunt/Uncle	FV	Family Viol. Shelter	PO	Police Officer
BF	Biological Father	GC	Grandchild	PS	Parent Substitute
CC	Concerned Citizen	GN	Guidance Counselor	PY	Psychologist/ Psychiatrist
CO	Cousin	GP	Grandparent	PZ	Physician
CR	Clergy	GU	Guardian	SA	Other St. Agency
CS	Christian Science Practitioner	IS	Institutional Staff	SB	Sibling
CT	Court	LA	Law Enforcement	SC	School Personnel
CW	Child Care Worker	MC	Medical Examiner/Coroner	SW	Social Worker
DA	Daughter/Son	MF	Medical Fac. Staff	TC	Teacher
DC	Day Care Fac./Prov.	MH	Mental Health Prof.	TP	Therapist
DH	Dental Hygienist	MO	Mother	UH	Unrelated. Home Member
DI	Director	NE	Neighbor	UK	Unknown
DS	DSS Worker	NN	Niece/ Nephew	XX	Other

Mandated Indicator Indicates whether the reporter was required by law to report a case of child abuse and/or maltreatment.

Description Text Text description of the relationship of the reporter in the case.

NCANDS Reporter Code Category of reporter type according to the National Child Abuse and Neglect Data System guidelines.

NCANDS Reporter Description Text description of NCANDS Reporter Code.

CPS Worker Folder

(Describes the individual workers associated with investigations. This folder is included in the Allegation and Investigation Catalogs.

Worker ID	Unique identification number assigned to the primary worker in the CONNECTIONS system.
Worker Name	Full name of the primary worker associated to a case.
Unit ID	Unique identification number assigned to the unit to which the primary worker is “in” assigned.
Unit Code	Code assigned to the unit to which the primary worker is “in” assigned.
County Code	Unique three-digit code assigned to the county to which the primary worker belongs.
Agency Code	Code assigned to the agency with primary responsibility for a case.
Site Code	Code assigned to the site to which the unit is associated.
First Name	First name of the primary worker assigned to a case.
Middle Name	Middle name of the primary worker assigned to a case.
Last Name	Last name of the primary worker assigned to a case.
Office Name	Name of the office to which the primary worker reports.

CPS Unit Folder
(Contains demographic details about the units associated to investigations and allegations. This folder is included in the Allegation and Investigation Catalogs.

Unit ID	Unique identification number of the unit within the district or agency to which a case belongs.
Agency Name	Name of the agency to which the unit belongs.
Agency Code	Code assigned to the agency with primary responsibility for a case.
Site Code	Code assigned to the site to which the unit is associated.
Unit Code	Code assigned to the unit with primary responsibility for a case.
Approver ID	Unique identification number assigned to the individual responsible for approving a case.
Approver Name	Full name of the individual with approval responsibility for a case.

CPS Individual Role Folder

(Contains descriptions of all roles played by victims, subjects, reporters and workers. This folder is included in the Allegation and Investigation Catalogs.

Role Code Code identifying the role.

Role Description Text Text description of the role:

AB	Abused Child	NO	No Role
AS	Alleged Subject	NS	Non-Confirmed Subject
CA	Confirmed Abused	PC	Primary Child
CM	Confirmed Maltreated	PR	Primary
CS	Confirmed Subject	RP	Reporter
HM	Historical Manager	SE	Secondary
HP	Historical Primary Worker	SR	Source
MA	Maltreated Child	SS	Sustained Subject
MG	Case Manager	SU	Suspect
NA	Non-confirmed Abused	UK	Unknown
NM	Non-confirmed Maltreated	VI	Victim

All Roles Text "ALL Roles"

Worker Agency Folder

Contains detailed information on the Agency to which the worker belongs. In Connections Agencies are coded ‘05’ in the CD_RSRC_TYPE column on the CAPS Resource table.

This folder is included in all CCRS related and Out of Home settings catalogs

Worker Agency ID — Unique identification number assigned to the agency by New York State. This data element from NBR_RSRC_AGENCY_ID

Worker Agency Contact Name — Name of the agency contact person. This data element from NM_RSRC_CONTACT

Worker Agency Certification Date — The date on which the agency was certified (licensed). This data element from DT_RSRC_CERT

Worker Agency Authorization To Date — The date on which the agency’s authorization expires. The only time an agency’s authorization will expire is when the agency is new and on probation. After the first re-authorization then the agency remains open until closed. This data element from CD_RSRC_CERT_BY

Worker Agency Close Date — The date on which the agency was closed. This data element from

Worker Agency Type Code — This code indicates whether the Agency is a District (D) or Voluntary Agency (V). This data element from CD_RSRC_AGENCY_TYPE

Worker Agency Status Code — The operational status of the agency (active or Inactive). This data element from CD_RSRC_STATUS

Worker Agency Name — Name of the agency. This data element from NM_RESOURCE

Worker Agency Address Line 1 --- first line of the agency's address. This data element from ADDR_RSRC_ST_LN_1

Worker Agency Address Line --- Second line of the agency’s address. This data element from ADDR_RSRC_ST_LN_2

Worker Agency City Address --- city in which the agency is located. This data element is from ADDR_RSRC_CITY

Worker Agency NYC Community District Code — community board district code that is generated by the geo-coding interface on the FAD and Resource director address windows. Community district is calculated for new York city addresses only. This data element is from ADDR_RSRC_CMNTY_DIST

Worker Agency State — abbreviated code for the state in which the agency is located. This data element is from CD_RSRC_STATE

Worker Agency Zip Code — numeric ZIP code for the agency. This data element is from ADDR_RSRC_ZIP

Worker Agency Address County Code — County in which the Agency is physically located. This data element is from CD_RSRC_CNTY

Worker Agency Phone Number — phone number for the agency. This data element is from NBR_RSRC_PHONE

Appendix B:
Predefined Impromptu Reports

FAD Impromptu Reports

Appendix B1:
Foster Home Reauthorization Coming Due

Report Title: Foster Home Reauthorization Coming Due

Report Purpose: Lists foster homes that require reauthorization for the period between the date of the last data refresh date and the end date specified by the user.

Report Prompts: End Date (end of time period)

Totals: Total Homes Coming Due for Period by Worker Agency ID

Data:

Data Field	Data Definition	Sample Values
Home Authorization Will Expire	Start and End dates entered by user	
Date of Report	Date on which the report is run	
Office	Name of the Office to which an agency is assigned	New Alternatives for Children
Unit	Three-digit identification number for the unit to which an employee is currently assigned	013
Worker Name	First and last names of the worker assigned to the Foster Home	Doe, John
Resource ID	Connections Vendor ID for the Resource	20035220
Home Name	Name of the Resource	Knox, Diane
Setting	Describes the type of home	Foster Home Congregate Home
Home Status	Status of the Resource Note: All current reports are formatted to include Accepted – Active and Emergency status only.	Accepted – Active Emergency
Cert from Date	Date of the original authorization or last reauthorization/approval date of a Foster or Congregate Care Home	10/8/00
Cert to Date	Date the resource is due to be closed if the worker takes no action	10/8/01

Appendix B2:
Facility Detail Report

Report Title: Facility Detail

Report Purpose: Provides information for Congregate and Foster Home resources in Accepted Active and Emergency statuses.

