



Reporting and Analytics Resource Guide

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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.

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!

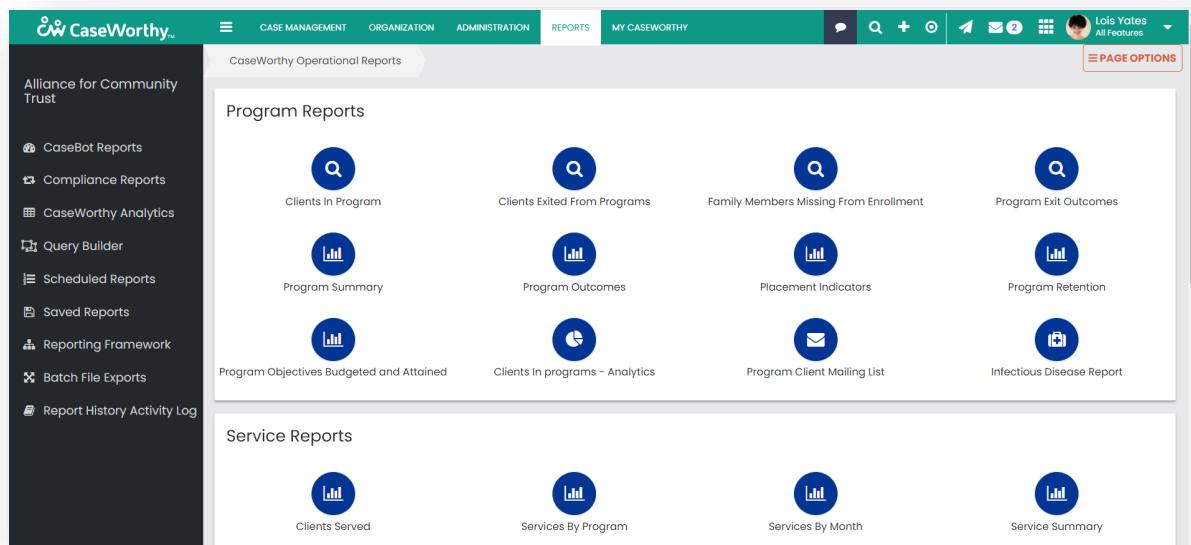
In this guide, we will review baseline reporting options already available to you in the application, most of which are found on the Reports Tab. We will explore all the report types in further detail later in this guide.

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.



The screenshot shows the CaseWorthy Operational Reports dashboard. On the left, there is a sidebar with the organization name "Alliance for Community Trust" and a list of reporting tools: CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, and Report History Activity Log. The main content area is titled "Program Reports" and "Service Reports". Under Program Reports, there are eight icons arranged in two rows of four: "Clients In Program", "Clients Exited From Programs", "Family Members Missing From Enrollment", "Program Exit Outcomes" (magnifying glass icon); "Program Summary", "Program Outcomes", "Placement Indicators", "Program Retention" (bar chart icon); "Program Objectives Budgeted and Attained", "Clients In programs - Analytics", "Program Client Mailing List", and "Infectious Disease Report" (envelope icon). Under Service Reports, there are four icons: "Clients Served", "Services By Program", "Services By Month", and "Service Summary" (bar chart icon).

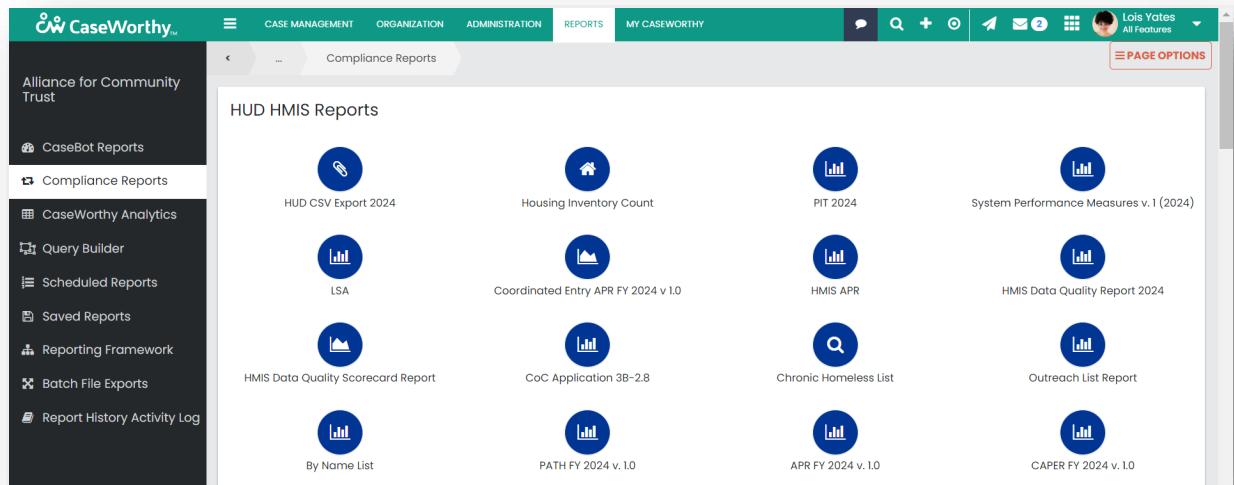
- A magnifying glass icon indicates it is a Search Report.
- A pie chart icon means it is an Analytics Report.

- 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.

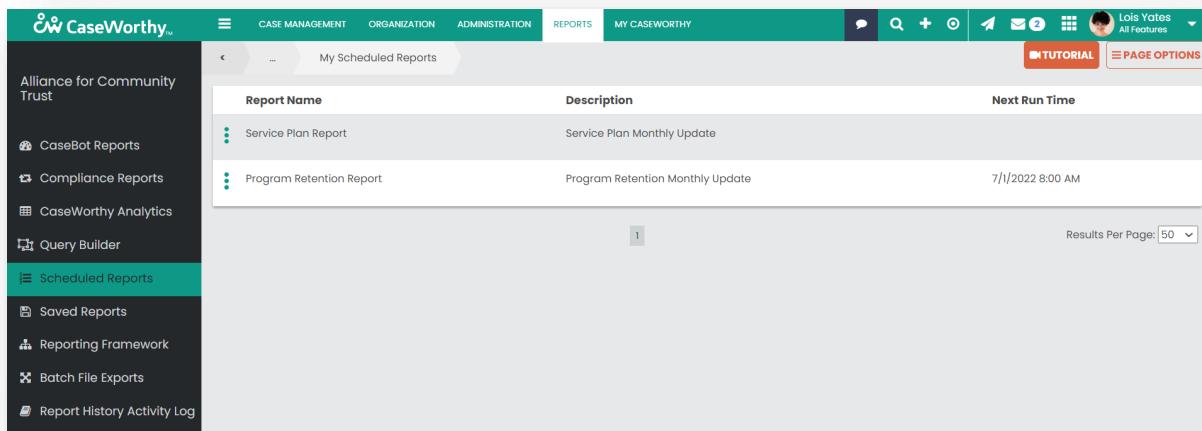


Report Type	Description
HUD CSV Export 2024	
Housing Inventory Count	
PIT 2024	
System Performance Measures v. 1 (2024)	
LSA	
Coordinated Entry APR FY 2024 v. I.O.	
HMIS APR	
HMIS Data Quality Report 2024	
HMIS Data Quality Scorecard Report	
CoC Application 3B-2.8	
Chronic Homeless List	
Outreach List Report	
By Name List	
PATH FY 2024 v. I.O.	
APR FY 2024 v. I.O.	
CAPER FY 2024 v. I.O.	

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

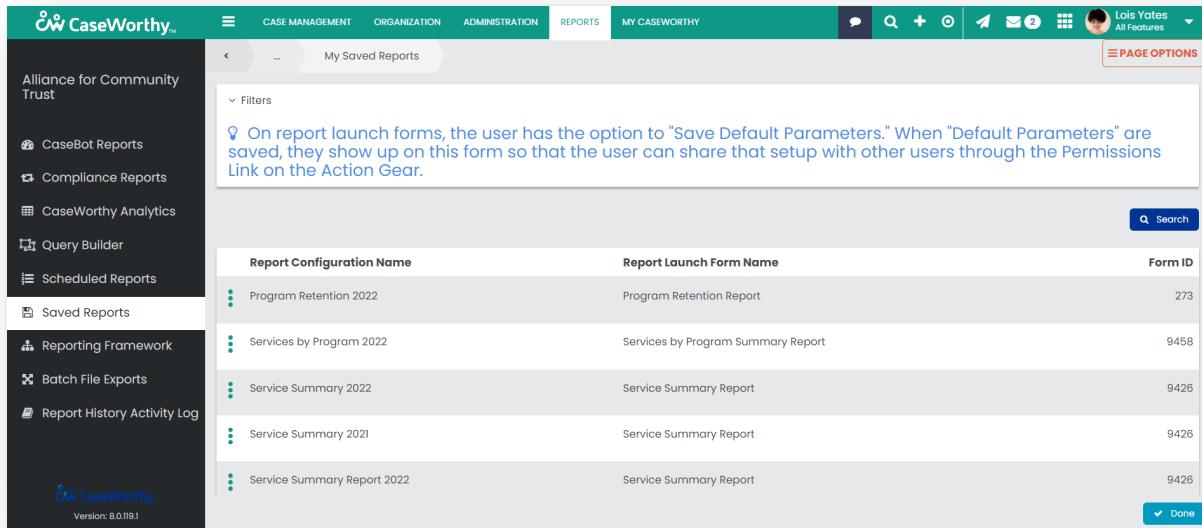
The Query Builder displays a list of all existing queries in your database. You can select ADD NEW to open the Query apBuilder, which allows you to easily add a new query. The Query apBuilder can be opened from multiple locations within CaseWorthy.

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.

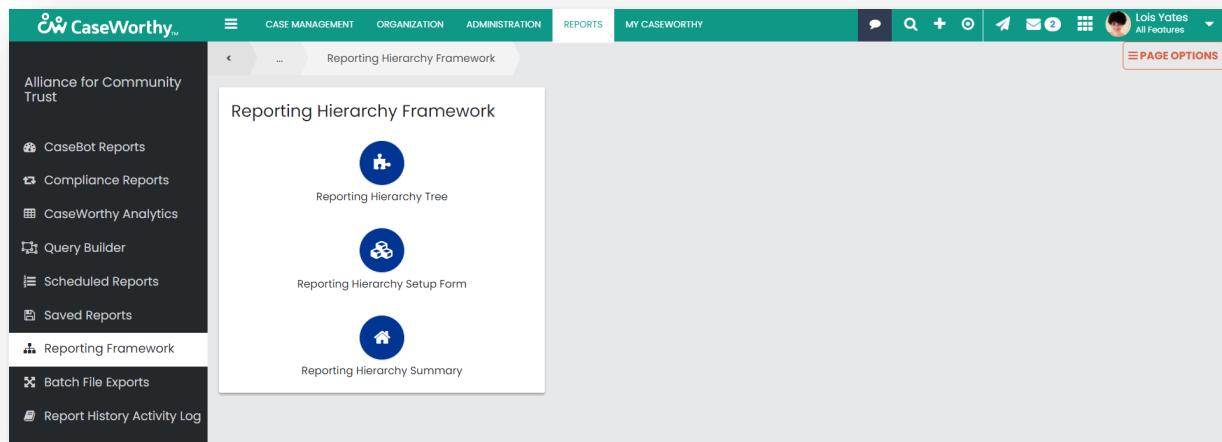


Some report types allow you to save set parameters so that you can easily access and run the same view of the report in the future.

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,

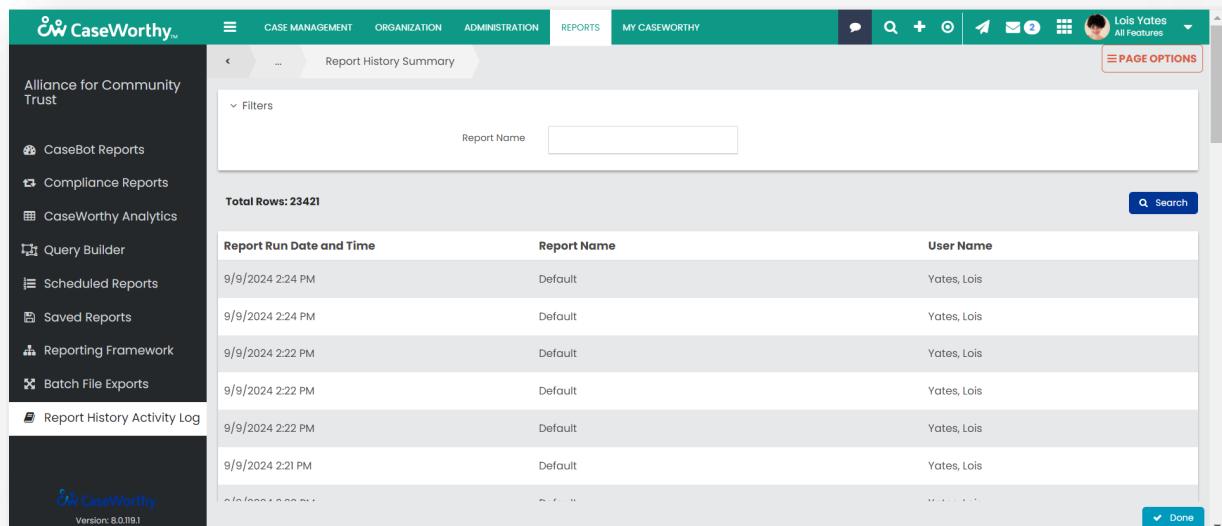
Services, and outcomes. This would be most useful if your Organization has very advanced data sharing needs.



The screenshot shows the CaseWorthy application interface. The top navigation bar includes links for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, and MY CASEWORTHY. The REPORTS section is currently active. On the far right of the top bar, there are icons for messaging, search, and other functions, along with a user profile for Lois Yates and a "PAGE OPTIONS" button. The main content area displays a "Reporting Hierarchy Framework" section with three items: "Reporting Hierarchy Tree" (puzzle piece icon), "Reporting Hierarchy Setup Form" (gear icon), and "Reporting Hierarchy Summary" (house icon). To the left of the main content is a sidebar with a dark background containing various reporting and analytics links: CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, and Report History Activity Log. The "Report History Activity Log" link is highlighted with a red box.

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.



The screenshot shows the CaseWorthy application interface. The top navigation bar includes links for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, and MY CASEWORTHY. The REPORTS section is currently active. On the far right of the top bar, there are icons for messaging, search, and other functions, along with a user profile for Lois Yates and a "PAGE OPTIONS" button. The main content area displays a "Report History Summary" section. It includes a "Filters" section with a dropdown menu set to "Report Name" and a search input field. Below this is a table header with columns: "Report Run Date and Time", "Report Name", and "User Name". The table body contains several rows of data, all showing the same information: "9/9/2024 2:24 PM", "Default", and "Yates, Lois". At the bottom right of the table, there is a "Done" button. To the left of the main content is a sidebar with a dark background containing various reporting and analytics links: CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, and Report History Activity Log. The "Report History Activity Log" link is highlighted with a red box. At the bottom of the sidebar, it says "CaseWorthy Version: 8.0.119.1".

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.

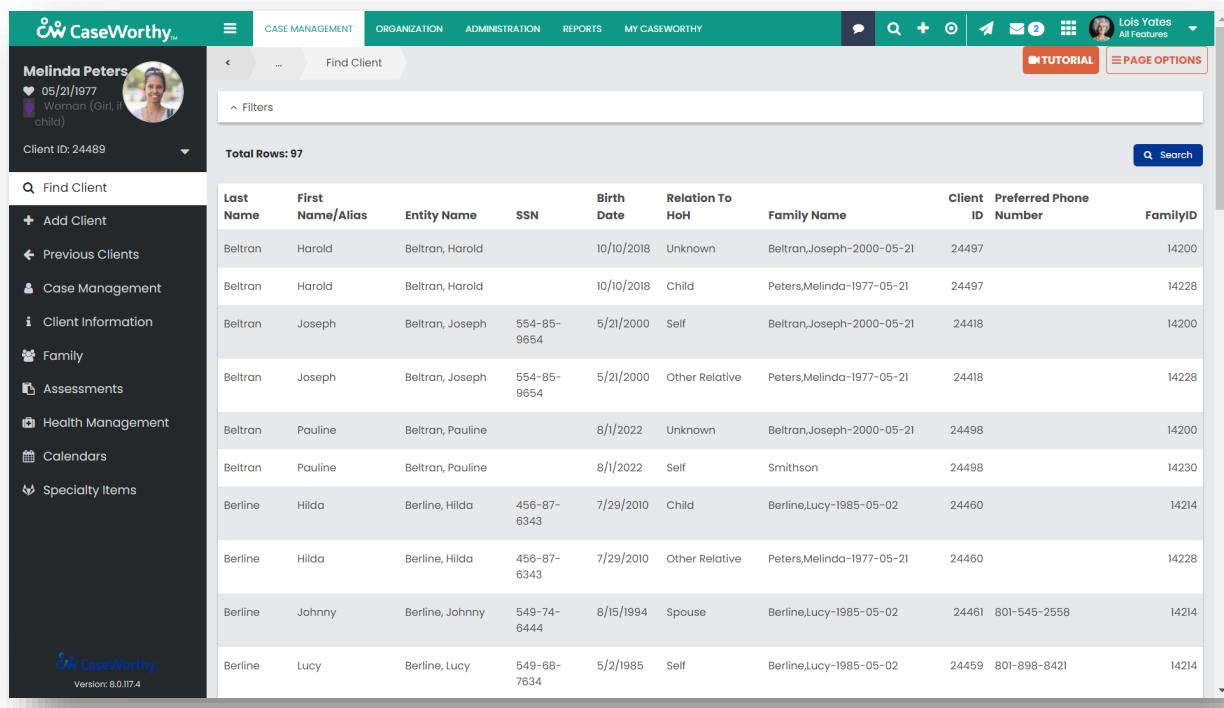
Search Reports are the least complex, but also offer the least amount of flexibility. These reports are configured to display single rows of data, which could pertain to Clients, services, program enrollment, etc.

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.

