CaseWorthy™

Reporting and Analytics Resource Guide

October 2, 2024

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Introduction

CaseWorthy Reporting and Analytics allows you to:

- Show the data you need in real time with custom reports and dashboards.
- Easily track and measure your program performance, client outcomes, and organizational goals.
- And showcase your impact by exporting and sharing your reports with funders, partners, and stakeholders.

With CaseWorthy Reporting and Analytics, you get full visibility and insight into program data and impact.

You can:

- Create and view reports that show the data you need in the way you want. Leverage ad hoc queries, pivot reports or even Power BI to generate insights into your data.
- Access and analyze your data as soon as it is available and updated. See the latest and most accurate data in your reports and monitor the changes and trends in your data over time. You can also use real-time data to make timely and informed decisions and actions.
- Export your data and reports to various formats, such as Excel, PDF, CSV, and more, and save them to your device or cloud storage. You can also share your data and reports with others via email, social media, or online platforms.
- And you can also explore and discover patterns, insights, and relationships in your data. Leverage intuitive data visualizations to highlight program success or identify opportunities for improvement.

There are so many possibilities available!

In this guide, we will:

- Explore the Reports tab in the CaseWorthy application.
- Review the details and advantages of all the CaseWorthy reporting options available.
- And walk through how to create, update, and schedule different types of reports.

You are encouraged to first have a good understanding of the CaseWorthy application and the Form apBuilder tool before continuing.

By leveraging powerful reporting tools, you can transform raw data into actionable insights, bringing your data to life in ways that drive smarter decisions and impactful outcomes.

Remember, the key to success lies in not just collecting data, but in telling the story it holds.

CaseWorthy

The Reports Tab

CaseWorthy offers a multitude of reporting options, including Search Reports, CaseBot Reports, Analytic Reports, and more! There are not only numerous baseline reports already created and available to you, but you can also create your own!

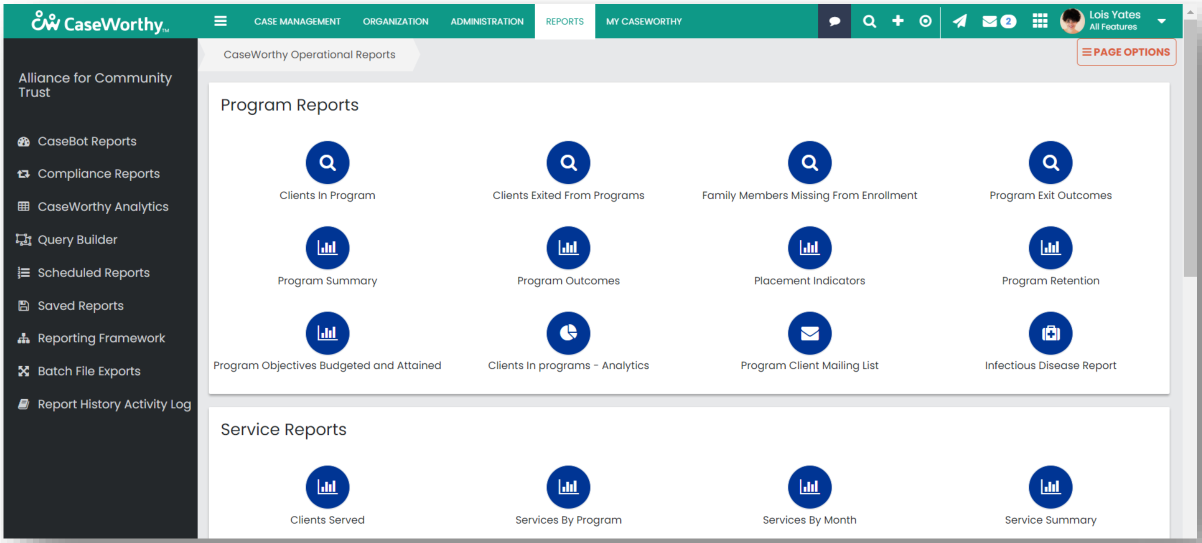
In this guide, we will review baseline reporting options already available to you in the application, most of which are found on the Reports Tab. We will explore all the report types in further detail later in this guide.

Existing reports are located throughout the application.

- The Case Management tab in CaseWorthy contains information about the Client loaded in the Entity Corner. There are several reports already available on this tab that enable you to view data related to the Client.
- The Organization tab contains information about the Organization loaded in the Entity Corner. There are also baseline reports available on this tab that allow you to view data related to your Organization.
- The Reports tab provides various reporting options for ALL entities in your database. This tab is where most reports can be accessed.

When you first open the Reports tab, you land on the Operational Reports dashboard, which offers an abundance of reporting options for your Organization's Programs, Services, Users, and more!

You can easily identify the report type by the icon that is displayed.



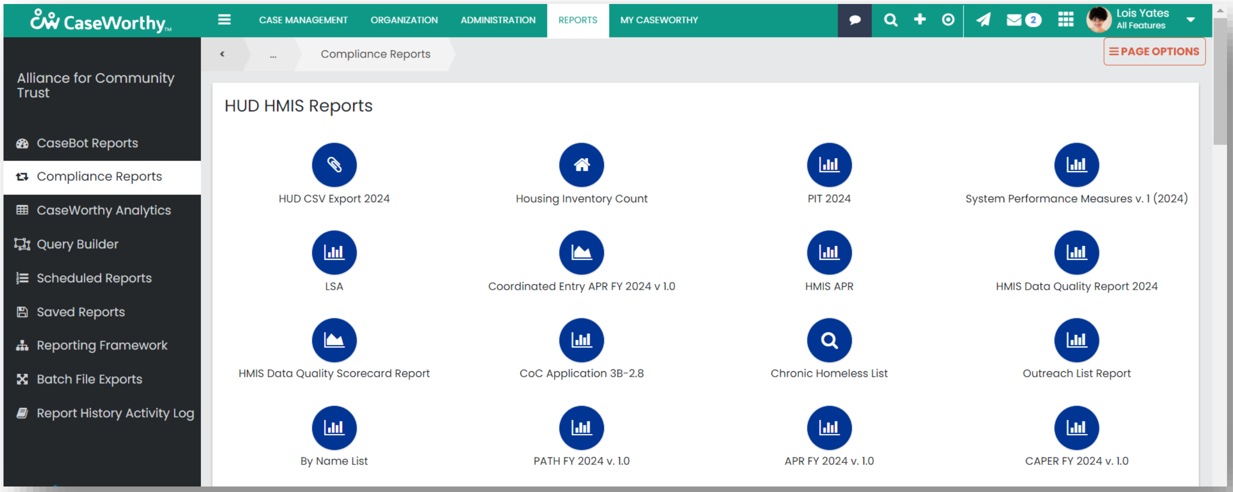
- A magnifying glass icon indicates it is a Search Report.
- A pie chart icon means it is an Analytics Report.

- And a bar chart icon represents an SSRS Report.

The navigation menu on the left offers additional reporting features.

CaseBot Reports allows you to view, copy, and edit existing CaseBot reports, as well as create new ExpressView and Advanced reports.

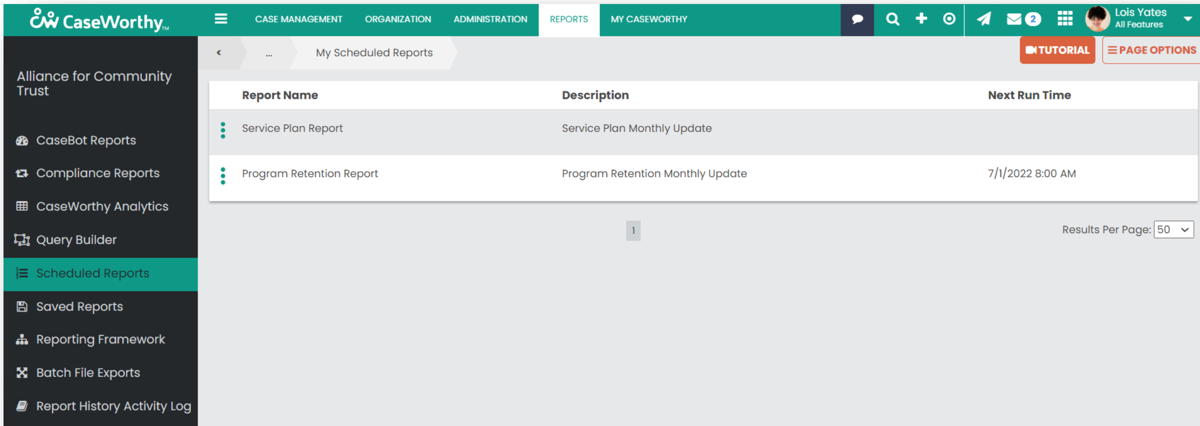
Compliance Reports is where existing HMIS reports are located. These reports are routinely updated to meet HMIS Data Standards.



CaseWorthy Analytics includes several advanced reporting options that provide in-depth analysis of your data, including Services, Enrollments, Referrals, and more!

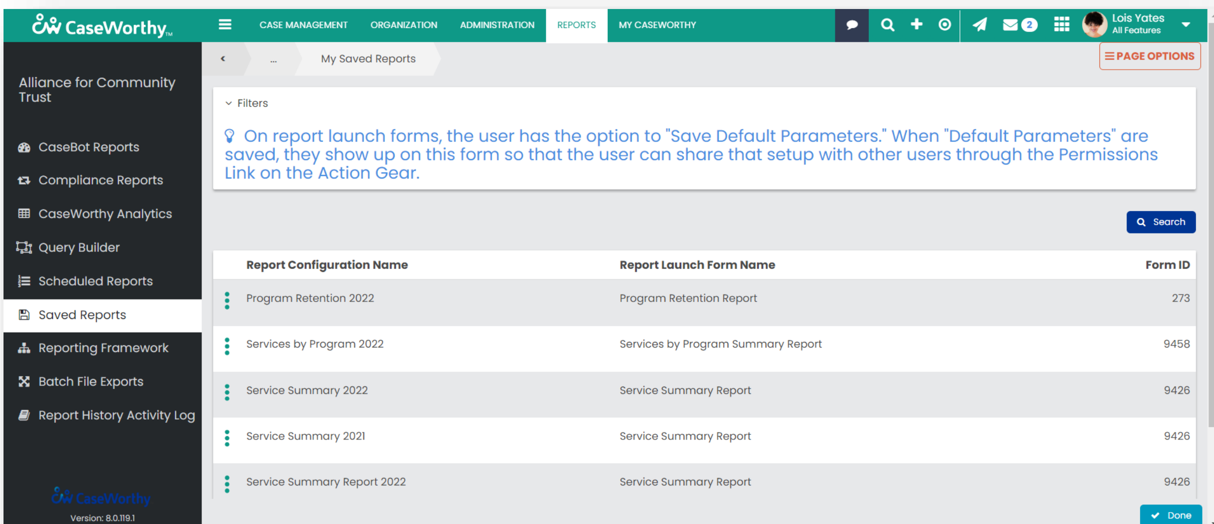
The Query Builder displays a list of all existing queries in your database. You can select ADD NEW to open the Query apBuilder, which allows you to easily add a new query. The Query apBuilder can be opened from multiple locations within CaseWorthy.

Several reports throughout CaseWorthy can be scheduled to automatically generate and deliver to specific email addresses.



Scheduled Reports allows you to view a list of all the reports that only you have scheduled. The list includes the report name, report description, and when the report is scheduled to generate again. You can also edit and delete the scheduled reports on this form. You also have the option to download your scheduled reports.

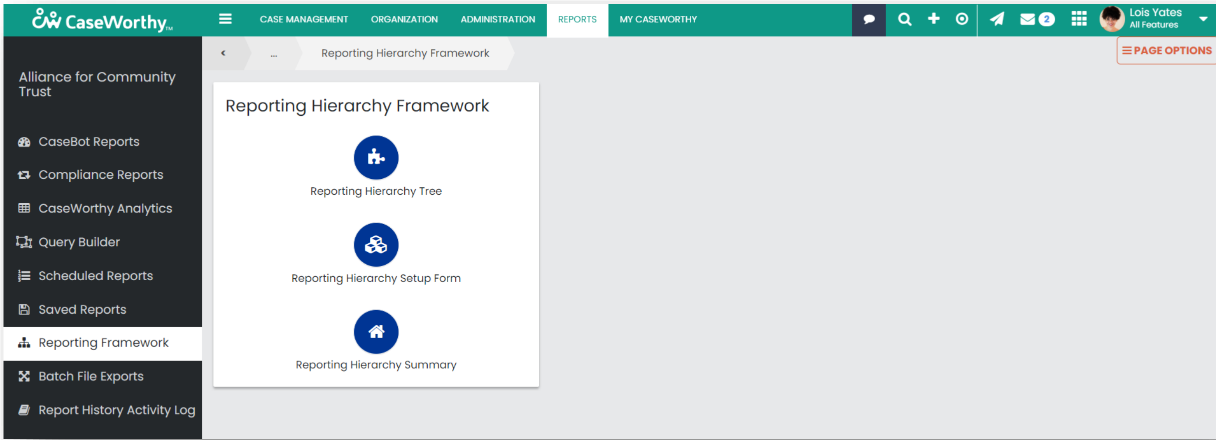
The next option is Saved Reports.



Some report types allow you to save set parameters so that you can easily access and run the same view of the report in the future.

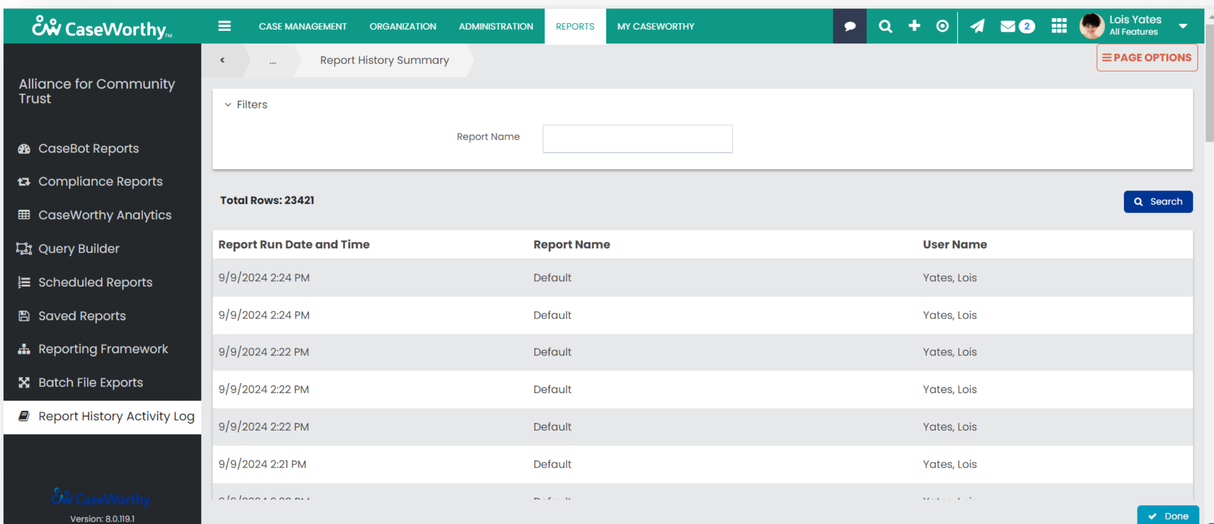
The *My Saved Reports* form displays a list of your saved report parameters so they can be easily shared with other Users by setting Permissions for each.

Reporting Framework allows you to create and manage reports based on hierarchical data structures, offering insights into various organizational levels, such as Providers, Programs, Services, and outcomes. This would be most useful if your Organization has very advanced data sharing needs.



The next option is Batch File Exports, which allows you to view a list of your existing scheduled batch file exports.

Finally, Report History Activity Log provides a list of your reporting historical data, including the date and time you ran a specific report and the name of the report.



Reporting Options

There are multiple CaseWorthy reporting options available at your fingertips.

These include Search Reports, Analytic Reports, CaseBot Reports, SSRS Reports, Power BI Reports, and the Query apBuilder tool.

- Search Reports are also called Search Forms. These are the most straightforward reports and allow you to quickly search through your data based on specific criteria. Search Reports are managed in the Form apBuilder.
- Analytic Reports are like Search Reports but are more advanced and designed to provide in-depth analysis of your data. Analytic Reports allow for customization and include pivot tables and charts.
- CaseBot Reports bring the power of automation to your reporting. These reports can be automated and customized, offer greater flexibility, and include charts, graphs, and templates.
- SSRS Reports offer highly customizable options and are designed for users who need precise control over the layout and formatting of their reports. These reports can be the most complex to build because they require such a high level of technical knowledge, but ultimately, they are the most customizable solution, are more flexible than CaseBot reports, and are the recommended solution when working with multiple types of data.
- Power BI Reports bring your data to life with interactive and visually engaging dashboards. This enhanced reporting option allows you to create dynamic reports that can be shared across your Organization, providing real-time insights and empowering teams to make informed decisions.
- The Query apBuilder tool allows you to create your own queries on dashboards, within lists, and even on Case Note and Email templates. It includes multiple options that allow you to fully customize your queries, including table joins, setting parameters, filters, automatic calculations, and much more!

In the upcoming sections of this guide, we will explore each of these reporting options in detail.

Search Reports

Search Reports are what we typically refer to as Search Forms in CaseWorthy.

You will encounter several Search Forms regularly within the application. These forms display rows of data, functioning similarly to a report.

Search Reports are the most straightforward reports, allowing you to quickly search through your data based on specific criteria. Whether you're looking for a particular Client, case, or service, Search Reports help you find exactly what you need, fast. They're great for getting quick answers without having to dig too deep.

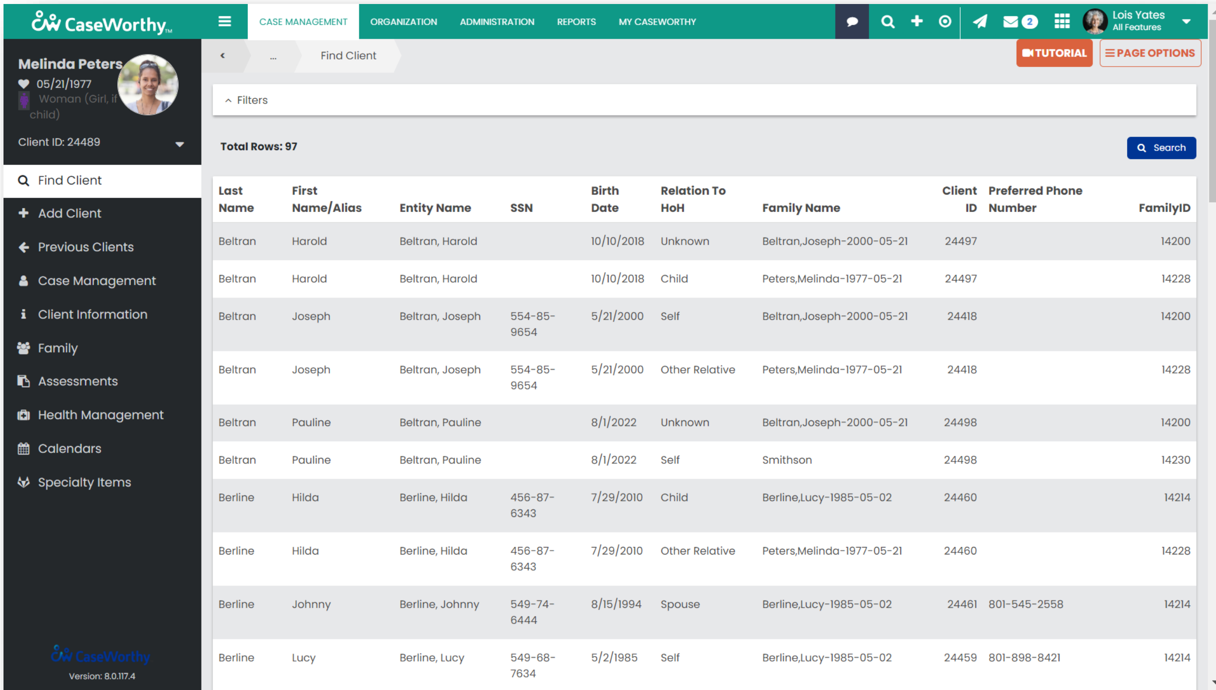
Search Reports are the least complex, but also offer the least amount of flexibility. These reports are configured to display single rows of data, which could pertain to Clients, services, program enrollment, etc.

There are multiple baseline Search Reports or Search Forms already available in the application. Search Reports are created and managed in the Form apBuilder.

Let's move over to the application.

The Case Management tab in CaseWorthy contains information about the Client loaded in the Entity Corner. There are several baseline Search Forms available that enable you to view data related to the Client.

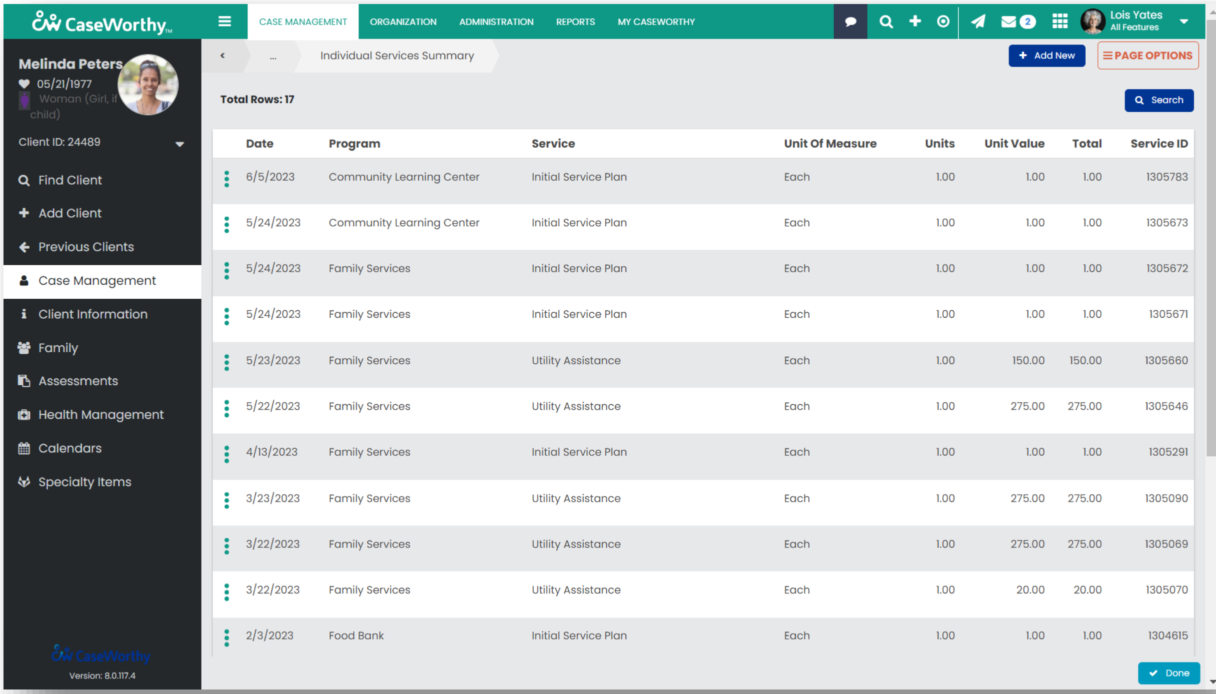
One example is the *Find Client* form, which allows you to filter and view existing Clients and some of their demographic data.



Let's look at some of the features included on this Search Report.

- Filters along the top allow you to search and display records based on specific criteria.
- The report is configured to initially display zero records. You must enter search criteria and then click SEARCH to display results.
- If the report has multiple records of results, pagination can also be customized. For example, this report is configured to display 50 results per page. You can then move through the different pages using the page number hyperlinks at the bottom of the results grid.
- Also notice there will be no SAVE button on this report since records cannot be added or edited.
- Once results are displayed, they can be sorted by clicking on the column headers. Click the header once to sort ascending. Click the header again to reverse the sort order to descend.
- You can also export these results to Excel by opening the **PAGE OPTIONS** menu and selecting EXCEL EXPORT.

Another baseline Search Report is *Individual Services* available on the *Manage Services* dashboard. This report allows you to view the current Client's services and details about those services.



Let's explore some of the features added to this Search Report.

- There are no filters along the top because the report is already configured to display ALL the current Client's service records.
- The vertical ellipsis menu is available off each record. This menu has been customized to allow you to easily make updates to the record, view additional details about the service transactions, and to delete the record.
- This Search Report was configured to initially display ALL records by default.
- Pagination was also set on this report to display 50 records per page.
- Like all other Search Reports, there is no SAVE button, and records can be easily sorted by clicking on the column headers.
- And this report can be easily exported to Excel as well!

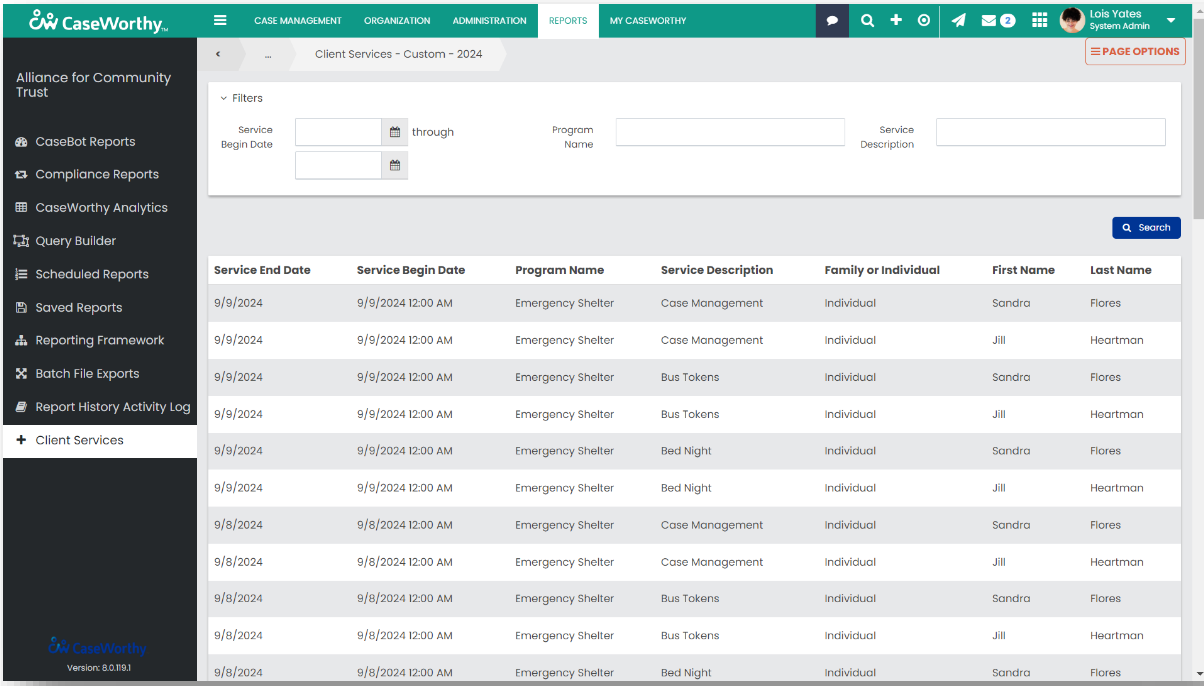
The Reports tab provides various reporting options for ALL Clients in your database. Several baseline Search Reports are available on this tab. Any report that includes a magnifying glass icon is a Search Report.