Report Prompts: None

Totals: None

Data:

Data Field	Data Definition	Sample Values
Agency	Name of the agency that owns the resource	700
Worker Name	First and last names of the worker assigned to this resource.	Smith, Carol
Office Name	The name of the office to which the worker is currently 'in' assigned. ***NOTE***: *In some cases, this will be different from the Worker Agency field.*	New Alternatives for Children
Worker Unit	Identification number of the unit to which the worker assigned to the resource is 'in' assigned in Connections.	013
Home Name	Name of the Foster or Congregate Home resource.	Smith, Marian
Resource ID	The Connections identification number for this resource.	173800
Facility ID	The Connections Vendor identification number for this resource.	00123456
Home Status	Status of the resource. ***NOTE***: *All current reports are formatted to include Accepted – Active and Emergency status only.*	Accepted – Active Emergency
Setting	Indicates the setting of the resource	Foster Care Congregate Care
Level of Care	The level of care provided by the resource.	Agency Boarding Home Approved Relative Foster Home Certified Foster Home Group Home Group Residence Institution
Cert From	The date on which the resource was last authorized	6/25/01

Data Field	Data Definition	Sample Values
Cert To	The date on which authorization for the resource expires	6/25/02
Capacity	The maximum number of children for which the resource is licensed	6
# Unavailable	Number of unavailable spaces in this resource	2
Male Min Yrs & Mos	The minimum age, in years and months, of male children that the resource is licensed to accept.	0 1
Male Max Yrs & Mos	The maximum age, in years and months, of male children that the resource is licensed to accept.	4 0
Female Min Yrs & Mos	The minimum age, in years and months, of female children that the resource is licensed to accept.	0 1
Female Max Yrs & Mos	The maximum age, in years and months, of female children that the resource is licensed to accept.	2 0
Program Types	Describes the types of programs offered by the resource. Values include: RG – Regular EM – Emergency TH – Therapeutic HP – Hard to Place MC – Mother/Child HIV – HIV+/AIDS MT – Maternity SO – Sexual Offenders RTC – Residential Treatment Center DRC – Diagnostic Reception Center RA – Refugee Assistance Program SILP – Supervised Independent Living Program SNM – Special Needs Medical SNB – Special Needs Behavioral	
Home Location		
Street Ln 1	The first line of the street address of the resource.	2520 Linden Blvd
Street Ln 2	The second line of the resource’s street address.	
City	City in which the resource is located	Brooklyn
County	County in which the resource is located.	Manhattan
CD	Community district in which the resource is located. ***NOTE****: This field will be completed for New York City resources. All others will be blank.*	05
State	State in which the resource is located.	NY

Data Field	Data Definition	Sample Values
Zip	Zip code of the resource's street address.	11206-4555
Phone	Phone number for the resource	5186732000
Ext	Phone extension number for the resource.	123
Race	Race of the resource.	African American
Language	Language(s) spoken at the resource.	English
Religion	Predominant religion practiced at the resource.	Protestant
Member Name	Name of each member living in the resource	Jones, Carmen
Person ID	The Connections identification number of the individuals living in the resource	12189099
Relationship	Relationship of the individuals living in the resource.	Foster Parent
Role	Identifies the principal and collateral relationships of the persons living in the resource.	Principal
DOB	Date of birth of the individuals living in the resource.	10/13/48
Sex	The gender of the individuals living in the resource.	F
Race	Race of the individual living in the resource.	African American
Connections As Of Date	Date of the latest update of the OCFS Data Warehouse	10/05/2001
Date of This Report	Date on which the report was requested.	9/14/01
Fingerprint Card Sent	Date on which fingerprint cards for this home member were sent.	
Fingerprint Card Returned	Date on which fingerprint cards for this home member were returned.	
Medical Exam Date	Date on which this home member received a medical examination.	
CCRS Child CIN	The CIN identification number for the child.	
Child Name	Name of the child.	
ASFA Time in Care	Number of months the child has been in care, based on ASFA guidelines.	
Total Siblings	Number of siblings of this child.	
Siblings Placed	Number of this child's siblings who have been placed in care.	

Appendix B3:
Facility Summary List Report

Report Title: Facility Summary List Report

Report Purpose: To provide workers and supervisors with a listing of all foster care facilities by agency/district.

Report Prompts: None

Totals: Total number of foster care facilities by agency/district

Data:

Data Field	Data Definition	Sample Values
Agency/District Name	The name of the agency to which the workers is currently "in" assigned.	New Alternatives for Children
Agency/District Code	Code assigned to the agency by New York State	700`
Total Number of Foster Homes	Total number of foster homes within the responsibility of the agency	56
Worker Office Name	Name of the office to which the worker is assigned.	
Unit Code	Unique identification number for the unit within a district that is responsible for the foster homes	006
Worker Name	Name of the worker responsible for the foster home	SMITH JOHN E
Resource ID	Unique identification number assigned to the foster home in the Connections system	13456
Home Name	Name by which the foster home is known	Smith, Clara
Home Member Name	Name of individual who is a member of the home	Smith, Jill
Role	Identifies the principal and collateral relationships in the foster home	Principal Collateral
Relationship	Describe the relationship of the home member	Foster Parent Daughter/Son Grandchild
Setting	Indicates the setting of the resource	Foster Home Congregate Home
Status	Status of the Foster Home	Accepted-Active Emergency
Fingerprint Card Sent	Date on which a fingerprint card for the home member was sent for a criminal background check	1/01/2001
Fingerprint Card Received	Date on which the results of the criminal background check were received	3/31/2001

Data Field	Data Definition	Sample Values
Medical Exam Date	Date on which the home member received a medical examination.	
Cert Date	Date on which the foster home was last authorized.	2/28/2003
Authorized to Date	Date on which the foster home's certification will expire.	2/28/2004

Appendix B4:
Closed Facility Report

Report Title: Closed Facility Report

Report Purpose: Provides information on facilities, which closed within three months of the last data refresh date.

Report Prompts: None

Totals: Total number of facilities, which closed within the three months prior to the last data refresh date.

Data:

Data Field	Data Definition	Sample Values
Facilities Closed During the Three Months Prior To	The date of the last data refresh.	9/30/01
Worker Agency ID	The agency of the office to which the worker is 'in' assigned.	A03
Agency Name	Name of the agency that owns the resource.	Chautaugua County DSS
Total Closed Facilities	Total number of homes whose certifications will become overdue by the date entered by the user	6
Office	Name of the office to which the agency is assigned.	Chautauqua Office Bldg
Unit	Code identifying the unit in which the worker is currently active.	013
Worker Name	First and last names of the worker assigned to the resource.	Smith, John E
Resource ID	The Connections identification number for the foster home.	13456789
Home Name	Name of the foster home.	Davis, Lynn
Setting	Describes the type of setting for the foster home (i.e., relative, resource, congregate)	Foster Home Congregate Home
Home Status	Current status of the foster home	Accepted-Active Emergency
Certification Date	The date on which the foster home was last authorized	8/6/00
Recert Date	Date on which the home needs to be recertified.	8/6/01
Closure Reason	Reason the home was closed.	

Appendix B5:
Admissions to Foster Care Summary Report

Report Title: Admissions to Foster Care Summary Report

Report Purpose: To provide a summary of the number of admissions to foster care (movement code = M910) by voluntary agency.

Report Prompts: Start Date and End Date – for user to specify the time period for which to run the report.

Totals: Total admissions by ethnicity, Hispanic origin, facility type, sex, age range at admission, goal, and previous care.