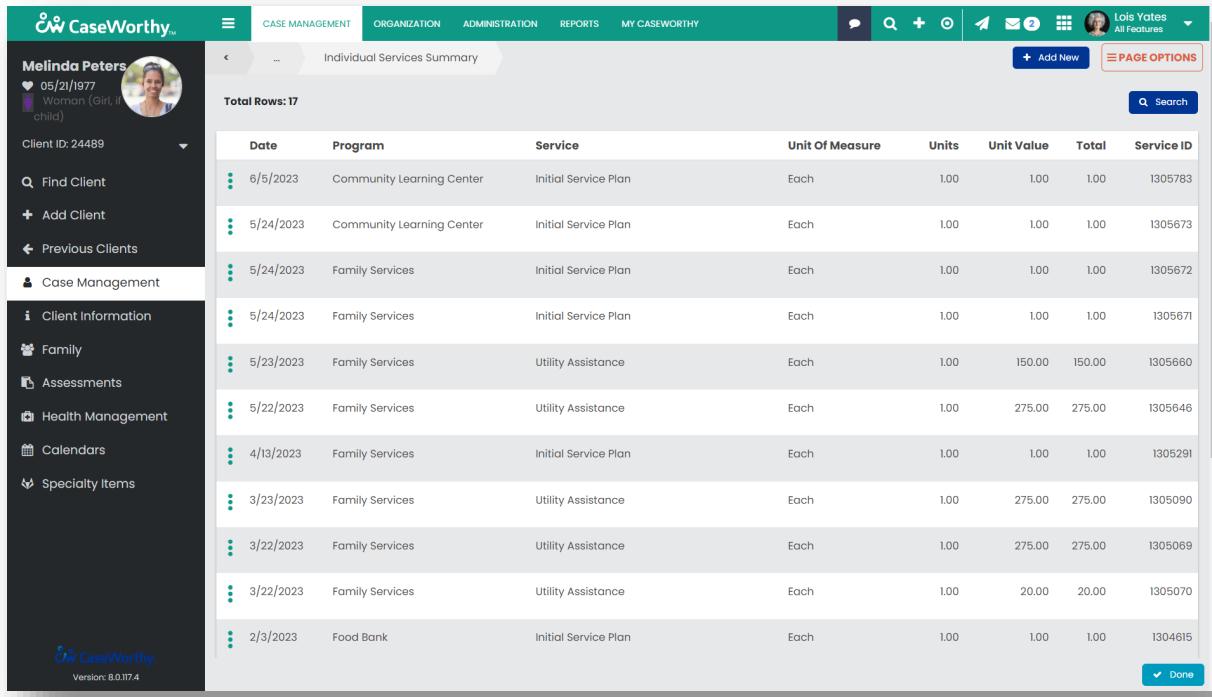


Last Name	First Name/Alias	Entity Name	SSN	Birth Date	Relation To HoH	Family Name	Client ID	Preferred Phone Number	FamilyID
Beltran	Harold	Beltran, Harold		10/10/2018	Unknown	Beltran,Joseph-2000-05-21	24497		14200
Beltran	Harold	Beltran, Harold		10/10/2018	Child	Peters,Melinda-1977-05-21	24497		14228
Beltran	Joseph	Beltran, Joseph	554-85-9654	5/21/2000	Self	Beltran,Joseph-2000-05-21	24418		14200
Beltran	Joseph	Beltran, Joseph	554-85-9654	5/21/2000	Other Relative	Peters,Melinda-1977-05-21	24418		14228
Beltran	Pauline	Beltran, Pauline		8/1/2022	Unknown	Beltran,Joseph-2000-05-21	24498		14200
Beltran	Pauline	Beltran, Pauline		8/1/2022	Self	Smithson	24498		14230
Berline	Hilda	Berline, Hilda	456-87-6343	7/29/2010	Child	Berline,Lucy-1985-05-02	24460		14214
Berline	Hilda	Berline, Hilda	456-87-6343	7/29/2010	Other Relative	Peters,Melinda-1977-05-21	24460		14228
Berline	Johnny	Berline, Johnny	549-74-6444	8/15/1994	Spouse	Berline,Lucy-1985-05-02	24461	801-545-2558	14214
Berline	Lucy	Berline, Lucy	549-68-7634	5/2/1985	Self	Berline,Lucy-1985-05-02	24459	801-898-8421	14214

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.



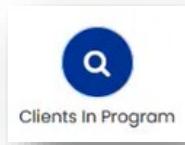
The screenshot shows the CaseWorthy software interface with the title "Individual Services Summary". The left sidebar displays client information for "Melinda Peters" (Client ID: 24489) and a vertical ellipsis menu with options like Find Client, Add Client, Previous Clients, Case Management, Client Information, Family, Assessments, Health Management, Calendars, and Specialty Items. The main content area shows a table of service transactions:

Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
6/5/2023	Community Learning Center	Initial Service Plan	Each	1.00	1.00	1.00	I305783
5/24/2023	Community Learning Center	Initial Service Plan	Each	1.00	1.00	1.00	I305673
5/24/2023	Family Services	Initial Service Plan	Each	1.00	1.00	1.00	I305672
5/24/2023	Family Services	Initial Service Plan	Each	1.00	1.00	1.00	I305671
5/23/2023	Family Services	Utility Assistance	Each	1.00	150.00	150.00	I305660
5/22/2023	Family Services	Utility Assistance	Each	1.00	275.00	275.00	I305646
4/13/2023	Family Services	Initial Service Plan	Each	1.00	1.00	1.00	I305291
3/23/2023	Family Services	Utility Assistance	Each	1.00	275.00	275.00	I305090
3/22/2023	Family Services	Utility Assistance	Each	1.00	275.00	275.00	I305069
3/22/2023	Family Services	Utility Assistance	Each	1.00	20.00	20.00	I305070
2/3/2023	Food Bank	Initial Service Plan	Each	1.00	1.00	1.00	I304615

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.

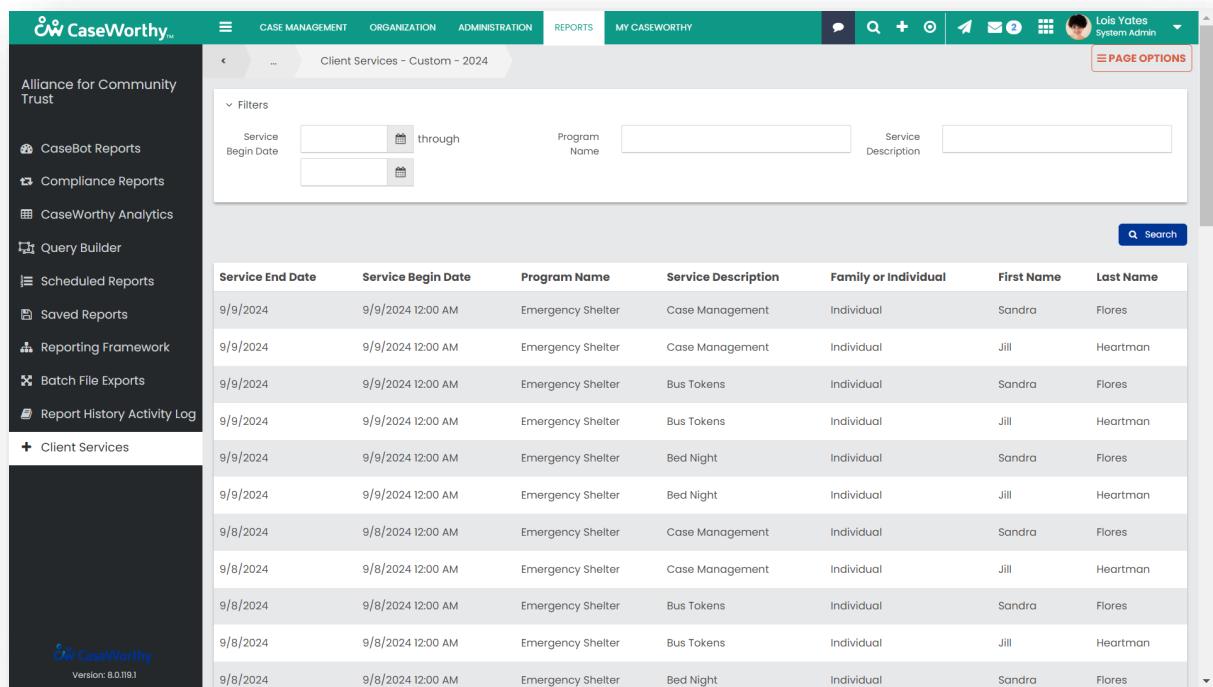


There are Search reports that allow you to view which Programs Clients are enrolled in, which Clients have exited a Program, and much more.

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.

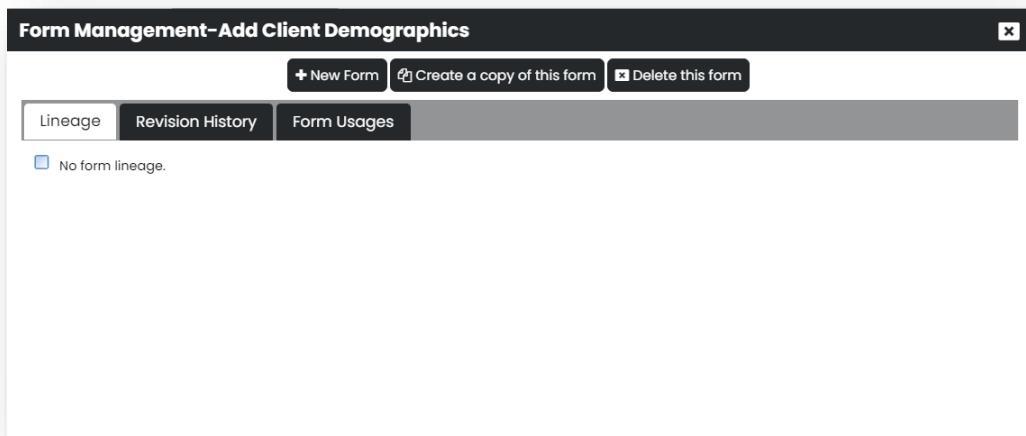


The screenshot shows the CaseWorthy application interface. The left sidebar contains navigation links for CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, Report History Activity Log, and Client Services. The main content area has a teal header bar with tabs for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, and MY CASEWORTHY. Below the header is a toolbar with icons for messaging, search, and other functions. The main content area displays a search report titled "Client Services - Custom - 2024". It includes a "Filters" section with fields for Service Begin Date, Program Name, and Service Description, each with date pickers. A "Search" button is located below the filters. The main table lists client services with columns for Service End Date, Service Begin Date, Program Name, Service Description, Family or Individual, First Name, and Last Name. The data in the table is as follows:

Service End Date	Service Begin Date	Program Name	Service Description	Family or Individual	First Name	Last Name
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Sandra	Flores
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Sandra	Flores
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Jill	Heartman
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Sandra	Flores
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Jill	Heartman
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Sandra	Flores

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.

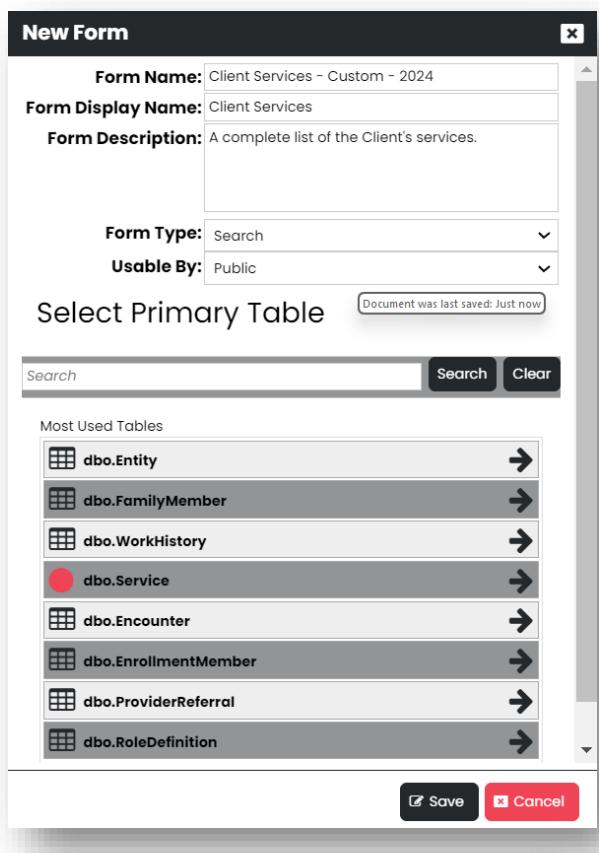


The New Form window displays.

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.



The screenshot shows the 'New Form' dialog box. At the top, there are fields for 'Form Name' (Client Services - Custom - 2024), 'Form Display Name' (Client Services), and 'Form Description' (A complete list of the Client's services.). Below these are dropdowns for 'Form Type' (Search) and 'Usable By' (Public). A message at the bottom indicates the document was last saved 'Just now'. The main area is titled 'Select Primary Table' and contains a search bar and a list of 'Most Used Tables'. The 'dbo.Service' table is highlighted with a red dot to its left. At the bottom right are 'Save' and 'Cancel' buttons.

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.

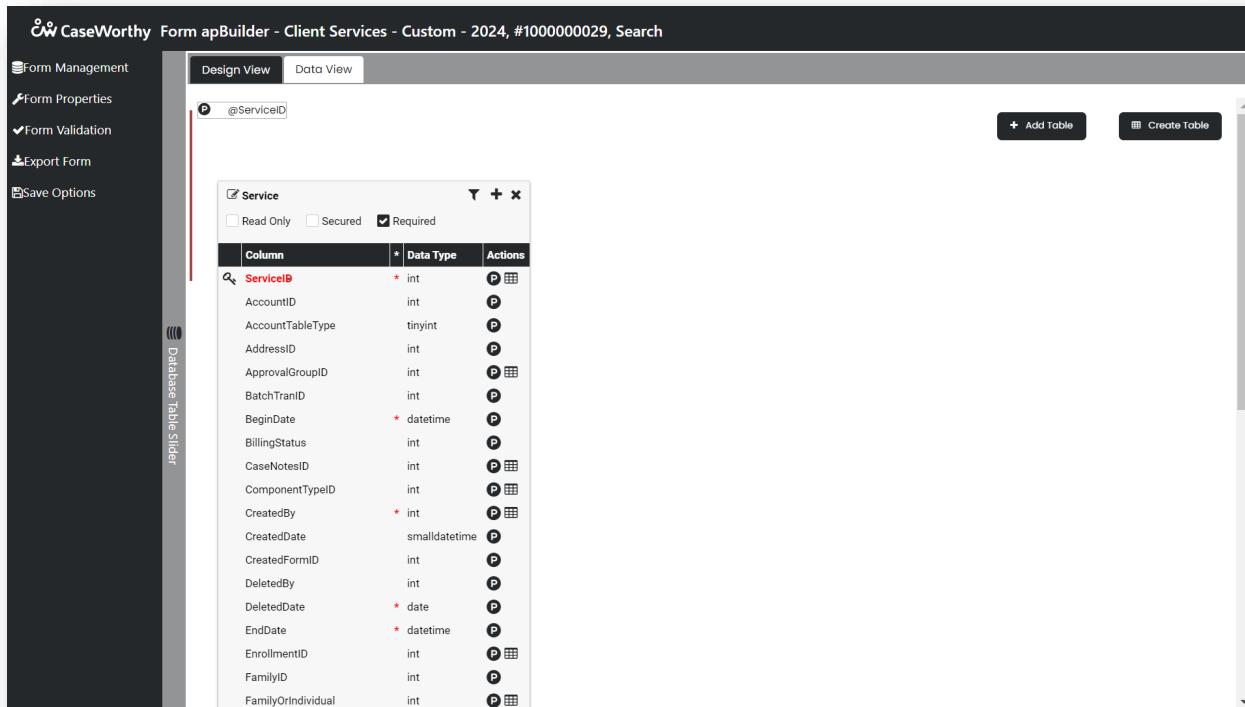
The new form display name, formID, and form type are now displayed at the top of the page.

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.

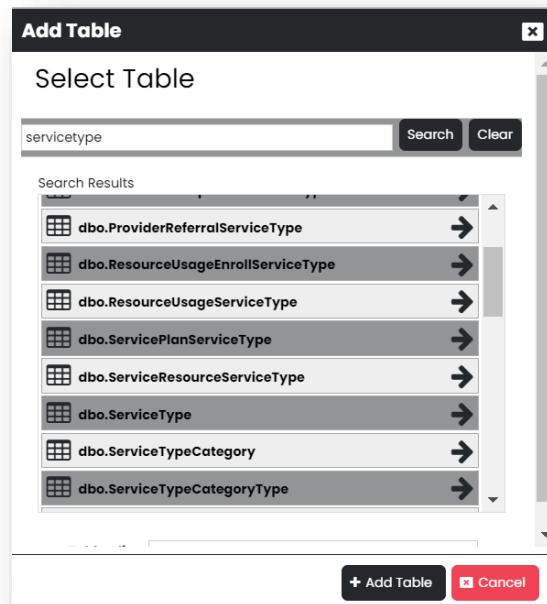
Since the primary key for the Service table is ServiceID, the @ServiceID parameter was added by default.



