

Report Writing Using Report Studio for Data Warehouse

Workshop 1: Create a New List Report

Purpose:

Your Director would like to monitor current FASP (Family Assessment and Service Plan) activity at your Local District or Voluntary Agency, so she has asked you to generate a report with a list of the FASPs that are currently 'In Process' or 'Pending Approval' for each staff member. For each FASP, please include the Case ID, Case Name, Stage ID, FASP due date, FASP type, and FASP status. She is interested only in FASPs with a due date on or after June 2006, and she would like to see a count of the number of FASP for each staff member.

Task	Where to Work	Hints
1. Create a new list report using the "OCFS DW – WDFASP Admin" package.		Public Folders Report Studio OCFS DW – WDFASP Admin
2. From the Model tab, add Query Items to the report: <ul style="list-style-type: none"> • WORKER ID • CASE ID • CASE NAME • STAGE ID • FASP TYPE CODE • FASP DUE DATE • FASP STATUS CODE 	Insertable Objects Model tab	OCFS DW – WDFASP Admin → Current Worker FASP Detail Import View → Current Worker FASP Detail From DM_FS_WORKER_D Query Subject <ul style="list-style-type: none"> • WORKER ID From DM_FS_CASE_D Query Subject <ul style="list-style-type: none"> • CASE ID • CASE NAME From DM_FSS_D Query Subject <ul style="list-style-type: none"> • STAGE ID From DM_FASP_DC Query Subject <ul style="list-style-type: none"> • FASP_TYPE_CD • FASP_DUE_DT • FASP_STATUS_CD
3. Group the data by WORKER ID	Work area Toolbar	Group button
4. Sort the data by FASP DUE DATE	Work area Toolbar	Sort button <ul style="list-style-type: none"> • Sort Ascending

5. Determine how many FASPs there are for each staff member by counting the number of FASP DUE DATES for each WORKER ID.	Work area Toolbar	Aggregate button <ul style="list-style-type: none"> Count List Headers & Footers button <ul style="list-style-type: none"> Turn off all counts, except the one for WORKER ID (footer)
6. Create a filter to exclude Plan Amendment (PLA) FASP Types from the report.	Toolbar	Filter button <ul style="list-style-type: none"> Tabular filter Query Items [FASP_TYPE_CD] <> 'PLA' Validate
7. Create a filter to include only FASPs with a status of In Process (PROC) or Pending (PEND).	Toolbar	Filter button <ul style="list-style-type: none"> Tabular filter Query Items [FASP_STATUS_CD] in ('PROC', 'PEND') Validate
8. Create a filter to include only FASPs due since Jan 2006.	Toolbar	Filter button <ul style="list-style-type: none"> Tabular filter Query Items [FASP_DUE_DT] >= 2006-06-01 Validate
9. Run and save the report. [This report will be used again later in the training.]	Toolbar	Run the report. Save as "OCFS DW – Workshop 1"
10. Time permitting: Remove the time stamp from the FASP Due Date.	Properties Pane	Data Format → Date → Date Style → medium

Results: (Note: The screenshot below does not include real data.)

WORKER ID	CASE ID	CASE NAME	STAGE ID	FASP_TYPE_CD	FASP_DUE_DT	FASP_STATUS_CD
12345	33333333	Delta, Michael	23000003	REA	Jul 14, 2006	PEND
	66666666	Golf, Mary	23000006	CMP	Aug 3, 2006	PROC
	00000000	Alpha, Linda	23000000	REA	Aug 16, 2006	PEND
12345					3	
12346	88888888	India, Elizabeth	23000008	INI	Jul 7, 2006	PEND
	22222222	Charlie, Christopher	23000002	CMP	Jul 25, 2006	PROC
	99999999	Juliet, Joseph	23000009	CMP	Aug 3, 2006	PROC
	55555555	Foxtrot, Kevin	23000005	REA	Aug 9, 2006	PROC
	44444444	Echo, Susan	23000004	REA	Aug 22, 2006	PROC
	77777777	Hotel, Christopher	23000007	REA	Sep 6, 2006	PROC
12346					6	
12347	11111111	Beach, Jodi	23000001	REA	Sep 1, 2006	PROC
12347					1	