Data:

Data Field	Data Definition	Sample Values
District/Agency/ Statewide	Statewide or the name of the agency or district.	Albany
Report Period	The period for which the report is run, specified by the user in prompt response	9/1/01 – 9/30/01
Admissions to Foster Care during Period	Total number of children who have a movement code of the most recent "M910" with a corresponding activity date that falls within the request report time period.	4745
Race	Count of the number of children admitted to foster care by racial origin, based on present AFCARS definitions	White African-American Asian American Indian or Alaskan Native Native Hawaiian or Other Pacific Islander Other Unknown
Hispanic Origin	Count of the number of children admitted to foster care by whether or not they are of Hispanic origin	Yes No
Facility Type	Count of the number of children admitted to foster care by the type of facility to which they were admitted	Foster Boarding Home Approved Relative Home Congregate Care *Institution* *Group Residence* *Group Home* *Supervised Independent Living* *Agency Operated Boarding Home* *Other*

Data Field	Data Definition	Sample Values
Gender	Count of the number of children admitted to foster care by sex	Male Female
Age Range at Admission	Count of the number of children admitted to foster care by *age in years* at the date of admission	0 – 2 3 – 5 6 – 9 10 – 13 14 – 18 Over 18
Goal	Count of the number of children admitted to foster care by their CPS permanency planning goal	Discharge to Parent/Legal Guardian Discharge to Independent Living Discharge to Adoption Discharge to Adult Residential Care Other Goal No Goal
Admissions	Count of the number of children admitted to foster care by previous admission history	Not previously in care Readmitted within 3 months Readmitted within 4-12 months Readmitted within 13-24 months Readmitted within 25 or more months

Appendix B6:
Discharges from Foster Care Summary Report

Report Title: Discharges from Foster Care Summary Report

Report Purpose: To provide a summary of the number of children discharged from foster care (movement code = M990, M999, or M970) by agency

Report Prompts: Start Date and End Date – for user to specify the time period for which to run the report
Discharge Activity Code(s) – for user to specify the type of discharge(s) for which to run the report.

Totals: Total discharges by ethnicity, Hispanic origin, facility type, sex, age range at discharge, goal, final discharge reason, and time in care at discharge

Data:

Data Field	Data Definition	Sample Values
District/Agency/ Statewide	Statewide or the name of the agency or district.	Albany
Report Period	Period of time for which the report is run, specified by the user in response to prompts	9/1/01 – 9/30/01
Activity Code	Type of discharge(s) for which the report is run	M970 – Trial Discharge M990 – Child Placement Ended M999 – Child Track Closed
Discharges from Foster Care during Period	Total number of children who have been discharged from foster care during the specified time period. *Note: If a child has more than one discharge during the period, the child is only counted once, based on the most recent discharge.*	100
Race	Count of the number of children discharged from foster care by racial origin, based on present AFCARS definitions	White African-American Asian American Indian or Alaskan Native Native Hawaiian or Other Pacific Islander Other Unknown
Hispanic Origin	Count of the number of children discharged from foster care by whether or not they are of Hispanic origin	Yes No

Data Field	Data Definition	Sample Values
Facility Type	Count of the number of children discharged from foster care by the type of facility to which they were admitted	Foster Boarding Home Approved Relative Home Congregate Care Institution Group Residence Group Home Supervised Independent Living Agency Operated Boarding Home Other
Gender	Count of the number of children discharged from foster care by sex	Male Female
Age Range at Discharge	Count of the number of children discharged from foster care by *age in years* at the date of discharge	0 – 2 3 – 5 6 – 9 10 – 13 14 – 18 Over 18
Goal	Count of the number of children discharged from foster care by their CPS permanency planning goal	Discharge to Parent/Legal Guardian Discharge to Independent Living Discharge to Adoption Discharge to Adult Residential Care Other Goal No Goal
Final Discharge Reason	Count of the number of children discharged from foster care by the final discharge reason	Return to Parent Release to Relative Release to Own Responsibility Release to Primary Resource Person Adoption – subsidized Adoption – not subsidized Order of Court Other
Time in Care at Discharge	Count of the number of children discharged from foster care by the average number of months they were in care at the time they were discharged	Average Number of Months

Appendix B7:
Legal Detail Report

Report Title: Legal Status Detail

Report Purpose: To provide agency workers and managers with details of the legal activities in a child's case

Report Prompts: CIN

Totals: None

Data:

Data Field	Data Definition	Sample Values
District	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case	66
Office	Identifies within a district, the office that has responsibility for the case	070
Unit	Used within a district to identify the unit currently responsible for the case	006
Worker	Used within a district to identify the worker currently responsible for the case	005
Child Name	The name of the child	SMITH JOHN E
Agency Where Placed	Unique agency identification number assigned by New York State to the agency responsible for placing the child	A43
In Care 12 of 22 Months	Current time in care based on ASFA guidelines, expressed in months	22+
ASFA In Care Date	Date on which the child was admitted to foster care	9/15/01
CIN	Unique identifying number for an individual in the CCRS system	BX44990J
Case Name	The name by which the child's case is currently identified (usually line 1 name in the CCRS application)	SMITH DAINA
Case Number	The district-assigned case number that uniquely identifies the child's case within the district, or responsible state agency	S4934766
Current Legal Status	Current legal status of the child based on legal activity	Abuse/Neglect Proceeding
Next Hearing	Date on which the next hearing on the case is to be held	
Legal Activity History: Date	Date on which the activity took place	8/15/01

Data Field	Data Definition	Sample Values
Legal Activity	The description of the legal event based on "Reportable Events" in the CCRS system.	Petition Filed Anticipated Discharge Hearing Additional Dispositions Revocation Appeal Agreement Signed Unknown
Type of Legal Activity or Reason	Type of legal event as recorded in the CCRS system	Transfer of Care & Custody Court Action Court Review Article 10 – Abuse/Neglect 1055 Court Review Article 7 – PINS 756 Court Review (PINS) Article 3 – JD 384 – Voluntary surrender for adoption 384b – Commitment of guardianship and custody 651b – Refugee Assistance Program Violation of Disposition Other Family Court Other Court (non-Family) 355.3 Court Review (JD) 1055A (Court Review)
Court or Disposition	Describes whether the case has been assigned to the court or for disposition	Court Disposition
Docket # or Anticipated Discharge Date or Disposition or Court	Docket number assigned to the case by the court or the anticipated discharge date of the case	
Hearing Date or Next Hearing Date or Source	The date of the hearing or source of appeal.	

Appendix B8:
In Care Detail Report

Report Title:	In Care Detail Report
Report Purpose:	To provide agency workers and managers with details of a child's movements to and from foster care facilities
Report Prompts:	CIN
Totals:	None

Data:

Data Field	Data Definition	Sample Values
Child Name	The name of the child	SNYDER CALVIN J
In Care 12 of 22 Months	Length of time child has been in care, according to ASFA regulations, expressed in months	22+
CID		
District	The state-assigned district code which identifies the local social services district currently controlling the case	66
Case Name	The name by which the child's case is currently identified (usually Line 1 of the CCRS application)	SNYDER DAINA
CIN	Unique identification number assigned to the child in the CCRS system	BX44990J
Case Number	The district-assigned case number which uniquely identifies the child's case within the district	S4934766
Agency	Code for the agency responsible for the case	A43
Case Address	The street, city, state and zip code of the residential address for the WMS case	41 DELAWARE ST WATKINS GLEN NY 12054
Race	Code identifying the ethnicity of the child	White African American Asian American Indian or Alaskan Native Native Hawaiian or Other Pacific Islander Other Unknown
Office	Unique identification number of the office within a district that has responsibility for the case	070
Gender	Code identifying the sex of the child	M, F
Unit	Unique identification number of the unit within a district currently responsible for the case	006