There are Search reports that allow you to view which Programs Clients are enrolled in, which Clients have exited a Program, and much more.

Search Report Example

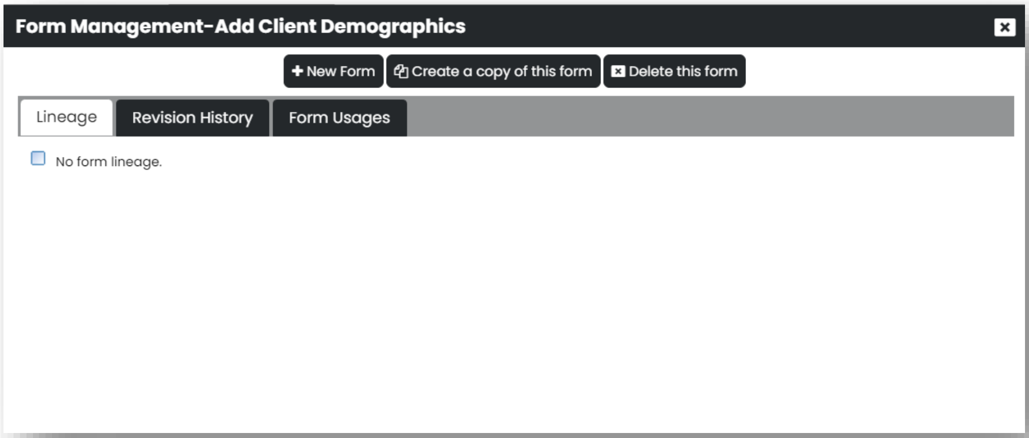
Before getting started, it is important to decide which database to use when creating a new form. If you are practicing, it might be a good idea to use your training database. If you are comfortable using the Form apBuilder and creating forms, you might decide to use your production database. Either way, you can use the Export Form option in the Form apBuilder to move the form from one database to another when it is ready to use.

In this example, we will create a basic Search Report like this one. This Search Report could live on the Reports tab and will display services for ALL Clients that are enrolled in a program. The filter at the top allows you to narrow results by service begin Date, the program name, and the service description.



Let’s get started.

Open the Form apBuilder from any form. Then, in the Form Management window, select NEW FORM to create a blank form.

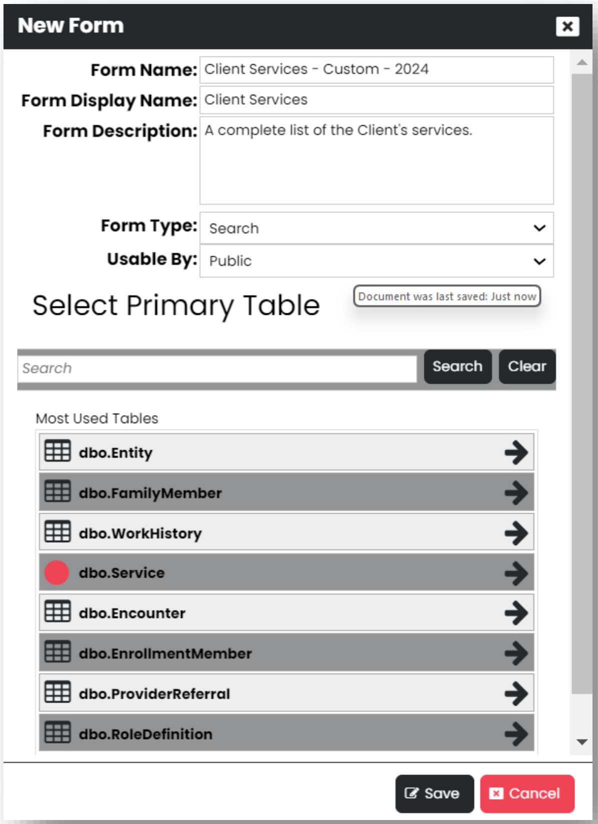


The New Form window displays.

The **Form Name** is basically the file name or the label the form is given in the database. I am going to name the form “Client Services – Custom – 2024”.

The **Form Display Name** is the label or name that displays for the User. I only want “Client Services” to display as the form name for the User.

Then enter a short description that gives details about the form and how it can be used in the application.



Select 'Search' as the **Form Type**.

The **Usable By** dropdown specifies what level of User will be able to open the form. We want this form accessible to any User that has the link, so 'Public' will be selected.

At the bottom, select the primary table that will apply to this form. To determine which table to select, think about "what data do I need on this form?" and "which table holds most of that data?"

Remember, the data on the form is about the Client's services. There will be multiple tables added for this form, but since the data mostly focuses on services, let's start with the Service table as the primary table. Search for and select the table. Once selected, a red dot displays to the left of the table name.

We will have the ability to add and join the remaining tables later. This step is just for selecting the primary table on the form.

Select SAVE to create the form.

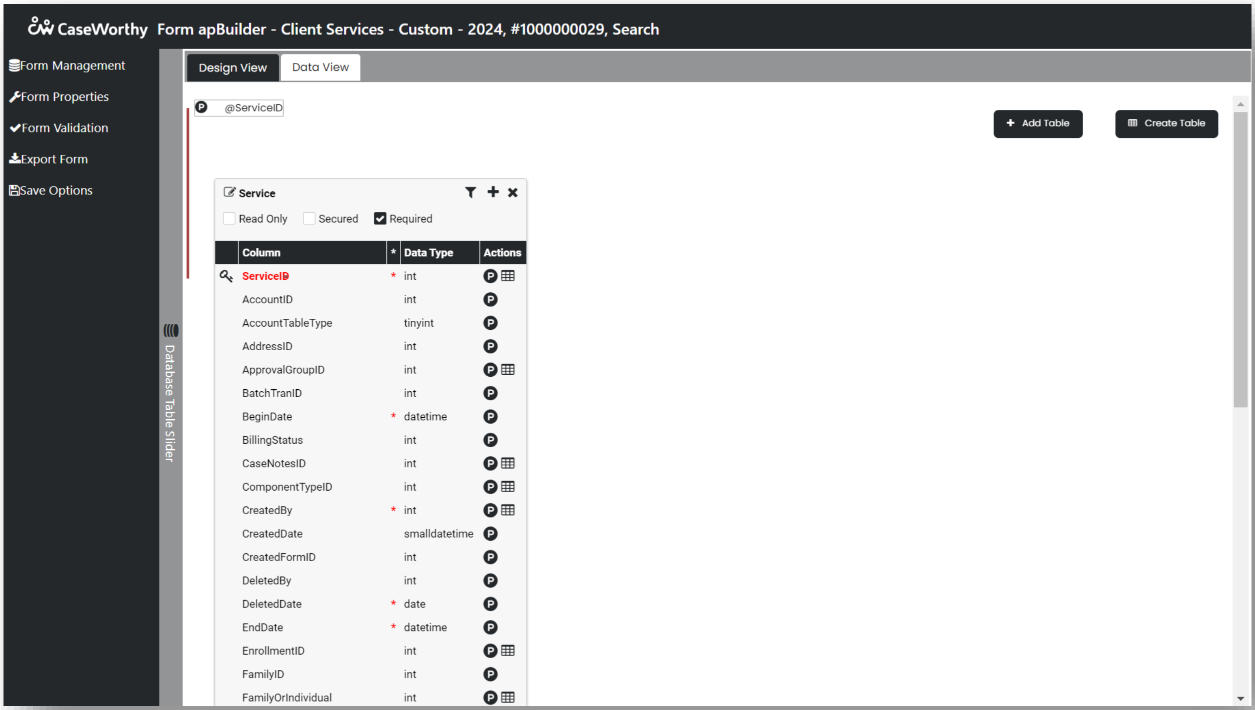
The new form display name, formID, and form type are now displayed at the top of the page.

By default, we landed on the Design View tab, which is blank. This is where we will design the layout of the form and how it will appear for the User.

But let's move over to the Data View tab to finish configuring the tables first.

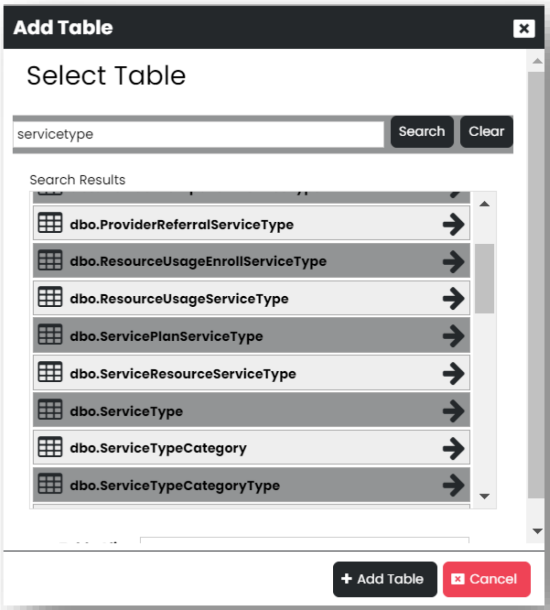
Since we selected the Service table as the primary table, it has already been added to the form.

Since the primary key for the Service table is ServiceID, the @ServiceID parameter was added by default.

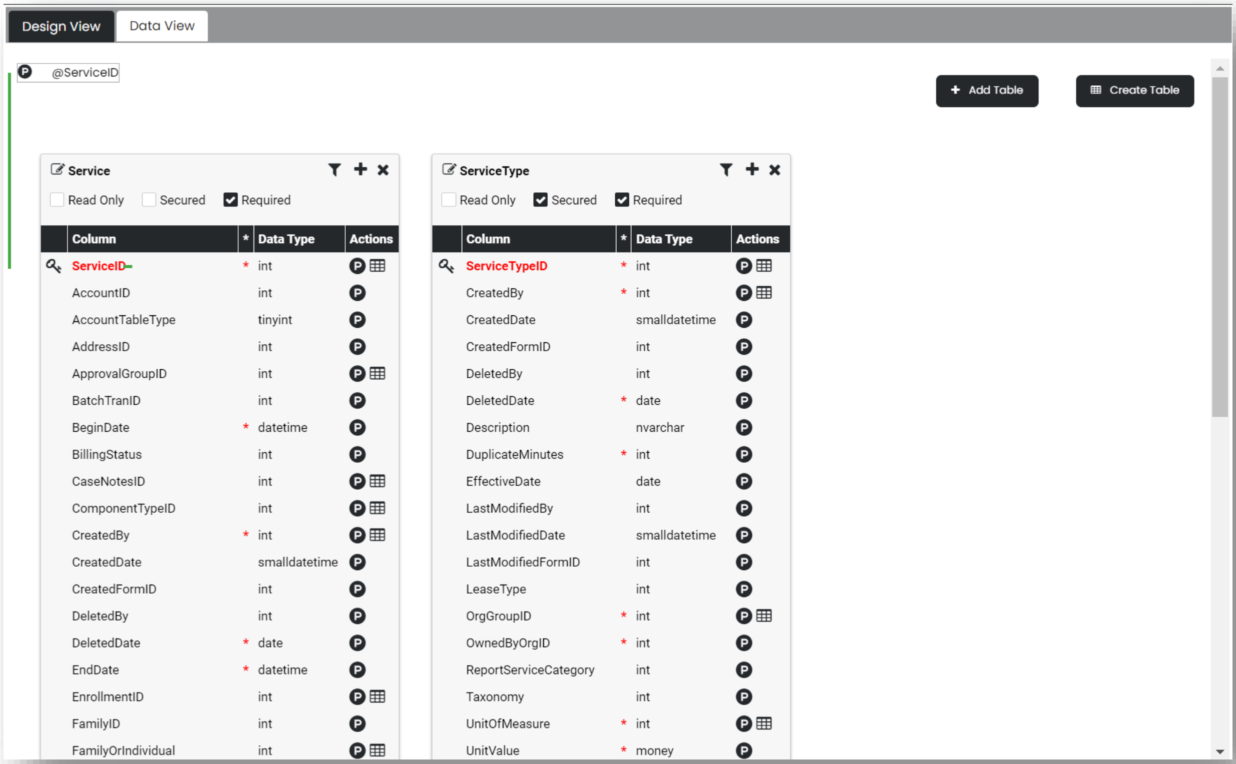


There is other data we need on the form that is not stored within the Service table. Let's add the other tables now.

Select ADD TABLE and then search for the ServiceType table. This is how we will access the Service Description.



Once added, the ServiceType table will display to the right of the Service table.



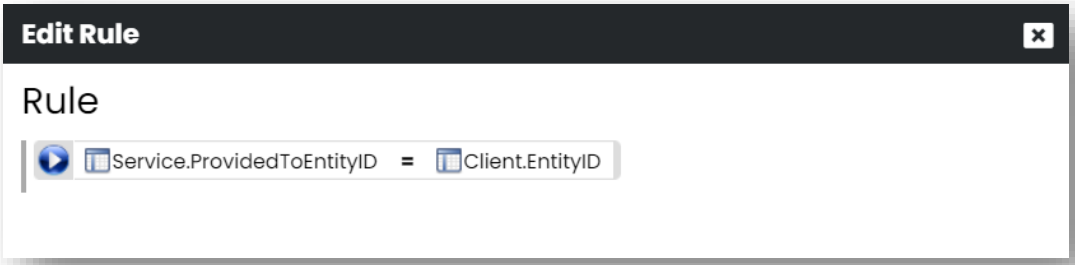
Then, add the Enrollment and Program tables. This allows us to connect the Client to the Services they receive. These tables are displayed below the ServiceType table.

We will also add the Client table so we can access specific details about the Client. This table is displayed below the Program table.

Now we have all the tables we need. But we must join them together, so the system understands how these tables and their data are related to one another.

First, select the filter icon for the Client table.

To join two tables, you should first review the table columns. How can I link this table to another table? Are there two columns that are the same? There could be multiple options for linking tables. In this example, we can add a new rule that states, the "Service.ProvidedToEntityID" field equals the "Client.EntityID" field. These represent the Client ID, and they should be the same on each table. This rule joins the two tables together.

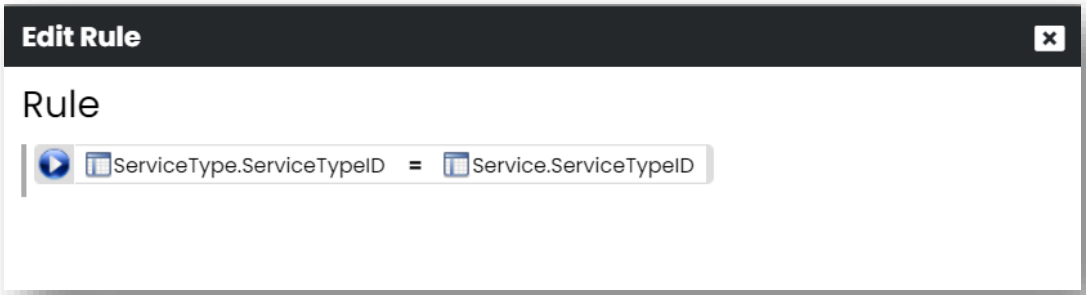


Once saved, we can move over to the ServiceType table.

How can this table be joined to another table?

There could be multiple options, but we just need one. Let's join the ServiceType table to the Service table through the ServiceTypeID.

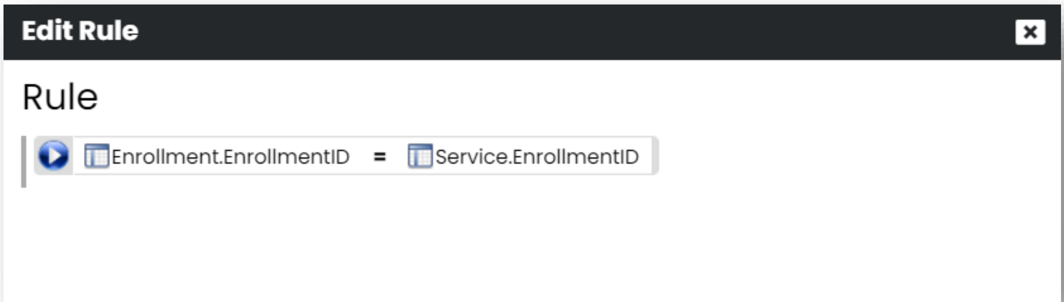
Select the filter icon to add the rule.



The rule should look like this: "ServiceType.ServiceTypeID" is equal to "Service.ServiceTypeID".

Let’s now look at the Enrollment table. How can we join this table to another table? How about the EnrollmentID, which is found on both the Enrollment and Service tables?

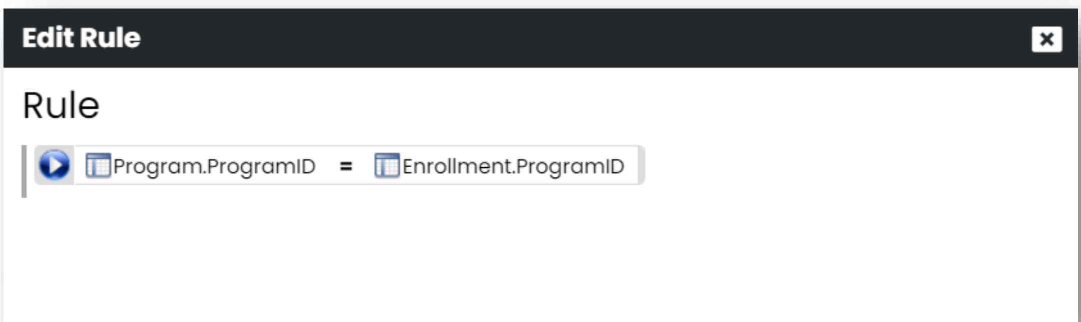
Select the filter to add the rule. It should look like this: “Enrollment.EnrollmentID” is equal to “Service.EnrollmentID”.



And how about the Program table? How could we create a join?

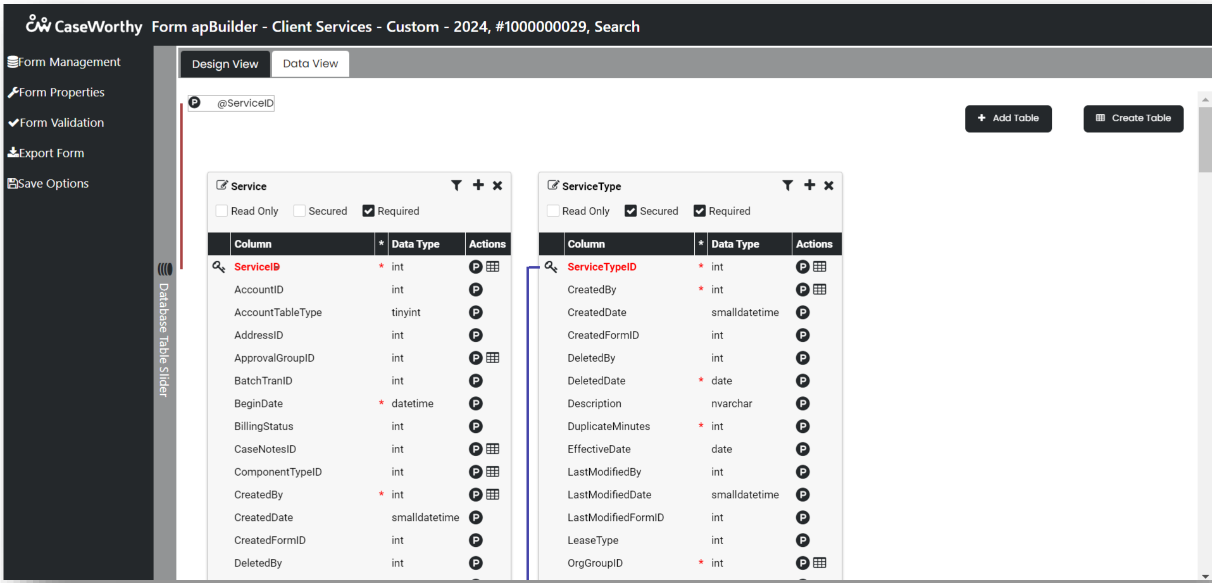
The Enrollment and Program tables both have a ProgramID column.

Select the filter to add the rule. It will look like this: “Program.ProgramID” is equal to “Enrrollment.ProgramID”.



Now that the tables all have joins, let’s stop and save. We will use the Save & Edit option so we can continue configuring the report.

Notice, once the form is saved, the colored lines appear that represent how the tables are joined.



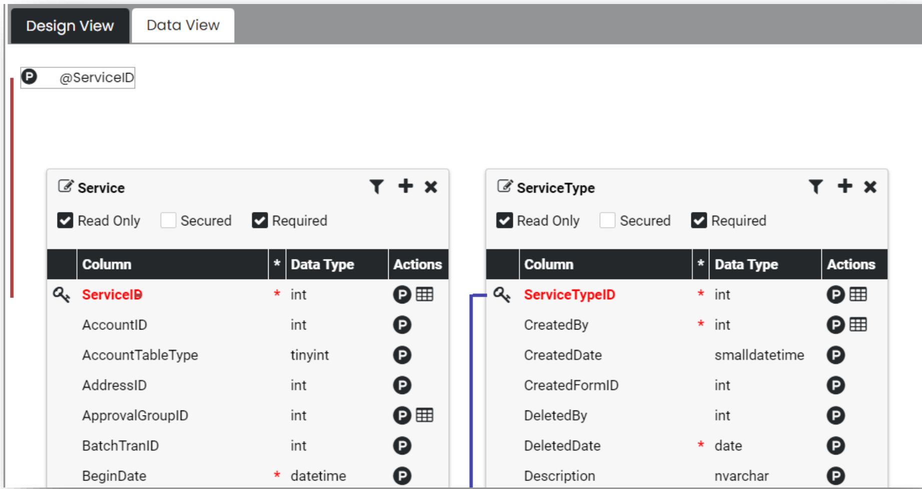
Joining tables can be an involved process. As you gain more experience with the tables in the CaseWorthy database, it will become easier. And remember, if you have questions, we encourage you to send an inquiry to support@caseworthy.com.

Still on the Data View tab, let's now review the settings for each of our tables.

Since we will only be displaying data on the form and not allowing edits, all the tables should be marked as **Read Only**.

The **Secured** option can be used if you would like to respect your Organization's data sharing rules. I do not have multiple Organization's sharing data in this database. Therefore, none of the tables should be marked as 'Secured'.

And, lastly, all the tables should be set to **Required**. This is necessary for a couple of reasons. First, there are required fields in the tables that cannot be null. And second, because we will be displaying data from all the tables on the form.



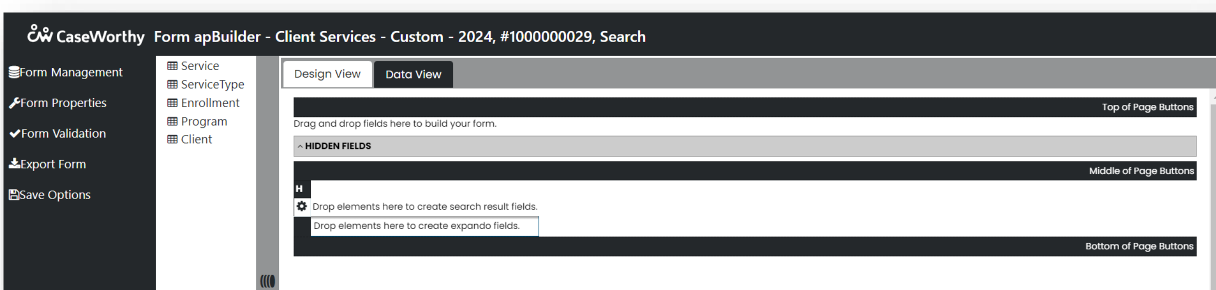
There are many other options available on this tab. For example, you can add additional tables, you can add new columns to tables, and so forth. I invite you to create your own forms and explore these options further as you become more comfortable working in the Form apBuilder.

Since we have finished configuring the tables for this form, let's stop and save again using the Save & Edit option in the Save Options menu.

Let's now move over to the Design View tab where we can configure how the form will appear for the User.

Initially, the form is blank.

To view the tables and fields available to be added to the form, select the Database Table Slider. The window expands, revealing the five tables.



Click each table to further expand the list to reveal all the available fields.

Before we start building, remember this is a Search form. There can be filters at the top and search results are organized into rows at the bottom.

Let’s start by building the bottom portion of the form first.

Service is the first table displayed.

There are two fields we want to use from this table: BeginDate and EndDate. To include them on the form, simply click the name, and then drag and drop the field to the middle section of the blank canvas.