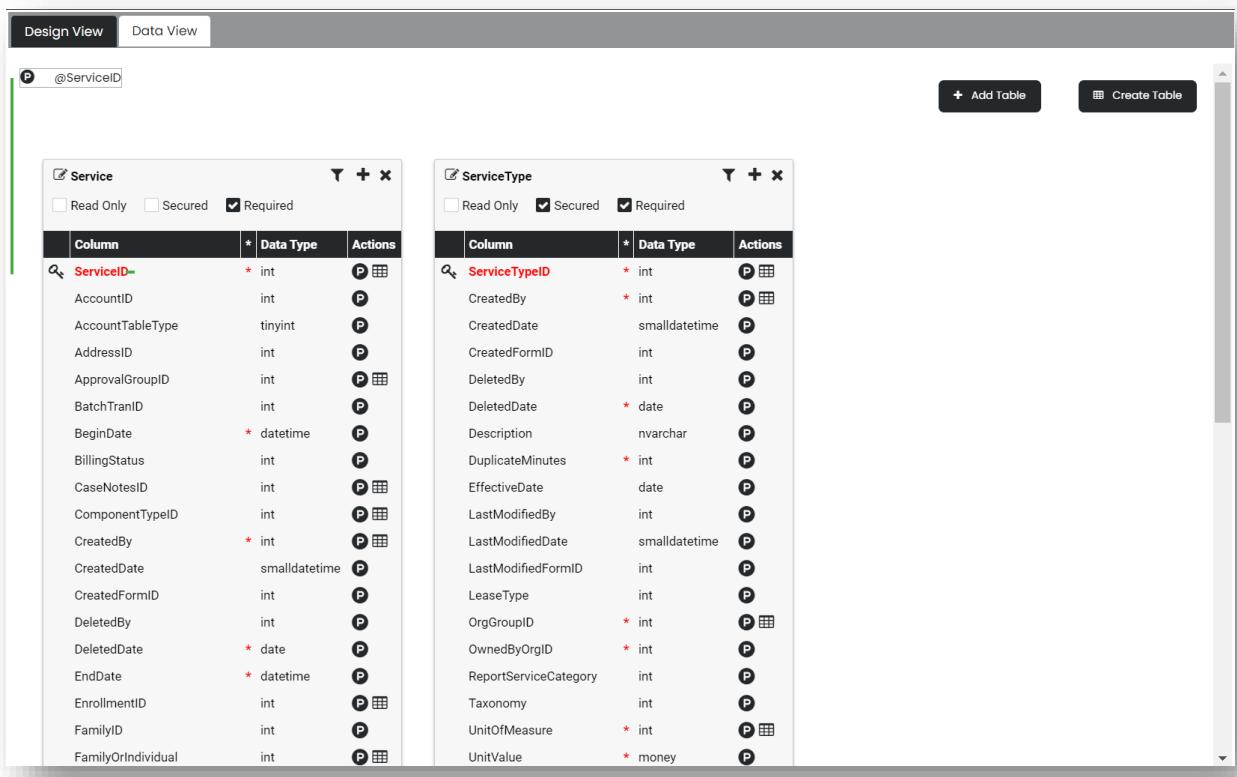
Column	Data Type	Actions
ServiceID	* int	P
AccountID	int	P
AccountTableType	tinyint	P
AddressID	int	P
ApprovalGroupID	int	P
BatchTranID	int	P
BeginDate	* datetime	P
BillingStatus	int	P
CaseNotesID	int	P
ComponentTypeID	int	P
CreatedBy	* int	P
CreatedDate	smalldatetime	P
CreatedFormID	int	P
DeletedBy	int	P
DeletedDate	* date	P
EndDate	* datetime	P
EnrollmentID	int	P
FamilyID	int	P
FamilyOrIndividual	int	P

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.



Service			
Column	*	Data Type	Actions
ServiceID	*	int	P
AccountID		int	P
AccountTableType		tinyint	P
AddressID		int	P
ApprovalGroupID		int	P
BatchTranID		int	P
BeginDate	*	datetime	P
BillingStatus		int	P
CaseNotesID		int	P
ComponentTypeID		int	P
CreatedBy	*	int	P
CreatedDate		smalldatetime	P
CreatedFormID		int	P
DeletedBy		int	P
DeletedDate	*	date	P
EndDate	*	datetime	P
EnrollmentID		int	P
FamilyID		int	P
FamilyOrIndividual		int	P

ServiceType			
Column	*	Data Type	Actions
ServiceTypeID	*	int	P
CreatedBy	*	int	P
CreatedDate		smalldatetime	P
CreatedFormID		int	P
DeletedBy		int	P
DeletedDate	*	date	P
Description		nvarchar	P
DuplicateMinutes	*	int	P
EffectiveDate		date	P
LastModifiedBy		int	P
LastModifiedDate		smalldatetime	P
LastModifiedFormID		int	P
LeaseType		int	P
OrgGroupID	*	int	P
OwnedByOrgID	*	int	P
ReportServiceCategory		int	P
Taxonomy		int	P
UnitOfMeasure	*	int	P
UnitValue	*	money	P

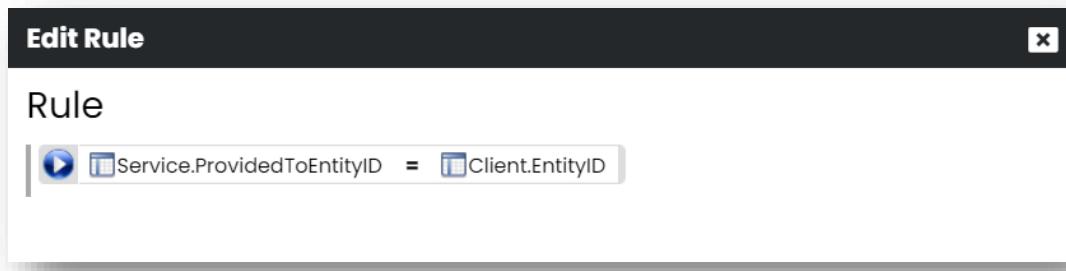
Then, add the Enrollment and Program tables. This allows us to connect the Client to the Services they receive. These tables are displayed below the ServiceType table.

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.

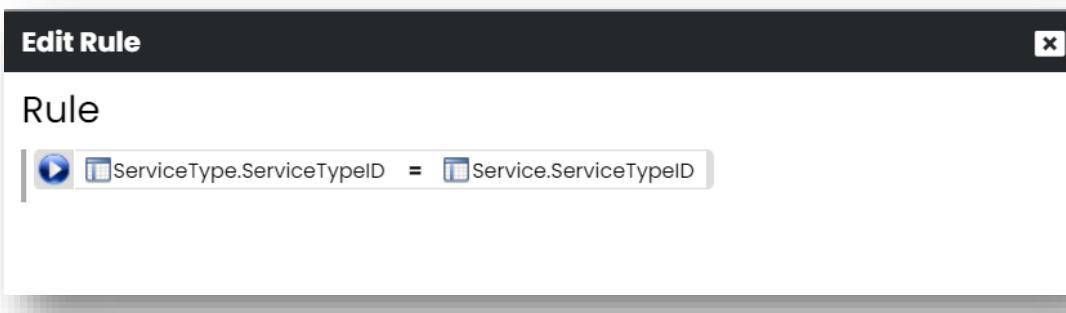


Once saved, we can move over to the ServiceType table.

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.

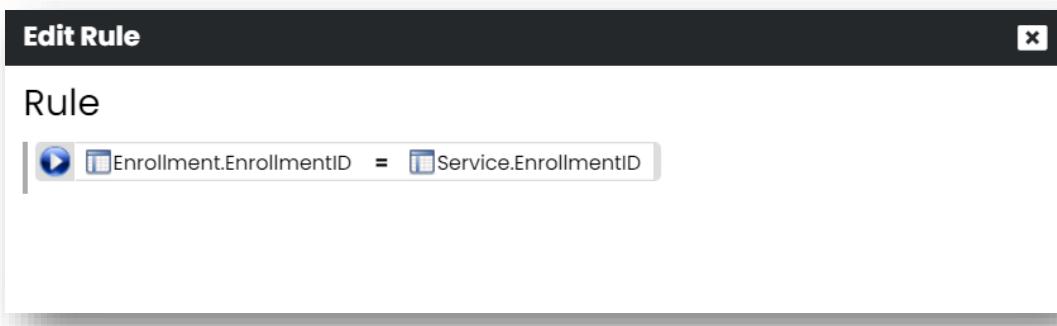
Select the filter icon to add the rule.



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?

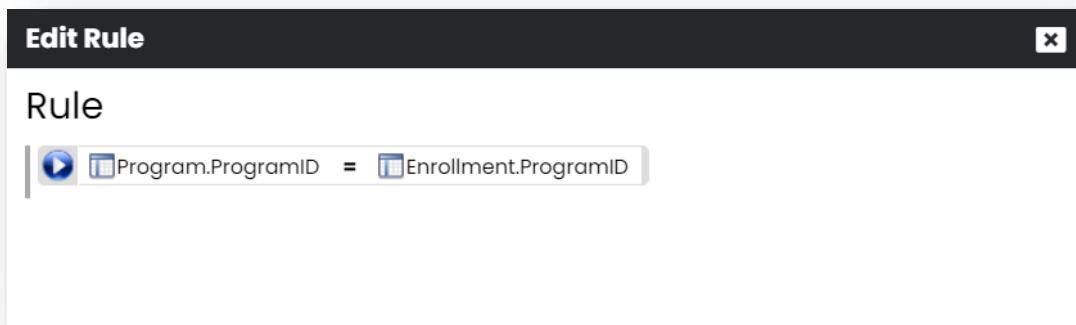
Select the filter to add the rule. It should look like this: "Enrollment.EnrollmentID" is equal to "Service.EnrollmentID".



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

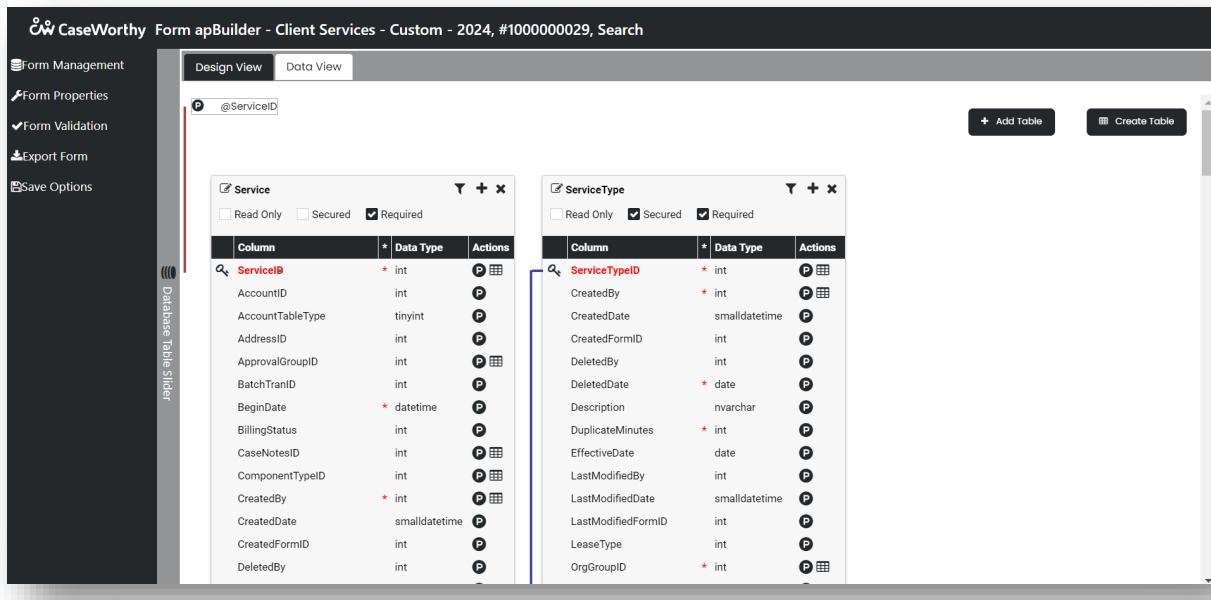
The Enrollment and Program tables both have a ProgramID column.

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



Column	Data Type	Actions
ServiceID	* int	P
AccountID	int	P
AccountTableType	tinyint	P
AddressID	int	P
ApprovalGroupID	int	P
BatchTranID	int	P
BeginDate	* datetime	P
BillingStatus	int	P
CaseNotesID	int	P
ComponentTypeID	int	P
CreatedBy	* int	P
CreatedDate	smalldatetime	P
CreatedFormID	int	P
DeletedBy	int	P

Column	Data Type	Actions
ServiceTypeID	* int	P
CreatedBy	* int	P
CreatedDate	smalldatetime	P
CreatedFormID	int	P
DeletedBy	int	P
DeletedDate	* date	P
Description	nvarchar	P
DuplicateMinutes	* int	P
EffectiveDate	date	P
LastModifiedBy	int	P
LastModifiedDate	smalldatetime	P
LastModifiedFormID	int	P
LeaseType	int	P
OrgGroupID	* int	P

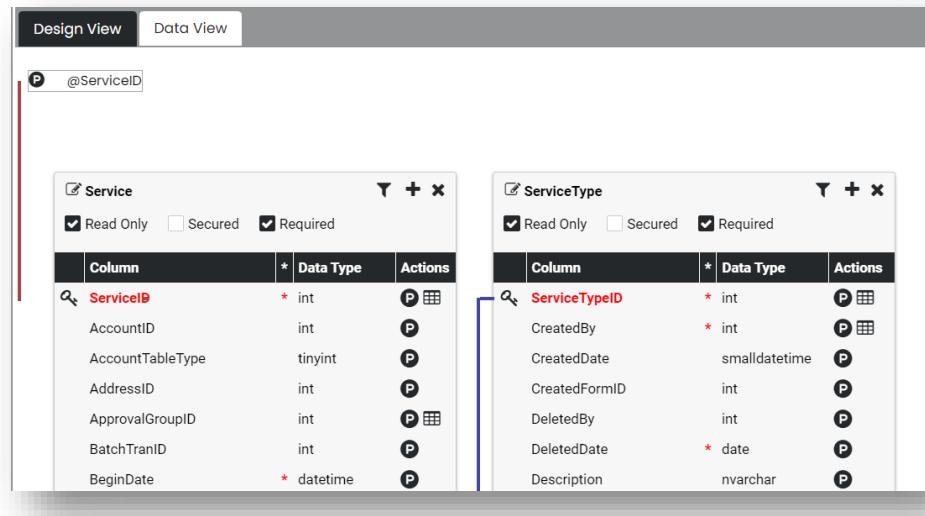
Joining tables can be an involved process. As you gain more experience with the tables in the CaseWorthy database, it will become easier. And remember, if you have questions, we encourage you to send an inquiry to support@caseworthy.com.

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.



The screenshot shows the Data View tab of the Form apBuilder interface. It displays two database tables: 'Service' and 'ServiceType'. The 'Service' table has columns: ServiceID (Primary Key, int), AccountID (int), AccountTableType (tinyint), AddressID (int), ApprovalGroupID (int), BatchTranID (int), and BeginDate (datetime). The 'ServiceType' table has columns: ServiceTypeID (Primary Key, int), CreatedBy (int), CreatedDate (smalldatetime), CreatedFormID (int), DeletedBy (int), DeletedDate (date), and Description (nvarchar).

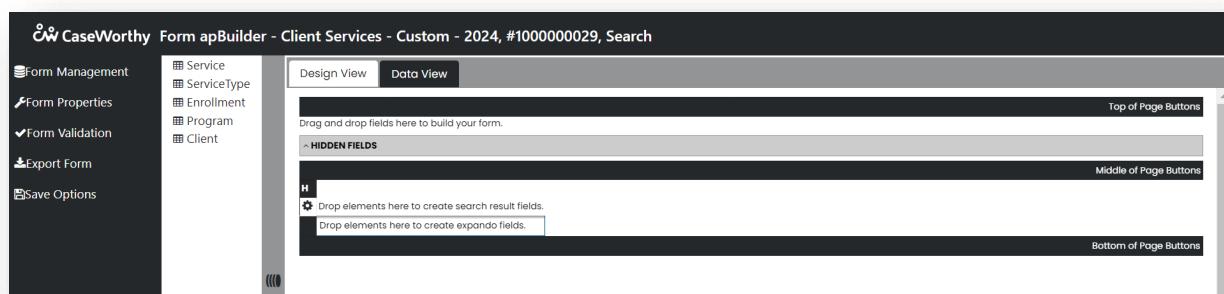
There are many other options available on this tab. For example, you can add additional tables, you can add new columns to tables, and so forth. I invite you to create your own forms and explore these options further as you become more comfortable working in the Form apBuilder.

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.



The screenshot shows the Design View tab of the Form apBuilder interface. On the left, there is a sidebar with navigation links: Form Management, Form Properties, Form Validation, Export Form, and Save Options. The main area shows the Database Table Slider expanded, listing the tables: Service, ServiceType, Enrollment, Program, and Client. Below the slider, there are sections for 'HIDDEN FIELDS', 'Top of Page Buttons', 'Middle of Page Buttons', and 'Bottom of Page Buttons'.

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.

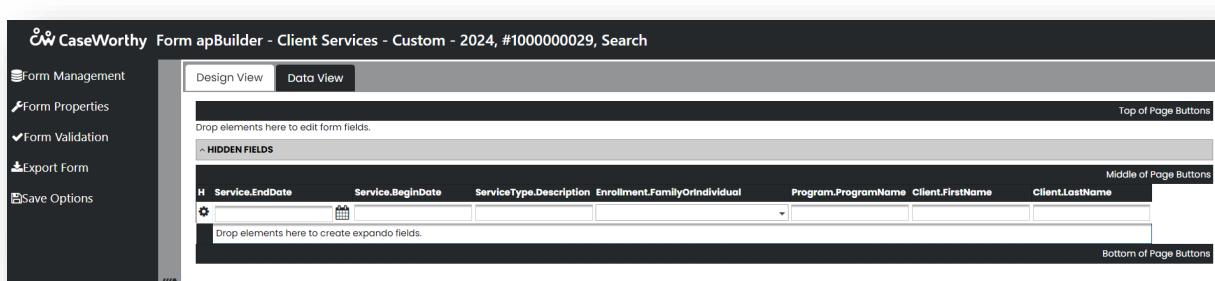
Once these two fields are added, let's move over to the ServiceType table. This table stores the Service Description, which we will also add to the form.

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.

Enrollment.FamilyOrIndividual Element Properties

Label	Family or Individual
Type	Drop Down List
Label Color	Default
Usage	Search Only
Required	<input type="checkbox"/>
Input	Enrollment.FamilyOrIndividual
Output	Enrollment.FamilyOrIndividual
List	1782   
On Change Refresh	<input type="checkbox"/>
Default	<input type="checkbox"/>
Set Workflow Variable	<input type="checkbox"/>

Save **Cancel**

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.

First Name Element Properties

Label	First Name
Type	Text Box
Label Color	Default
Usage	Search Only
Required	<input type="checkbox"/>
Input	Client.FirstName
Output	Client.FirstName
List	  
Default	<input type="checkbox"/>
Set Workflow Variable	<input type="checkbox"/>
Print	<input checked="" type="checkbox"/>
No Filter	<input type="checkbox"/>

Save **Cancel**

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.