Data Field	Data Definition	Sample Values
Legal Status	Current legal status of child based on legal activity. Note: If there are multiple legal codes on the same day, only one will be displayed, prioritized in the order shown.	Abuse/Neglect Proceeding PINS/JD Proceeding Adoption Proceeding Foster Care Review Proceeding Other Unknown
DOB	Date on which the child was born	12/19/83
Current Age	Child's current age based on the date of birth	17
Number of Siblings **In Case** **In Placement**	 Number of child's siblings in the CCRS case Number of the child's siblings in the CCRS case who are currently placed in foster care	3 2
Worker	Unique identification number of the worker currently responsible for the case	006
Current Goal	Permanency planning goal from the latest service assessment.	Discharge to Parent/Legal Guardian Discharge to Independent Living Discharge to Adoption Discharge to Adult Residential Care Other Goal No Goal
Case Manager	This field is populated with the known worker since CCRS does not collect Case Manager information.	
Foster Care Admission Date	Date of the most recent activity that qualifies the child for inclusion in this report	
Agency Admission Date	Date on which the agency accepted the child's case	
Facility Admission Date	Date of the child's admission to the facility	

Data Field	Data Definition	Sample Values
Child's Placements:		
Movement Code	The 4-character CDRS activity code	M910
Effective Date	The date the movement took place	1/1/2001
Transaction Date	The date on which the movement was entered	1/1/2001
Facility Type	The type of facility as defined by who licensed the facility the number of clients it can accommodate, and the type of service it provides.	Institution, Group Residence, Group Home, SILP, Agency Operated Boarding Home, etc.
Facility Name/ Address	The name and address of the facility in which the child was placed.	Four Winds 30 Crescent Ave Saratoga Springs, NY 14606-4844
Family Contact/ Phone	Name of the individual acting as contact for the facility. Telephone number of the facility	Nancy Smith 5187823681
Child's Family/Case Members:	Contains details of the child's family members.	
Name	Full name of family member	JAMES PATTERSON
CIN	CCRS identification number of the family member	SO1345X
DOB	Date of birth of family member	
Line Number	CCRS application line number of family member	1
Relationship	Relationship of family member to the child	Biological Father
Current Address	Address for the family member	13 Elm Street, Amstead, NY
Current CCRS Status	CCRS child status of in care or absent	Absent, In 24 Hour Care
CCRS Data As	Last date on which CCRS data was updated	9/31/01
Date of This Report	Current date	10/13/01

Appendix B9:
In Care Summary Report

Report Title: In Care Summary Report

Report Purpose: To provide agency workers and managers with a summary of all placements for a specified month and year.

Report Prompts: Month/Year

Totals: Total number of children placed by Ethnicity, Hispanic Origin, Status, Facility Type, Sex, Age Range, Goal, Time in Care, and ASFA Time in Care

Data:

Data Field	Data Definition	Sample Values
Year-Month	Year and month for which the report was requested (Prompt)	2001-08
District/Agency/ Statewide	Statewide or the name of the agency or district.	Albany
Total Number of Children in Foster Care	Total number of children whose status is 04 ("in 4-hour care") or 06 ("absent") for the period of time requested	80
Race	Total number of children in foster care by racial origin	White African American Asian American Indian or Alaskan Native Native Hawaiian or Other Pacific Islander Other Unknown
Hispanic Origin	Total number of children in foster care by whether or not they are of Hispanic Origin	Yes No
Status	Total number of children in foster care by their status	In 4-Hour Care In Absence Status
Facility Type	Total number of children in foster care by the type of facility in which they are placed	Foster Boarding Home Approved Relative Home Congregate Care *Institution* *Group Residence* *Group Home* *Supervised Independent Living* *Agency Operated Boarding* Other
Gender	Total number of children in foster care by their sex	Male Female

Data Field	Data Definition	Sample Values
Age Range	Total number of children in foster care by their age in years	0 – 2 3 – 5 6 – 9 10 – 13 14 – 17 18 +
Goal	Total number of children in foster care by their permanency planning goal	Discharge to Parents/Legal Guardians Discharge to Independent Living Discharge to Adoption Discharge to Adult Residential Care Other Goal No Goal
Time in Care	Average number of months the children reported on have been in care	40
ASFA Time in Care	Total number of children in foster care by the time they have been in care according to ASFA guidelines	Children in Care at Least 12 of 22 months Children in Care Less Than 12 of 22 months
CCRS Data As Of	The latest date on which CCRS data was updated	9/15/01
Date of This Report	Current Date	10/13/01

CFSR Program Improvement Plan Reports

Appendix B10:
AFCARS First-Time-Entry Summary Data

Report Title: AFCARS First-Time-Entry Summary Data

Report Purpose: Provides districts with the capacity to review the **cases that are part of the AFCARS data submission**, individually and from a systemic viewpoint. The data items are pieces of information that link directly to the CFSR as well as to issues that impact child welfare policy and practice.

Report Prompts: District

Totals: None

Additional Info: From any text with Aqua colored shading, you may 'Drill Through' to a corresponding **child specific list** by selecting the desired prompt values for the Report Year and the related category such as placement type, permanency goals, etc. The detailed report will contain key information for each child including Office, Unit, Worker, Case Name, CIN, Child Name, and Agency Where Placed.

Data Item	Data Definition	Sample Values
Number of children entering care for the first time in cohort group (%= 1st time entry of all entering within first 6 months)	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Most Recent Placement Types	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Most Recent Permanency Goals	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Number of Placement Settings in Current Episode	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Reason for Discharge	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Median Length of Stay in Foster Care	Represented in median months for Federal fiscal years 1999, 2000, 2001	

Appendix B11:
AFCARS Point-In-Time Summary Data

Report Title: AFCARS Point-In-Time Summary Data

Report Purpose: Provides districts with the capacity to review the **cases that are part of the AFCARS data submission**, individually and from a systemic viewpoint. The data items are pieces of information that link directly to the CFSR as well as to issues that impact child welfare policy and practice.

Report Prompts: District

Totals: None

Additional Info: From any text with Aqua colored shading, you may 'Drill Through' to a corresponding **child specific list** by selecting the desired prompt values for the Report Year and the related category such as placement type, permanency goals, etc. The detailed report will contain key information for each child including Office, Unit, Worker, Case Name, CIN, Child Name, and Agency Where Placed.

Data Item	Data Definition	Sample Values
Foster Care Population Flow	Children in foster care on first day of year (10/1/YY): # of children for Federal fiscal years 1999, 2000, 2001	
	Admissions During Year: # of children for Federal fiscal years 1999, 2000, 2001	
	Discharges During Year: # of children for Federal fiscal years 1999, 2000, 2001	
	Children in care on last of year (9/30/YY): # of children for Federal fiscal years 1999, 2000, 2001	
Placement Types for Children in Care	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Permanency Goals for Children in Care	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Number of Placement Settings in Current Placement	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Number of Removal Episodes for Children in Care	# of children and % of children for Federal fiscal years 1999, 2000, 2001	

Data Item	Data Definition	Sample Values
Number of Children in care 17 of the most recent 22 months	# of children and % of children for Federal fiscal years 1999, 2000, 2001	
Median Length of Stay in Foster Care	Represented in median months for Federal fiscal years 1999, 2000, 2001	
Length of Time to Achieve Perm. Goal	# of children and % of children for Federal fiscal years 1999, 2000, 2001	

Appendix B12:
Discharge to Adoption Summary

Report Title:	Discharge to Adoption Summary
Report Purpose:	This report identifies the Length of Time to Adoption indicator defined by ACF's Children's Bureau. This report is intended to help identify potential systemic factors contributing to failure in providing safety and permanency to children in care.
Report Prompts:	None
Totals:	State totals for: Children Discharged to Adoption More than 2 Years after Removal, Children Discharged to Adoption within 2 Years of Removal, Children Discharged to Adoption, and Rate.
Additional Info:	Information is available by year in separate cubes. You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Date	Date of Report	04/09/2003
District Code	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case.	099
District Name	The local social services district currently controlling input transactions to the child's case.	Hudson
Children Discharged to Adoption more than 2 Yrs after Removal	This population is a unique count of children whose adoption occurred more than two years after removal.	30
Children Discharged to Adoption within 2 Yrs of Removal	This population is a unique count of children whose adoption occurred within two years of removal.	9
Children Discharged to Adoption	The universe (or base population) is a count of unique (distinct) children who were adopted during a federal fiscal year: Children Discharged to Adoption more than 2 Yrs After Removal *Plus* Children Discharged to Adoption within 2 Yrs of Removal	39