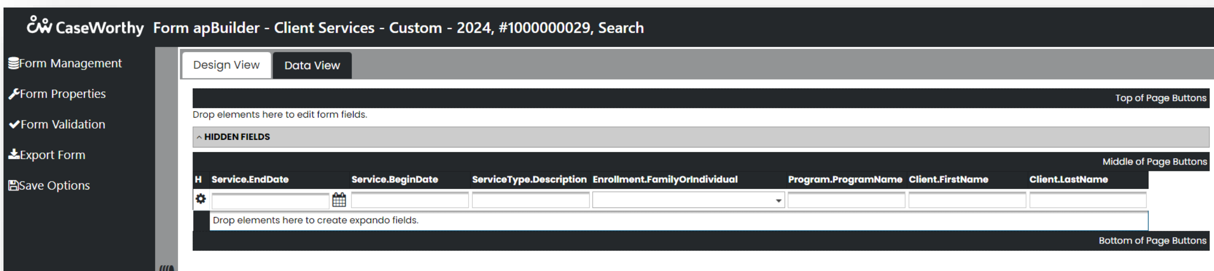
Once these two fields are added, let’s move over to the ServiceType table. This table stores the Service Description, which we will also add to the form.

From the Enrollment table, let’s drag and drop the FamilyorIndividual field.

And from the Program table, we can add ProgramName.

Finally, drag and drop the FirstName and LastName fields from the Client table.

Once all the fields are on the form, close the Database Table Slider.



You can now easily click and drag each field on the form to be organized in a way that suits your preference.

Now that we have the data, let’s customize the fields.

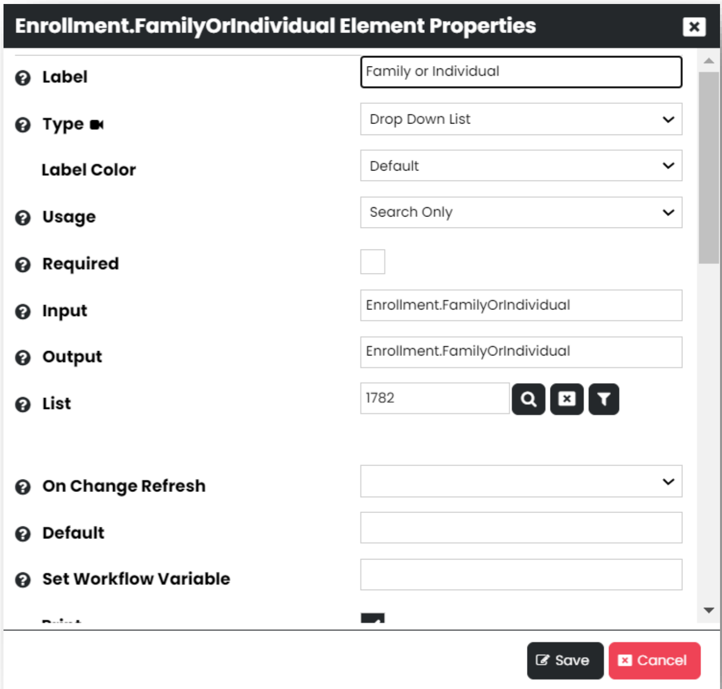
Let’s start with the FamilyorIndividual field.

Simply click the field to open its properties. There are several options available for customization. We are just going to focus on a couple of properties for this form.

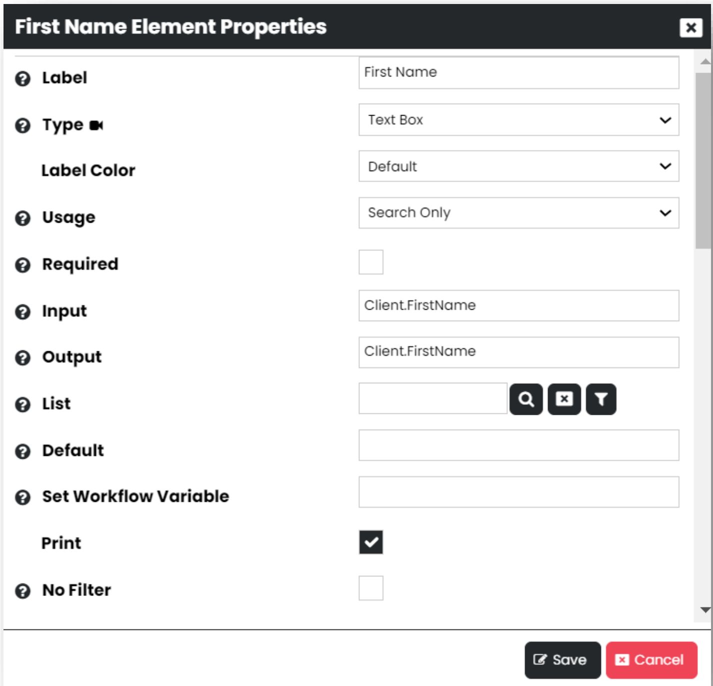
For FamilyorIndividual, we can update the **Label**. By default, all the fields will display with their column names. Let’s change this field to display as “Family or Individual”.

Notice the **Type** is set to ‘Drop Down List’ by default. The system will set each field to a certain type depending on how it is stored in the table. The type can be changed if needed. We will leave this as it is.

The **Usage** is set to ‘Search’ which means the field will only be displayed in the search results section at the bottom of the form.

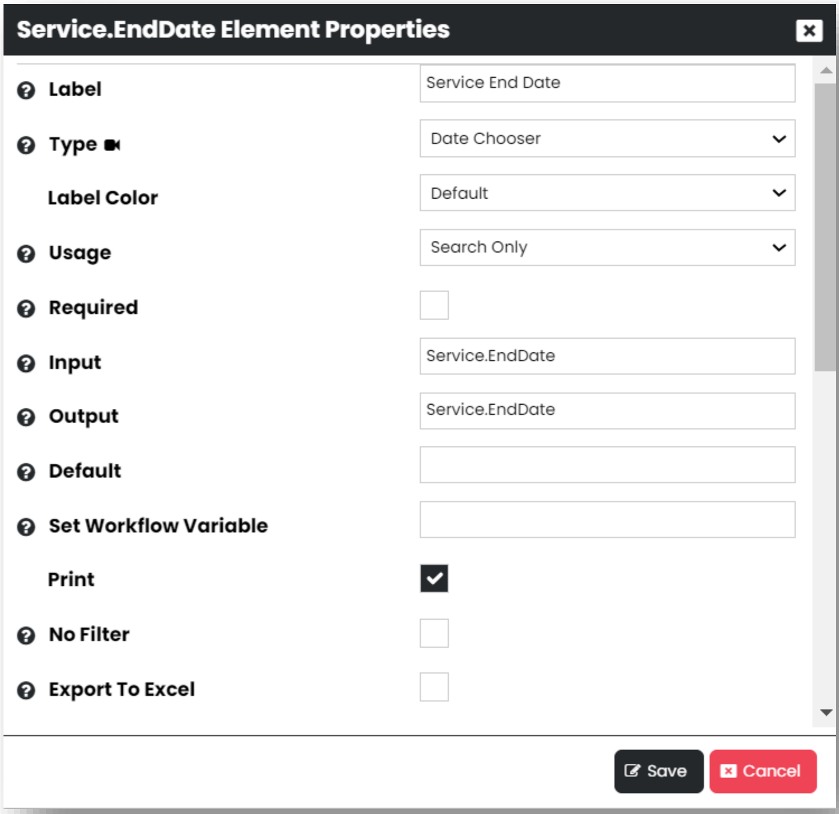


Let's change the same properties for the **First Name** and **Last Name** fields, updating the **Label**. Notice these two fields have a **Type** of 'Text Box', which we will leave as is.



Let's update the ServiceEndDate field next.

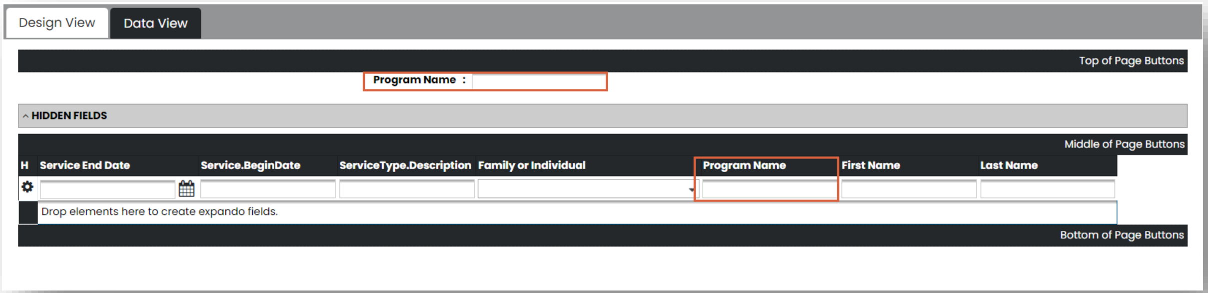
Change the **Label**. Notice the **Type** for this field is set to 'Date Chooser' since this is the date the Client's service ended. We will leave the **Type** as is.



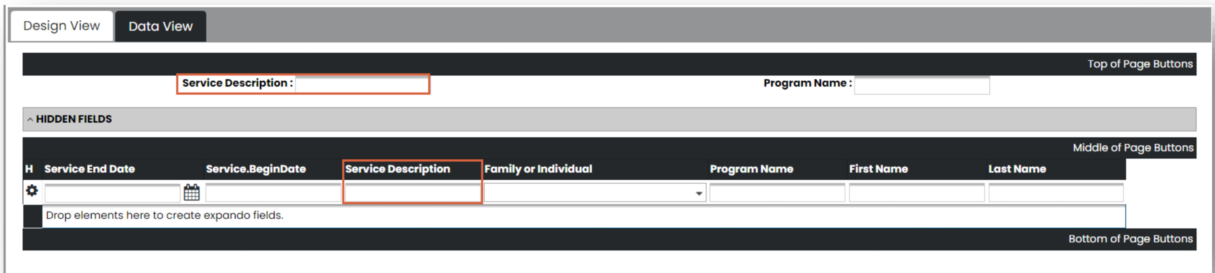
The remaining three fields are ProgramName, Description, and BeginDate, which will be set a little differently.

Open the properties for the ProgramName field and change the **Label** to 'Program Name'. Then, change the **Usage** to 'Edit and Search'. This indicates the **Program Name** field will not only display as a column in the results table, but it will also display as a filter at the top of the form.

Once saved, notice the field now displays in both places.



Let's do the same thing for ServiceType. Update the label to "Service Description" and change the usage to 'Edit and Search'. Save the properties when done.



The last field remaining is ServiceBeginDate.

The **Service Begin Date** field will also serve as a filter and display as a column in the results below.

However, this field will also serve an additional function. Since this field stores the date the Client's service began, we want the User to be able to filter the results with a date range, not just one specific begin date.

Let's update the field's properties.

Change the **Label** to 'Service Begin Date'.

Then, change the **Type** to 'Date Range'.

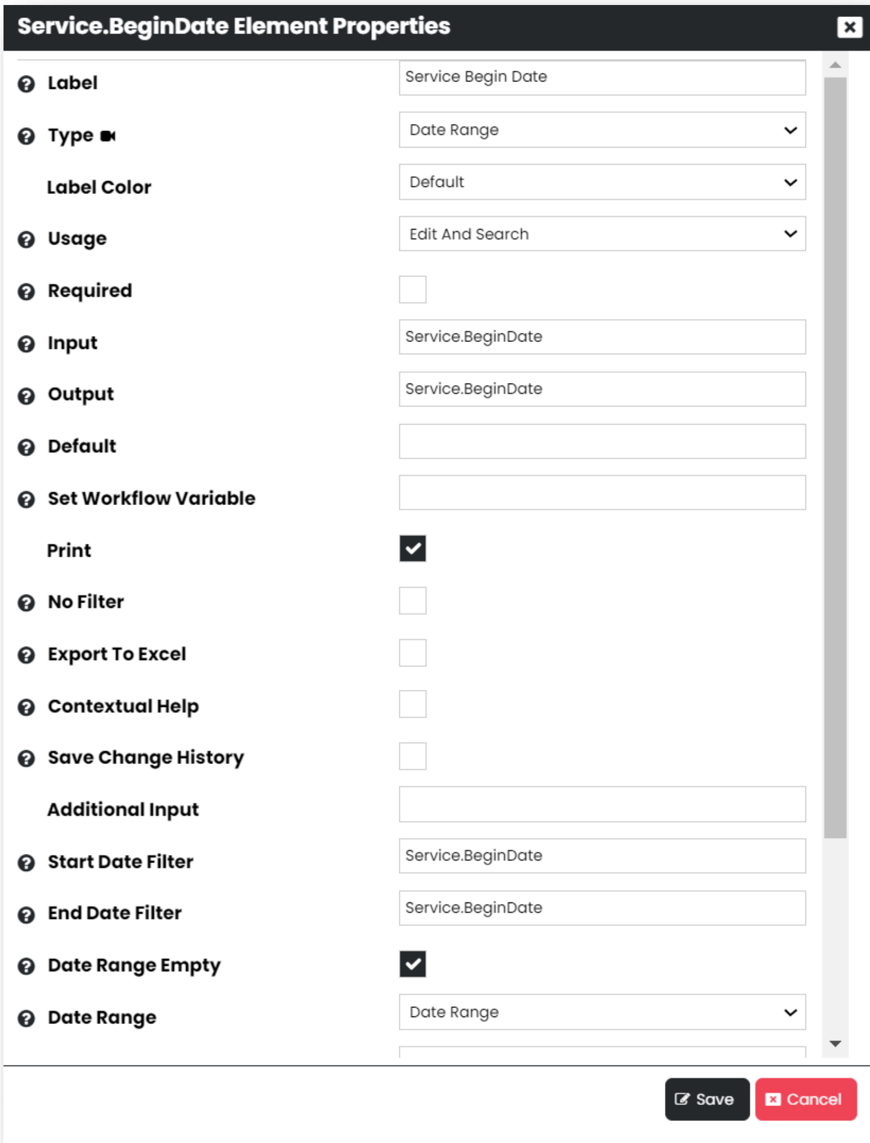
Update the **Usage** to 'Edit and Search'.

Next, confirm the **Input** and **Output** are set to Service.BeginDate which ensures the field is populated with the correct table data.

Also confirm the **Start Date Filter** and **End Date Filter** are set to Service.BeginDate so the filters use the correct table data.

And since we want the filter to be set with a blank date initially, select the **Date Range Empty** option.

In the **Date Range** dropdown, select ‘Date Range’. This element property controls the filter which dictates the search should occur between two specified dates or before or after a single specified date.



Finally, in the **End Date default** dropdown, select ‘No default’ so the end date filter will be blank initially.

Then, save your changes.

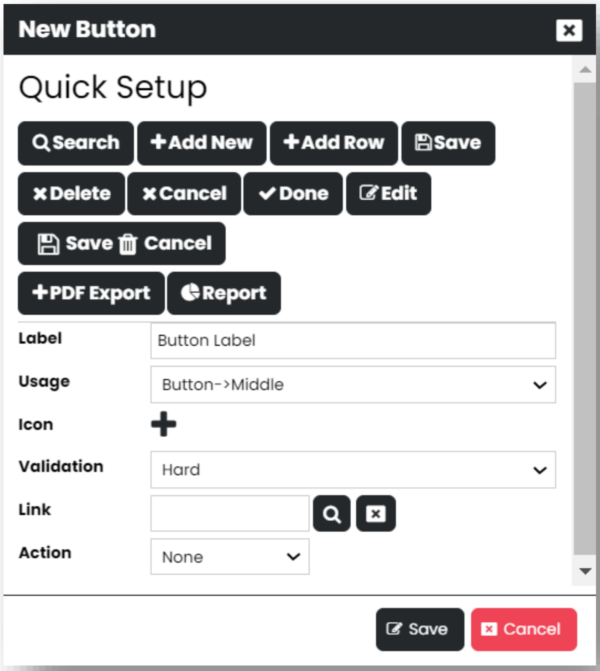
We are now done configuring all the fields we added to the form. If you would like to continue to change the layout, simply click and drag the fields to display according to your preference.

Let's move the **Program Name** field to display in the filter section before the **Service Description** field.

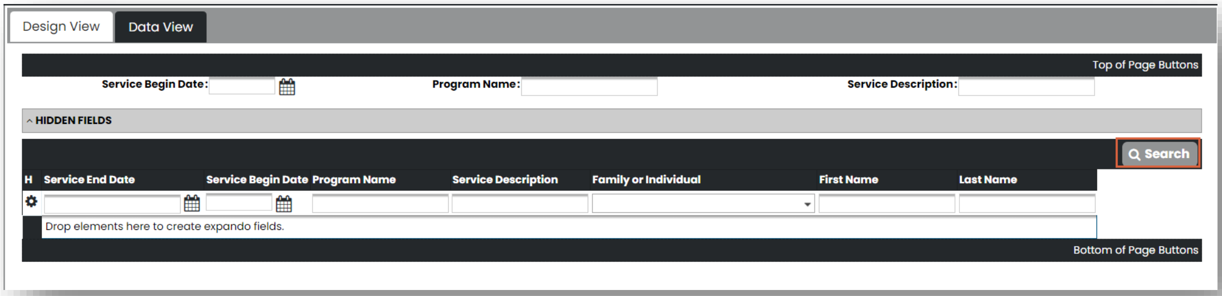
A Search Form typically includes a SEARCH button that allows the User to use the filters at the top and then search for results.

To add a SEARCH button beneath the filters, select **Middle of Page Buttons**.

Then, use the Quick Setup menu and choose the SEARCH button.



The button displays on the form and needs no further configuration.



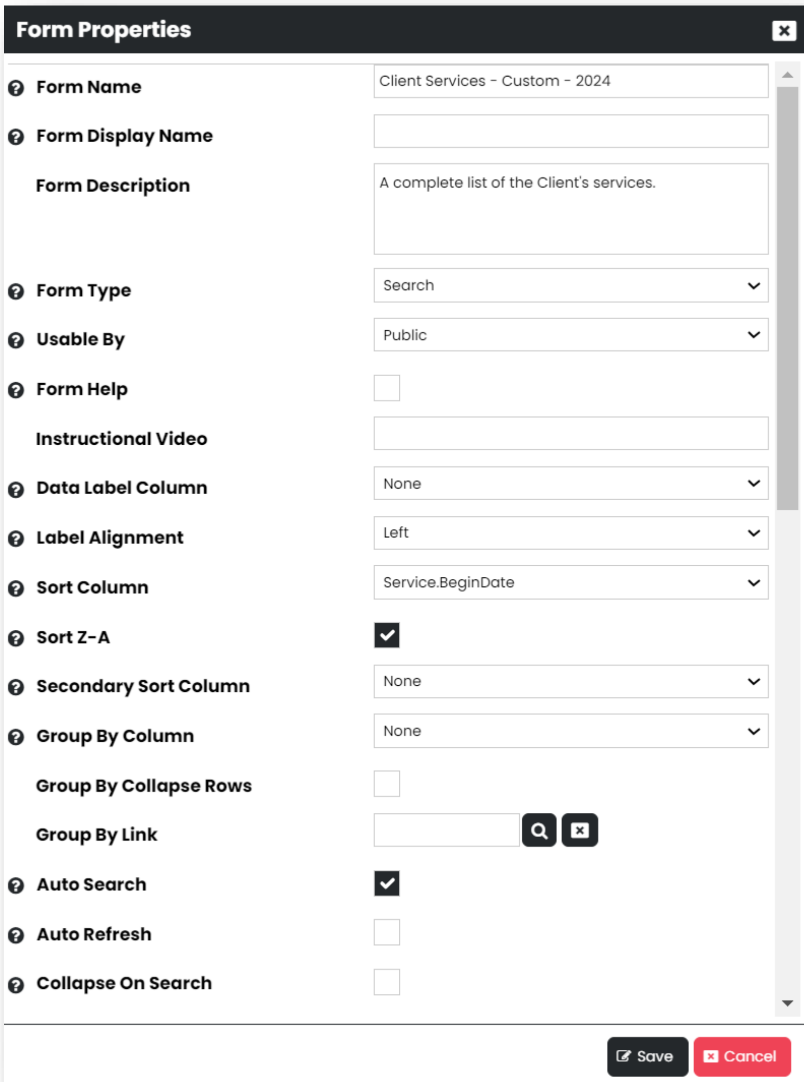
There are various other settings available for each element, as well as for the form. For example, you can add a menu off each record in the search results. You can customize the options that are displayed in the menu, as well as what happens when the menu item is clicked.

You are encouraged to incorporate all the available functionality into your custom forms as you become more comfortable with the Form apBuilder tool.

We are almost done! Before completing the final step, let's stop and save.

Let's move over to the Form Properties menu where we can put some final touches on the form.

Form Properties allows you to update the form's name, description, type, and much more. I encourage you to use all these options as you become more comfortable with the Form apBuilder tool.



For our example, let's update the sort order for the results. By changing the **Sort Column** to Service.BeginDate and selecting the **Sort Z-A** option. This will sort the results by the Service's begin date in descending order.

We can also select **Auto Search**. This indicates ALL records should display when the form initially loads. Otherwise, the form will be blank until the User clicks the SEARCH button.

You can customize so many aspects of this form which we encourage once you feel confident using the Form apBuilder tool.

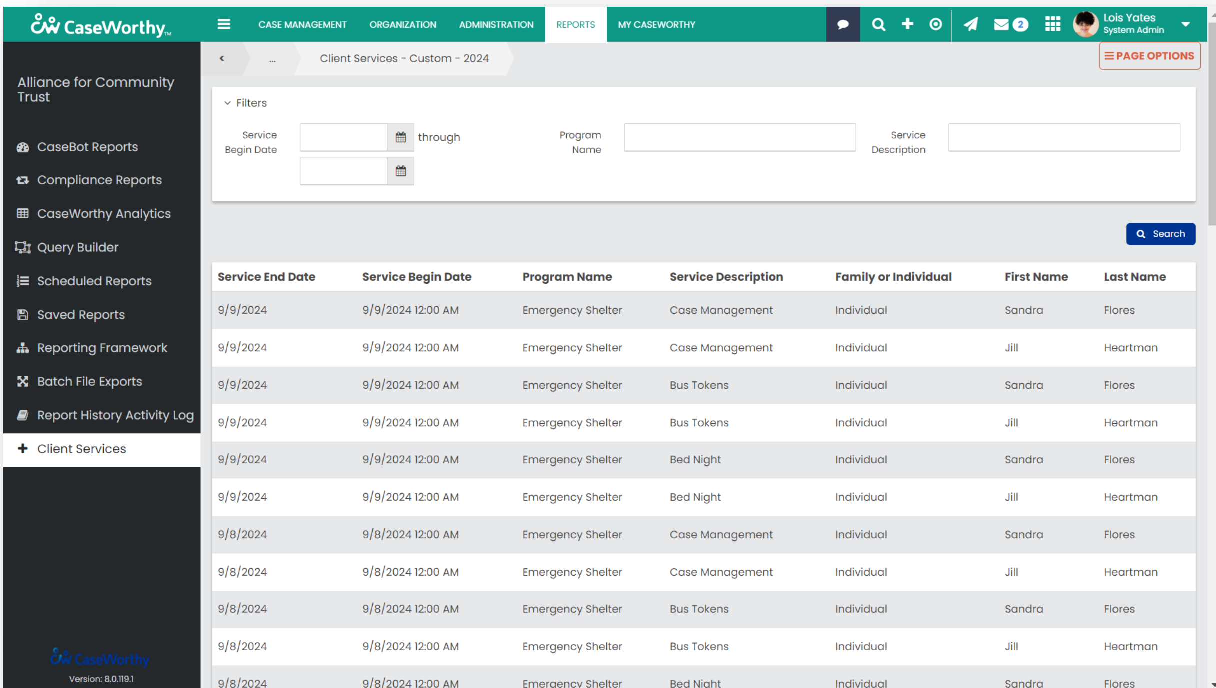
When done updating the Form's properties, click SAVE.

And that is it!

Save the form one last time.

To access your Search Report or Form, you will need to add a link to the form using the Role apBuilder. For this example, I have added a new role called System Admin and I have given myself access to that role.

On the Reports tab, I added a Client Services link to this report.



The form name is displayed at the top of the window.

The filters display at the top of the form and are blank by default.

All service records for All Clients display automatically when the form loads.

The records can be filtered by using the service begin date, program name, and service description fields at the top and then by clicking the SEARCH button.

The records are automatically sorted by **Service Begin Date** in descending order and the field names display correctly.

Analytic Reports

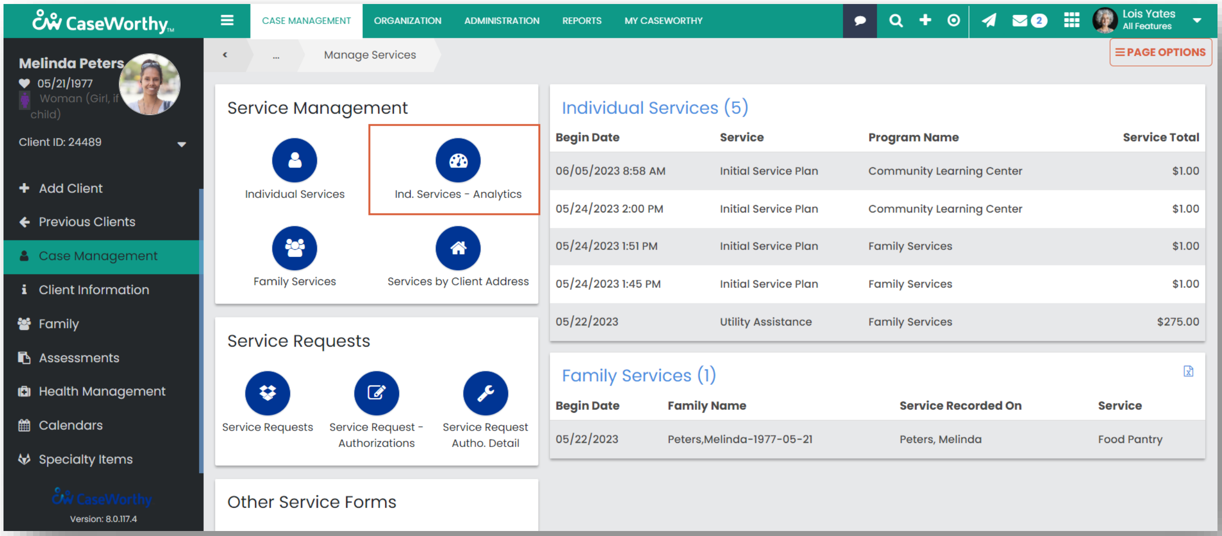
Analytic Reports are like Search Reports, but they are more advanced and designed to provide in-depth analysis of your data. With Analytic Reports, you can uncover trends, patterns, and insights that might not be immediately obvious. They're ideal for users who need to perform detailed data analysis and make data-driven decisions. Analytic Reports allow for customization and include pivot tables and charts.