Service.EndDate Element Properties

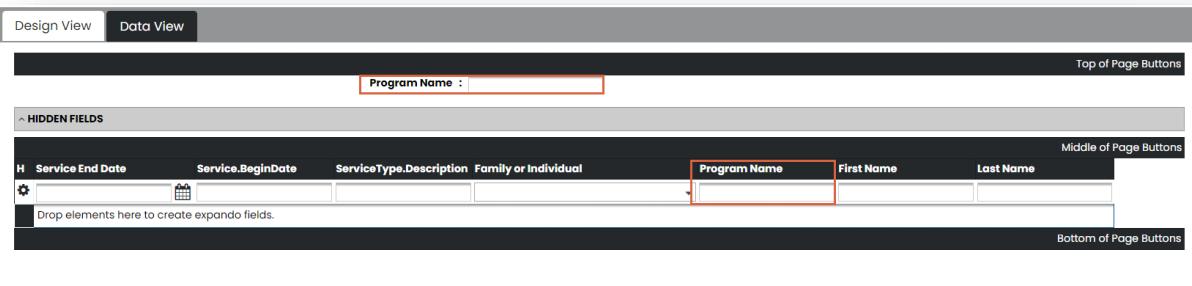
Label	Service End Date
Type	Date Chooser
Label Color	Default
Usage	Search Only
Required	<input type="checkbox"/>
Input	Service.EndDate
Output	Service.EndDate
Default	
Set Workflow Variable	
Print	<input checked="" type="checkbox"/>
No Filter	<input type="checkbox"/>
Export To Excel	<input type="checkbox"/>

Save **Cancel**

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

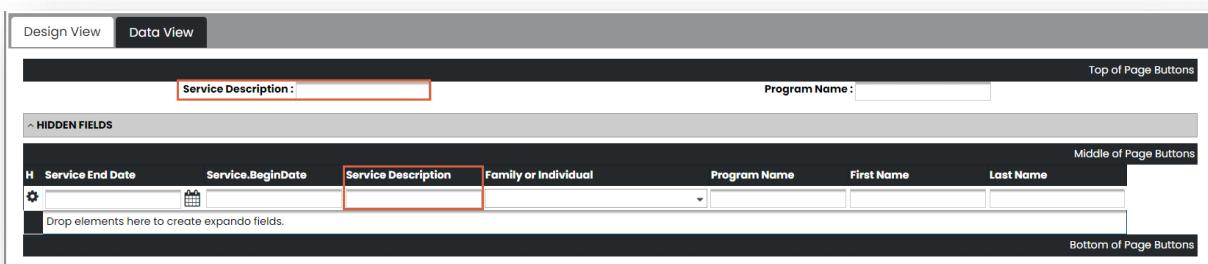
Open the properties for the ProgramName field and change the **Label** to 'Program Name'. Then, change the **Usage** to 'Edit and Search'. This indicates the **Program Name** field will not only display as a column in the results table, but it will also display as a filter at the top of the form.

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



The screenshot shows the CaseWorthy Design View interface. At the top, there are two tabs: "Design View" and "Data View". Below the tabs, there are three horizontal sections labeled "Top of Page Buttons", "Middle of Page Buttons", and "Bottom of Page Buttons". In the "Middle of Page Buttons" section, the "Program Name" field is highlighted with a red border. The interface includes a "HIDDEN FIELDS" section and a "Drop elements here to create expando fields." area.

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 screenshot shows the CaseWorthy Design View interface. At the top, there are two tabs: "Design View" and "Data View". Below the tabs, there are three horizontal sections labeled "Top of Page Buttons", "Middle of Page Buttons", and "Bottom of Page Buttons". In the "Middle of Page Buttons" section, the "Service Description" field is highlighted with a red border. The interface includes a "HIDDEN FIELDS" section and a "Drop elements here to create expando fields." area.

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.

Service.BeginDate Element Properties

Label	Service Begin Date
Type	Date Range
Label Color	Default
Usage	Edit And Search
Required	<input type="checkbox"/>
Input	Service.BeginDate
Output	Service.BeginDate
Default	
Set Workflow Variable	
Print	<input checked="" type="checkbox"/>
No Filter	<input type="checkbox"/>
Export To Excel	<input type="checkbox"/>
Contextual Help	<input type="checkbox"/>
Save Change History	<input type="checkbox"/>
Additional Input	
Start Date Filter	Service.BeginDate
End Date Filter	Service.BeginDate
Date Range Empty	<input checked="" type="checkbox"/>
Date Range	Date Range

Buttons: Save Cancel

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

Then, save your changes.

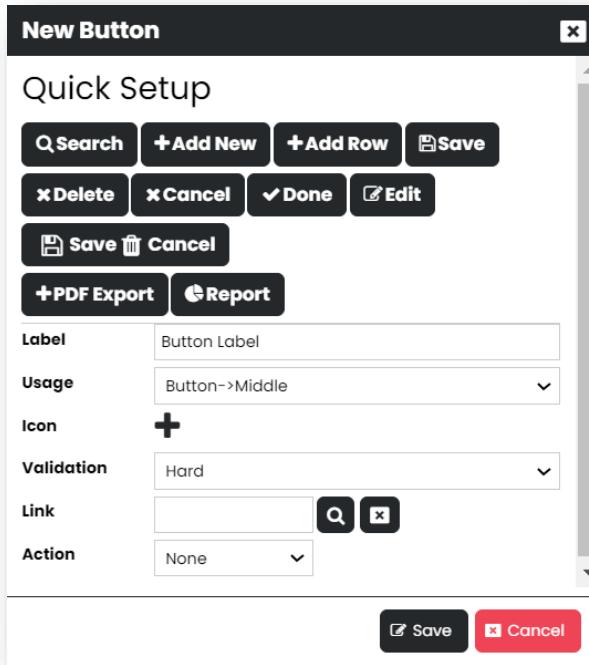
We are now done configuring all the fields we added to the form. If you would like to continue to change the layout, simply click and drag the fields to display according to your preference.

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

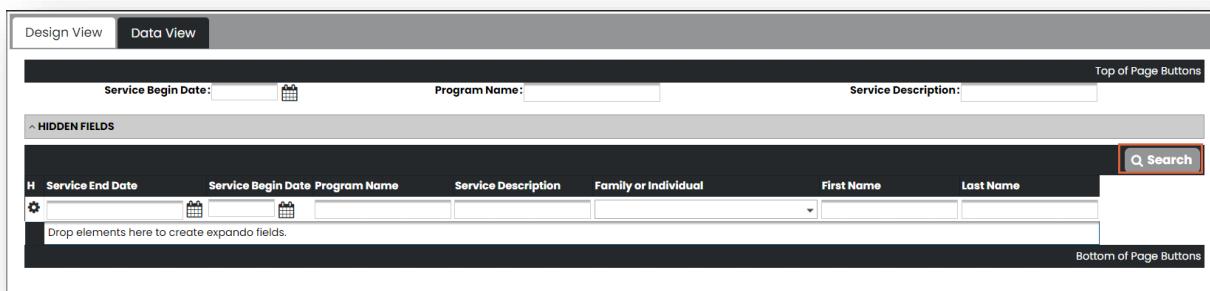
A Search Form typically includes a SEARCH button that allows the User to use the filters at the top and then search for results.

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.



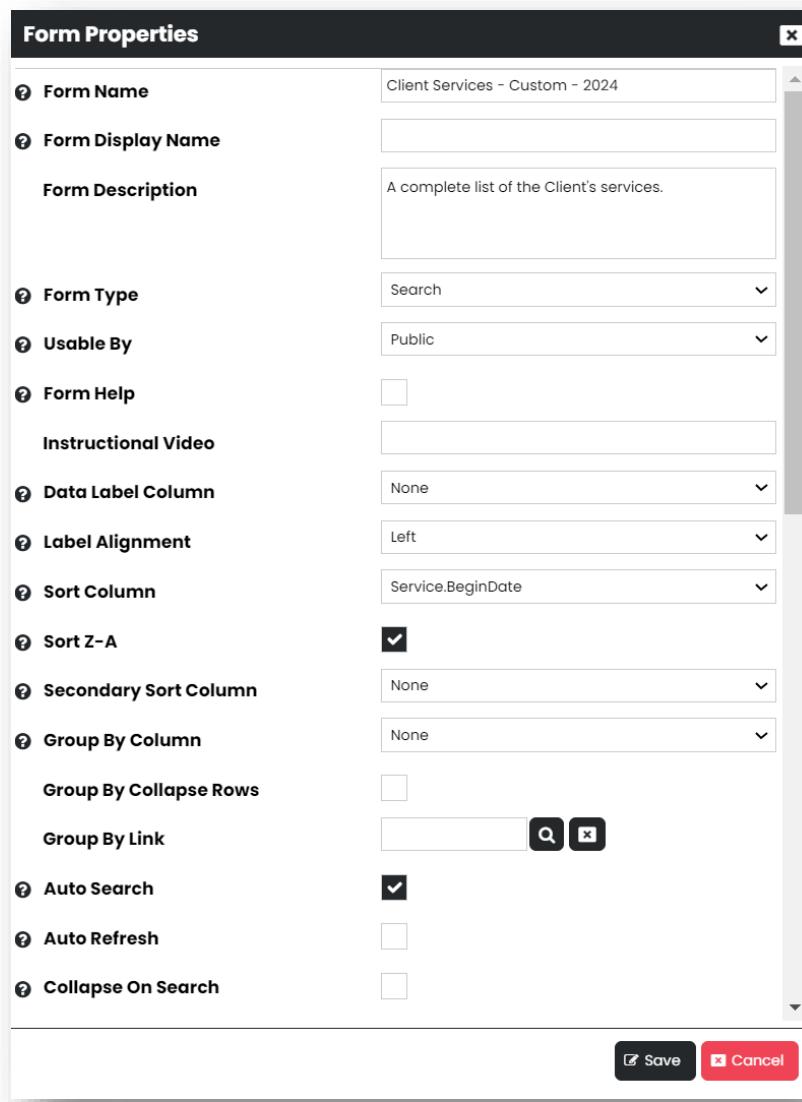
There are various other settings available for each element, as well as for the form. For example, you can add a menu off each record in the search results. You can customize the options that are displayed in the menu, as well as what happens when the menu item is clicked.

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.

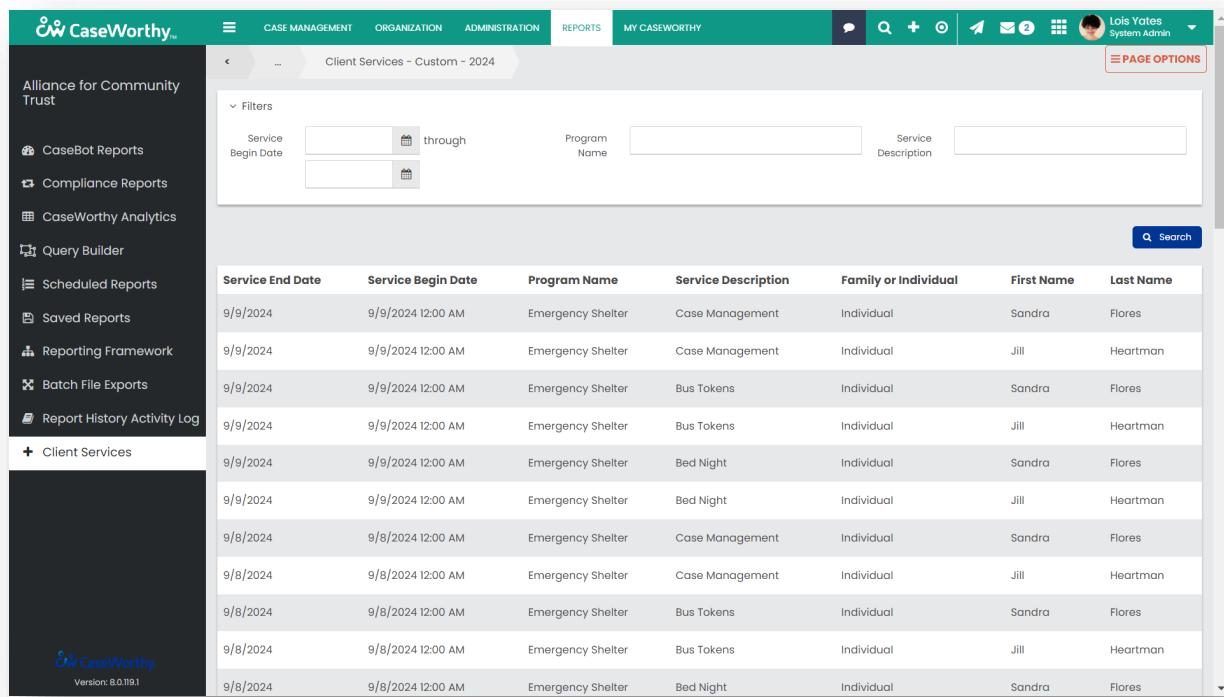
When done updating the Form's properties, click SAVE.

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.



Service End Date	Service Begin Date	Program Name	Service Description	Family or Individual	First Name	Last Name
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Sandra	Flores
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Sandra	Flores
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Jill	Heartman
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Jill	Heartman
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Sandra	Flores
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Jill	Heartman
9/8/2024	9/8/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Sandra	Flores

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

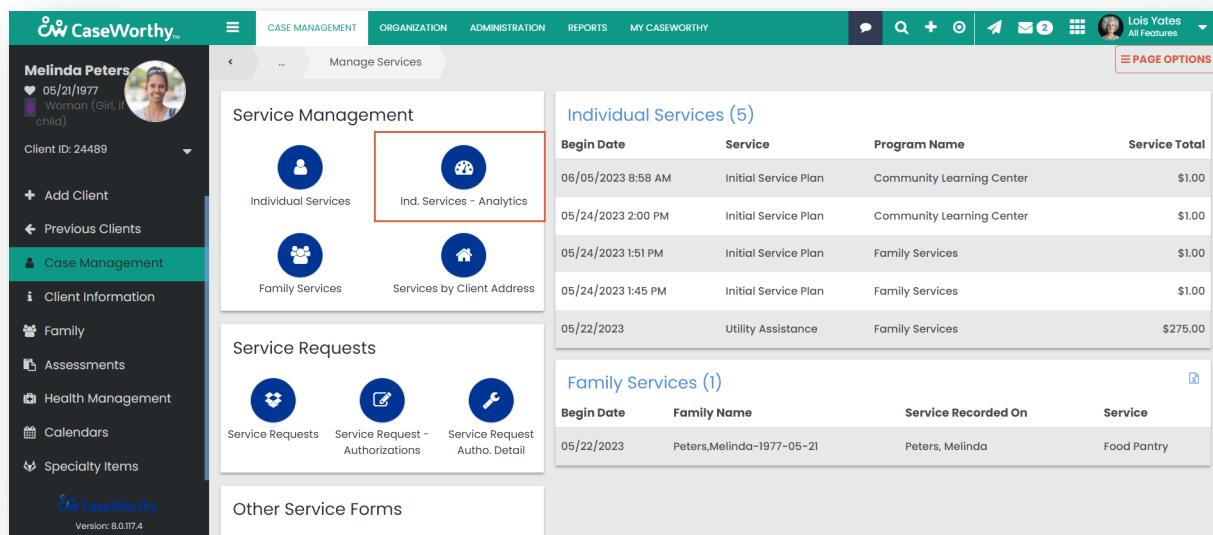
Analytic Reports are like Search Reports, but they are more advanced and designed to provide in-depth analysis of your data. With Analytic Reports, you can uncover trends, patterns, and insights that might not be immediately obvious. They're ideal for users who need to perform detailed data analysis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

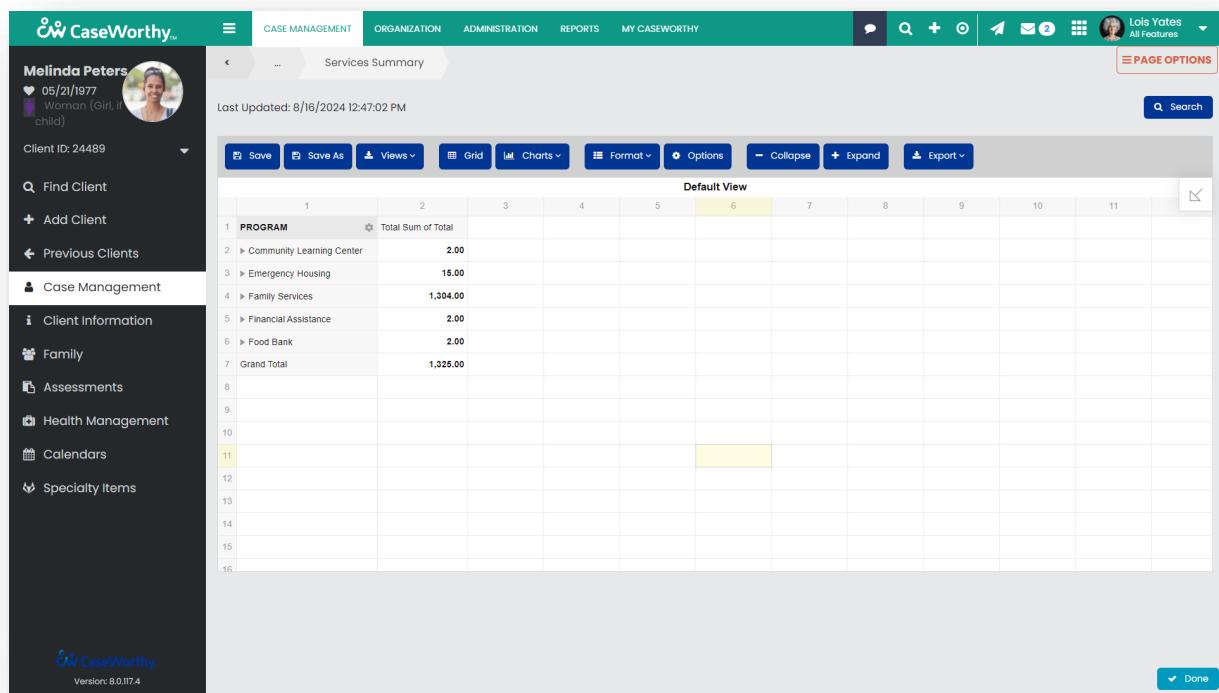
An example of an Analytics Form is *Individual Services – Analytics* on the *Manage Services* dashboard.