Data Item	Data Definition	Sample Values
Rate	% value of Children Discharged to Adoption within 2 Yrs Of Removal *Divided by* Children Discharged to Adoption	23.1

Appendix B13:
Maltreatment in Foster Care Summary

Report Title:	Maltreatment in Foster Care Summary
Report Purpose:	This series of Incidence of Child Abuse and/or Neglect in Foster Care reports is intended to help identify potential systemic factors contributing to the maltreatment of these children by looking at the children and perpetrators in these reports.
Report Prompts:	None
Totals:	State totals for: Children with Incident, Children in Foster Care, and Rate.
Additional Info:	Information is available by year in separate cubes. You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Date	Date of Report	04/09/2003
County Code	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case.	099
County Name	The local social services district currently controlling input transactions to the child's case.	Hudson
No. Children with incident	A unique count of children with substantiated allegations in an indicated report for the year with an intake start date between January and September whose perpetrator was a foster parent or residential facility staff.	5
No. Children in Foster Care	The universe (or base population) is a count of unique (distinct) children in foster care from January to September taken from the Adoption and Foster Care Analysis and Reporting System (AFCARS) FFY submission.	835
Rate	% value of No. Children with incident *Divided by* No. Children in Foster Care	.60

Appendix B14:
Recurrence by District

Report Title: Recurrence by District

Report Purpose: This series of Recurrence Reports is intended to help identify potential systemic factors contributing to the recurrence of these children by looking at the allegations in the multiple reports. Because child level information is also provided, reviewing other dynamics on a case-by-case basis is possible.

Report Prompts: None

Totals: State totals for: Children with Recurrence, Children with Indicated Reports, and Rate.

Additional Info: Information is available by year in separate cubes.

You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Date	Date of Report	04/09/2003
District Code	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case.	099
District Name	The local social services district currently controlling input transactions to the child's case.	Hudson
Children with Recurrence	A child is counted as an instance of 'recurrence' if the child has another substantiated allegation in an indicated report and the date of the second oral report is within 2 to 183 days of the oral report of the first report.	26
Children with Indicated Reports	The universe (or base population) is a count of unique (distinct) children with a substantiated allegation in an indicated report that was reported in the first six months of the year.	150
Rate	% value of Children with Recurrence *Divided by* Children with Indicated Reports	17.3

Appendix B15:
Re-Entry to Foster Care Summary

Report Title:	Re-Entry to Foster Care Summary
Report Purpose:	This report identifies the Re-entry to Foster Care indicator defined by ACF's Children's Bureau. This report is intended to help identify potential systemic factors contributing to failure in providing safety and permanency to children in care.
Report Prompts:	None
Totals:	State totals for: Children re-entering Foster Care with no Previous Placement or more than 1 Yr after Previous Placement, Children Re-entering Foster Care within 1 Yr of Discharge from Previous Placement, Children Admitted during the Year, and Rate.
Additional Info:	Information is available by year in separate cubes.
	You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Date	Date of Report	04/09/2003
District Code	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case.	099
District Name	The local social services district currently controlling input transactions to the child's case.	Hudson
Children re-entering Foster Care with no Previous Placement or more than 1 Yr after Previous Placement	This population is a unique count of children who at the time of admission had no previous placement or more than one year of discharge from a preceding placement.	57
Children Re-entering Foster Care within 1 Yr of Discharge from Previous Placement	This population is a unique count of children who at the time of admission were within one year of discharge from a preceding placement.	6

Data Item	Data Definition	Sample Values
Children Admitted during the Year	The universe (or base population) is a count of unique (distinct) children admitted during a federal fiscal year: Children Re-entering Foster Care with no Previous Placement or more than 1 Yr after Previous Placement *Plus* Children Re-entering Foster Care within 1 Yr of Discharge from Previous Placement	63
Rate	% value of Children Re-entering Foster Care within 1 Yr of Discharge from Previous Placement *Divided by* Children Admitted during the Year	9.5

Appendix B16:
Reunify with Parent or Caretaker Summary

Report Title: Reunify with Parent or Caretaker Summary

Report Purpose: This report identifies the Length of Time to Reunification indicator defined by ACF's Children's Bureau. This report is intended to help identify potential systemic factors contributing to failure in providing safety and permanency to children in care.

Report Prompts: None

Totals: State totals for: Children Reunified more than 1 Yr after Removal, Children Reunified within 1 Yr of Removal, Children Reunified, and Rate.

Additional Info: Information is available by year in separate cubes.

You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Date	Date of Report	04/09/2003
District Id	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case.	099
District Name	The local social services district currently controlling input transactions to the child's case.	Hudson
Children Reunified more than 1 Yr after Removal	This population is a unique count of children whose reunification occurred more than one year after removal.	79
Children Reunified within 1 Yr of Removal	This population is a unique count of children whose reunification occurred within one year of removal.	231
Children Reunified	The universe (or base population) is a count of unique (distinct) children who left foster care during a federal fiscal year because they were reunified with their parents: Children Reunified more than 1 Yr. After Removal *Plus* Children Reunified within 1 Yr of Removal	310
Rate	% value of Children Reunified within 1 Yr. Of Removal *Divided by* Children Reunified	74.5

Appendix B17:
Six National Indicators

Report Title: Six National Indicators

Report Purpose: This report identifies the national indicators defined by ACF's Children's Bureau. This report is intended to help identify potential systemic factors contributing to failure in providing safety and permanency to children in care.

Report Prompts: None

Totals: None

Additional Info: Information is available by year in separate cubes.

From the main report, you may 'Drill Through' to a report detailing the numbers from each District. You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Safety Indicators	The **recurrence of maltreatment** data rate is derived from our NCANDS submission. The following definition is used by the Children's Bureau for recurrence. The universe (or base population) is a count of unique (distinct) children with a substantiated allegation in an indicated report that was reported in the first six months of the year. From that population a child is counted as an instance of 'recurrence' if the child has another substantiated allegation in an indicated report and the date of the second oral report is within 2 to 183 days of the oral report of the first report. Success is considered any rate *below* the National Standard of 6.1%.	
	The **incidence of child abuse and/or neglect in foster care** rate is derived from our NCANDS submission. The following definition is used by the Children's Bureau for incidence of child abuse and/or neglect in foster care. The universe (or base population) is a count of unique (distinct) children in foster care from January to September taken from the Adoption and Foster Care Analysis and Reporting System (AFCARS) FFY submission. The numerator for this population is a unique count of children with substantiated allegations in an indicated report for the year with an intake start date between January and September whose perpetrator was a foster parent or residential facility staff. Success is considered any rate *below* the National Standard of 0.57%.	