It is not difficult to create an Analytic Report, but you must first have a good working knowledge of the CaseWorthy application and the Form apBuilder.

Let's move over to the application.

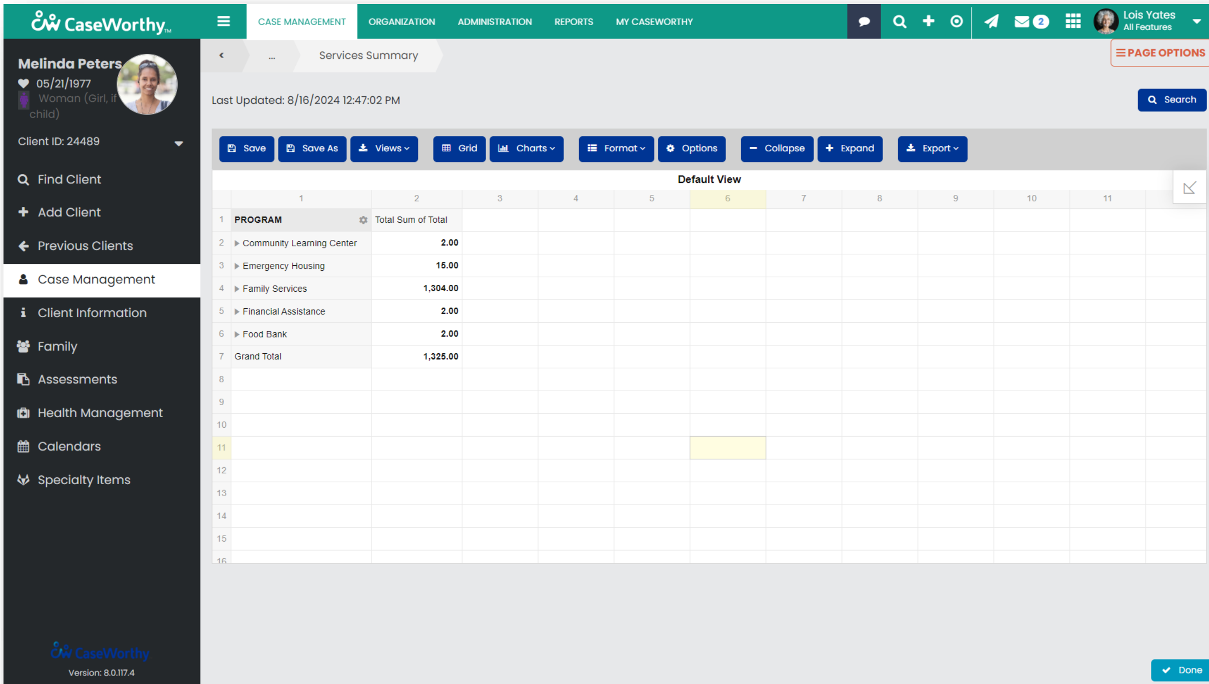
The Case Management tab in CaseWorthy contains information about the Client loaded in the Entity Corner. There are several baseline Analytic Forms available that enable you to view data related to the Client.

An example of an Analytics Form is *Individual Services – Analytics* on the *Manage Services* dashboard.



This form is like the *Services Search* form, but it offers additional functionality because it has been configured as a pivot table, or an Analytics Report.

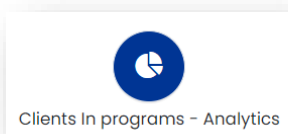
This form does require an active Client with existing services to be loaded in the Entity Corner, or the report will be blank.



Let's review the features on this report.

- Different views can be created and saved for later access.
- You can customize the fields, rows, columns, and values, including which data displays on the report and how that data is labeled.
- You can easily add automated calculations, like a total sum of dollars, a total count of enrollments, today's date, and more.
- The view can be changed from a grid to a chart.
- And you can export the data to multiple formats.

The Reports tab provides various reporting options for ALL Clients in your database. Several baseline Analytic Reports are available on this tab. Any report that includes a pie chart icon is an Analytic Report.

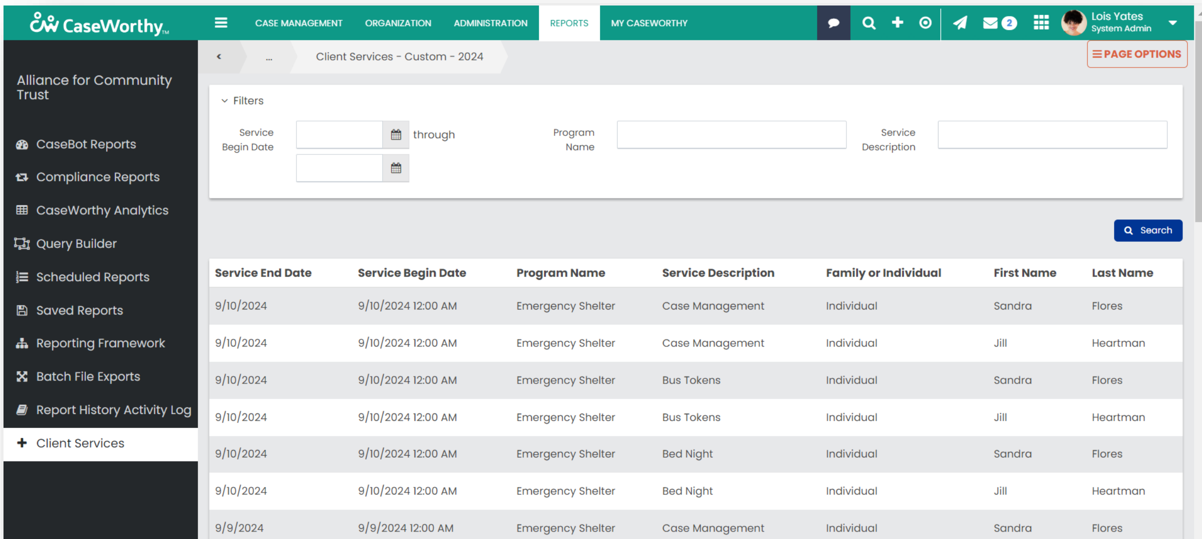


There are Analytic reports that allow you to view program enrollment data, Client referrals by Provider, and more.

Analytic Report Example

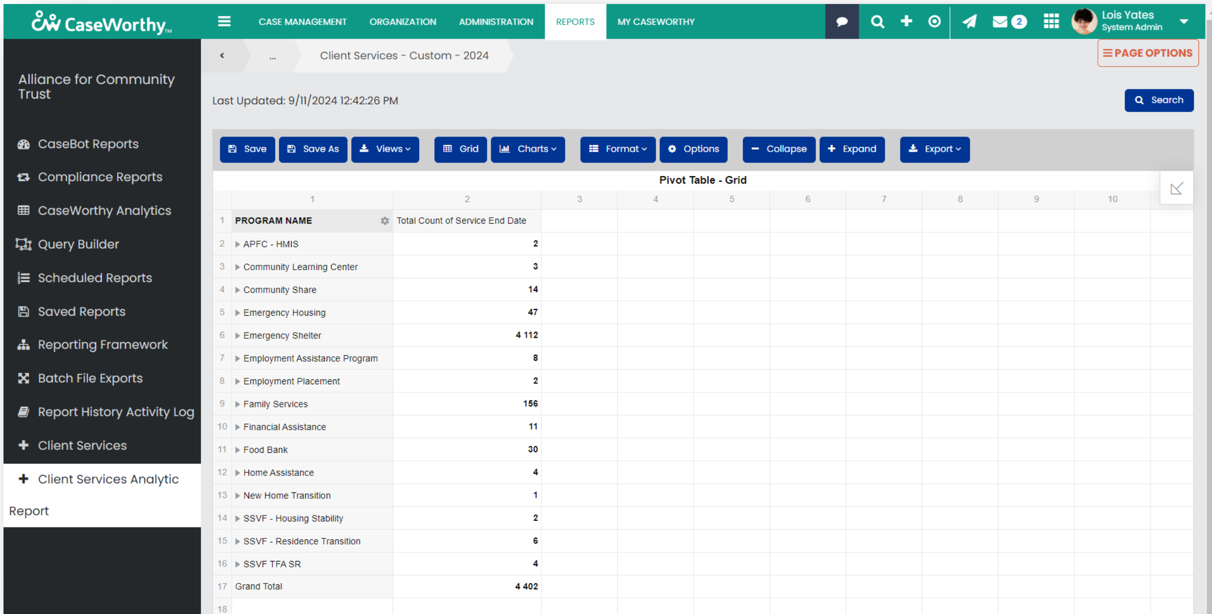
Building an Analytic Report is just like building a Search Report, but with different Form Properties. In other words, Analytic Reports are essentially Search Reports, but they have more flexibility because of the additional tools available.

For our Analytic Report example, we will use the basic Search Report we created in the *Search Report Example* section of this guide.

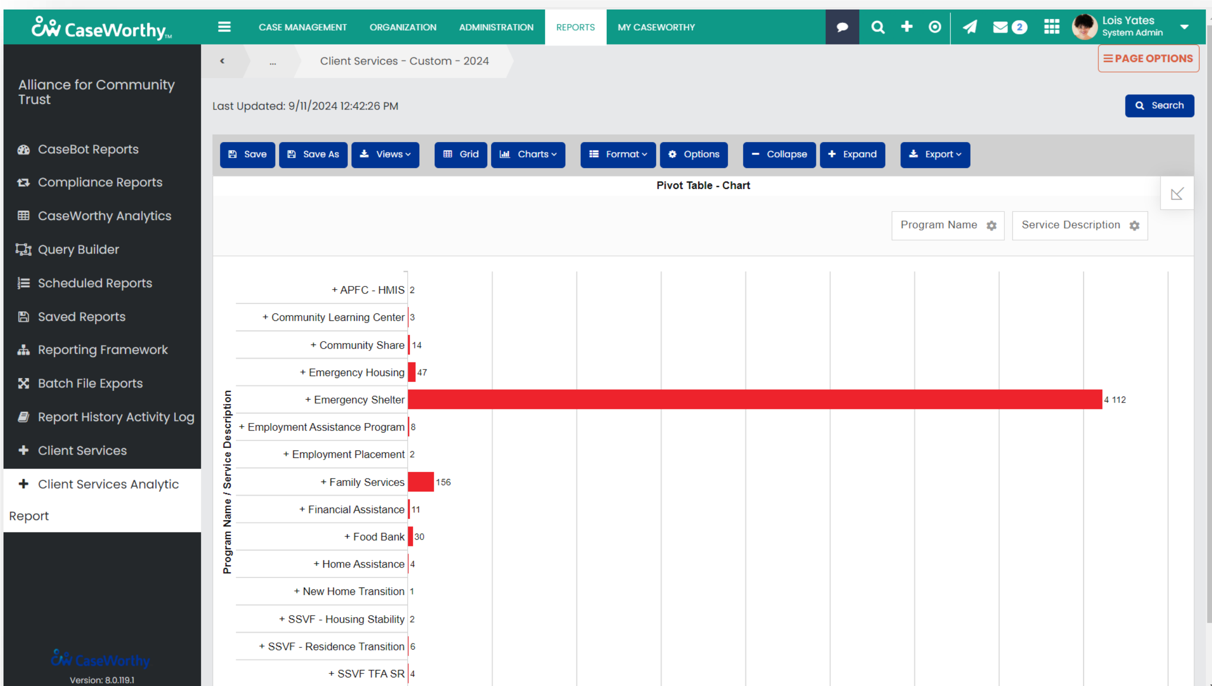


Our Client Services Search Report was placed on the Reports tab and displays services for ALL Clients.

Once we update the properties and add customization, our Analytic Report will look like this as a grid.

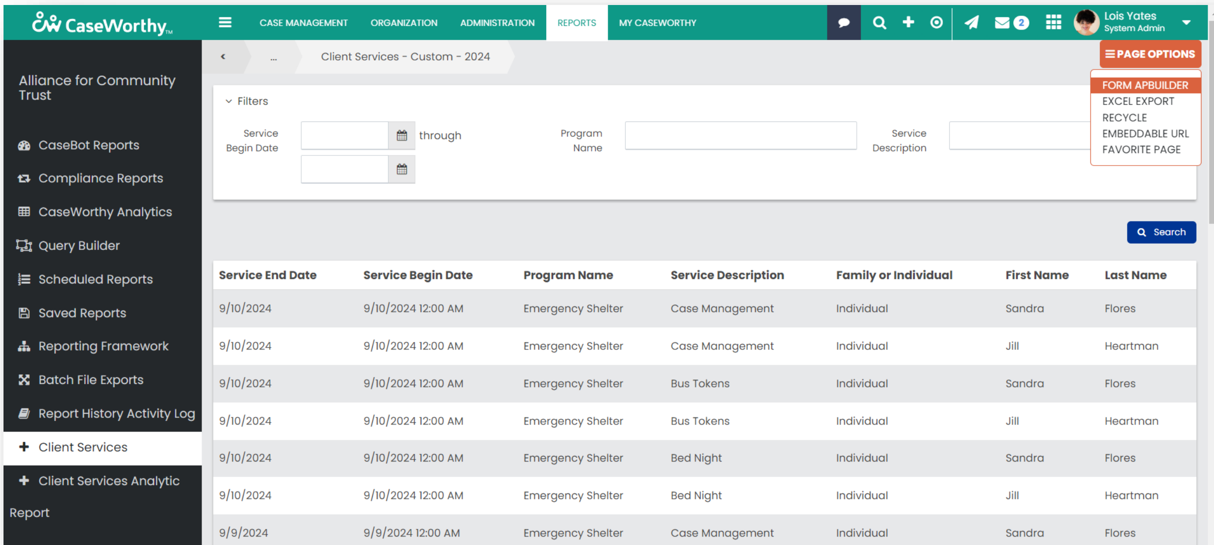


And like this as a bar chart.



Let’s get started.

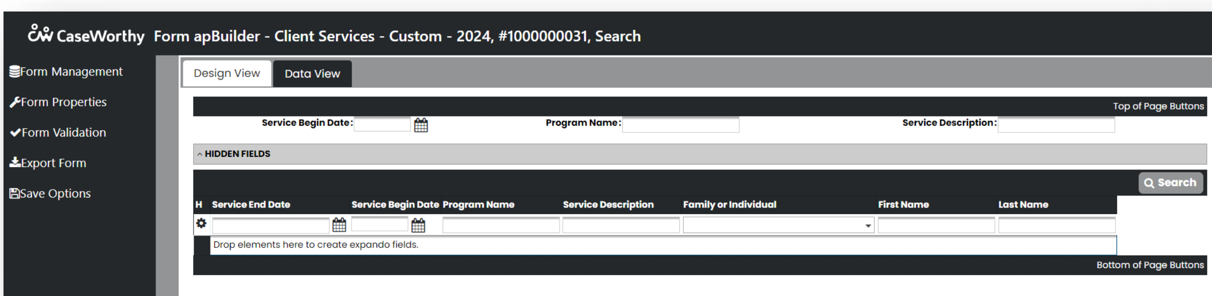
You will either create a new form at this point, or you can create a copy of an existing form. Since we are using the Client Services Search Report we previously created, I will open the form in the Form apBuilder.



And since we do not want to overwrite our existing Search Form, we will open the Form Management window and then select CREATE A COPY OF THIS FORM.

Give the form a new name and then save.

The form is displayed in the Form apBuilder on the Design View tab by default.



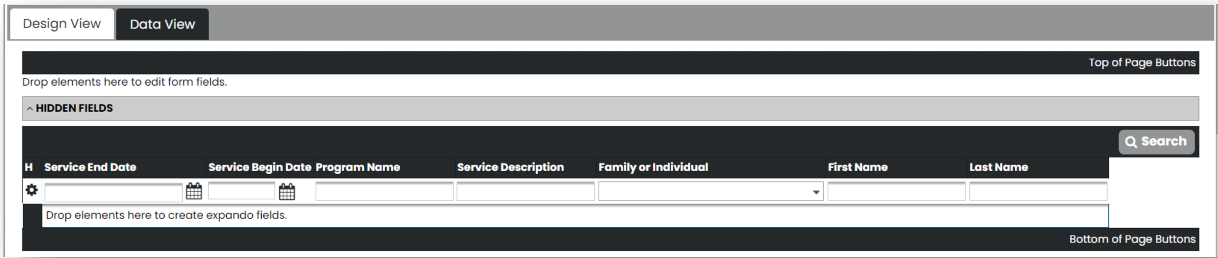
Since we have tables that are joined and configured, we do not need to make any changes on the Data View tab.

Let’s make some changes to the Design View tab.

Since our Analytic Report will not have filters at the top, we can remove those now. Keep in mind though, the edit section can include date filters, but it is not typically needed because Analytic Reports have built in filters available.

The **Service Begin Date**, **Program Name**, and **Service Description** were all set with a **Usage** of ‘Edit and Search’.

Double-click each field to open the Element Properties window and then change the **Usage** to ‘Search Only’. The fields will then only be displayed in the Search section of the form.



And before continuing, it is important to note, only the fields displayed on the report here will be available for display on the Analytic Report. If you would like to include additional fields from the available tables, you should add those now.

Now, let’s update our form’s properties to render it as an Analytic Report instead of a Search Report.

In the navigation menu, select Form Properties.

Form Properties allows you to update the form’s name, description, type, and much more. I encourage you to use all these options as you become more comfortable with the Form apBuilder tool.

For this example, we are only going to make one change. Towards the bottom of the Form Properties window, change the **Render As** dropdown from ‘None’ to ‘Render As Pivot’.

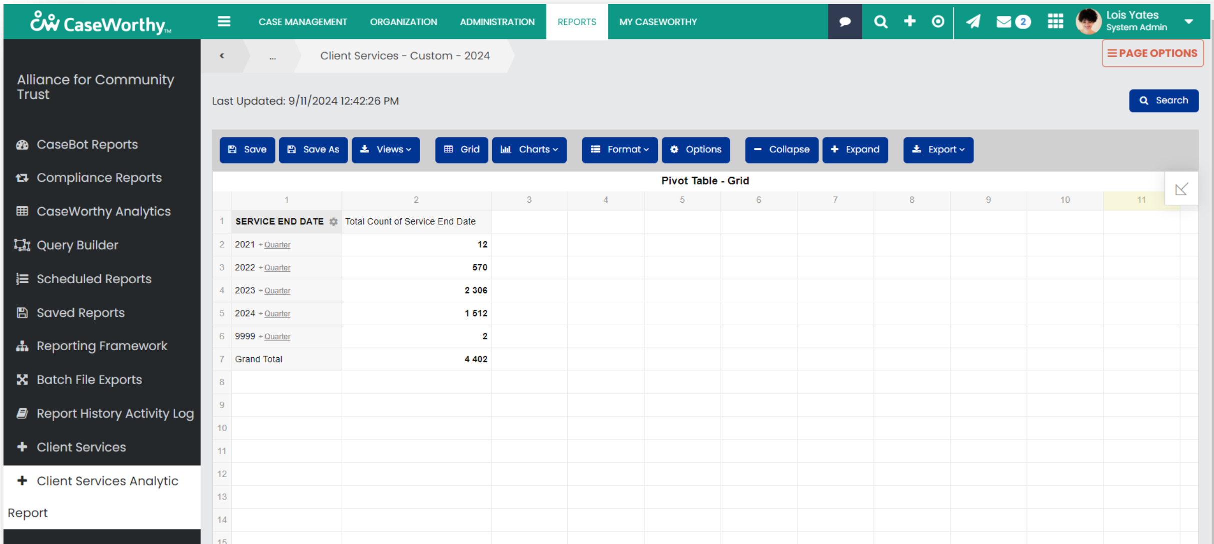
When done updating the Form’s properties, click SAVE.

And that is it!

Let’s save our form.

To access your Analytic Report, you will need to add a link to the report using the Role apBuilder. For this example, I have added a new role called System Admin and I have given myself access to that role.

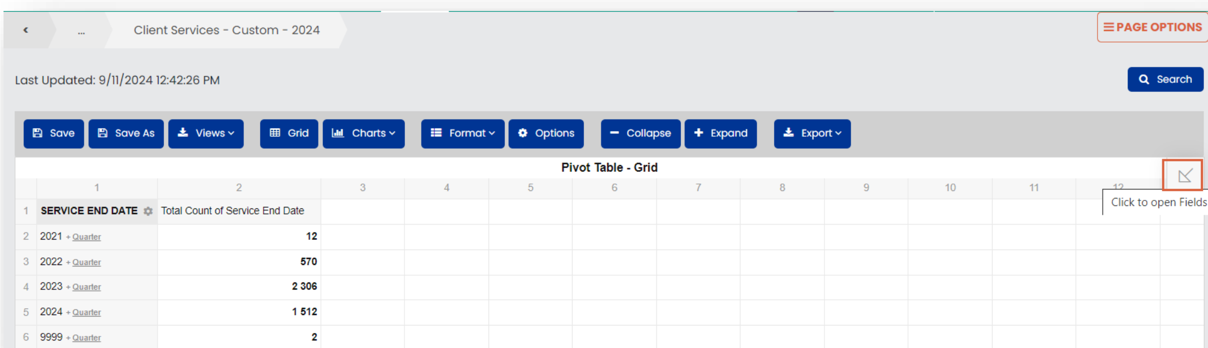
On the Reports tab, I added a Client Services Analytic Report link to this report.

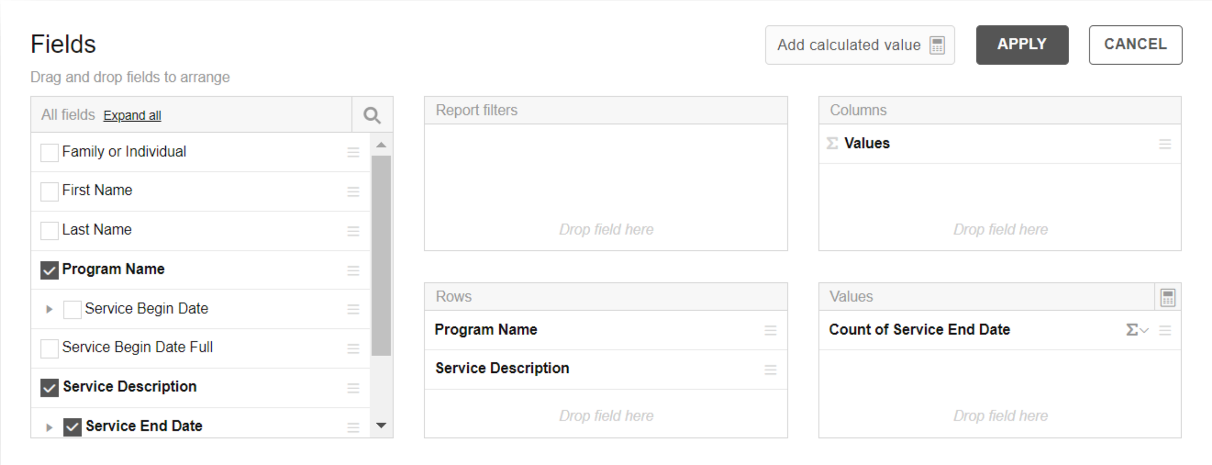


The default view for our Analytic Report is a basic grid view. However, all the tables and fields that were added to the form, including the Service, ServiceType, Program, Enrollment, and Client tables, are available on this report.

There are multiple options available for customizing the report. Once customized, you can save the view so that it is easily accessible the next time you access the report.

The arrow icon in the top right of the report opens the Fields window.





The window is displayed and includes ONLY the fields that were included on the report on the Design View tab in the Form apBuilder.

For this report, we will make a few changes:

- Remove any existing Report filters by double-clicking each item.
- In the Rows box, drag and drop the “Program Name” and the “Service Description”. Double-click any other fields to remove them.
- In the Columns box, “Values” displays by default. This will automatically display a **Grand Total** row at the bottom of the report with a sum of each column.
- Select ADD CALCULATED VALUE to create a new formula. A list of common formulas is displayed, or you have the option to create your own. Select to include the existing formula “Service End Date Count”, and then select APPLY.

And that’s it. Select APPLY to save your changes.

The Analytics Report is now an interactive reporting tool.

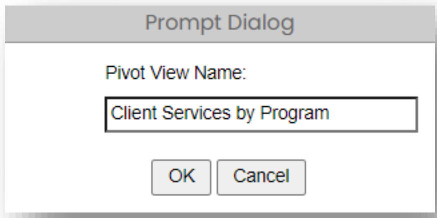
The **Program Name** is displayed in the first column. You can select the arrow next to each **Program Name** to drill down further to also view the Services.

The total count of services provided is displayed in the second column.

And a **Grand Total** row displays at the bottom.

The toolbar at the top provides additional options.

Select SAVE AS to save this report view for future use. It is important to note, you must have a User Category set to ‘Pivot Editor’ to have the option to save an Analytic Report.