Begin Date	Service	Program Name	Service Total
06/05/2023 8:58 AM	Initial Service Plan	Community Learning Center	\$1.00
05/24/2023 2:00 PM	Initial Service Plan	Community Learning Center	\$1.00
05/24/2023 1:51 PM	Initial Service Plan	Family Services	\$1.00
05/24/2023 1:45 PM	Initial Service Plan	Family Services	\$1.00
05/22/2023	Utility Assistance	Family Services	\$275.00

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.



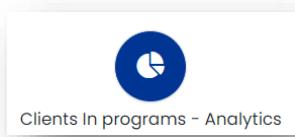
Last Updated: 8/16/2024 12:47:02 PM

PROGRAM	Total Sum of Total
> Community Learning Center	2.00
> Emergency Housing	15.00
> Family Services	1,304.00
> Financial Assistance	2.00
> Food Bank	2.00
Grand Total	1,325.00

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.

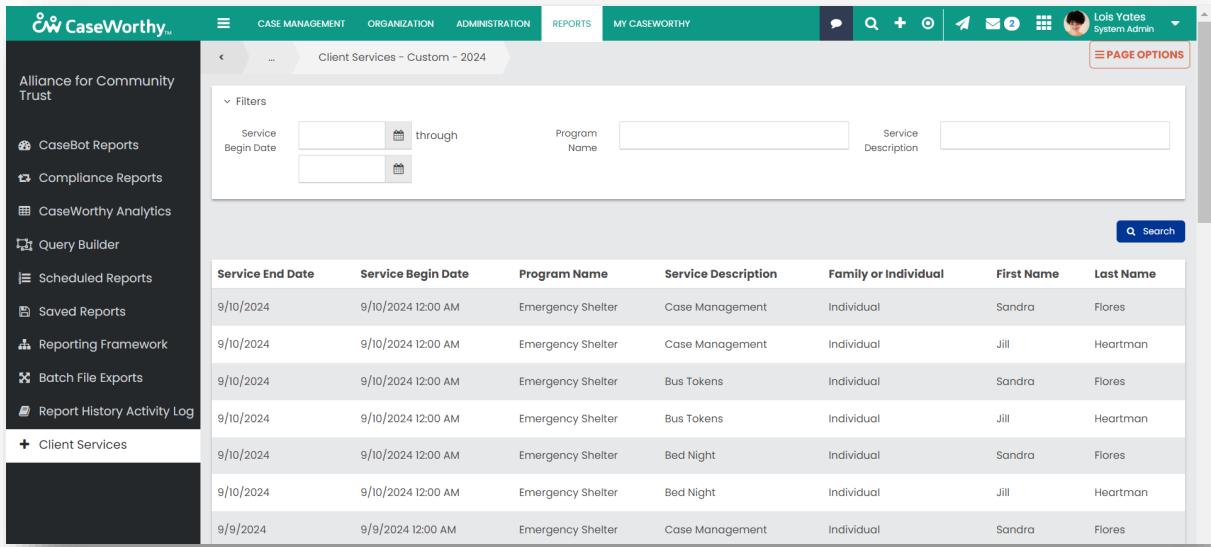


There are Analytic reports that allow you to view program enrollment data, Client referrals by Provider, and more.

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.

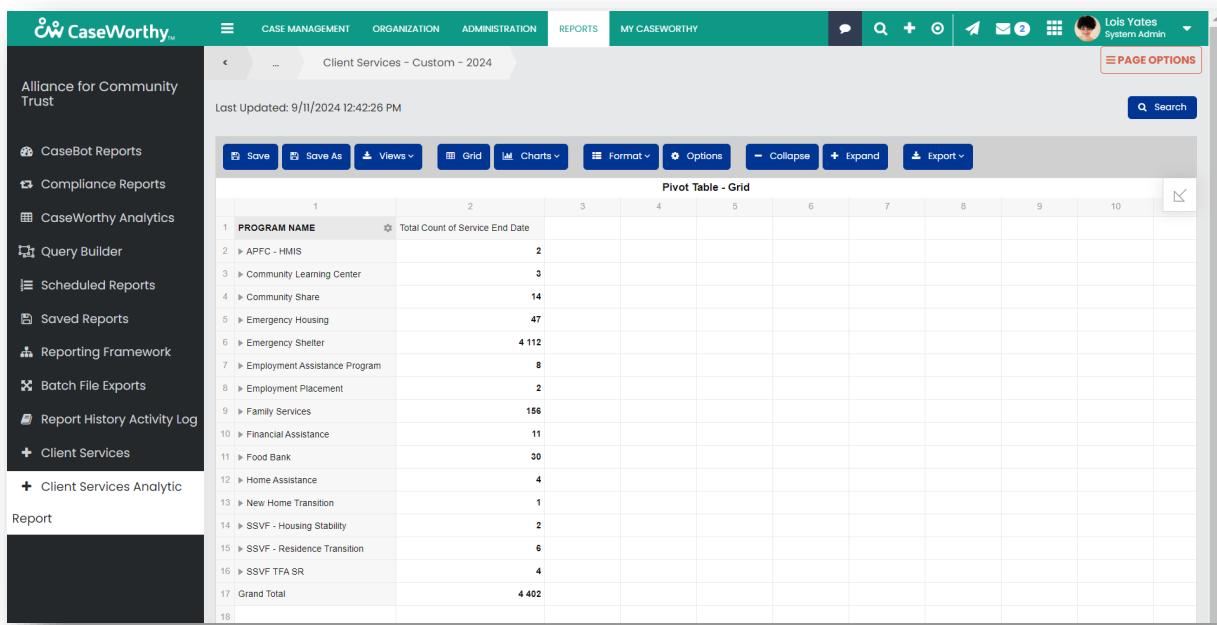


The screenshot shows the CaseWorthy application interface. On the left is a sidebar with various reporting options: CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, and Report History Activity Log. Under 'Client Services', there is a plus sign icon. The main area has tabs for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS (which is selected), and MY CASEWORTHY. Below these are navigation icons and a user profile for Lois Yates, System Admin. A 'PAGE OPTIONS' button is also present. The central part of the screen displays a search form titled 'Client Services - Custom - 2024'. It includes filters for Service Begin Date (set to 9/10/2024) and Program Name, and a Service Description field. A 'Search' button is at the bottom right of the filter area. Below the filters is a grid table with columns: Service End Date, Service Begin Date, Program Name, Service Description, Family or Individual, First Name, and Last Name. The data in the table is as follows:

Service End Date	Service Begin Date	Program Name	Service Description	Family or Individual	First Name	Last Name
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Jill	Heartman
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Sandra	Flores
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Jill	Heartman
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Sandra	Flores
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores

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

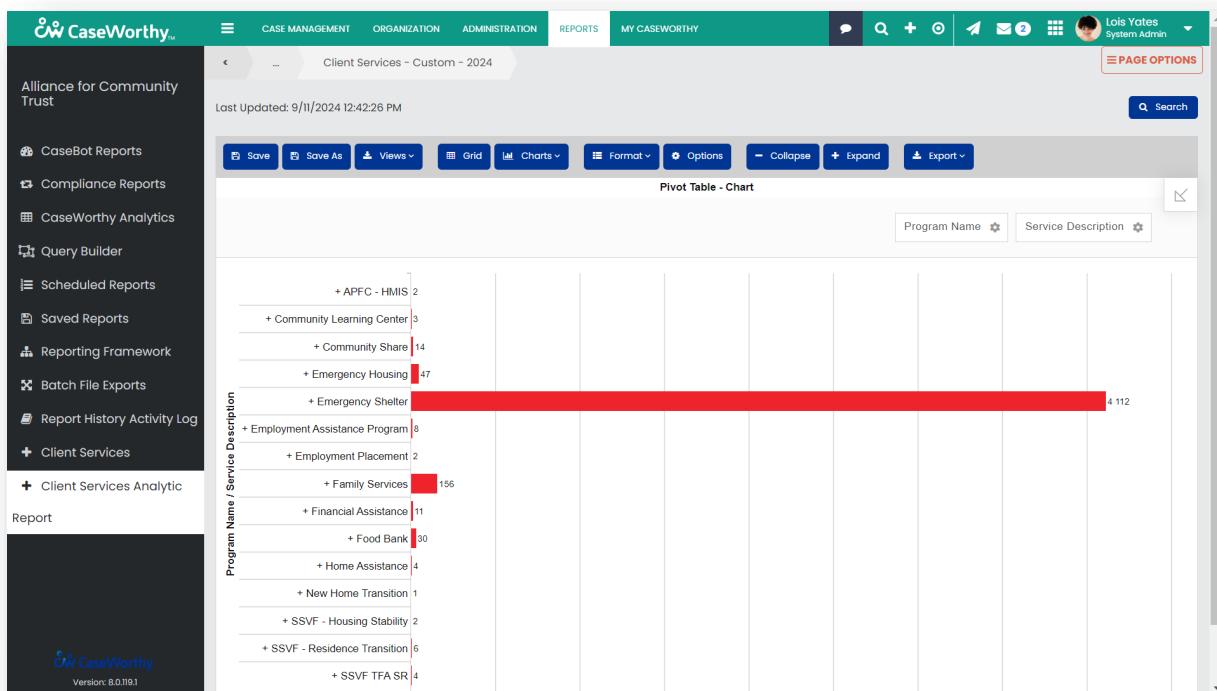
Once we update the properties and add customization, our Analytic Report will look like this as a grid.



Last Updated: 9/11/2024 12:42:26 PM

PROGRAM NAME	Total Count of Service End Date
► APFC - HMIS	2
► Community Learning Center	3
► Community Share	14
► Emergency Housing	47
► Emergency Shelter	4 112
► Employment Assistance Program	8
► Employment Placement	2
► Family Services	156
► Financial Assistance	11
► Food Bank	30
► Home Assistance	4
► New Home Transition	1
► SSVF - Housing Stability	2
► SSVF - Residence Transition	6
► SSVF TFA SR	4
Grand Total	4 402

And like this as a bar chart.



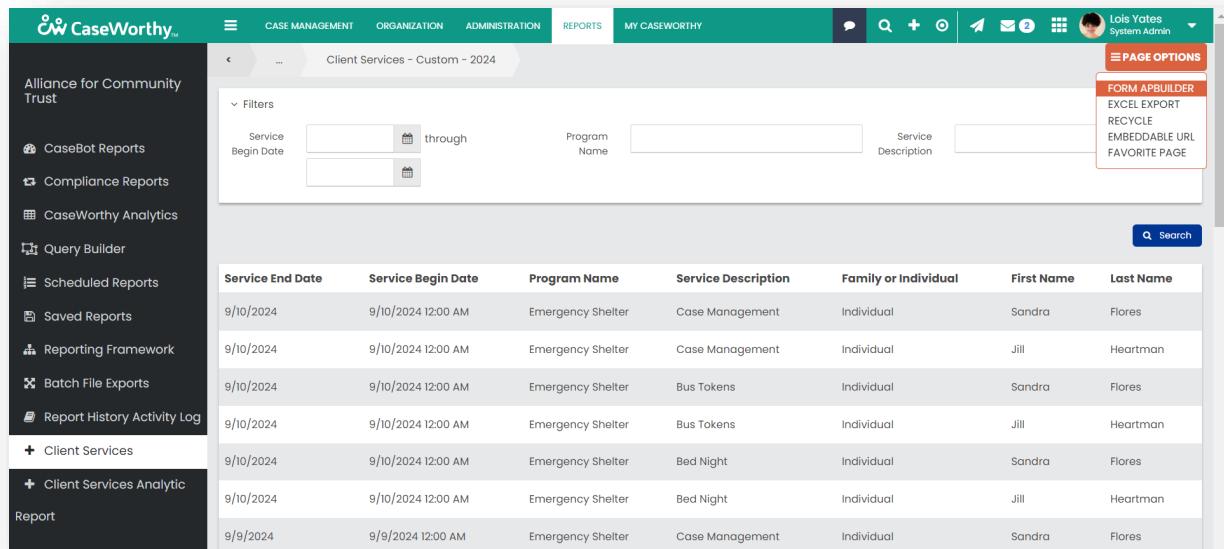
Last Updated: 9/11/2024 12:42:26 PM

Pivot Table - Chart

Program Name / Service Description	Count
+ APFC - HMIS	2
+ Community Learning Center	3
+ Community Share	14
+ Emergency Housing	47
+ Emergency Shelter	4 112
+ Employment Assistance Program	8
+ Employment Placement	2
+ Family Services	156
+ Financial Assistance	11
+ Food Bank	30
+ Home Assistance	4
+ New Home Transition	1
+ SSVF - Housing Stability	2
+ SSVF - Residence Transition	6
+ SSVF TFA SR	4

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.

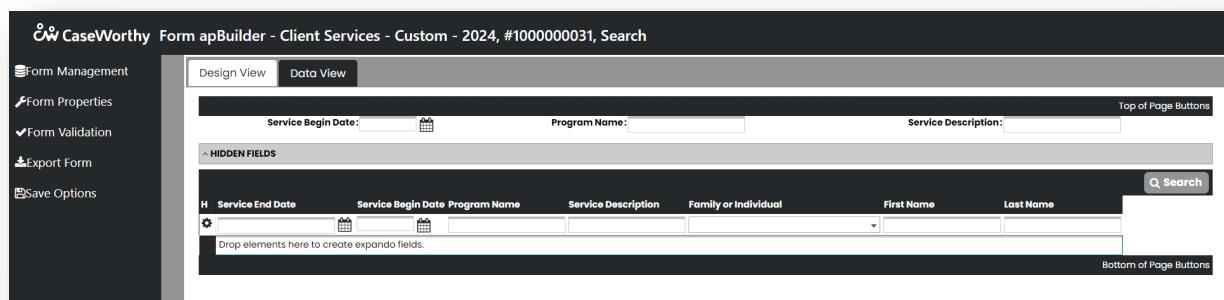


Service End Date	Service Begin Date	Program Name	Service Description	Family or Individual	First Name	Last Name
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Jill	Heartman
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Sandra	Flores
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bus Tokens	Individual	Jill	Heartman
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Sandra	Flores
9/10/2024	9/10/2024 12:00 AM	Emergency Shelter	Bed Night	Individual	Jill	Heartman
9/9/2024	9/9/2024 12:00 AM	Emergency Shelter	Case Management	Individual	Sandra	Flores

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.



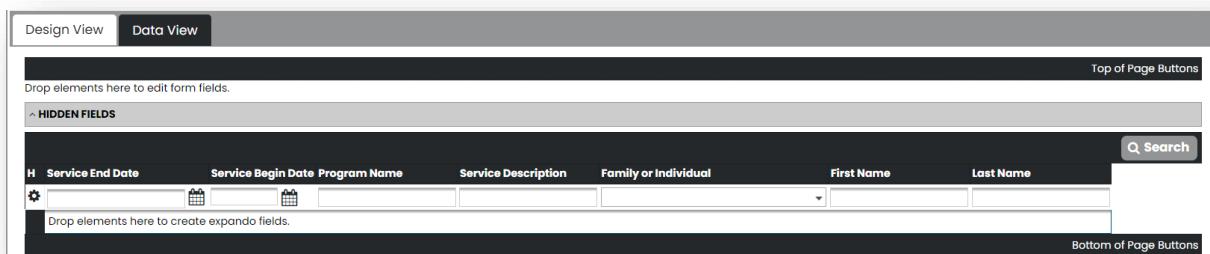
Since we have tables that are joined and configured, we do not need to make any changes on the Data View tab.

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’.

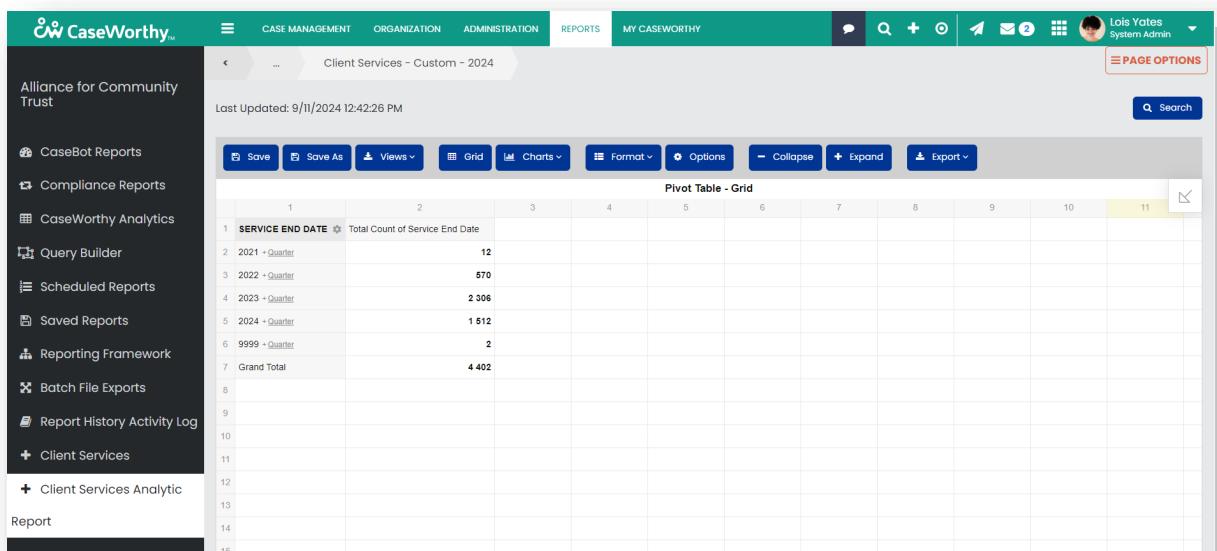
When done updating the Form’s properties, click SAVE.

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.