Data Item	Data Definition	Sample Values
Permanency Indicators	The **Length of time to reunification with parents** rate is derived from our AFCARS submission. The following definition is used by the Children's Bureau for length of time to reunification with parents. The universe (or base population) is a count of unique (distinct) children who left foster care during a federal fiscal year because they were reunified with their parents. The numerator for this population is a unique count of children whose reunification occurred within one year of removal. Success is considered any rate *above* the National Standard of 76.2%.	
	The **Length of time to adoption** rate is derived from our AFCARS submission**.** The following definition is used by the Children's Bureau for length of time to adoption: The universe (or base population) is a count of unique (distinct) children who were adopted during a federal fiscal year. The numerator for this population is a unique count of children whose adoption occurred within two years of removal. Success is considered any rate *above* the National Standard of 32%.	
	The **Stability of Placement** rate is derived from our AFCARS submission. The following definition is used by the Children's Bureau for stability of placement: The universe (or base population) is a count of unique (distinct) children served during the period and who on the last day had been in care less than one year. The numerator for this population is a unique count of children who had two or fewer placements during that period. Success is considered any rate *above* the National Standard of 86.7%.	
	The **Re-entry to Foster Care** rate is derived from our AFCARS submission. The following definition is used by the Children's Bureau for re-entry to foster care: The universe (or base population) is a count of unique (distinct) children admitted during a federal fiscal year. The numerator for this population is a unique count of children who at the time of admission were within one year of discharge from a preceding placement. Success is considered any rate *below* the National Standard of 8.6%.	

Appendix B18:
Two or Fewer Placement Settings Summary

Report Title: Two or Fewer Placement Settings Summary

Report Purpose: This report identifies the Stability of Placement indicator defined by ACF's Children's Bureau. This report is intended to help identify potential systemic factors contributing to failure in providing safety and permanency to children in care.

Report Prompts: None

Totals: State totals for: Children with More Than 2 Placement Settings and In Care Less Than 1 Yr, Children with 2 or Fewer Placement Settings and In Care Less Than 1 Yr, Children in Foster Care Less Than 1 Yr, and Rate.

Additional Info: Information is available by year in separate cubes.

You may 'Drill Through' to a corresponding **child specific list(s)**.

Data Item	Data Definition	Sample Values
Date	Date of Report	04/09/2003
District Code	The state assigned district code which identifies the local social services district currently controlling input transactions to the child's case.	099
District Name	The local social services district currently controlling input transactions to the child's case.	Hudson
Children with More Than 2 Placement Settings and In Care Less Than 1 Yr	This population is a unique count of children who had more than two placements settings during the period.	13
Children with 2 or Fewer Placement Settings and In Care Less Than 1 Yr	This population is a unique count of children who had two or fewer placements during the period.	476
Children in Foster Care Less Than 1 Yr	The universe (or base population) is a count of unique (distinct) children served during the period and who on the last day had been in care less than one year: Children with More Than 2 Placement Settings and In care Less Than 1 Yr *Plus* Children with 2 or Fewer Placement Settings and In Care Less Than 1 Year	489

Data Item	Data Definition	Sample Values
Rate	% value of Children with 2 or Fewer Placement Settings and In Care Less Than 1 Yr *Divided by* Children in Foster Care Less Than 1 Yr	97.3

Security Reports

Appendix B19:
Assignee/Designee Report

Report Title: Assignee/Designee Report

Report Purpose: Allows a security coordinator to be able to track which agency workers are assignees or designees of another worker.

Report Prompts: Agency Code

Totals: None

Data Item	Data Definition	Sample Values
Date of this Report	Current Date	04/09/2003
Data As Of	Date of Latest OCFS Data Warehouse Update	04/02/2003
Agency Name	Name of Agency reporting	Hudson County DSS
Agency Code	Code of Agency reporting	A90
Staff Name	Workers' names as they appear in CONNECTIONS	Doe, John
Unit	The unit code to which the worker is in assigned	063
Assignee	The names of the worker's designees	Fuss, Katie
Unit	The unit code of the worker's designees	008
Date Expires	The date that each assignment expires	03/15/2011
Designee	The names of the worker's assignees	McCord, Murphy
Unit	The unit code of the worker's assignees	009
Date Expires	The date that each designee's assignment expires	10/09/2004

Appendix B20:
Business Function Report

Report Title: Business Function Report

Report Purpose: Allows a security coordinator to track which agency staff have a particular business function.

Report Prompts: Agency Code
Business Function

Totals: None

Data Item	Data Definition	Sample Values
Date of this Report	Current Date	04/09/2003
Data As Of	Date of Latest OCFS Data Warehouse Update	04/02/2003
Agency Name	Name of Agency reporting	Hudson County DSS
Agency Code	Code of Agency reporting	A90
Office Type	Type of office of report	District
Business Function	The business function in question	ACCESS ALL DIST
Site	Specific Site for report	3H0
Staff Name	Workers' names as they appear in CONNECTIONS	Doe, John
Unit	The unit code to which the worker is in assigned	063
Designee	The names of the worker's designees	Fuss, Katie
Unit	The unit code for the worker's designees	009

Appendix B21:
Staff Security Report

Report Title: Staff Security Report

Report Purpose: Allows a security coordinator to track which agency staff is in CONNECTIONS, what business functions each staff member has, which staff is a Unit Approver, whether a staff person is an Assignee or Designee, and whether cases may be assigned to a staff member.

Report Prompts: Agency Code

Totals: None

Data Item	Data Definition	Sample Values
Date of this Report	Current Date	04/08/2003
Data As Of	Date of Latest OCFS Data Warehouse Update	04/02/2003
Agency Name	Name and code of Agency reporting	Hudson County DSS A90
Site	Specific Site for report	3H0
Unit	The unit code to which the worker is in assigned	063
Name	Workers' names as they appear in CONNECTIONS	Doe, John
NT Logon	Worker's logon ID assigned through WEBSTAR	XX2222
Unit Approver	Yes or No – Is the worker a Unit Approver for any unit?	No
Staff Role	The role of the worker	Supervisor
Business Functions	All business functions assigned to the worker	CASE/PERS SRCH
Assignee or Designee	Yes or No – Is the worker an assignee or designee for anyone else	No
Case Assignable	Yes or No – Can cases be assigned to the worker?	Yes

Appendix B22:
Unit Approver Report

Report Title: Unit Approver Report

Report Purpose: Allows a security coordinator to be able to easily see who is the Unit Approver for any unit in his or her agency.

Report Prompts: Agency Code

Totals: None

Data Item	Data Definition	Sample Values
Date of this Report	Current Date	04/09/2003
Data As Of	Date of Latest OCFS Data Warehouse Update	04/02/2003
Agency Name	Name of Agency reporting	Hudson County DSS
Agency Code	Code of Agency reporting	A90
Staff Name	Worker's name as it appears in CONNECTIONS	Doe, John
Approver of Unit	The unit codes of units for which the worker is the Unit Approver	SD
In/Out Assigned	The type of assignment to the unit (In/Out)	Out

Appendix B23:
Consolidated Investigations

Report Title:	Consolidated Investigations Summary Report
Report Purpose:	To provide the number of consolidated CPS investigations for a particular month and year.
Report Prompts:	Month/Year
Totals:	None
Additional Info:	From any text with Aqua colored shading, you may 'Drill Through' to a corresponding **consolidated investigation detail list**. The detailed report will contain key information for each consolidated investigation including District, Office, and Report ID for both the original and duplicate investigation.