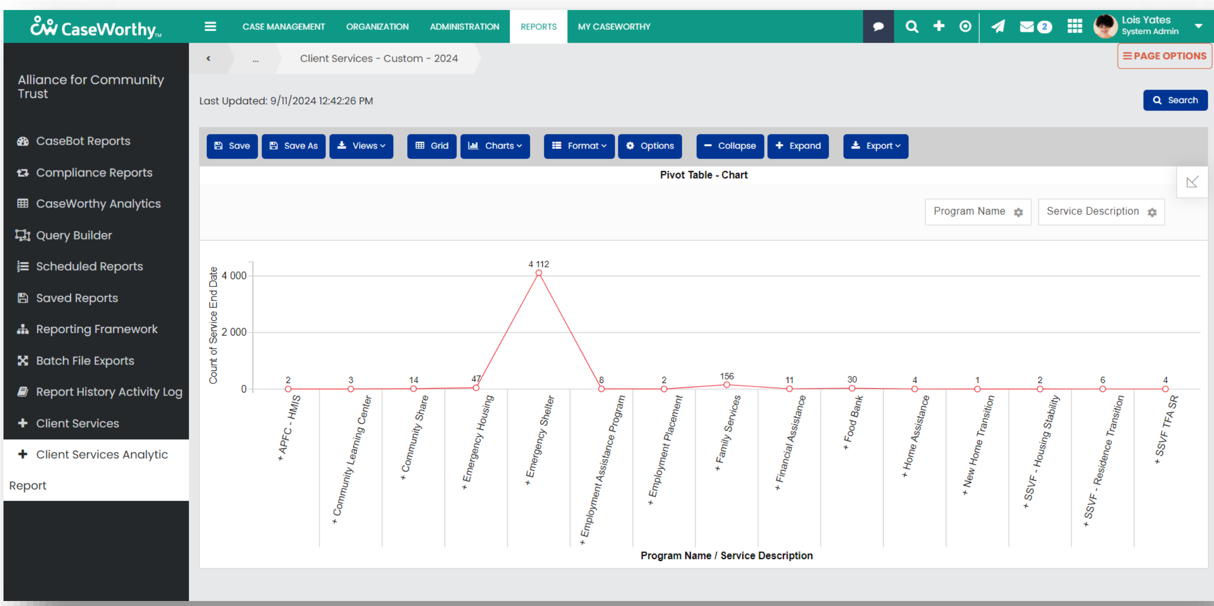
Give the view a meaningful name for easy reference and then select OK. A confirmation message displays indicating the report view was saved. Select OK to continue.

If you make any changes to the selected view, use SAVE to store those changes.

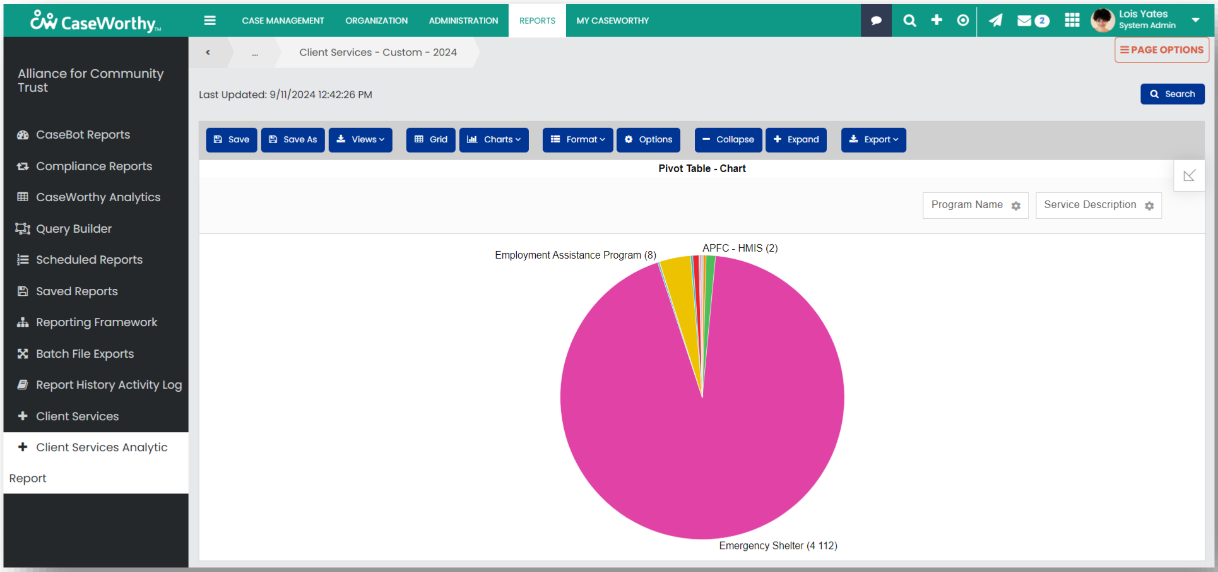
And to access the view later, simply select VIEWS, then select the appropriate report view from the list available.

You can also alternate the view between a grid and a chart. The current view is a grid. Select CHARTS to change the view to a chart of your choosing.

For example, this is the current report displayed as a Line chart.



And this is a Pie chart.

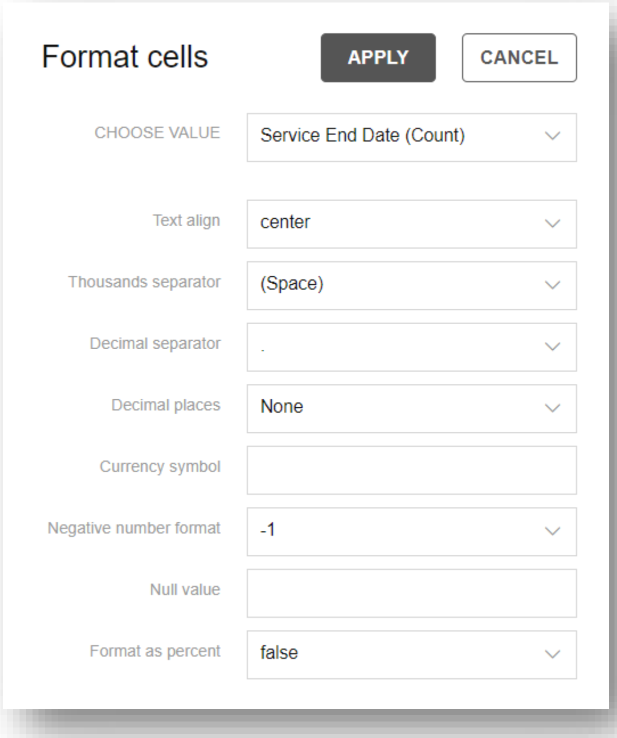


At this point, I am going to choose SAVE because I want this report view to always take me directly to the pie chart. A message displays indicating the view was updated.

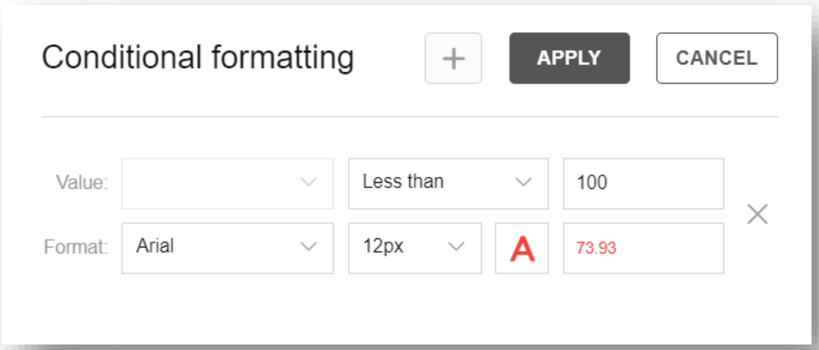
To easily change the report back to a table, select GRID.

The next option in the toolbar is FORMAT.

This allows you to format how columns with values are displayed. For example, we can use Format cells to update the **Total Count of Service End Date** column and center align the data.



Or we can choose Conditional formatting and add a rule that states any value that is less than 100 should display in red.



Notice how the **Total Count of Service End Date** values are now centered and any number less than 100 is displayed in red.

The next item in the toolbar is OPTIONS.

The Layout options window allows you to set how **Grand Totals** and **Subtotals** are displayed on the report. You can also choose between different layouts, including **Classic**, **Compact**, or **Flat**.

The next options on the toolbar are COLLAPSE and EXPAND.

Since this is an interactive report with drilldown functionality, these buttons allow you to easily alternate your report view by expanding all the columns and rows and then collapsing them.

The last option is EXPORT, which allows you to easily print or export your report in multiple formats, including HTML, CSV, Excel, and PDF.

And that's it!

We hope you enjoy creating new interactive reports in your CaseWorthy application.

CaseWorthy

CaseBot Reports

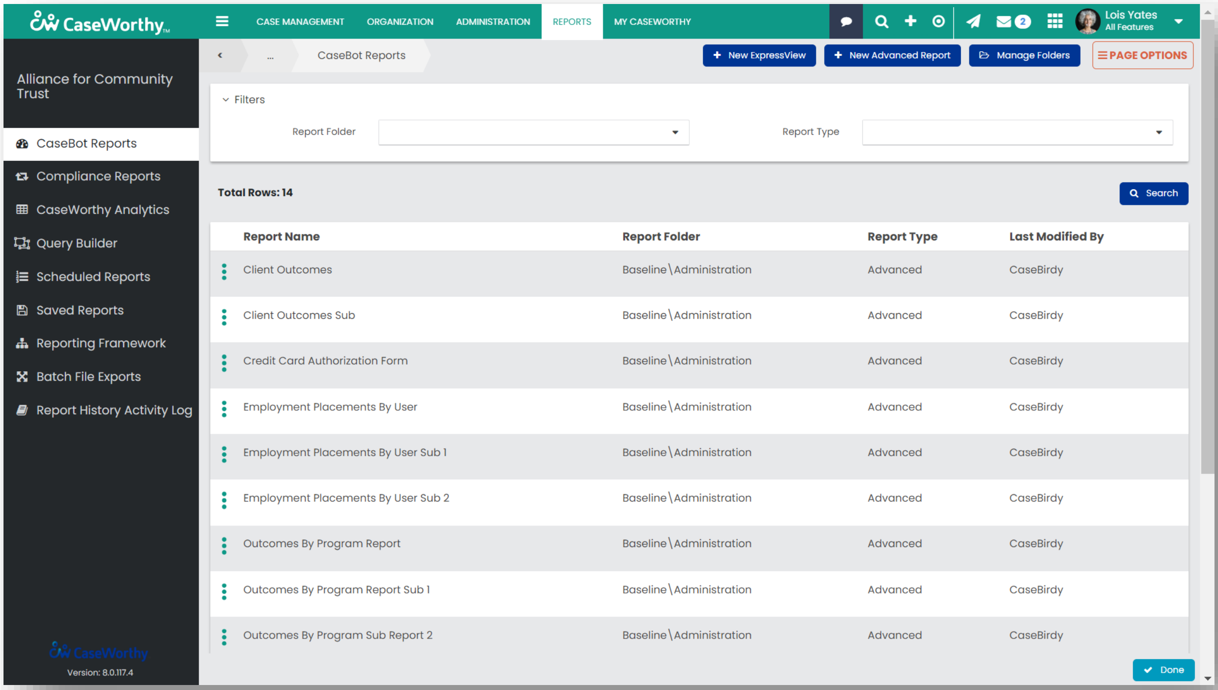
CaseBot brings the power of automation to your reporting.

CaseBot allows you to set up automated reports that are triggered by specific events or criteria. For example, you can schedule a report to be sent to your inbox when a new case is opened or when certain thresholds are met. This helps you stay informed without manually running reports, saving time and ensuring you never miss important updates.

There are several advantages of using CaseBot Reports. They:

- Allow for configuration and customization,
- Offer greater flexibility than analytics reports,
- Provide more detailed insights than analytic reports,
- And CaseBot reporting also includes integrated express and advanced reports, featuring charts, graphs, and templates.

Let's move over to the application.



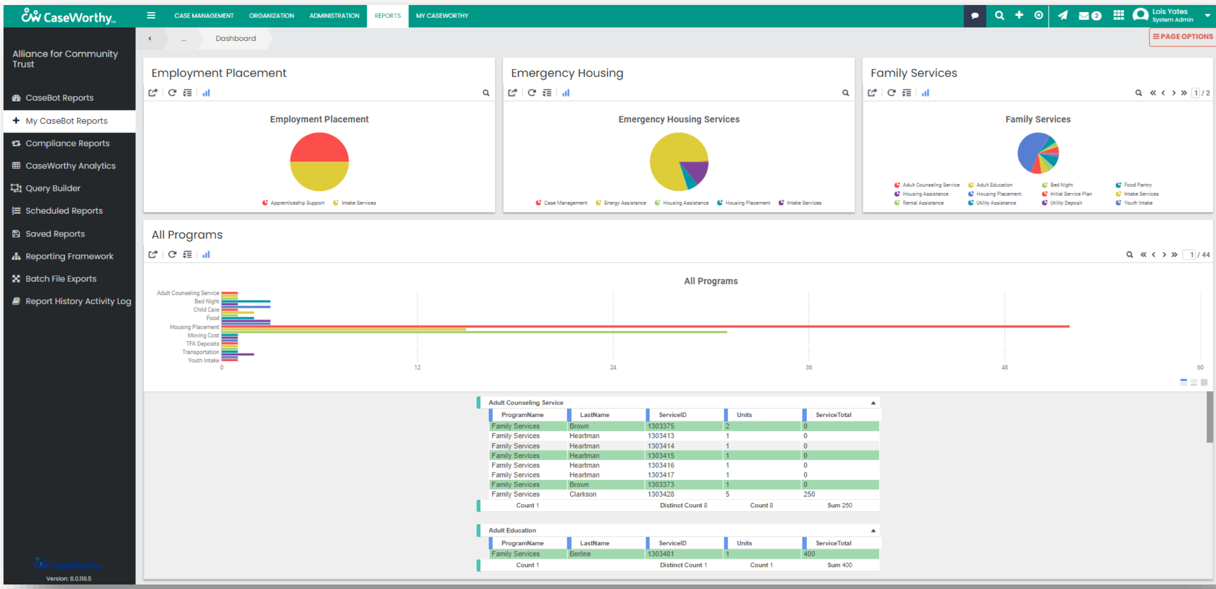
On the Reports tab, from the navigation menu, select CaseBot Reports.

A list of existing CaseBot reports is displayed, including the report name, the report type, and the folder where it is saved. The list can be filtered by where it is saved or the **Report Type**.

There are multiple baseline CaseBot reports available, but they cannot be edited. You can easily make a copy of a baseline report and then customize it as needed so you don't have to start from scratch.

Creating a new CaseBot report is very similar to using the Form apBuilder and Query apBuilder. You must first have a good working knowledge of the CaseWorthy application and its table structure.

Once you have created a CaseBot report, you will then need to decide where the report should live in the application and create a link to the report so it can be displayed. For example, you could create a custom dashboard and add a link to the dashboard using the Role apBuilder.



In this example, I created a custom dashboard and called it My CaseBot Reports. I then used the Role apBuilder to add a link to the dashboard in my 'System Admin' role.

The dashboard displays four different CaseBot reports, which were added by using the Dashboard apBuilder. Each report is a CaseBot Widget that includes a link to the report. If I were to make changes to the CaseBot reports, they would automatically update on this dashboard.

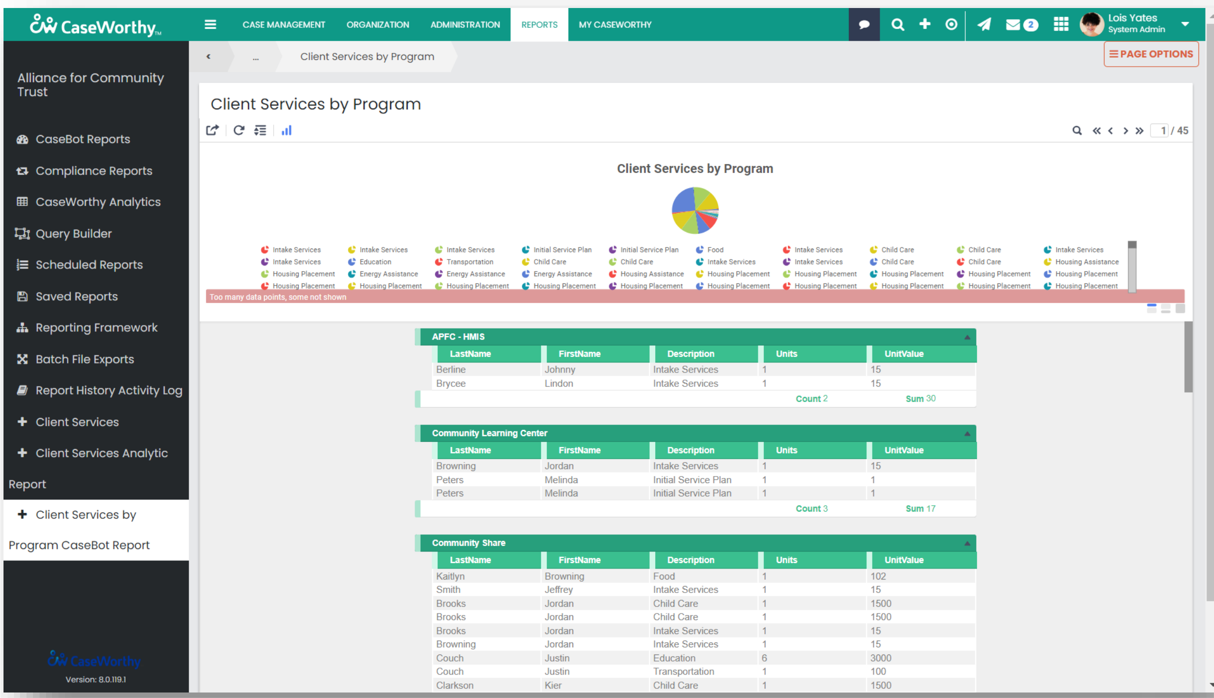
CaseWorthy

CaseBot Report Example

Creating a new CaseBot report is very similar to using the Form apBuilder and Query apBuilder. You must first have a good working knowledge of the CaseWorthy application and its table structure.

For our CaseBot Report example, we will create a new CaseBot Report named Client Services by Program. We will include a pie chart at the top, and a list of enrollments at the bottom, grouped by Program.

The report will be made available on a custom dashboard on the Reports tab.



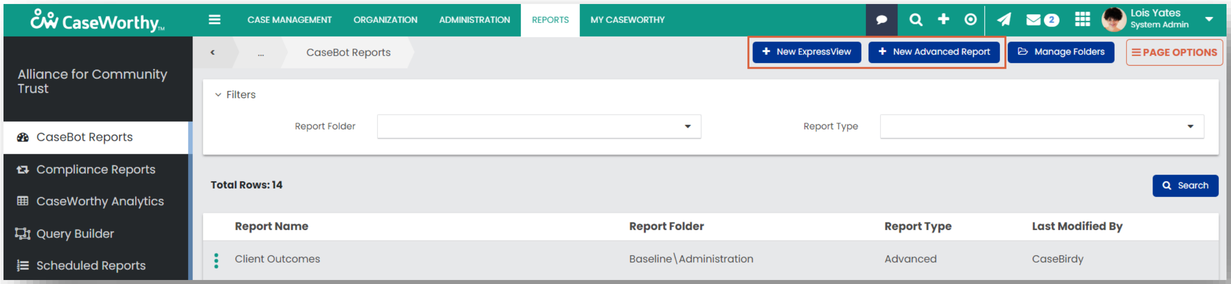
Let's get started.

On the Reports tab, from the navigation menu, select CaseBot Reports.

A list of existing CaseBot reports is displayed, including the report name, the report type, and the folder where it is saved. The list can be filtered by where it is saved or the **Report Type**.

There are multiple baseline CaseBot reports available, but they cannot be edited. You can easily make a copy of a baseline report and then customize it as needed so you don't have to start from scratch.

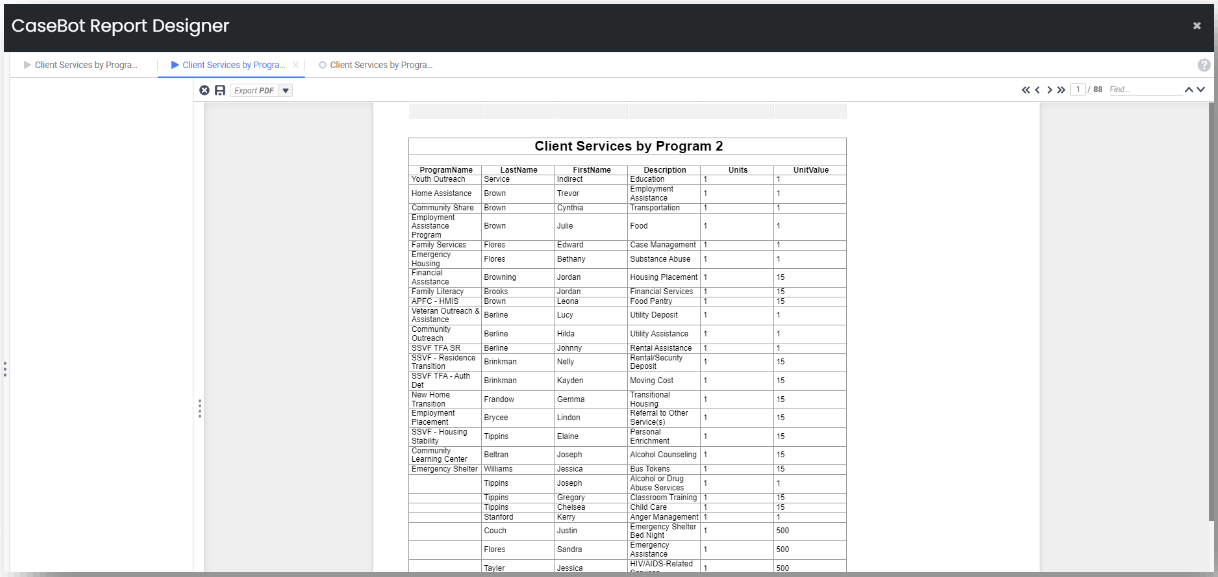
There are two options for creating a new CaseBot Report.



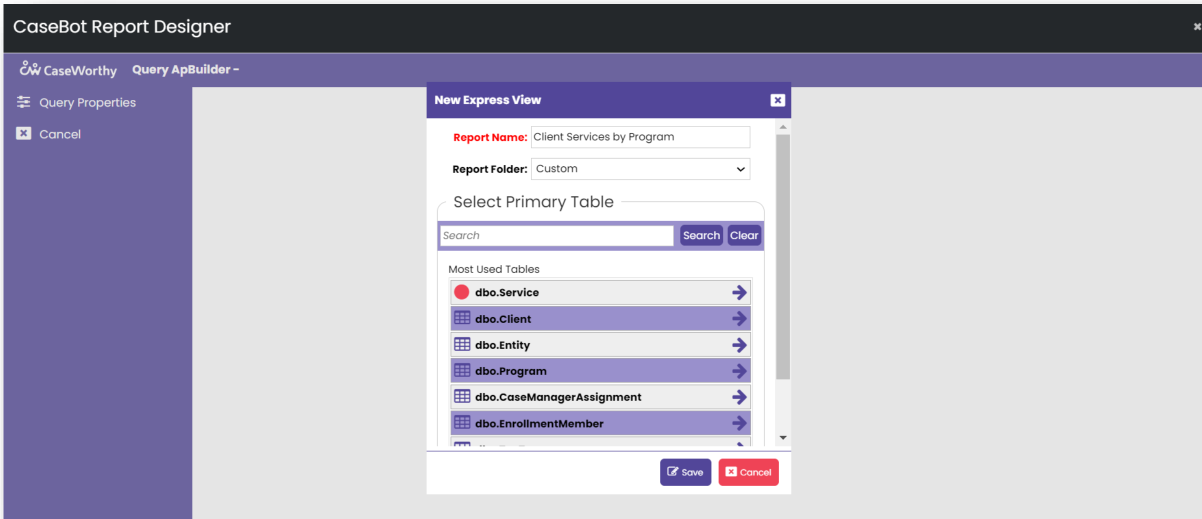
NEW EXPRESSVIEW allows you to use the Query apBuilder to add tables, fields, and buttons to your new report. This is the most challenging of the two options but offers the most customization, including grouping, charts, and themes.

NEW ADVANCED REPORT uses a wizard to guide you through the report creation process step-by-step. This is the simpler of the two options, and it does not require the use of table joins. You can create a basic report in minutes.

This option produces a spreadsheet-like report with little to no customization like this one.



In this example, we will use Express View to create our new report, which will include all Clients enrolled in Services, and then grouped by Program.



The Report Designer window displays, which uses the Query apBuilder tool.

Start by giving the report an identifying name, then select where the report should be saved.

Now we need to consider what tables should be included on the report. There will be a few tables added, but here we need to identify a primary table. Since ultimately the report will include all Clients and their services, we can start with the Service table.

The Service table appears on the left side of the Report Designer window.

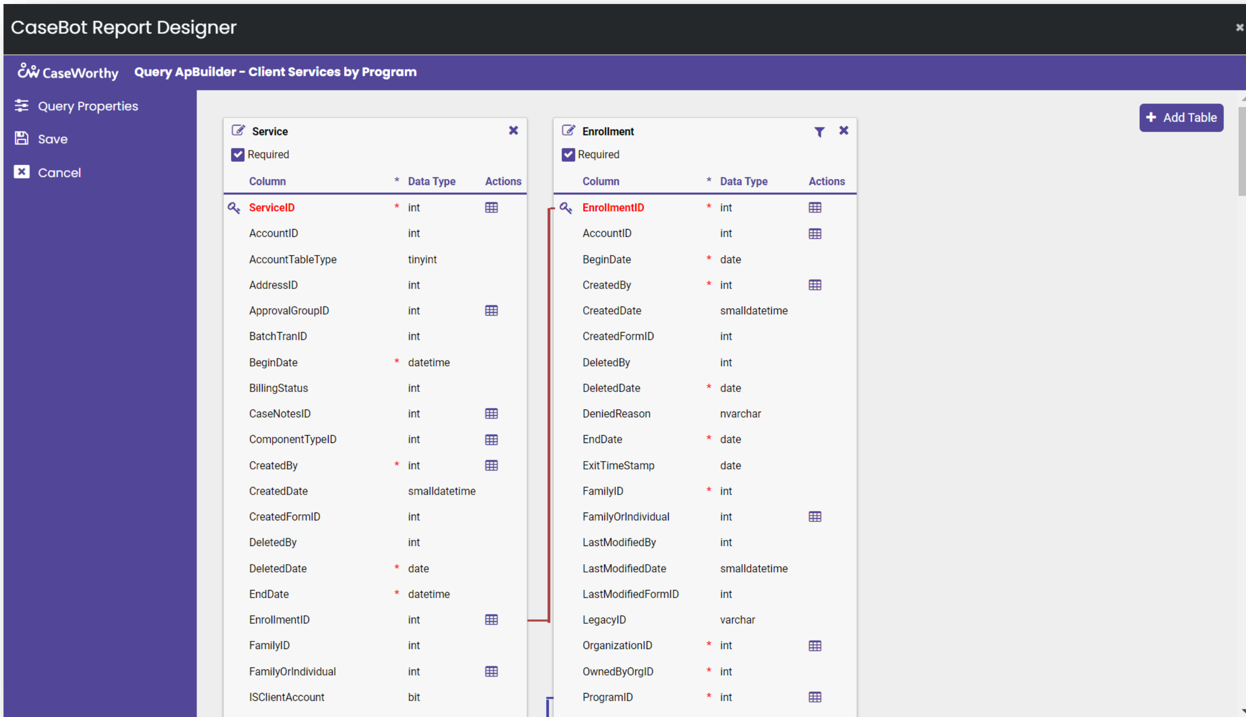
There is other data we need on the form that is not stored within the Service table. So, let's add the other tables now.