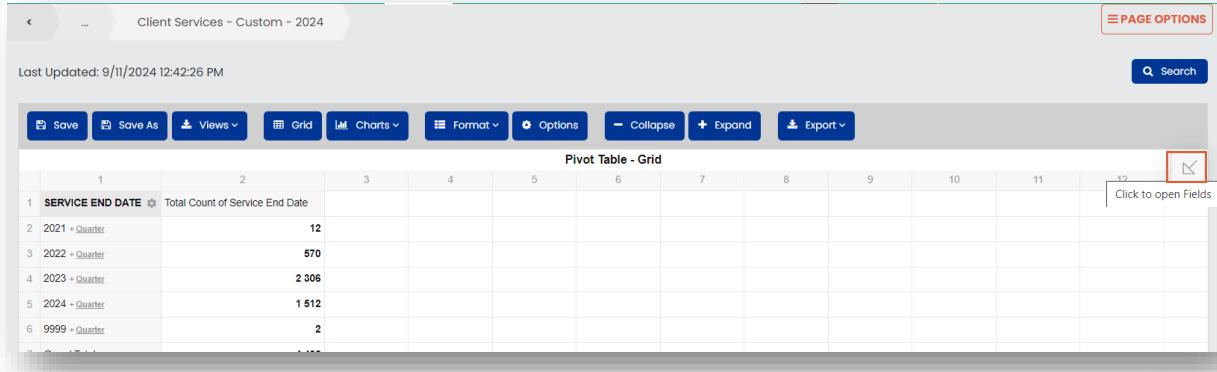
The screenshot shows a software application window titled "Client Services - Custom - 2024". The main content area is a "Pivot Table - Grid" showing the following data:

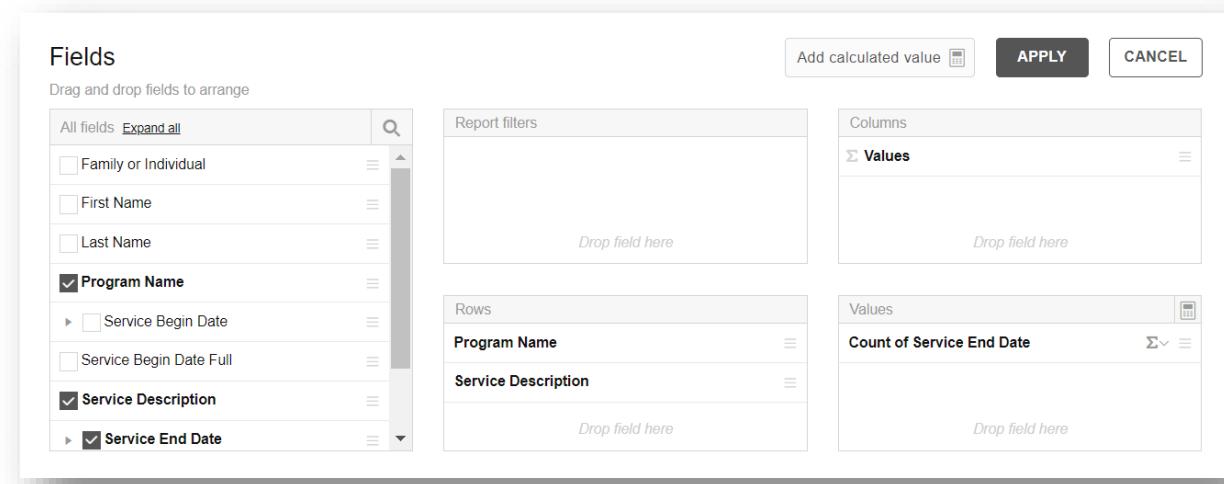
	1 SERVICE END DATE	2 Total Count of Service End Date
2021 + Quarter		12
2022 + Quarter		570
2023 + Quarter		2 306
2024 + Quarter		1 512
9999 + Quarter		2
Grand Total		4 402

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.

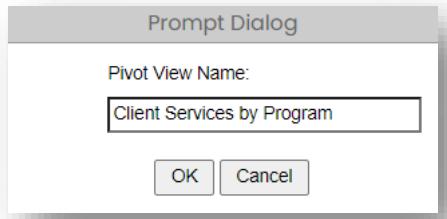
The total count of services provided is displayed in the second column.

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.



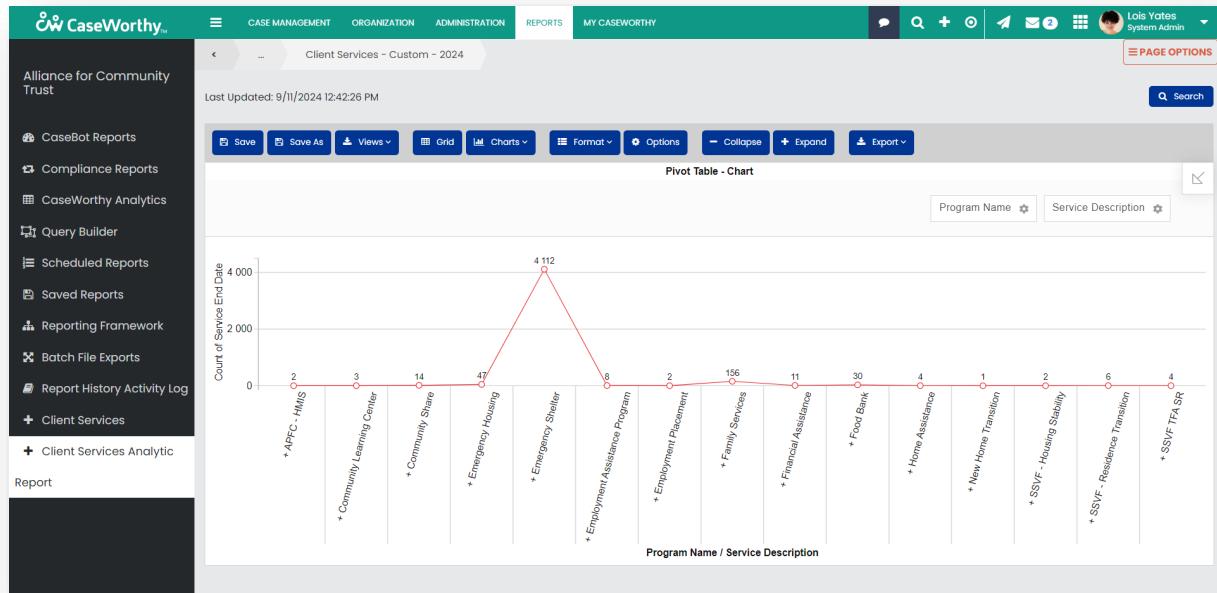
Give the view a meaningful name for easy reference and then select OK. A confirmation message displays indicating the report view was saved. Select OK to continue.

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

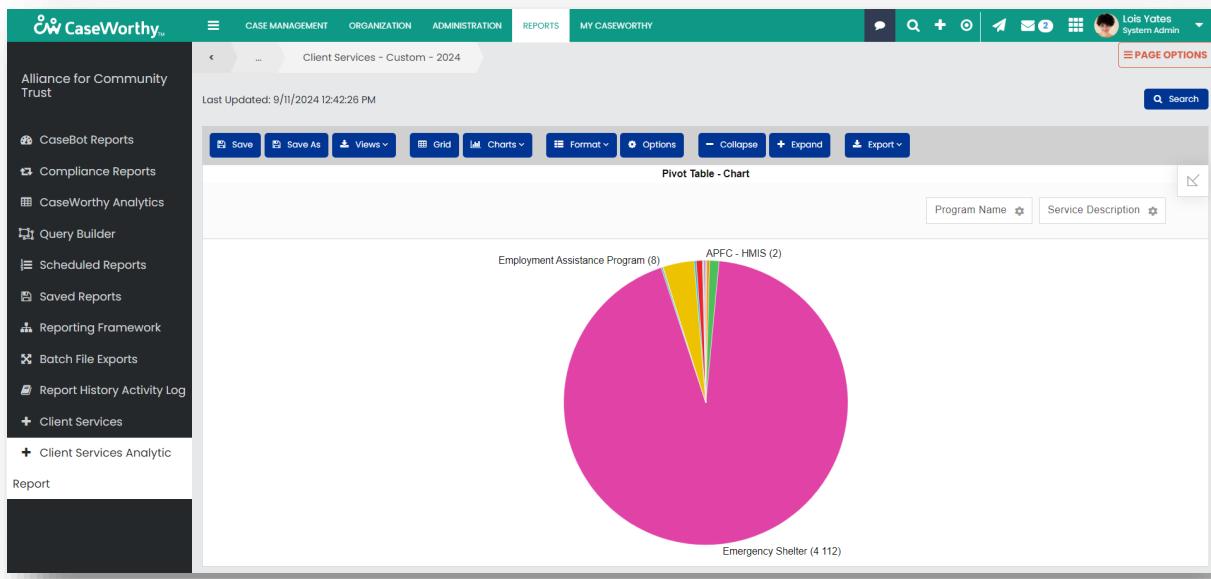
And to access the view later, simply select VIEWS, then select the appropriate report view from the list available.

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.

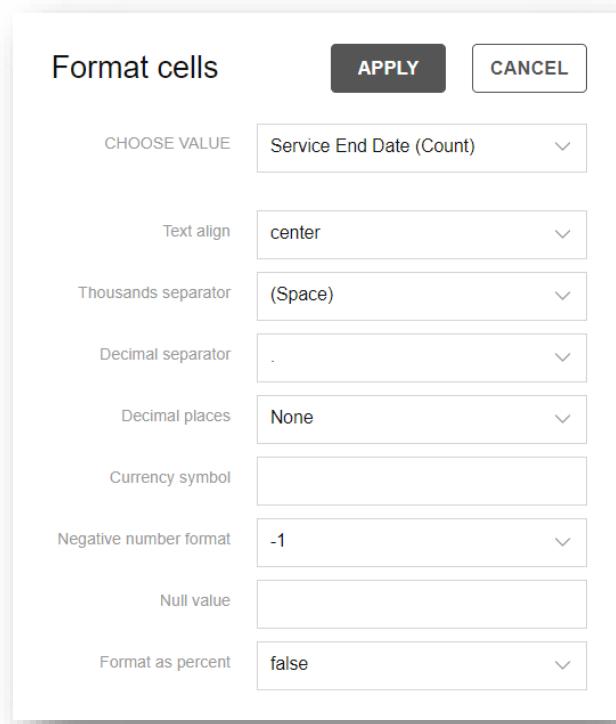


At this point, I am going to choose SAVE because I want this report view to always take me directly to the pie chart. A message displays indicating the view was updated.

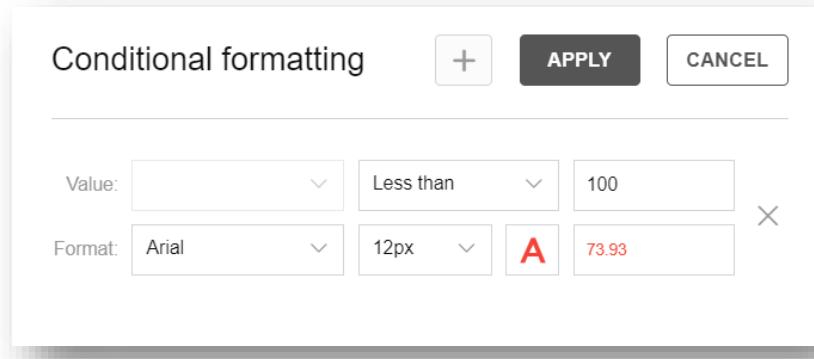
To easily change the report back to a table, select GRID.

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.

CaseBot Reports

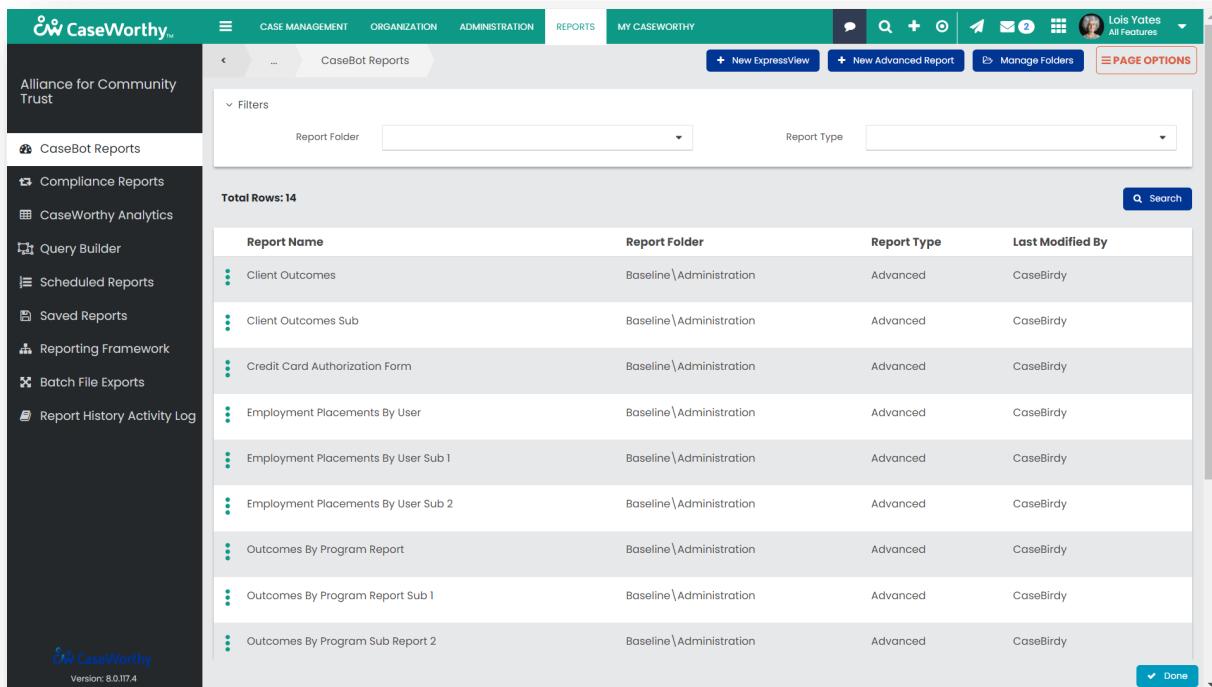
CaseBot brings the power of automation to your reporting.

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.



The screenshot shows the CaseWorthy application interface. The top navigation bar includes links for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, and MY CASEWORTHY. The REPORTS tab is selected. The top right features a search bar, a message icon, and a user profile for Lois Yates. Below the navigation is a toolbar with buttons for New ExpressView, New Advanced Report, Manage Folders, and Page Options.

The main content area displays a list of CaseBot reports. A sidebar on the left lists various reporting tools: Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, and Report History Activity Log. The central list shows 14 total rows, each with columns for Report Name, Report Folder, Report Type, and Last Modified By. The reports listed are Client Outcomes, Client Outcomes Sub, Credit Card Authorization Form, Employment Placements By User, Employment Placements By User Sub 1, Employment Placements By User Sub 2, Outcomes By Program Report, Outcomes By Program Report Sub 1, and Outcomes By Program Sub Report 2. All reports are saved in the Baseline\Administration folder and are Advanced type, last modified by CaseBirdy.

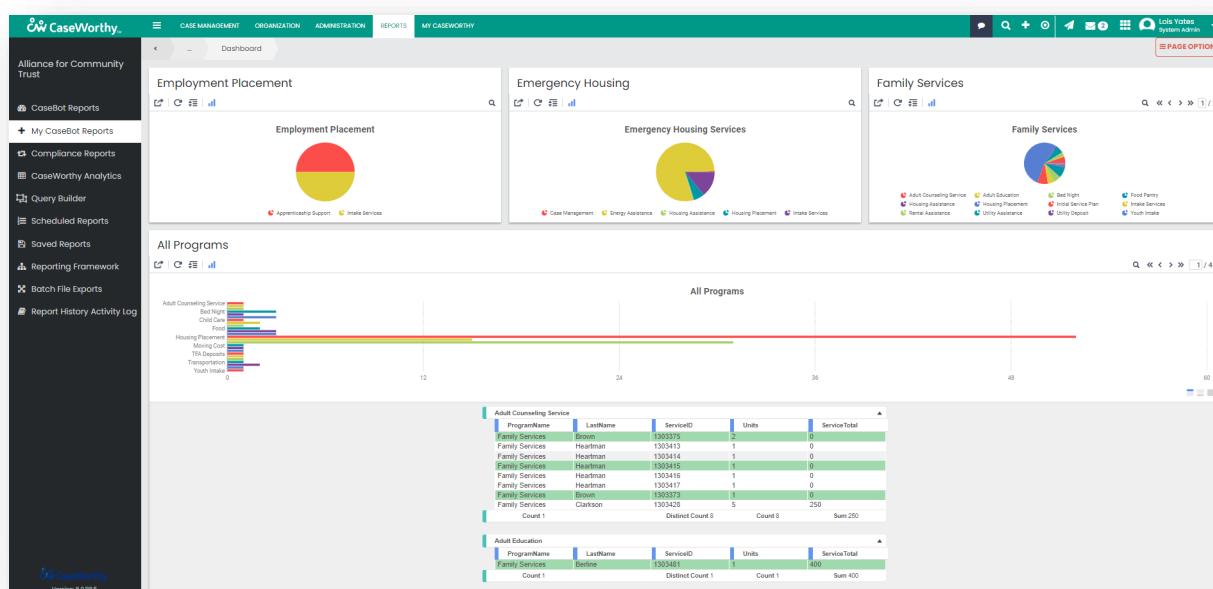
On the Reports tab, from the navigation menu, select CaseBot Reports.

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.



ProgramName	LastName	ServiceID	Units	ServiceTotal
Family Services	Brown	1303419	2	0
Family Services	Hearman	1303413	1	0
Family Services	Hearman	1303415	1	0
Family Services	Hearman	1303417	1	0
Family Services	Brown	1303473	1	0
Family Services	Carlson	1303420	5	250

ProgramName	LastName	ServiceID	Units	ServiceTotal
Family Services	Besline	1303481	1	400

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.