Data Item (Consolidated Investigation Summary Report)	Data Definition	Sample Values
Data As of Date	Date of the latest refresh of the OCFS Data Warehouse.	6/17/04
Report Date	Date the report was run.	6/21/04
District of Consolidated Investigation	The agency responsible for consolidating the duplicate investigation.	New York City
Office of Consolidated Investigation	The office responsible for consolidating the duplicate investigation.	Manhattan Field Office
Total Consolidated Investigations	The total number of duplicate investigations that were closed and consolidated into an open, ongoing investigation.	7
Day"X"	The number of duplicate investigations that took "X" day(s) from the duplicate investigation's intake start date to the consolidation approval date. "Day 7 and up" refers to consolidations that took 7 or more days to complete between the intake start date and the consolidation approval date. [Note: Although consolidations must be processed by the caseworker within 7 days, it is possible for the supervisor's approval to come after the 7-day consolidation period.]	3

Data Item (Consolidated Investigation Detail Report)	Data Definition	Sample Values
Data As of Date	Date of the latest refresh of the OCFS Data Warehouse.	6/17/04
Report Date	Date the report was run.	6/21/04
District of Consolidated Investigation	The name of the agency that handled the duplicate investigation.	New York City
Office of Consolidated Investigation	The name of the office that handled the duplicate investigation.	Manhattan Field Office
Case ID	The Case ID, which is the same for both the duplicate and original investigations.	12345678
ID of Consolidated Investigation	The Report ID for the duplicate investigation. This report has been consolidated and is now part of the original investigation.	98765432
ID of Original Investigation	The Report ID for the original investigation. This report remains and will continue to the investigation stage and to determination.	23456789
District of Original Investigation	The name of the agency that handled the original investigation.	New York City
Office of Original Investigation	The name of the office that handled the original investigation.	Manhattan Field Office

Appendix B24:
Admission to Discharge Summary Report

Report Title: Adoption Cohorts Summary: Admission to Discharge

Report Purpose: To detail the length of time necessary for children on an adoption track to move between admission and discharge to adoption.

Report Prompts: District Name

Totals: None

Additional Info: For children to be included in any of these reports they must be considered 'eligible' for adoption, or 'in the adoption track' by virtue of having a current goal of adoption **OR** they were actually discharged to adoption. If neither of these conditions exists, the children are dropped from the population to be counted for these reports. This report is comprised of three parts:

Summary Report Users are prompted to select a county. The length of time in months within which a discharge to adoption was achieved is displayed in columns broken into six-month periods ranging from 6 months or less to over 60 months. By year (1995-2001), the report identifies the total number of children who have been discharged to adoption and a percent, which represents the percentage of those children as compared to the total number of children eligible for discharge to adoption for that year. The number and percent are cumulative counts of children who have been discharged to adoption.

From the Summary Report, users will be able to drill down into the admission or incare table by double-clicking on the highlighted cohort name above the table ("Admission" or "Incare"). The user will then be prompted for a starting year that will return the Cohort Trend Report.

Cohort Trend Report This report displays either the admission or in-care cohort from the Summary Report and a graphic representation of the data for the selected years.

The third and final report, the **Child Detail List**, is accessed by drilling through on the admission (or incare) year, then choosing length of time (LOT) in months from the selection list. This detailed report displays key pieces of information for the children discharged to adoption, cohort and length of time to achieve the discharge to adoption. This list will be sorted by time to achieve the milestone and will include variables such as office/unit/worker, child specific demographic items, milestone dates and descriptions. Security is controlled based on user class. Districts can only see the children within their own district. Voluntary agencies will not see any children on the child specific list.

Data Item	Data Definition	Sample Values
Report Date	Current Date	2/10/04
CCRS Data As Of	Date of latest data update. Data is refreshed every 6 months.	December 2003
District Name	The local social services district currently with legal responsibility for the child.	Hudson
Cohort: Admission	Children who were admitted to foster care during a designated period of time.	385

Data Item	Data Definition	Sample Values
Number Admitted	Number of children who were admitted into foster care during the indicated year.	56
Cohort: Incare	Children who were in foster care at a designated point in time.	598
Number in Care	Number of children in foster care of as January 1st of the indicated year.	222
Adoption Track	Number of children with a current goal of adoption or who were discharged to adoption.	56
Number of Children	Cumulative number of children who achieved both admission and discharge to adoption within the specified number of months.	37
Percent Within	Cumulative percentage of children who achieved both admission and discharge to adoption as a percentage of all children in the adoption track.	73%

Appendix B25:
Adoption Cohort Summary Report

Report Title:	Adoption Cohorts Summary: Goal of Adoption Set Adoption Cohorts Summary: Freed Adoption Cohorts Summary: Placed Adoption Cohorts Summary: Discharged to Adoption
Report Purpose:	To detail the length of time necessary for children on an adoption track to move between the major adoption milestones: • Admission → Goal Set • Goal Set → Freed • Freed → Placed • Placed → Discharged to Adoption
Report Prompts:	District Name, Milestone
Totals:	None
Additional Info:	For children to be included in any of these reports they must be considered 'eligible' for adoption, or 'in the adoption track' by virtue of having a current goal of adoption **OR** they were actually discharged to adoption. If neither of these conditions exists, the children are dropped from the population to be counted for these reports. This report is comprised of three parts:

Summary Report Users are prompted to select both a county and milestone. The length of time in months within which a milestone was achieved is displayed in columns broken into six-month periods ranging from 6 months or less to over 60 months. By year (1995-2001), the report identifies the total number of children who have achieved that specific event and a percent, which represents the percentage of those children as compared to the total number of children eligible for a milestone for that year. The number and percent are cumulative counts of children who have achieved the particular event or milestone.

From the Summary Report, users will be able to drill down into the admission or incare table by double-clicking on the highlighted cohort name above the table ("Admission" or "Incare"). The user will then be prompted for a starting year that will return the Cohort Trend Report.

Cohort Trend Report This report displays either the admission or incare cohort from the Summary Report and a graphic representation of the data for the selected years.

The third and final report, the **Child Detail List**, is accessed by drilling through on the admission (or incare) year, then choosing length of time (LOT) in months from the selection list. This detailed report displays key pieces of information for the children in that milestone, cohort and length of time to achieve milestone. This list will be sorted by time to achieve the milestone and will include variables such as office/unit/worker, child specific demographic items, milestone dates and descriptions. Security is controlled based on user class. Districts can only see the children within their own district. Voluntary agencies will not see any children on the child specific list.

Data Item	Data Definition	Sample Values
Report Date	Current Date	2/10/04

Data Item	Data Definition	Sample Values
CCRS Data As Of	Date of latest data update. Data is refreshed every 6 months.	December 2003
District Name	The local social services district currently with legal responsibility for the child.	Hudson
Cohort: Admission	Children who were admitted to foster care during a designated period of time.	385
Number Admitted	Number of children who were admitted into foster care during the indicated year.	56
Cohort: Incare	Children who were in foster care at a designated point in time.	598
Number in Care	Number of children in foster care of as January 1st of the indicated year.	222
Milestone Count for **Admission to Goal of Adoption Set Report** **Goal Set to Freed Report** **Freed to Placed Report** **Placed to Discharged to Adoption Report**	 Number of children with a current goal of adoption or who were discharged to adoption. Number of children who have a Goal Set to Adoption. Number of children who are Freed for Adoption Number of children who are in an Adoption Placement.	 56 45 183 51
Number of Children	Cumulative number of children who achieved both milestones within the specified number of months.	37
Percent Within	Cumulative percentage of children who achieved both milestones as a percentage of all children in the milestone count.	73%

Appendix C:
OCFS Data Warehouse Reporting
Glossary

3-D Bar Display	A graph that shows relationships between two or more variables. Use to analyze large quantities of data that are difficult to interpret otherwise.
ASCII	ASCII stands for American Standard Code for Information Interchange. This is the code that makes it possible for just about every computer to understand the letter "A" (and all the other letters) as a letter "A". The ASCII text file, although simple and limited, is understood by virtually all computers.
Additional Information	Information that does not constitute a report of abuse/maltreatment but contains information pertinent to an open/active SCR case.
Associating	Linking a data item to a grouped data item to suppress duplicate data values. There should be a one-to-one relationship between the grouped item and the item being associated to it.
Calculated Column	A column whose values are calculated from other columns, calculated columns, functions, and constants to derive new data for a model.
Calculation	A category created by applying an operator to one or more categories. See also calculated category.
Catalog	A file that contains all of the information necessary for Impromptu to retrieve data from a database. The catalog does not contain all of the data, but only a user view of the database.
Category	Items that match a specific description or classification. Categories can be different levels of information within a dimension. Any categories can be grouped into more general categories. For example, a set of dates could be grouped into a month, and months into quarter, and quarters into years.
CCRS	Child Care Review Service
Clustered Bar Display	A graph that groups related information, compares summaries, and compares categories.
Cognos	Cognos is a software development company based in Canada. It is widely acknowledged to be the leading provider of business intelligence applications. Business intelligence is the term given to a category of applications and technologies for gathering, storing, sharing, analyzing, reporting and providing access to data to help users make better decisions.