Select ADD TABLE and then search for the ServiceType table. This is how we will access the Service Description.

Then, add the Enrollment and Program tables. This will connect the Client to the Services they receive.

We will also add the Client and Entity tables so we can access specific details about the Client.

Each of these tables is displayed on the right of the window one above the other.



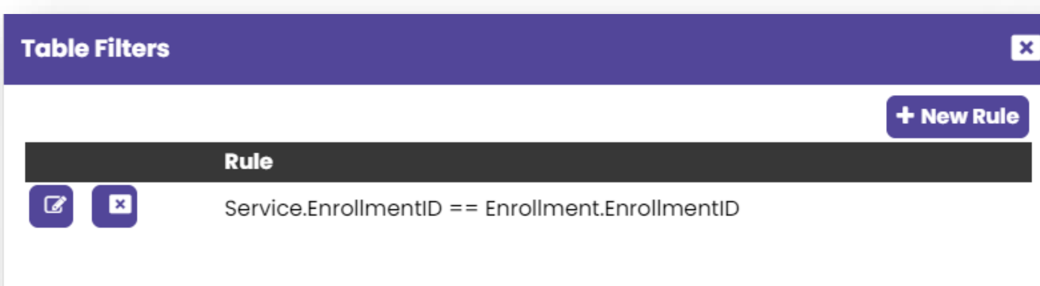
Now that we have all the necessary tables, the next step is to join them together, so the system understands how these tables and their data are related to one another.

To join two tables, you should first review the table columns.

Consider: How can I link this table to another table? Are there two columns that are the same? Start by looking at the primary key of the table. Can it be joined to a primary key or foreign key of another table? There could be multiple options for linking tables.

Let’s start with the Enrollment table. Select the filter icon.

We can add a new rule that states, the “Service.EnrollmentID” equals “Enrollment.EnrollmentID”. The Enrollment ID is the same on both tables and will join these two tables together.

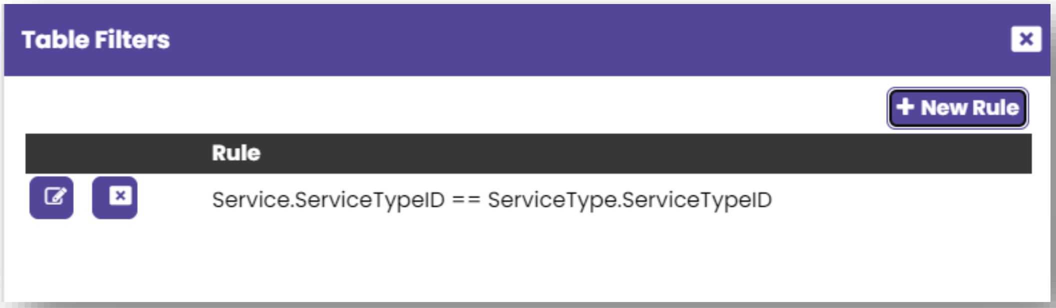


Once saved, we can move down to the ServiceType table.

How can this table be joined to another table?

There could be multiple options, but we just need one. Let’s join the ServiceType table to the Service table through the ServiceTypeID.

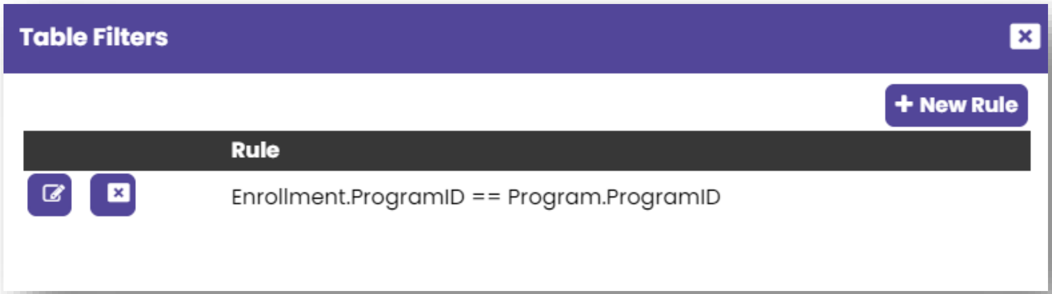
Select the filter icon to add the rule.



The rule should look like this: “Service.ServiceTypeID” which is a foreign key on the table is equal to “ServiceType.ServiceTypeID” which is the primary key on the table.

Let’s now look at the Program table. How can we join this table to another table? The Enrollment and Program tables both have a ProgramID column.

Select the filter to add the rule. It will look like this: “Enrollment.ProgramID” is equal to “Program.ProgramID”.

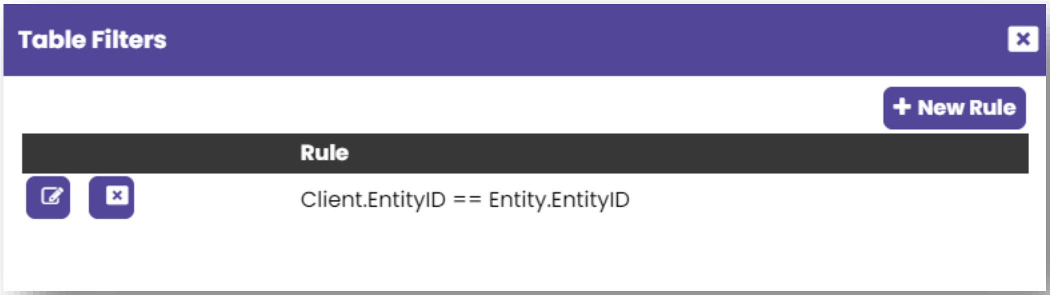


How about the Entity table? How can we join this table?

The EntityID on the Entity table is the same as the EntityID on the Client table.

Let’s create the rule.

“Client.EntityID” is equal to “Entity.EntityID”.

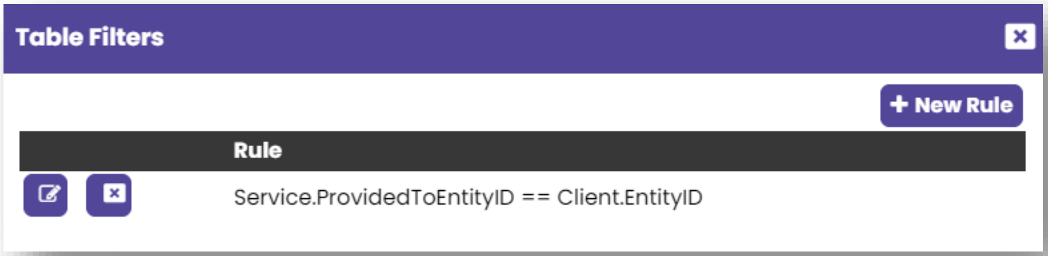


And the last table is the Client table. How can we join this table?

The Service table contains a field called “ProvidedToEntityID” which is in fact the same as the Client’s Entity ID.

Let’s add the rule to join these two tables together.

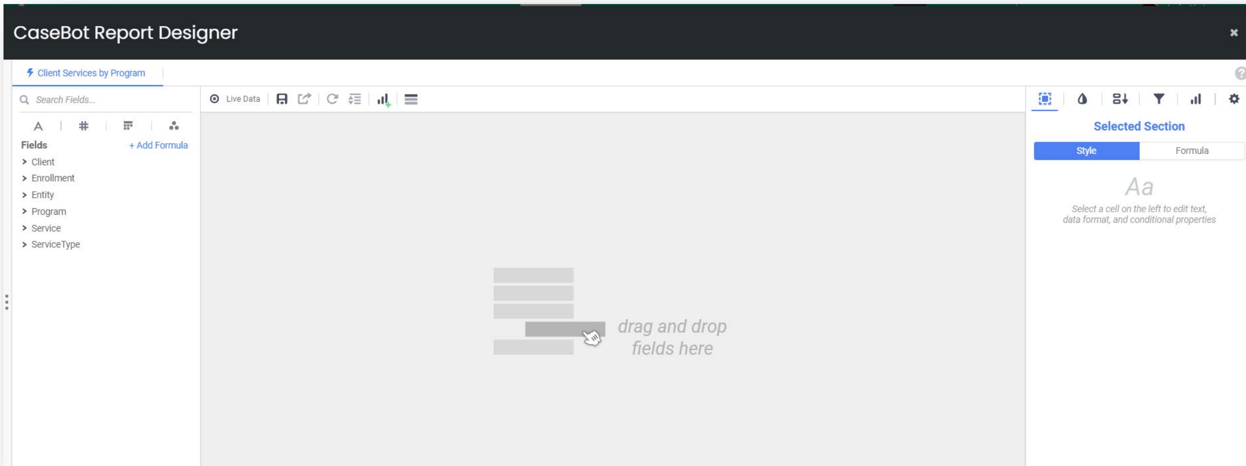
It should look like this: “Service.ProvidedToEntityID” is equal to “Client.EntityID”.



Joining tables can be an involved process. As you gain more experience with the tables in the CaseWorthy database, it will become easier. And remember, if you have questions, we encourage you to send an inquiry to support@caseworthy.com.

Now that the tables are added and all have joins, select **Continue** in the navigation menu to move to the next step.

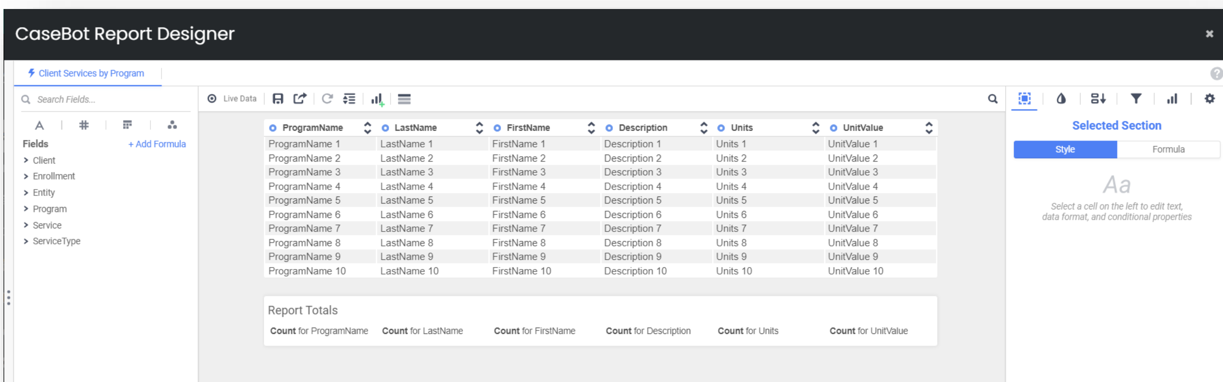
A blank canvas opens. This is where you design how your CaseBot Report will display for Users.



The tables included in the setup of the report are displayed on the left.

Click each table to reveal all the fields available within each table.

You can easily add fields to the report by dragging and dropping a field from the list on the left to the blank canvas on the right.



Let’s start with adding the **Program Name**.

Click on the Program table on the left to expand the view. All the fields are displayed. Scroll down to locate the **Program Name** field, then drag and drop the field onto the report canvas.

Click on the Program table again to collapse the list.

Next, open the Client table. Scroll down. Drag and drop the **Last Name** field onto the canvas, directly to the right of the **Program Name** field.

And still on the Client table, drag and drop the **First Name** field directly to the right of the **Last Name** field.

Click on the Client table again to collapse the list.

Let's now open our ServiceType table and add the **Description** field to the report.

Click on the ServiceType table again to collapse the list of fields.

Finally, click on the Service table.

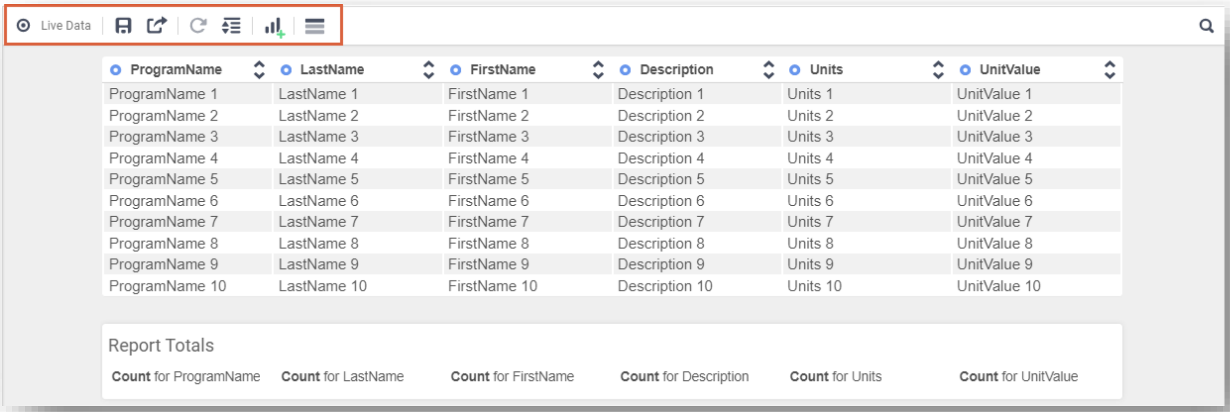
Drag and drop the **Units** field and the **Unit Value** field.

Click on the Service table again to collapse the list.

The report now has six columns of data, and we are done adding the fields to the report!

Before continuing, let's stop and save using the disc icon on the report toolbar.

Let's look at the other options available in the report toolbar.



Live Data allows you to view the report with real data from the database. Select the option again to toggle back to design view only.

You also have the option to export the report in multiple formats, including Excel, PDF, and more. The export will include live data regardless of what view is displayed on the page.

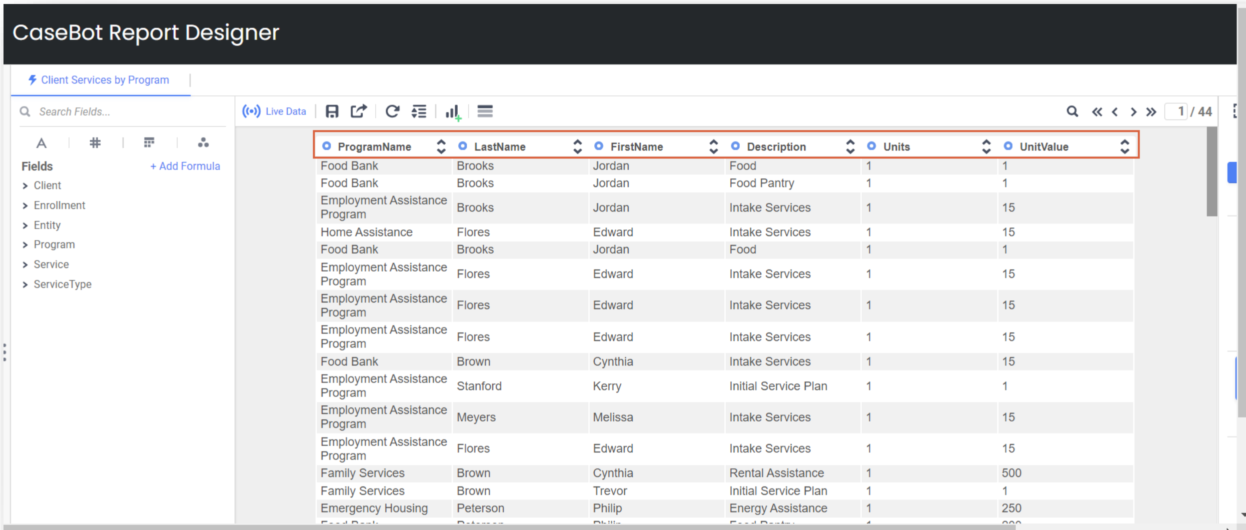
If you are viewing the report with live data, you also have a refresh option to update the data at any time.

Report Section Display Options allows you to show or hide different sections or rows of the report.

Show Visualization allows you to add charts or graphs to the report. We will come back to this option in a bit.

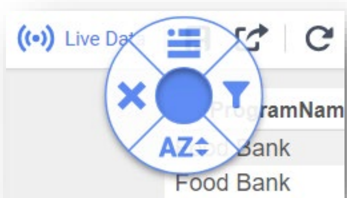
And, finally, **Edit Data Model** allows you to return to the Query apBuilder to update the tables and joins for the report, if needed.

Let's now look at the options available in each of the column headers.



The up and down arrows allow you to easily sort the data by column.

When you select the blue circle icon for each column, the radial menu appears.

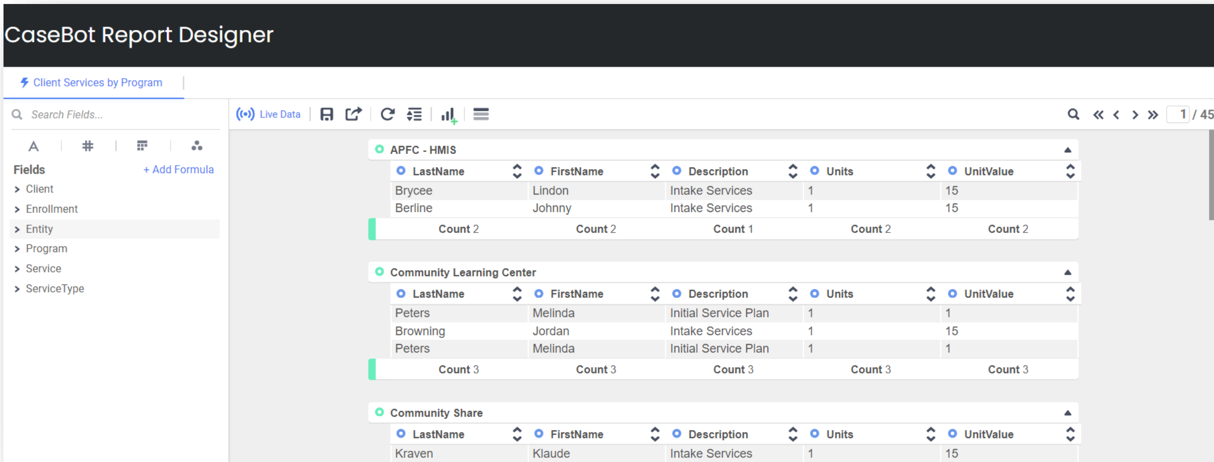


Use the X to remove the column from the report.

Use AZ to sort the data.

Use the filter icon to set a filter for the data in the column.

And the final option is to group. Let’s use this to group our report into sections **by Program Name**.



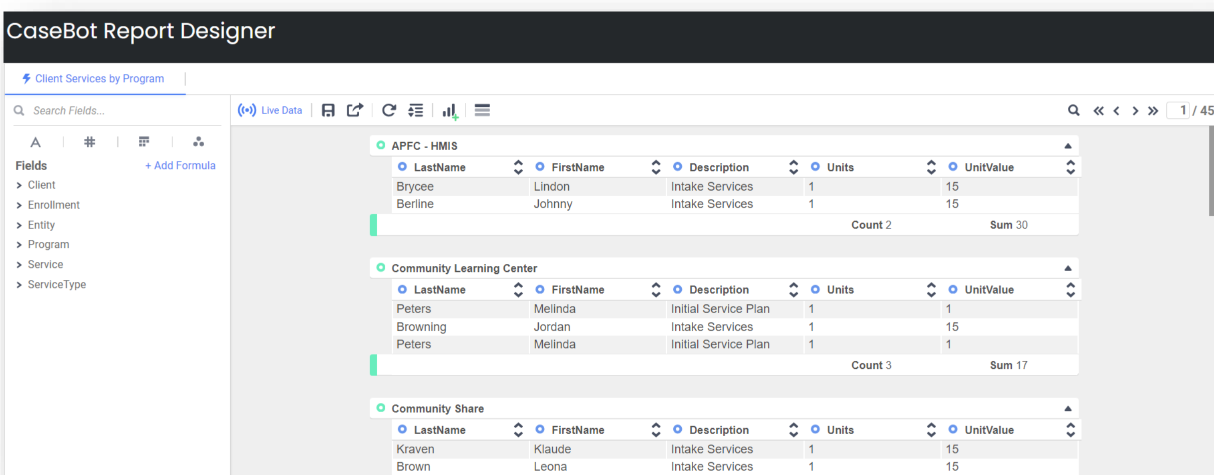
Let's now look at the footers for each group.

A count of records for each column is automatically added for every column in every group. We can easily change these by selecting each **Count** field.

We will start with the **Last Name Count** field. A dropdown list displays with options to set the field to a minimum, maximum, count, distinct count, or none. Let's change this column to 'None'. The footer then disappears for this column in every group.

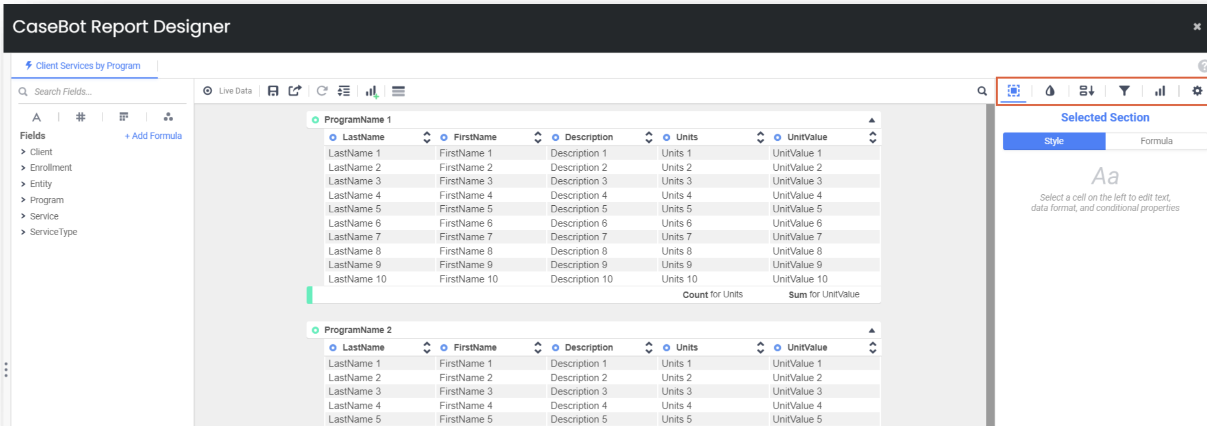
Let's remove the **Count** for **First Name** and **Description** as well.

We will leave the **Units** column as is, but we will change the **Unit Value** column from 'Count' to 'Sum'.



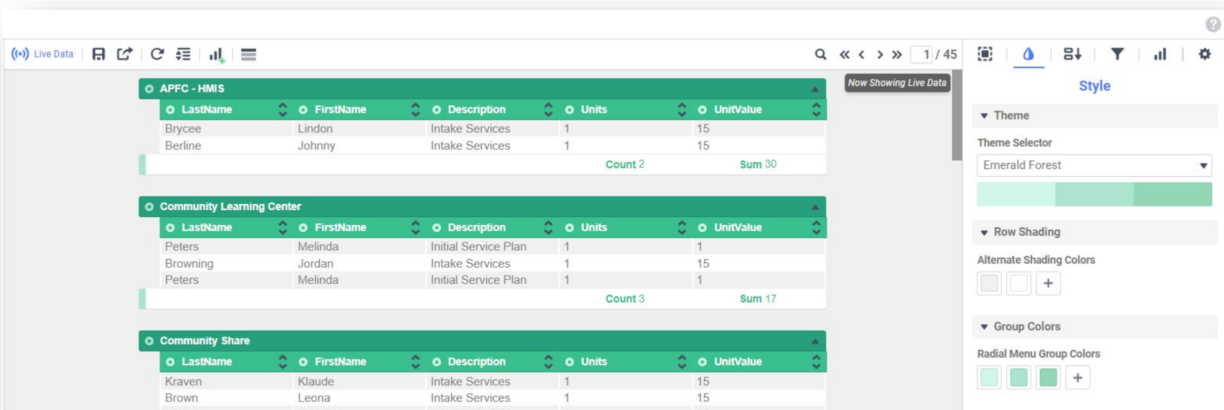
Remember to stop and save your work often.

Let's move on to the formatting toolbar on the right side of the page.

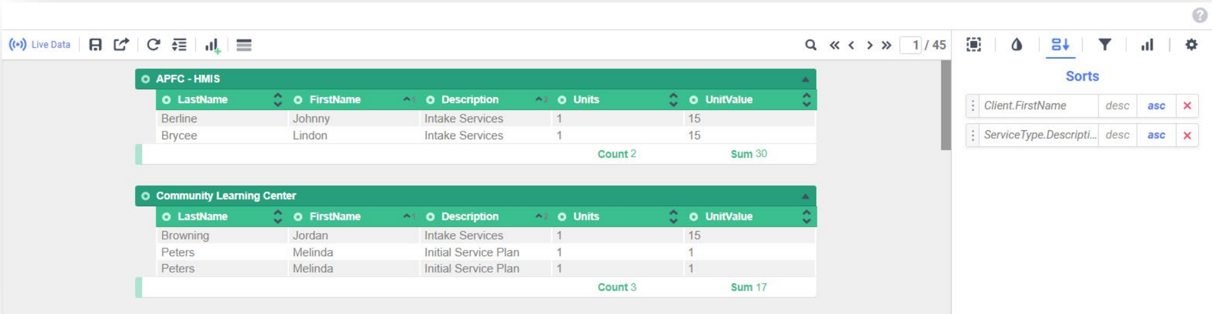


The first icon allows you to expand and collapse the toolbar, which increases your working report canvas if you are not currently using formatting options.