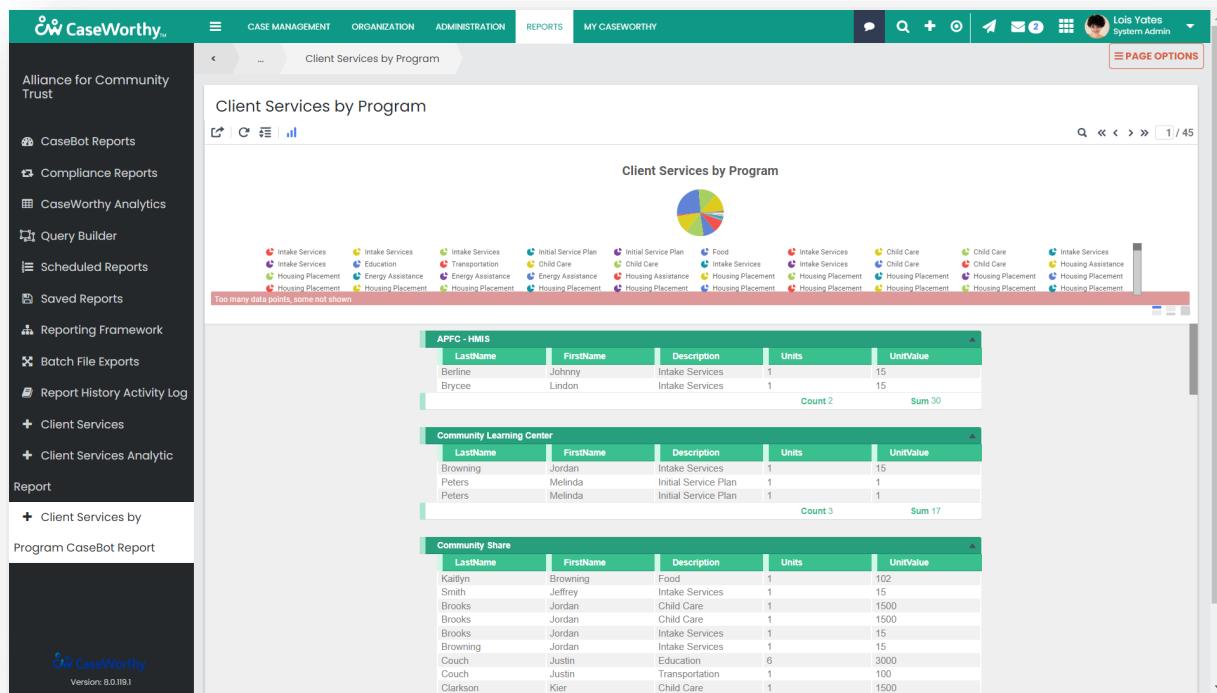
The dashboard displays four different CaseBot reports, which were added by using the Dashboard apBuilder. Each report is a CaseBot Widget that includes a link to the report. If I were to make changes to the CaseBot reports, they would automatically update on this dashboard.

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.



The screenshot shows the CaseWorthy application interface. The left sidebar contains navigation links for various reports and analytics. The main content area displays a report titled "Client Services by Program". At the top of the report is a pie chart. Below the chart are three tables showing enrollment data:

- APFC - HMIS**

Last Name	First Name	Description	Units	Unit Value
Berline	Johnny	Intake Services	1	15
Bryce	Lindon	Intake Services	1	15

Count 2 Sum 30

- Community Learning Center**

Last Name	First Name	Description	Units	Unit Value
Browning	Jordan	Intake Services	1	15
Peters	Melinda	Initial Service Plan	1	1
Peters	Melinda	Initial Service Plan	1	1

Count 3 Sum 17

- Community Share**

Last Name	First Name	Description	Units	Unit Value
Kaitlyn	Browning	Food	1	102
Smith	Jeffrey	Intake Services	1	15
Brooks	Jordan	Child Care	1	1500
Brooks	Jordan	Child Care	1	1500
Brooks	Jordan	Intake Services	1	15
Browning	Jordan	Intake Services	1	15
Couch	Justin	Education	6	3000
Couch	Justin	Transportation	1	100
Clarkson	Kier	Child Care	1	1500

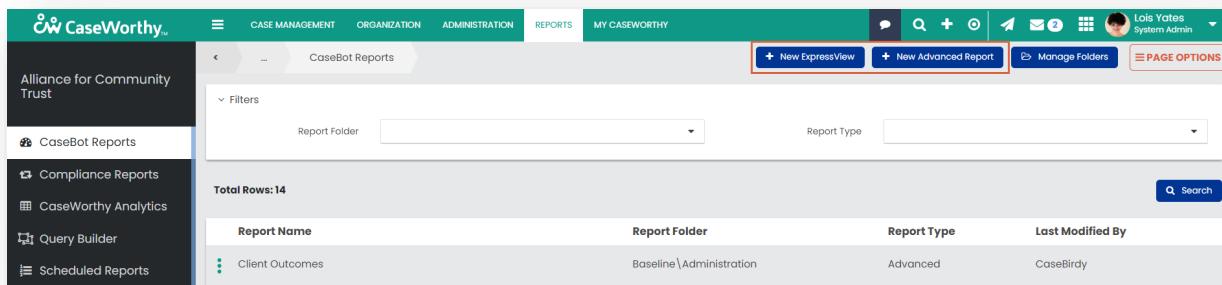
Let's get started.

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.

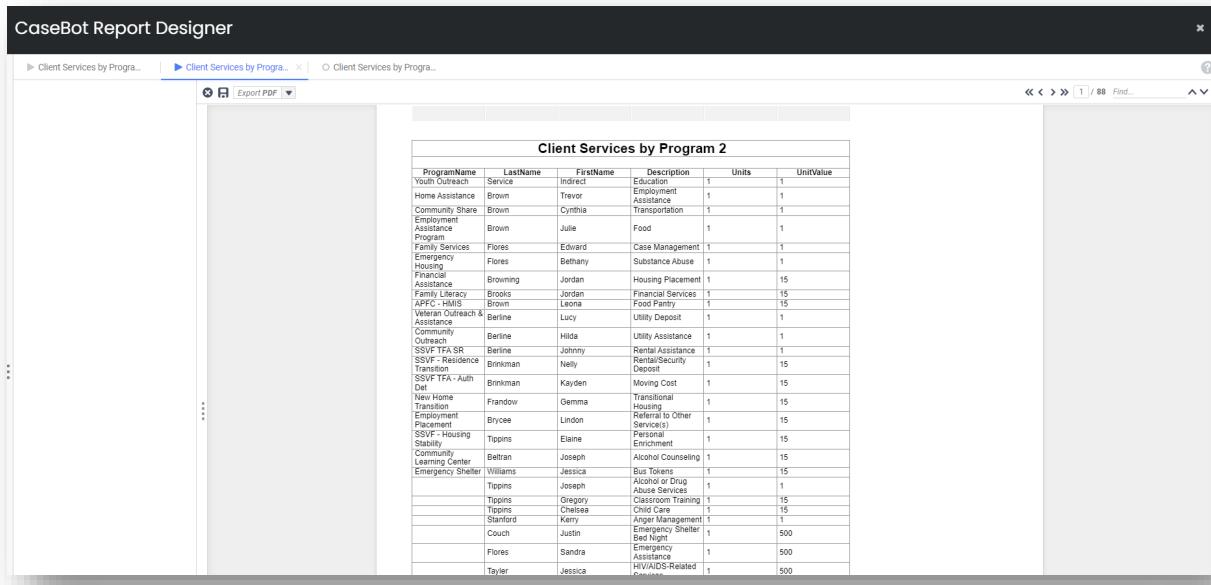


The screenshot shows the CaseWorthy software interface. The top navigation bar includes links for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, and MY CASEWORTHY. The MY CASEWORTHY tab is active. On the left, a sidebar menu lists 'Alliance for Community Trust' and several report categories: CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, and Scheduled Reports. The main content area displays a table titled 'CaseBot Reports' with one row: 'Client Outcomes'. The table includes columns for Report Name, Report Folder, Report Type, and Last Modified By.

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.

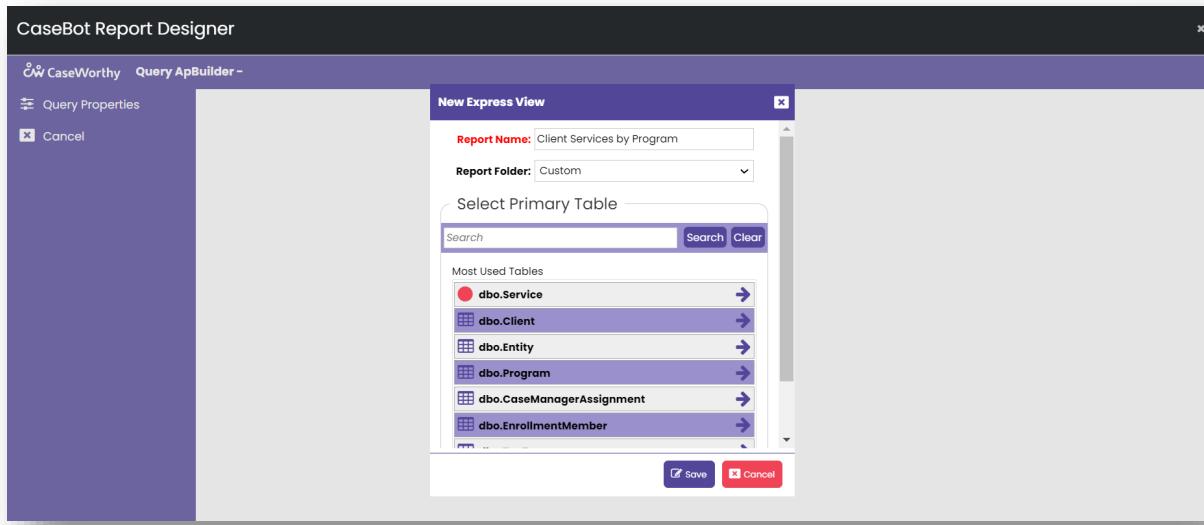
This option produces a spreadsheet-like report with little to no customization like this one.



The screenshot shows the CaseBot Report Designer interface. The title bar says 'CaseBot Report Designer'. Below it, there are three tabs: 'Client Services by Program...', 'Client Services by Program...', and 'Client Services by Program...'. The central area displays a table titled 'Client Services by Program 2'. The table has columns for ProgramName, LastName, FirstName, Description, Units, and UnitValue. The data in the table is as follows:

ProgramName	LastName	FirstName	Description	Units	UnitValue
Youth Outreach	Brown	Trevor	Education	1	1
Home Assistance	Brown	Trevor	Employment Assistance	1	1
Community Share	Brown	Cynthia	Transportation	1	1
Employment Assistance Program	Brown	Julie	Food	1	1
Family Services	Flores	Edward	Case Management	1	1
Emergency Housing	Flores	Bethany	Substance Abuse	1	1
Financial Assistance	Browning	Jordan	Housing Placement	1	15
Family Literacy	Brooks	Jordan	Financial Services	1	15
APFC - HHS	Brown	Leona	Food Pantry	1	15
Utility Deposit & Assistance	Berline	Lucy	Utility Deposit	1	1
Community Outreach	Berline	Hilary	Utility Assistance	1	1
SSIV TRA SR	Berline	Johnny	Rental Assistance	1	1
SSIV - Residence Transitions	Brinkman	Neily	Rental/Security Deposit	1	15
SSIV TRA - Auth Det	Brinkman	Kayden	Moving Cost	1	15
New Home Transition	Frandow	Gemma	Transitional Housing	1	15
Employment Readiness	Bryce	Lindon	Referral to Other Services	1	15
SSIV - Housing Stability	Tippins	Elaine	Personal Enrichment	1	15
Community Learning Center	Betran	Joseph	Alcohol Counseling	1	15
Emergency Shelter	Williams	Jessica	Book Rental	1	15
Tippins	Joseph	Gregory	Alcohol or Drug Abuse Services	1	1
Tippins	Gregory	Chloe	Classroom Training	1	15
Stanford	Kerry	Angela	Drug Testing	1	15
Couch	Justin	Angela	Anger Management	1	1
Flores	Sandra	Benjamin	Emergency Shelter	1	500
Taylor	Jessica	David	Emergency Assistance	1	500
			HIV/AIDS-Related	1	500

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.

CaseBot Report Designer

CaseWorthy Query ApBuilder - Client Services by Program

Query Properties

Save

Cancel

Service

Enrollment

+ Add Table

Column	Data Type	Actions
ServiceID	* int	
AccountID	int	
AccountTableType	tinyint	
AddressID	int	
ApprovalGroupID	int	
BatchTranID	int	
BeginDate	* datetime	
BillingStatus	int	
CaseNotesID	int	
ComponentTypeID	int	
CreatedBy	* int	
CreatedDate	smalldatetime	
CreatedFormID	int	
DeletedBy	int	
DeletedDate	* date	
EndDate	* datetime	
EnrollmentID	int	
FamilyID	int	
FamilyOrIndividual	int	
ISClientAccount	bit	

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.

Table Filters

+ New Rule

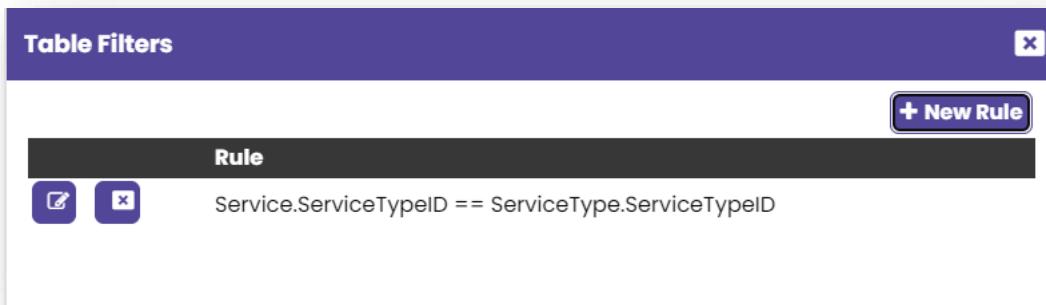
Rule
<input type="button"/> <input type="button"/> Service.EnrollmentID == Enrollment.EnrollmentID

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.

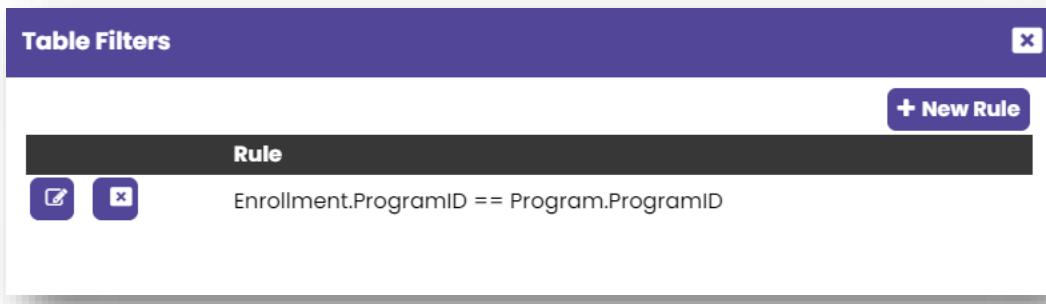
Select the filter icon to add the rule.



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".

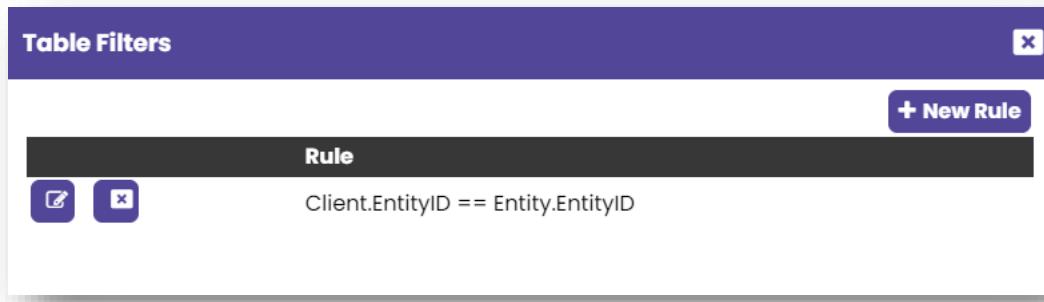


How about the Entity table? How can we join this table?

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".

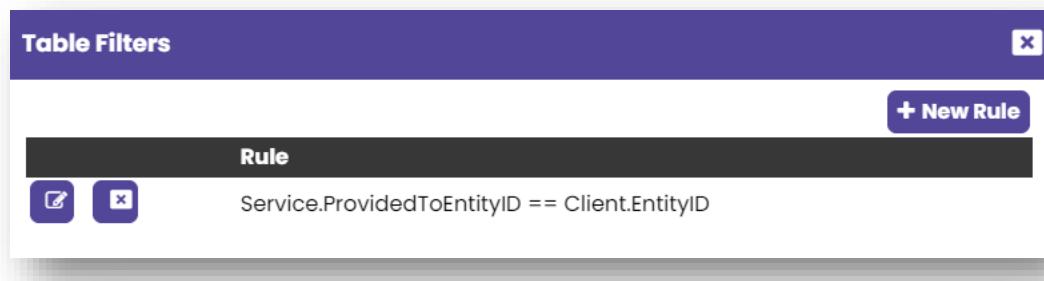


And the last table is the Client table. How can we join this table?

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.

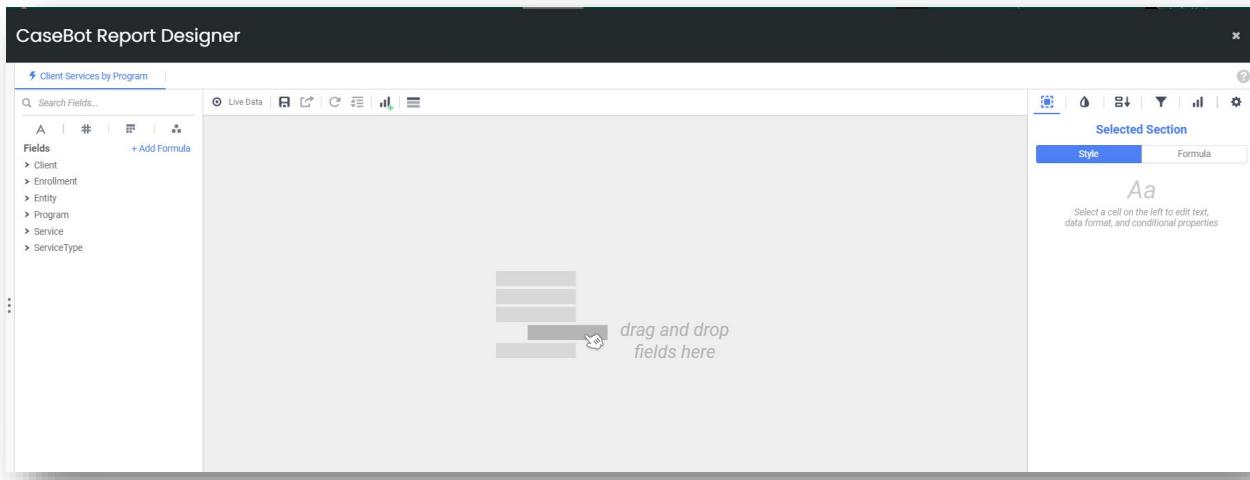
It should look like this: “ServiceProvidedToEntityID” is equal to “Client.EntityID”.