Cognos Common Logon	Cognos Common Logon maintains authentication data so you can open multiple secure data sources using different Cognos products. This means that you only have to provide a user ID and password once, even when you navigate from one Cognos application to another.
Column	In reports, a category that shows related information in a vertical list.
Connections	New York State's child welfare information system.
Correlation Display	A graph that shows the values of two measure that are being compared. Bars represent one measure and a line represents the other. You must have at least two measures to use a correlation display.
Crosstab Display	A chart that shows data in tabular format.
Cubes	A multidimensional representation of data. Cubes contain information organized into dimensions to provide faster retrieval and drill down to lower-level categories in reports.
Data Mart	Data marts are subsets of the larger data warehouse. They are smaller and focused on a particular subject.
Data Warehouse	A data warehouse is a collection of data retrieved from production systems. The data from diverse databases is combined and stored separately. The data warehouse organizes and stores the data needed for informational and analytical processing over a historical time perspective.
Delimited-Field Text File	A file containing text data, where the fields in each record are separated (delimited) by a character, such as a comma or a tab.
Dimension	A broad grouping of descriptive data about a major aspect of an organization, such as dates, geography, ethnicity, etc. Each dimension includes different levels of categories in one or more drill-down paths, and an optional set of special categories.
Dimension Line	In PowerPlay for Windows, shows the categories from each dimension used to filter on data for the current report.
Dimension Menu	In PowerPlay for Windows, a menu that appears when you select a dimension folder. You use a dimension menu to filter on specific information. When you select a category from the menu, the level of the dimension changes and so do the values in the report.
Dimension Viewer	An organized view of all dimensions, levels and categories in the selected cube. Use the dimension viewer to add categories as rows, columns, or layers, create subset definitions, format measures, filter, and define sets of categories.

Display	In PowerPlay for Windows, the type of chart or graph. You can change the display or add another display to the same report.
Drill	See Drill Down/Up or Drill-Through
Drill Down/Up	Focusing a report on a lower level of detail in a particular dimension; i.e., looking at child categories.
Drill-Through	Accessing more detailed information in another PowerPlay report, PowerCube, or Impromptu report. Drill-through access is set up to match on some combination of dimensions, measures, or data items.
Filter	Focus a report on a specific value of a data item or dimension.
Fixed-Field Text File	A file that contains text data aligned in fixed-length columns.
Functions	A predefined formula that takes one or more values, performs an operation, and returns a value.
Grouping	Grouping data in an Impromptu serves to bring all like data together on the report.
Horizontal Axis	The X-axis on a display.
Impromptu	Impromptu is a user-friendly data query tool that allows the user easy access to a database while shielding him/her from technical database terminology, connections, and structures.
IAB	Institutional Abuse cases which are investigated by IAB investigative agencies (Regional Offices, Office of Mental Health, Office of Mental Retardation (OMR), or Developmental Delays (OMRDD).
Indicated	A determination made by local CPS that some credible evidence exists to support an incident of child abuse and/or maltreatment.
Initial Report	Information that contains a reasonable cause to suspect child abuse and/or maltreatment that has no open or active case in the SCR.
Join	Defines the relational links between tables in a database so that you can retrieve information from more than one table at a time.
Key Fields	The data items used to join tables.
Label	The name of a row, column, or layer.

Layers Another dimension, in addition to rows and columns, added to a report. Reports can contain several layers, but you can look at only one at a time.

MDC File A Cognos file that represents a cube. The file may contain the data, or be a pointer file to a database cube or third-party OLAP source.

Measures Numeric data used as performance indicators. For example, measures can be number of allegations, number of CPS Reports Indicated, number of children admitted to foster care, etc.

Missing Value A value that is not available for a category because of the context, or because there is no data. Missing values appear in a report as zero, NA (not available), a blank (nothing in the cell), or missing, depending on how the measure sin the cube were designed to handle missing values.

Multidimensional Cube File (.mdc) See cube or .mdc file.

Multiline Display A graph that reveals and compares trends and cycles that show relationships between variables. It also shows time series analysis and relationships between variables.

NCANDS National Child Abuse and Neglect Data System.

Nesting Adding another dimension or dimension level to an existing row or column on a report to provide a more detailed perspective of the data.

OCFS Office of Children and Family Services

PDF Portable Document Format. A file format developed by Adobe Systems that captures formatting information from a variety of desktop publishing applications, making it possible to send formatted documents and have them appear on the recipient's monitor or printer as they were intended. To view a file in PDF format, you need Adobe Acrobat Reader.

Pie Display A graph that shows the relationship between the whole and the parts. For example, a pie display can show how much of a department's budget goes to paper supplies.

PowerPlay PowerPlay is a data analysis tool that utilizes OLAP (On Line Analytical Processing) technology. It allows users to easily explore data across the organization.

Prompts Request for information when a report is opened that determines the focus or scope of the report.

Query	A question to a database that defines what information you want from the data source.
Ranking	Assigning ordinals to values in a selected row or column of a report, to be used to sort the values in ascending or descending order.
Row	A category that shows related information in a horizontal list.
Scatter Display	A graph that compares two different measures. You must have at least two measures to use the scatter display effectively.
Simple Bar Display	A graph that shows change over a specific time period, contrasts two or more variables, and reveals trends and irregularities in a bar format.
Single Line Display	A graph that shows change over a specific time period, contrasts two or more variables, and reveals trends and irregularities in a line format.
Slice and Dice	To change and arrange data when you: • Choose different categories for your report • Drill down or drill up • Drag dimensions from the dimension line • Swap rows, columns, or layers • Filter information For example, you have a report that shows the number of CPS Reports by each district at the end of the last quarter. You can slice and dice information to show CPS Report Determinations over the last two months for each worker.
Sort	To arrange values in numerical order, or labels in alphabetical order. You can sort in ascending or descending order.
Stacked Bar Display	A graph or chart that shows relative proportions of parts to the whole and the relationship between the parts. For example, the days to determination data can be segmented into indicated and unfounded determinations as stacked bars.
Subsequent Report	A report involving either new allegations or a new incident of the same allegations occurring under an open SCR case number.
Substantiated	A finding by local CPS that credible evidence exists to support an allegation of child abuse and/or maltreatment.

Swapping To exchange the position of categories in a report. You can swap rows and columns, columns and layers, or rows and layers. The terms rows and columns change depending on the current display. For a pie display, rows and columns are called displays and slices.

Unfounded A determination made by local CPS that no credible evidence has been found to substantiate the report of child abuse and/or maltreatment.

Unsubstantiated A finding by local CPS that no credible evidence exists to support an allegation of child abuse and/or maltreatment.

Variable A symbol representing a value supplied by your computer or by PowerPlay for Windows. For example, the variable Date represents today's date. You can add a report variable such as Date to a report title, header, or footer.

Vertical Axis The Y-axis on a display.

View In PowerPlay for Windows, a way of presenting a report: normal, page layout, and page width. You can use a combination of views. For example, you can use normal view for working with the report, and page layout view or page width view to organize parts of the report. There are two types of views: dimension views and user class views. See also Display.