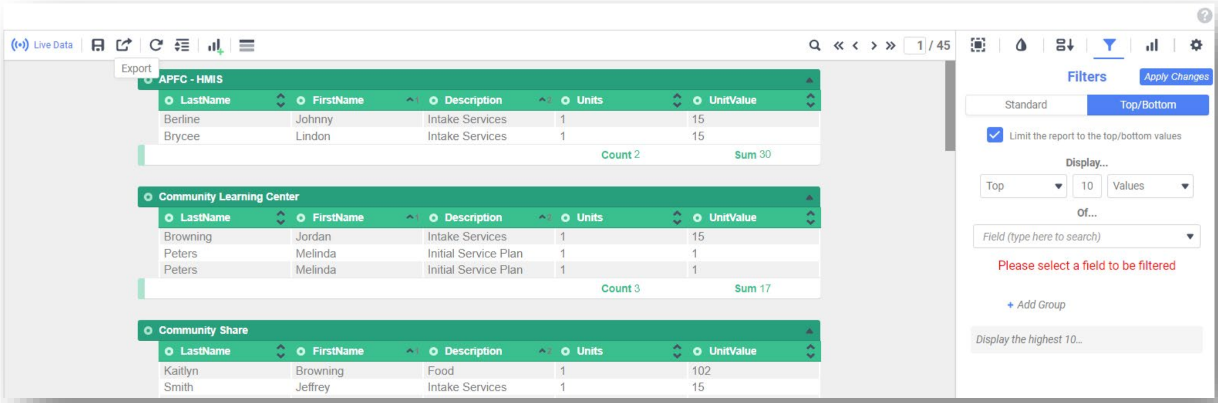
Report Formatting and Style allows you to change the theme colors, row shading, and group colors. The report is set to a basic 'Custom' theme by default. This is what it looks like with an 'Emerald Forest' theme.



Sorts displays any sorting rules that you have added to your report. For example, if you click the up and down sort arrow on the **First Name** column, that sort rule will automatically appear in the Sorts menu. And if you click the up and down sort arrow for the **Description** column, that rule will also appear in the Sorts menu. You can then further customize those rules by choosing to sort in ascending or descending order, as well as remove the sort from the report altogether.



Filters allows you to further customize existing filters or add new ones.

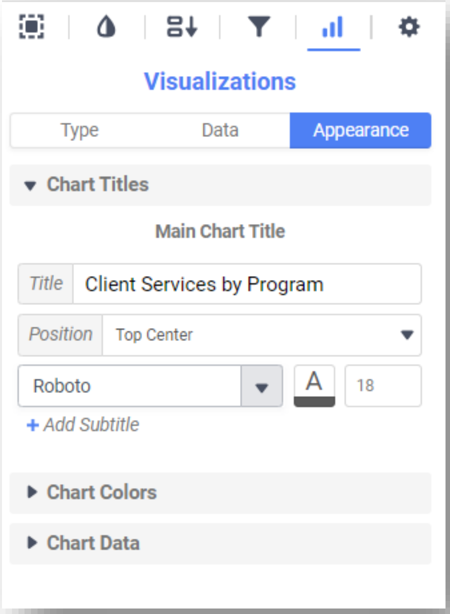


Visualizations is used to easily add charts or graphs to the report.

On the Type tab, let's choose to include a pie chart. The pie chart displays automatically at the top of the report. If the chart does not appear, select **Show Visualizations** in the report toolbar at the top.

The Data tab allows you to set the labels and values for the chart. In this example, I will set the pie chart to display the Service Type Descriptions as the labels and the Service Unit Values as the chart values.

The Appearance tab includes options for changing the chart titles, the chart colors or themes, as well as additional customization options for the chart data and legend.



The final option in the toolbar is **Settings**, which allows you to change the name of the report, where the report is saved, and additional export options.

For additional information about creating ExpressView CaseBot reports, use the Get Help icon in the top right-hand corner of the page.

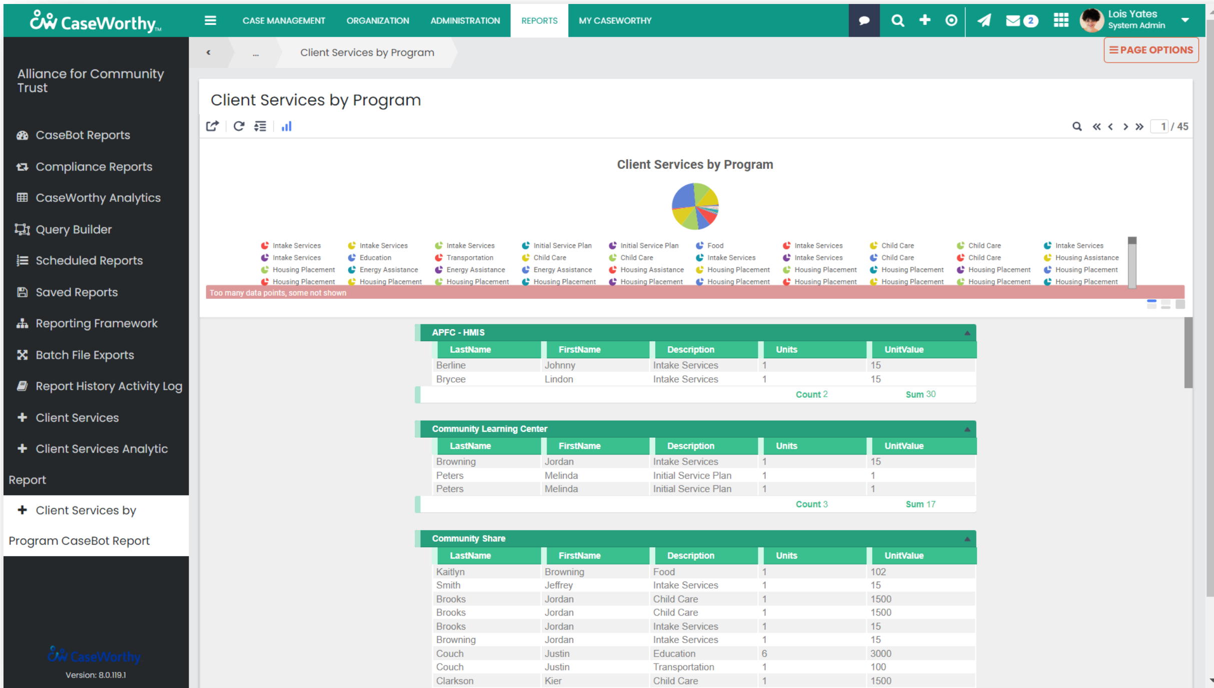
Let's save the report one last time.

And that's it! The report is ready.

To access your CaseBot Report, you will need to determine and set up where the report will live. For this example, I have added a new role called System Admin and I have given myself access to that role.

I created a custom dashboard and called it Client Services by Program. I then used the Dashboard apBuilder to add a CaseBot Widget that includes a link to the report. If I were to make changes to this CaseBot report, they would automatically update on this dashboard.

On the Reports tab, I added a Client Services by Program CaseBot Report link to this report.



The pie chart displays at the top with the legend right below.

The chart labels are the Service Type Description, and the data is populated with Service Unit Values.

The report data below is grouped by Program and includes any Client who is enrolled in a service.

Each record includes the Client' first and last name, the service description, service units, and the service units value.

Each Program group includes the total count of service units and the total sum of the service unit value.

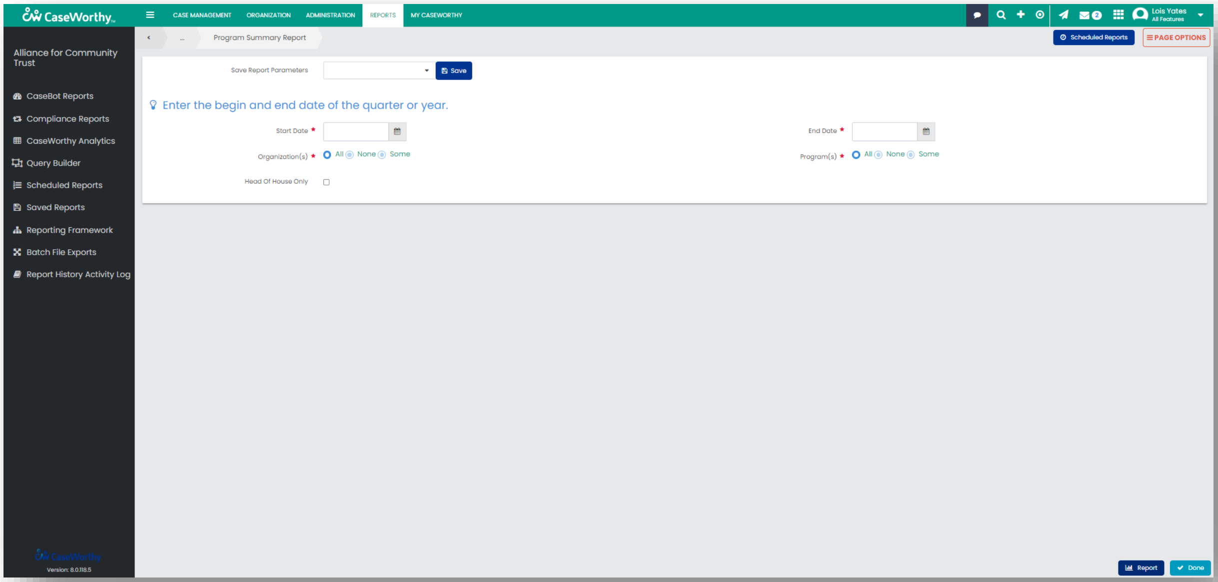
SSRS Reports

SSRS Reports are another type of reporting option available within CaseWorthy.

SSRS reports offer highly customizable options and are designed for users who need precise control over the layout and formatting of their reports. SSRS Reports are perfect for generating official documents, compliance reports, or any other reports where detail and presentation are crucial.

SSRS reports can be complex to build because they require such a high level of technical knowledge, including SQL, but ultimately, they are the most customizable solution, are more flexible than CaseBot reports, and are the best solution when working with multiple types of data.

SSRS Reports have three important features that are not available in other reporting options.

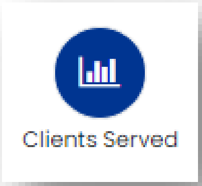


First, when you initially open an SSRS Report, you will be prompted to set multiple parameters before generating the report. This allows you to easily choose what data should be included in the report. For example, you can select the start and end dates, the Organizations, the Programs, and more!

Second, you can save each view of the report so that it can be quickly selected and generated in the future without having to set the parameters again.

And third, you can schedule the report to be automatically generated and distributed electronically on set dates and times in the future.

There are several baseline SSRS Reports available on the Reports tab. Any report that includes a bar chart icon is an SSRS Report.



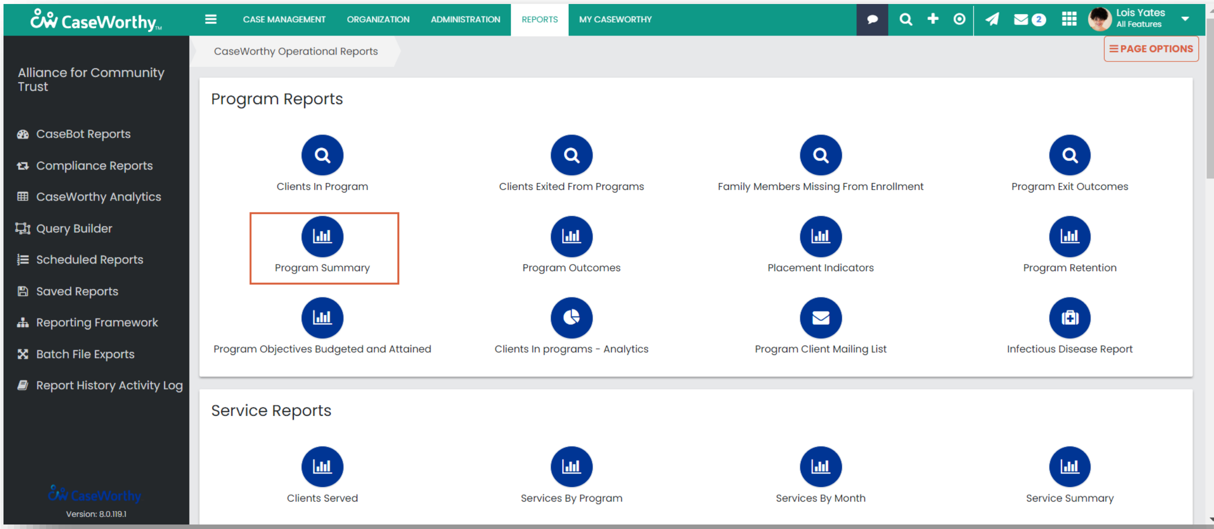
You can create your own SSRS report, but it requires SQL knowledge and direct collaboration with a CaseWorthy Support Analyst.

Before starting from scratch, we recommend you explore the reports already available. There are SSRS reports that allow you to view a summary of program details, the Clients served and the services they receive, services by month, and much more!

How to Run and Schedule an SSRS Report

In this section, we will review how to run and schedule an SSRS Report.

In this example, we will use the baseline **Program Summary** SSRS report located on the Reports tab.



From the launch form, the parameters can be set and saved, the report can be run, and it can be scheduled.

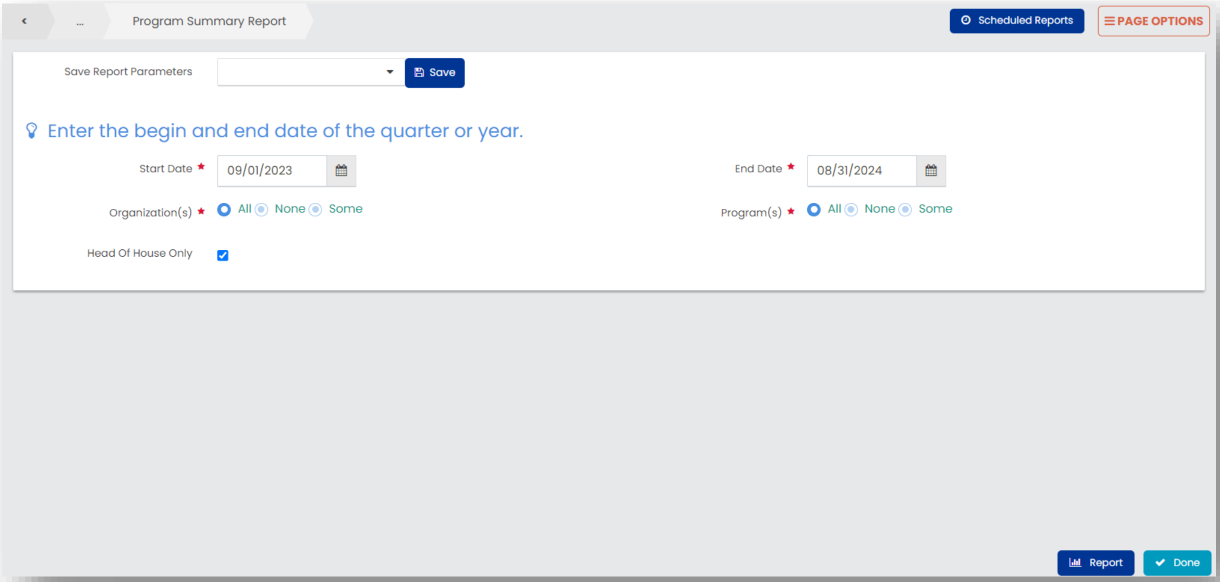
Run the Report

Let's first review how to run the report.

Each SSRS report has specific parameters that should be configured before launching the report.

This SSRS report displays how many Clients are enrolled in each program. The report is a graphical representation of the Clients in Progress search form report and has additional filters. The report can be filtered by the enrollment start and end dates, program name, and to show only the head of household records.

The required fields are denoted with a red star.



Select the **Start** and **End Date**. These are the dates the Client was enrolled and are typically the start and end dates of a quarter or an entire year.

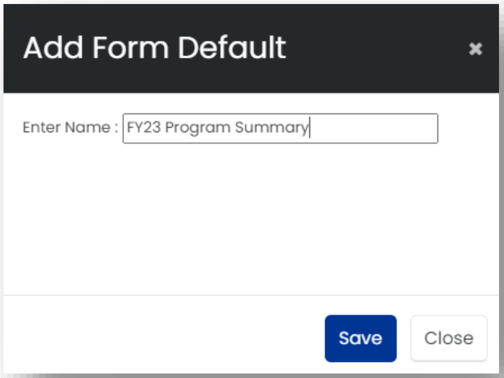
Then select the **Organizations** that should be included on the report. Options allow you to include 'All' Organizations, 'None', or 'Some', which allows you to individually select one or more Organizations. Notice this field is set to 'All' by default.

Next, select which **Programs** should be included. Options also include 'All', 'None', or 'Some'.

The **Head of House Only** option is not required. Select the checkbox to only include the Head of Household on the report, which excludes all other family member data.

You can now launch the report, or you can save these parameters so that you can easily generate this same report in the future without selecting the options again.

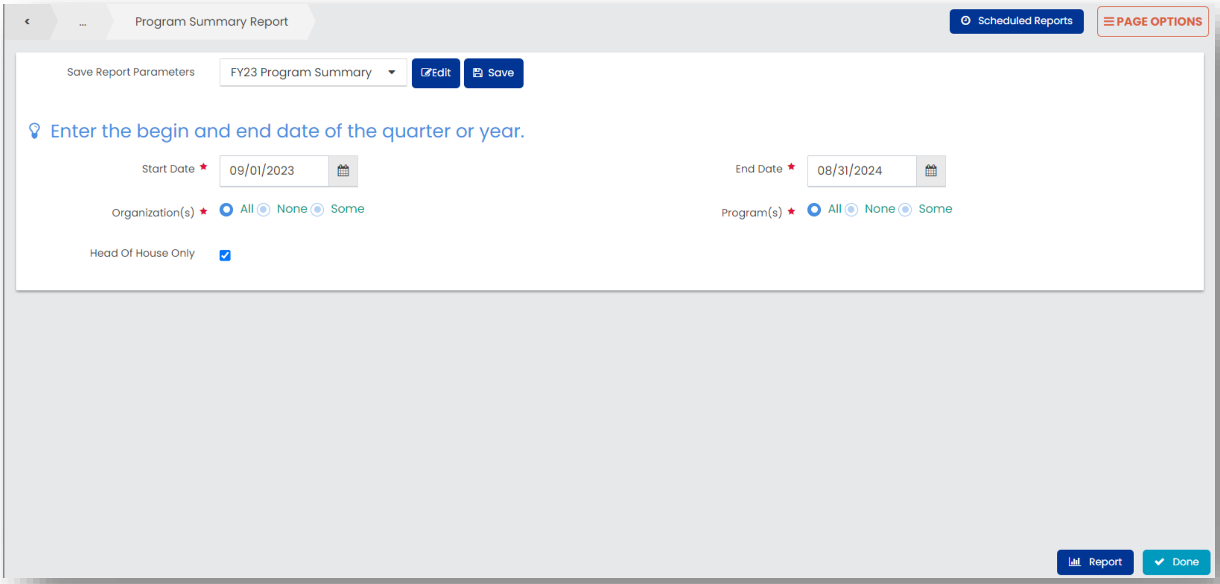
Next to the **Save Report Parameters** dropdown, select SAVE to save the report. You are prompted to enter a name for the report.



Select SAVE. A confirmation message displays indicating the report was saved successfully.

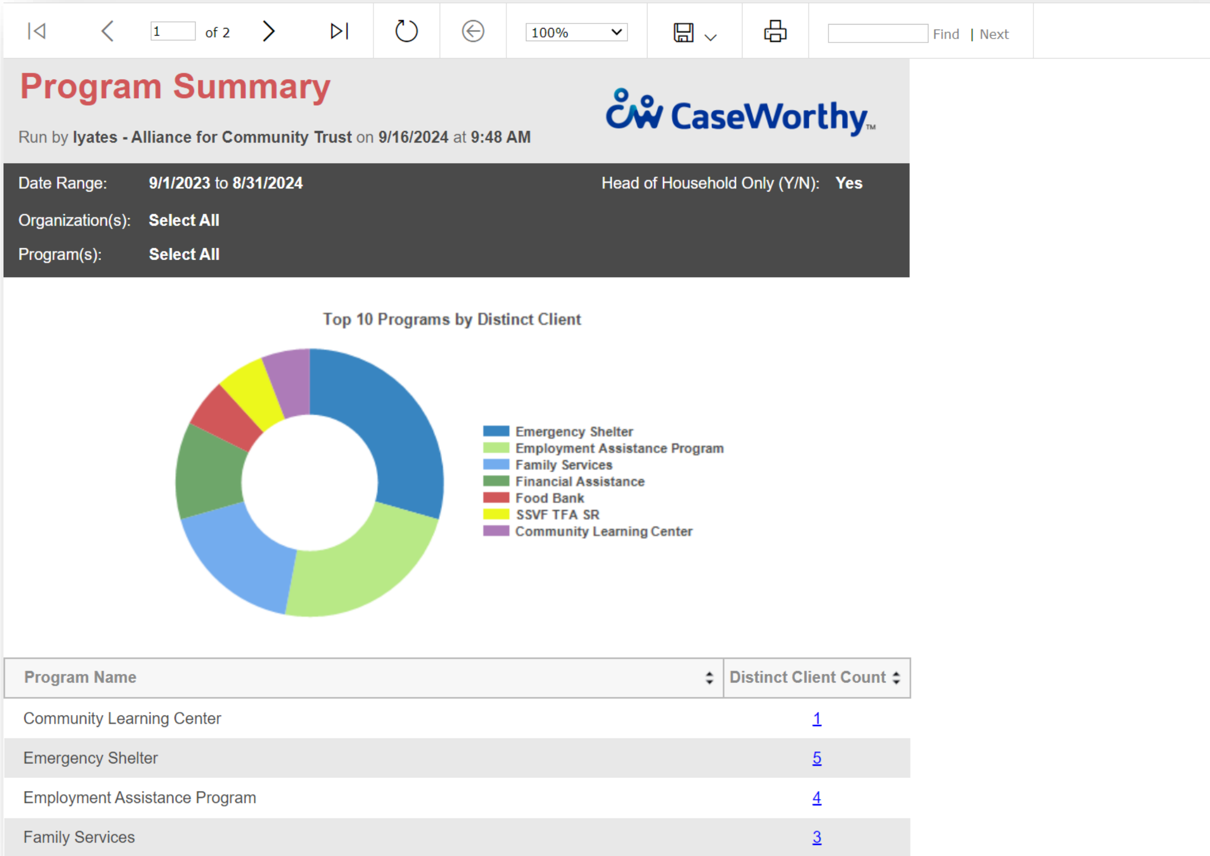
Select CLOSE.

The report name will now display in the **Save Report Parameters** dropdown so you can easily access these same parameters later.



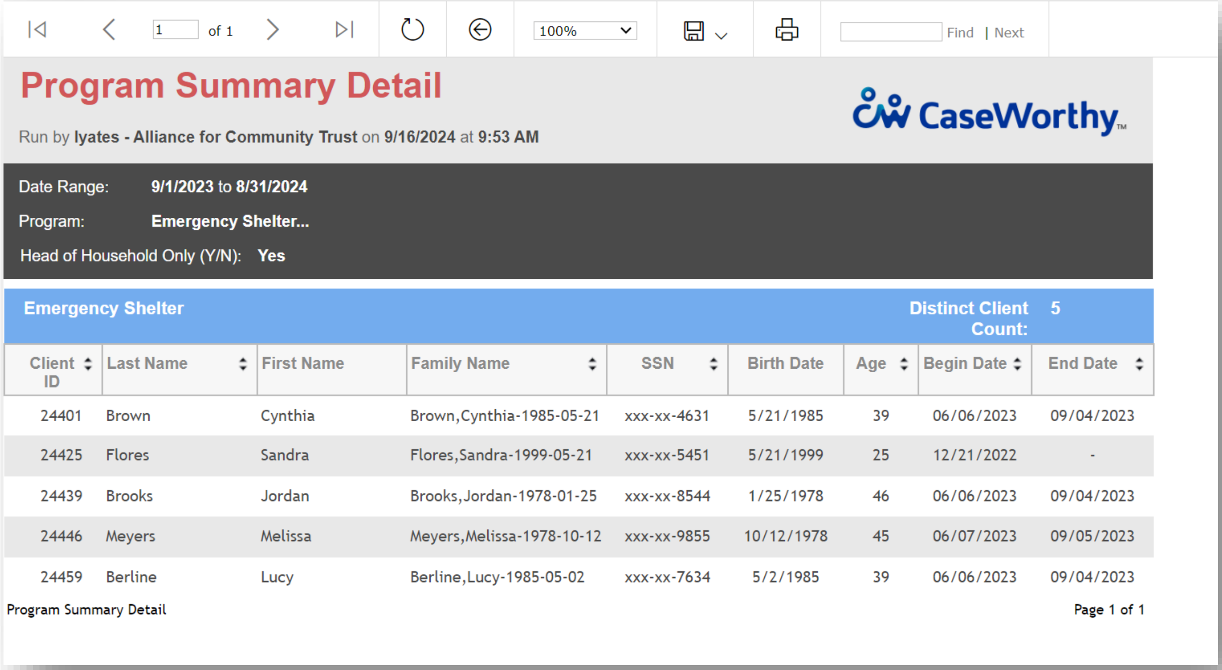
Let's now launch the report.

The report opens in a separate window.



The pie chart on the report displays the percentage of Clients enrolled in the top ten programs in proportion to one another.

Each program includes a **Client Count**, which is also a hyperlink that can be used to drill down into the details of the enrolled Client records.



1 of 1 Find | Next

100%

Program Summary Detail

Run by lyates - Alliance for Community Trust on 9/16/2024 at 9:53 AM

Date Range: 9/1/2023 to 8/31/2024

Program: Emergency Shelter...

Head of Household Only (Y/N): Yes

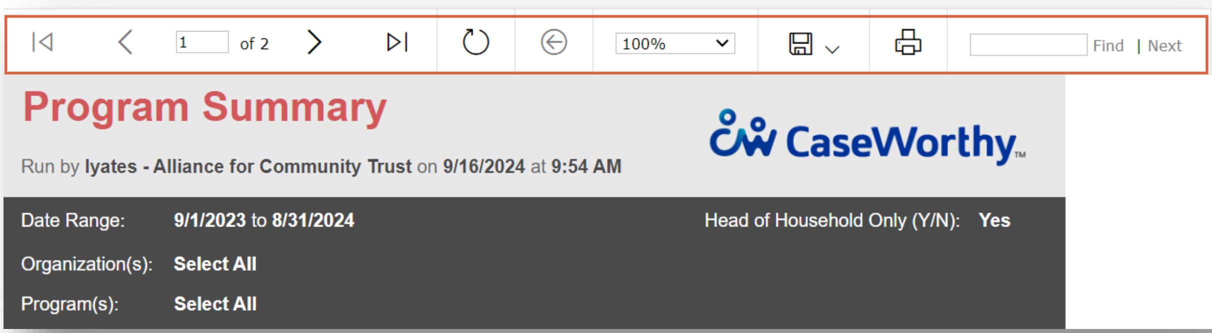
Emergency Shelter — Distinct Client Count: 5

Client ID	Last Name	First Name	Family Name	SSN	Birth Date	Age	Begin Date	End Date
24401	Brown	Cynthia	Brown,Cynthia-1985-05-21	xxx-xx-4631	5/21/1985	39	06/06/2023	09/04/2023
24425	Flores	Sandra	Flores,Sandra-1999-05-21	xxx-xx-5451	5/21/1999	25	12/21/2022	-
24439	Brooks	Jordan	Brooks,Jordan-1978-01-25	xxx-xx-8544	1/25/1978	46	06/06/2023	09/04/2023
24446	Meyers	Melissa	Meyers,Melissa-1978-10-12	xxx-xx-9855	10/12/1978	45	06/07/2023	09/05/2023
24459	Berline	Lucy	Berline,Lucy-1985-05-02	xxx-xx-7634	5/2/1985	39	06/06/2023	09/04/2023

Program Summary Detail

Page 1 of 1

All SSRS reports include the same toolbar at the top.



1 of 2 Find | Next

100%

Program Summary

Run by lyates - Alliance for Community Trust on 9/16/2024 at 9:54 AM

Date Range: 9/1/2023 to 8/31/2024

Head of Household Only (Y/N): Yes

Organization(s): Select All

Program(s): Select All

Use the *previous page* and *next page* arrows to navigate forward and backward one page.

Use the *first page* and *last page* arrows to quickly move to the first or last page of the report.

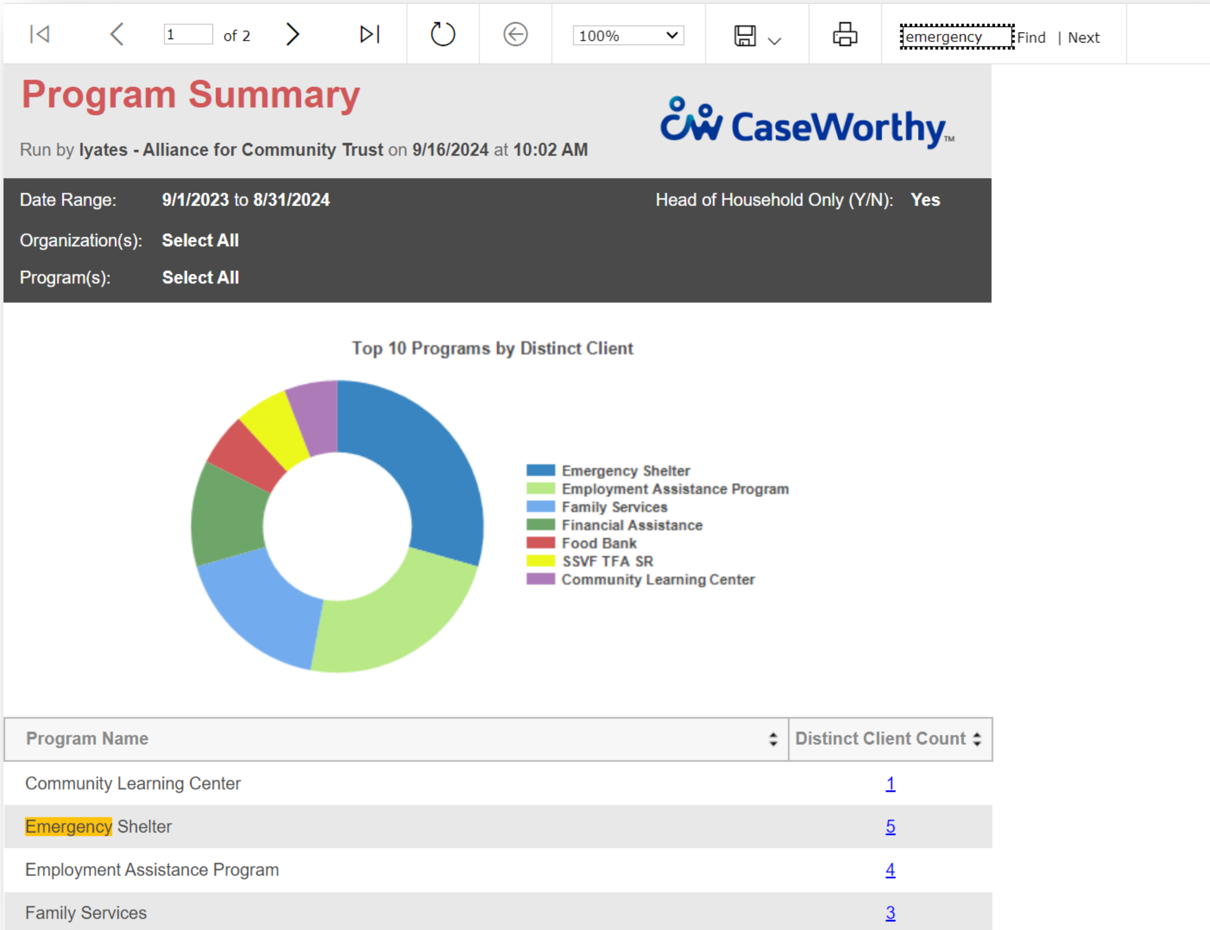
If new data is entered in the database while the report is still open, *Refresh* allows you to update the report to include the newly recorded data.

And if you use hyperlinks to drill down to a sub-report, you can use *Go back to the parent report* to quickly navigate back to the parent report.

The report can also be saved in a variety of formats, including Word, Excel, PDF, and more!

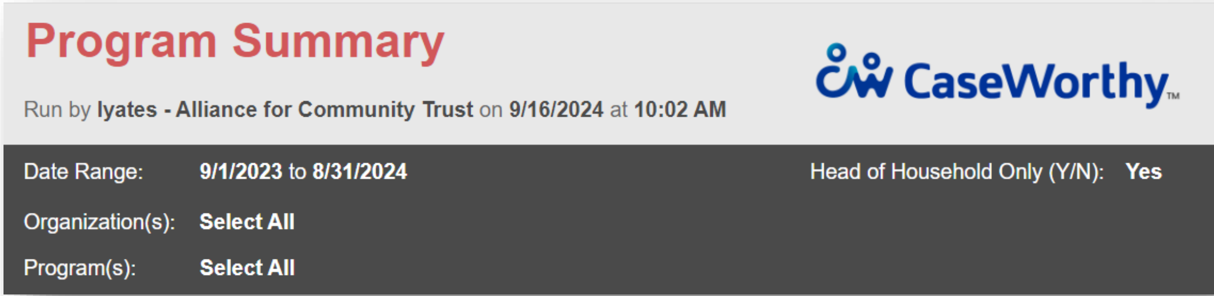
Select the *printer* icon to print the report.

The last option in the toolbar allows you to easily search the parent report and sub-reports for existing text. When the text is found, it is highlighted in yellow.



The title of the report appears at the top along with details about who ran the report and when.

And right underneath, the parameters that were selected on the launch form are displayed.



The logo that is displayed on the report can be set in two places.

If a logo has been uploaded to the Organization's Setup form, it will automatically be pulled from there. If no logo exists for the Organization, then the logo is pulled directly from the Role apBuilder.

Click the X in the top right corner to close the report window.

Schedule the Report

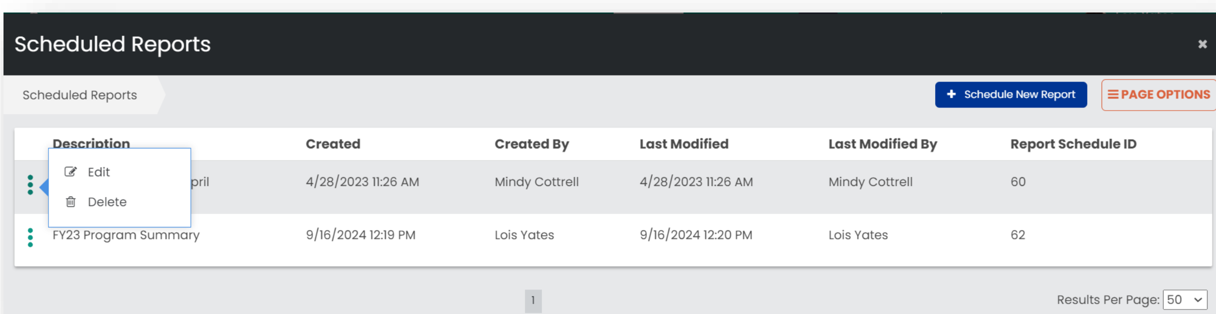
Let's now review how to schedule the report.

Scheduled Reports are automatically generated and distributed electronically on set dates and times in the future.

On the launch form, select SCHEDULED REPORTS.

The current distribution schedule displays, including the date and time it was created and by which User.

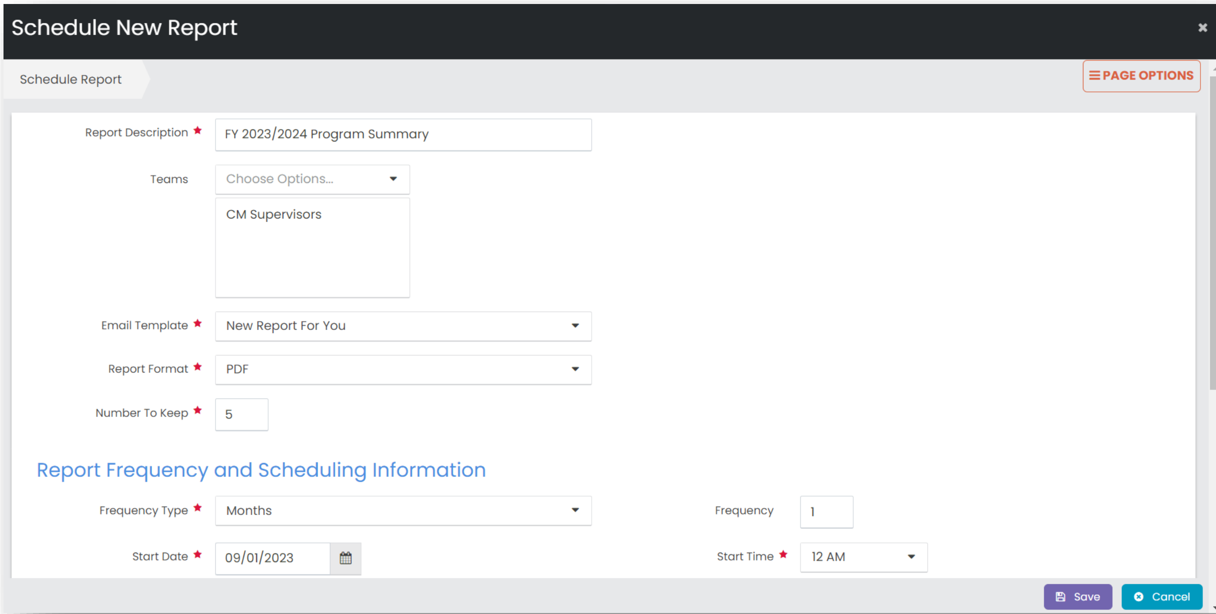
The vertical ellipsis allows you to edit or delete each scheduled report.



Or you can use SCHEDULE NEW REPORT to add a new one.

When adding to the schedule, be sure to enter all required information before saving.

For the description, enter a title for the scheduling instance so it can be easily identified on the *Scheduled Reports* form.



Select each team that should receive the emailed report. The list of teams are those available within the User's Organization and are set up on the Administration tab.

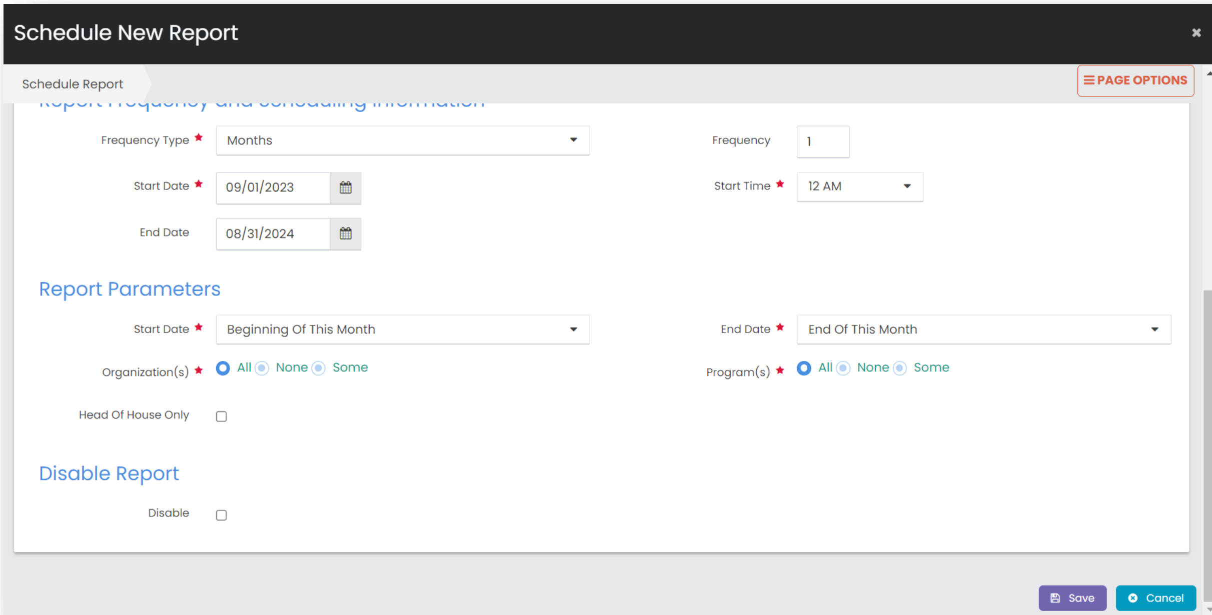
Select the email template to use for the message body. The 'New Report For You' template is a practical option that notifies the email recipient of the scheduled report, including the report name, who scheduled it, and a link to the application to open the report. The template can be modified in Codes and Categories.

Next, select the **Report Format**. The report can be generated and sent as an Excel or PDF file.

Enter the number of reports that should be kept on file before deleting old versions. The number defaults to five. If a zero is entered, versions are never deleted.

Select how often the report should be sent. Monthly is the default setting.

Then, select how often the report should be generated during the frequency type selected. For example, if Months was selected for the **Frequency Type**, and one is entered here, the report will be delivered once per month.



Select the start and end dates for when the report delivery should be effective. The **Start Date** is required, but the **End Date** is not.

Then select the time the report should be delivered.

The parameters section is specific to the report you are scheduling. This report includes options for setting the **Start Date**, **End Date**, **Organization**, **Program**, and if only the **Head of Household** should be included.

Select **Disable** if you would like to end the scheduled report from generating. It is best practice to disable the instance rather than delete it.

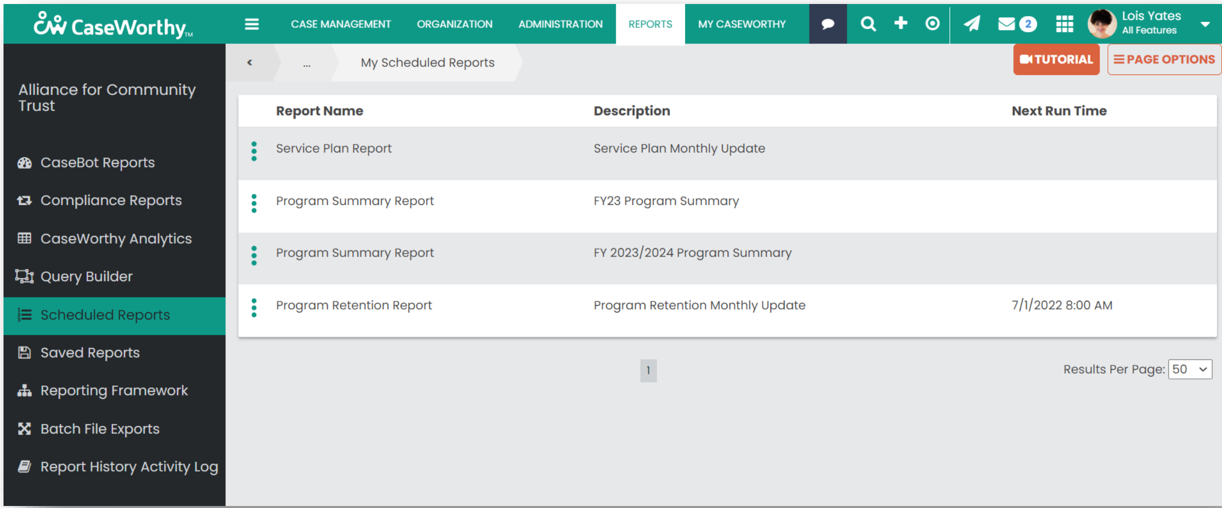
Select SAVE when done.

When a report is generated and sent, the members of the selected team receive an email indicating the report is ready to download.

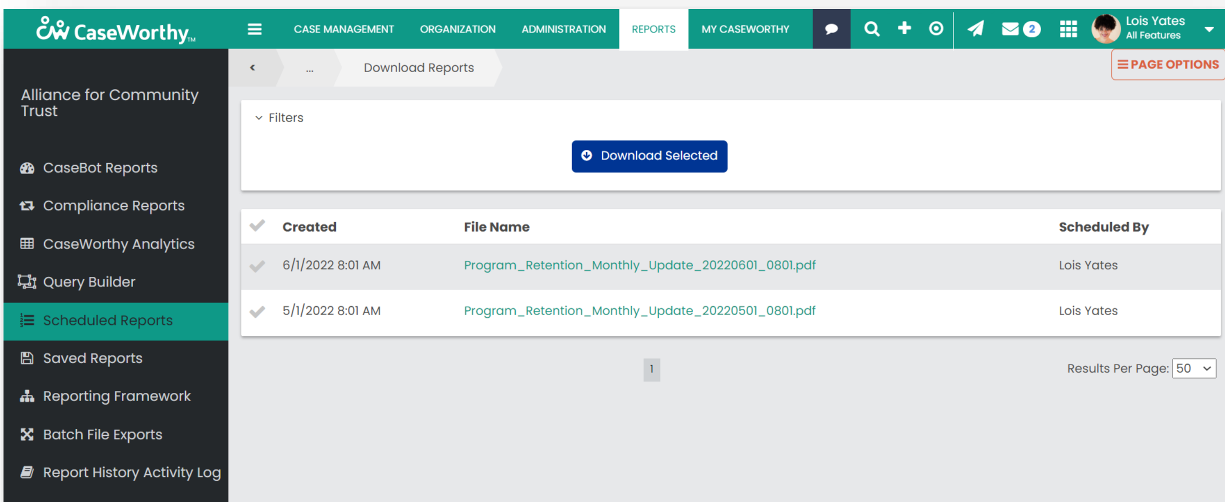
Select the link and log into the application.

Navigate to the Reports tab and select Scheduled Reports in the navigation menu on the left.

My Scheduled Reports displays all the reports that are scheduled to be delivered to you.



Download Scheduled Reports displays any reports available for download. Select one or more reports and click DOWNLOAD SELECTED.

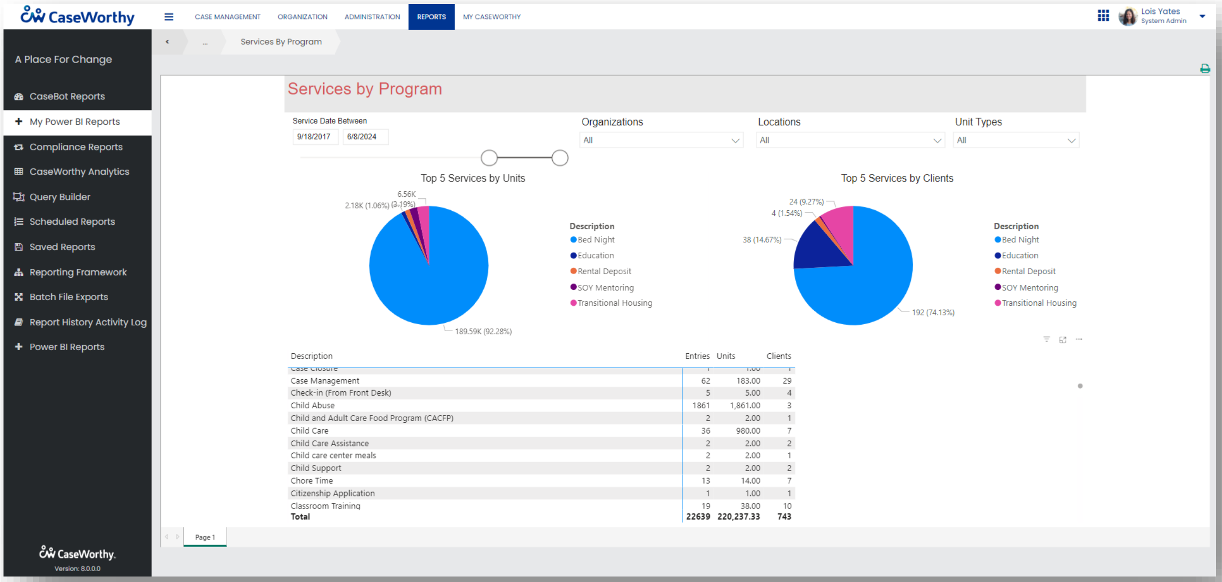


Once the report is downloaded, you can open and view the file.

Power BI Reports

The next report option is Power BI Reporting, which brings your data to life with interactive and visually engaging dashboards. Power BI allows you to create dynamic reports that can be shared across your Organization, providing real-time insights and empowering teams to make informed decisions. Whether you need to track key performance indicators or visualize complex data sets, Power BI Reports are a powerful tool.

CaseWorthy's Power BI integration offers a dedicated workspace, works with your existing reports and visualizations, and is a seamless transition from Power BI Desktop to your secure CaseWorthy environment.



CaseWorthy's Power BI Reports are an enhanced option to the CaseWorthy case management software. For information on adding this feature or for further details and training, please contact your CaseWorthy Account Manager.

Query apBuilder

Another powerful tool for creating customized reports within the platform is the Query apBuilder.

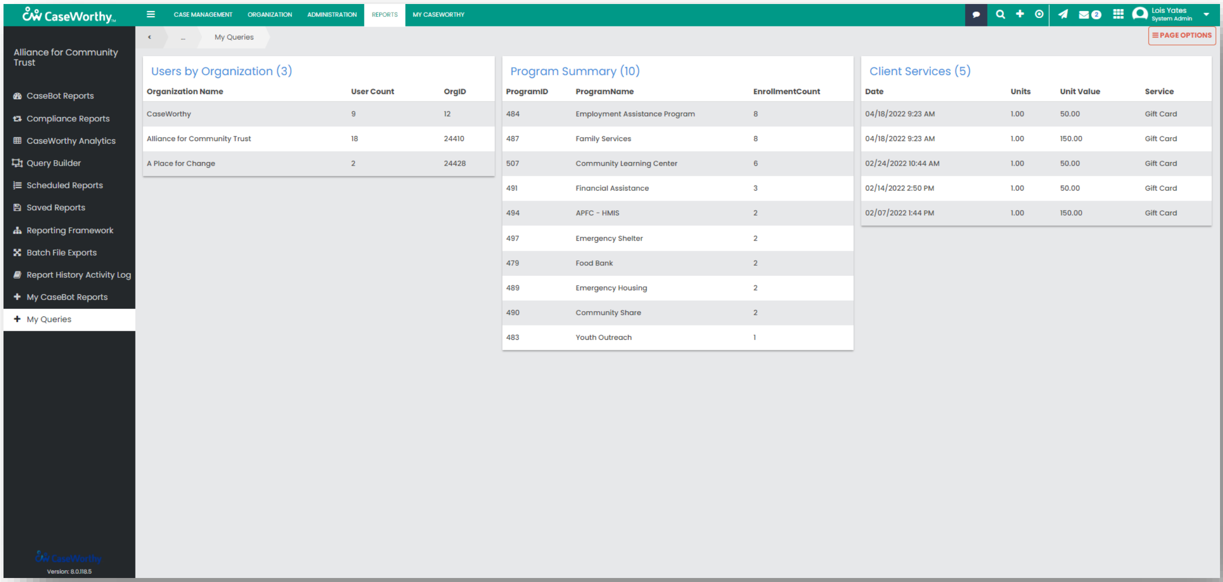
This tool allows you to create your own queries on dashboards, within lists, and even on Case Note and Email templates. It includes multiple options that allow you to fully customize your queries, including table joins, setting parameters, filters, automatic calculations, and much more!

Query apBuilder is opened from multiple places within the application, like on a form or on a dashboard. You can also easily access the tool from any page by opening the App Console in the top right corner.

Once you have created a query, you will then need to decide where you want the query to display in the application. You would typically display the query on a custom form or dashboard. This is in the same process we reviewed for displaying a CaseBot Report.

In my example, I created a custom dashboard and called it My Queries. I then used the Role apBuilder to add a link to the dashboard in my 'System Admin' role.

My custom dashboard displays three queries, which I added by using the Query widget in the Dashboard apBuilder. Each table is in fact a linked query. If I were to make changes to these queries in the Query apBuilder, they would automatically update on this dashboard.



Using the Query apBuilder does require a solid understanding of CaseWorthy table structures and configuring parameters. Additional information about the Query apBuilder is available in our LMS, CaseWorthy University.