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.

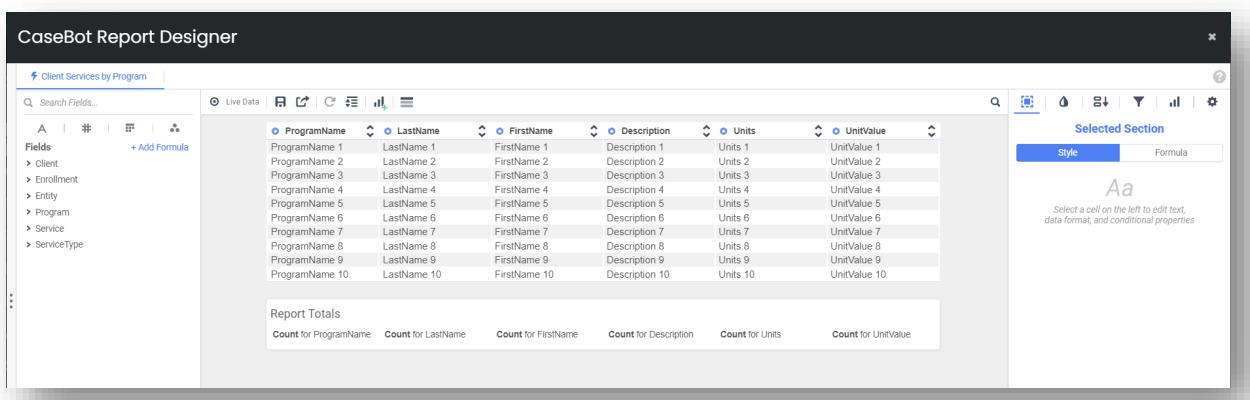
A blank canvas opens. This is where you design how your CaseBot Report will display for Users.



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.

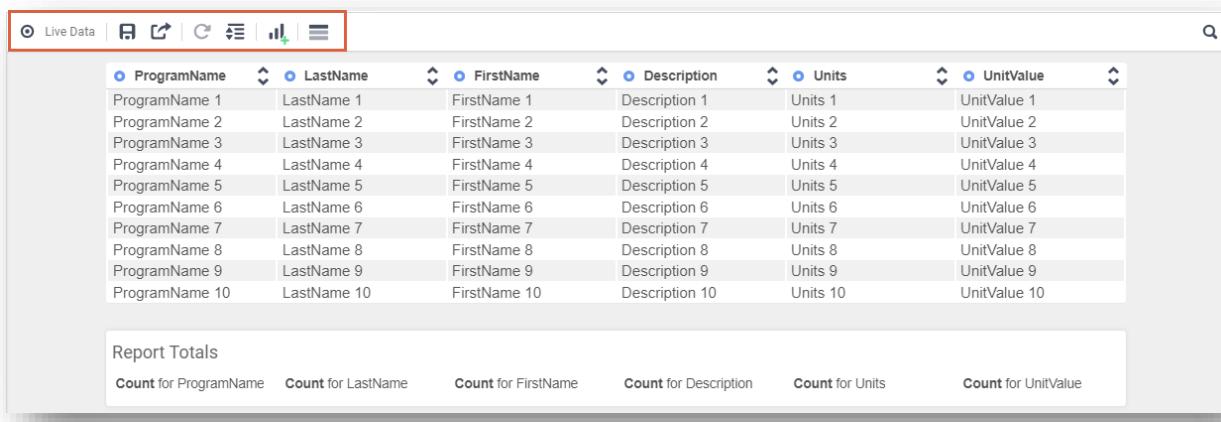
Drag and drop the **Units** field and the **Unit Value** field.

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	Print	Refresh	Export	Filter	Chart	Report Totals
<input checked="" type="radio"/> Live Data	<input type="radio"/>					

ProgramName	LastName	FirstName	Description	Units	UnitValue
ProgramName 1	LastName 1	FirstName 1	Description 1	Units 1	UnitValue 1
ProgramName 2	LastName 2	FirstName 2	Description 2	Units 2	UnitValue 2
ProgramName 3	LastName 3	FirstName 3	Description 3	Units 3	UnitValue 3
ProgramName 4	LastName 4	FirstName 4	Description 4	Units 4	UnitValue 4
ProgramName 5	LastName 5	FirstName 5	Description 5	Units 5	UnitValue 5
ProgramName 6	LastName 6	FirstName 6	Description 6	Units 6	UnitValue 6
ProgramName 7	LastName 7	FirstName 7	Description 7	Units 7	UnitValue 7
ProgramName 8	LastName 8	FirstName 8	Description 8	Units 8	UnitValue 8
ProgramName 9	LastName 9	FirstName 9	Description 9	Units 9	UnitValue 9
ProgramName 10	LastName 10	FirstName 10	Description 10	Units 10	UnitValue 10

Count for ProgramName	Count for LastName	Count for FirstName	Count for Description	Count for Units	Count for UnitValue
-----------------------	--------------------	---------------------	-----------------------	-----------------	---------------------

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.

CaseBot Report Designer

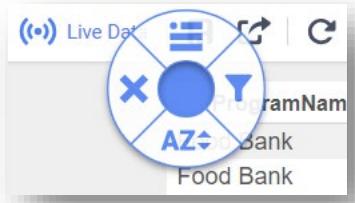
Client Services by Program

Search Fields... Live Data

ProgramName	LastName	FirstName	Description	Units	UnitValue
Food Bank	Brooks	Jordan	Food	1	1
Food Bank	Brooks	Jordan	Food Pantry	1	1
Employment Assistance Program	Brooks	Jordan	Intake Services	1	15
Home Assistance	Flores	Edward	Intake Services	1	15
Food Bank	Brooks	Jordan	Food	1	1
Employment Assistance Program	Flores	Edward	Intake Services	1	15
Employment Assistance Program	Flores	Edward	Intake Services	1	15
Employment Assistance Program	Flores	Edward	Intake Services	1	15
Food Bank	Brown	Cynthia	Intake Services	1	15
Employment Assistance Program	Stanford	Kerry	Initial Service Plan	1	1
Employment Assistance Program	Meyers	Melissa	Intake Services	1	15
Employment Assistance Program	Flores	Edward	Intake Services	1	15
Family Services	Brown	Cynthia	Rental Assistance	1	500
Family Services	Brown	Trevor	Initial Service Plan	1	1
Emergency Housing	Peterson	Philip	Energy Assistance	1	250

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**.

CaseBot Report Designer

Client Services by Program | Live Data | | Q << < > >> 1 / 45

Search Fields... | + Add Formula

Fields

- > Client
- > Enrollment
- > Entity
- > Program
- > Service
- > ServiceType

Last Name	First Name	Description	Units	Unit Value
Bryce	Lindon	Intake Services	1	15
Berline	Johnny	Intake Services	1	15

Count 2 Count 2 Count 1 Count 2 Count 2

Last Name	First Name	Description	Units	Unit Value
Peters	Melinda	Initial Service Plan	1	1
Browning	Jordan	Intake Services	1	15
Peters	Melinda	Initial Service Plan	1	1

Count 3 Count 3 Count 3 Count 3 Count 3

Last Name	First Name	Description	Units	Unit Value
Kraven	Klaude	Intake Services	1	15

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'.

CaseBot Report Designer

Client Services by Program | Live Data | | Q << < > >> 1 / 45

Search Fields... | + Add Formula

Fields

- > Client
- > Enrollment
- > Entity
- > Program
- > Service
- > ServiceType

Last Name	First Name	Description	Units	Unit Value
Bryce	Lindon	Intake Services	1	15
Berline	Johnny	Intake Services	1	15

Count 2 Sum 30

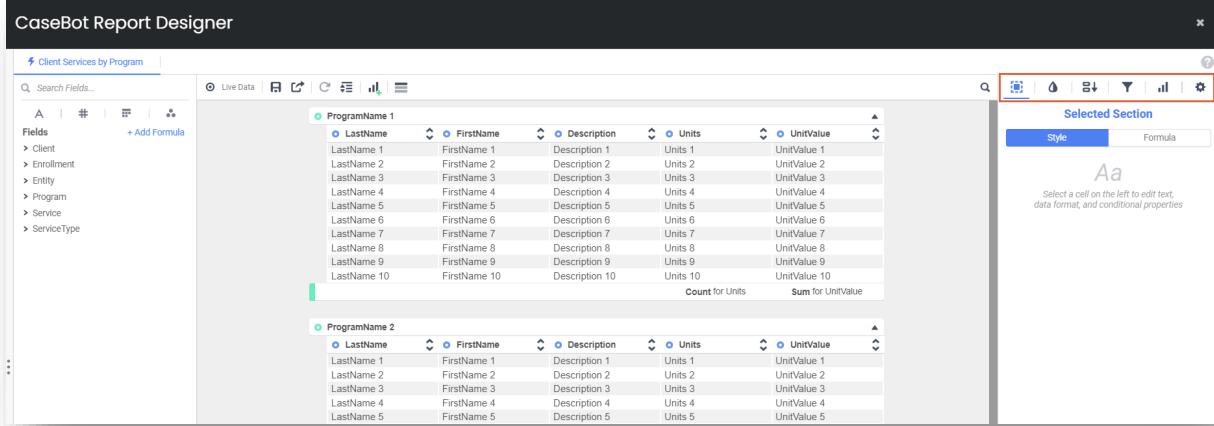
Last Name	First Name	Description	Units	Unit Value
Peters	Melinda	Initial Service Plan	1	1
Browning	Jordan	Intake Services	1	15
Peters	Melinda	Initial Service Plan	1	1

Count 3 Sum 17

Last Name	First Name	Description	Units	Unit Value
Kraven	Klaude	Intake Services	1	15
Brown	Leona	Intake Services	1	15

Remember to stop and save your work often.

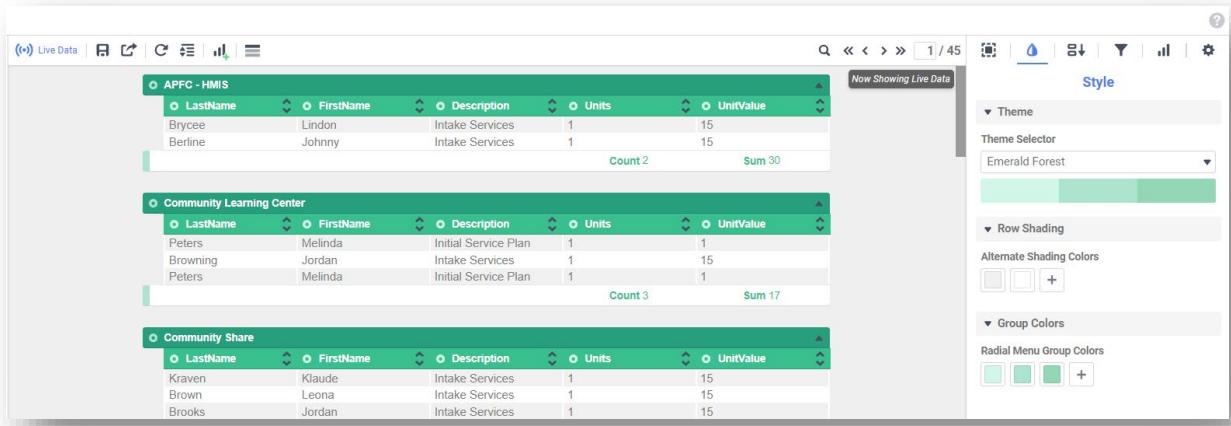
Let's move on to the formatting toolbar on the right side of the page.



The screenshot shows the CaseBot Report Designer interface. On the left, there's a sidebar with 'Fields' categories like Client, Enrollment, Entity, Program, Service, and ServiceType. The main area displays two tables. The first table, 'ProgramName 1', has 10 rows with data: LastName 1-10, FirstName 1-10, Description 1-10, Units 1-10, and UnitValue 1-10. The second table, 'ProgramName 2', has 5 rows with similar data. A toolbar at the top right includes icons for expand/collapse, search, and other report functions.

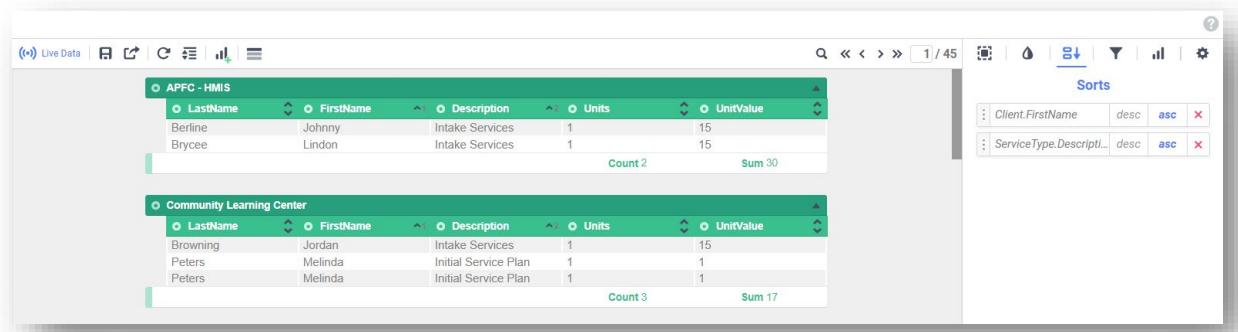
The first icon allows you to expand and collapse the toolbar, which increases your working report canvas if you are not currently using formatting options.

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.



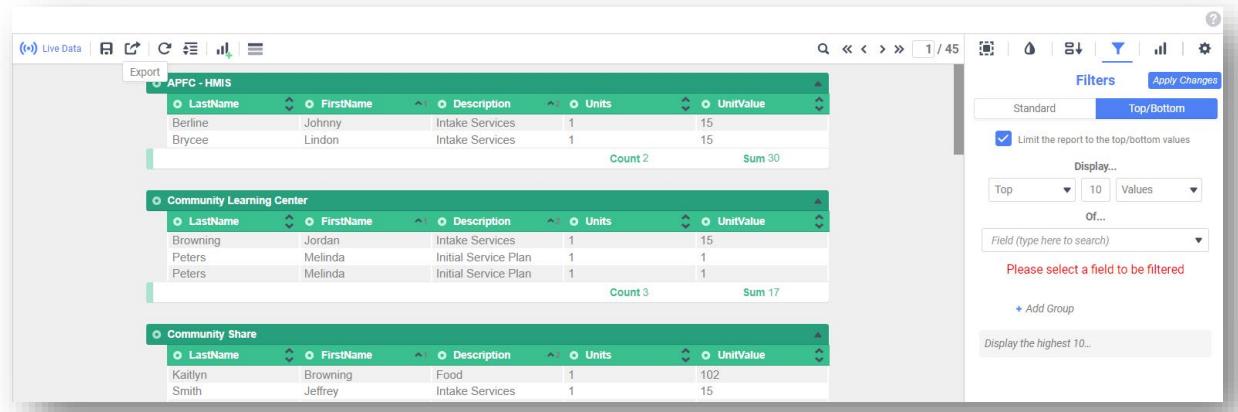
The screenshot shows the CaseBot Report Designer interface with three tables: 'APFC - HMIS', 'Community Learning Center', and 'Community Share'. Each table has columns for LastName, FirstName, Description, Units, and UnitValue. The 'Style' panel on the right is open, showing the 'Theme' section with 'Emerald Forest' selected, a 'Row Shading' section with 'Alternate Shading Colors' options, and a 'Group Colors' section with 'Radial Menu Group Colors' options.

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.



The screenshot shows a report interface with two data tables. The first table, 'APFC - HMIS', has columns for LastName, FirstName, Description, Units, and UnitValue. It contains two rows: Berline (Johnny, Intake Services, 1, 15) and Brycee (Lindon, Intake Services, 1, 15). The total count is 2 and the sum is 30. The second table, 'Community Learning Center', has the same structure and contains three rows: Browning (Jordan, Intake Services, 1, 15), Peters (Melinda, Initial Service Plan, 1, 1), and Peters (Melinda, Initial Service Plan, 1, 1). The total count is 3 and the sum is 17. On the right, there are 'Sorts' and 'Filters' panels.

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



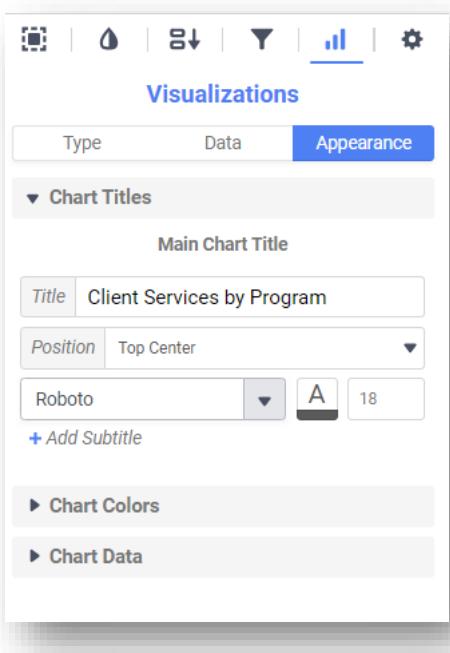
The screenshot shows the same report interface with the 'Filters' tab selected. The 'Top/Bottom' filter is applied to the APFC - HMIS table, showing the top 10 values. The right side of the interface includes a 'Filters' panel with options for 'Standard', 'Top/Bottom', and 'Display'. It also includes a search bar and a message 'Please select a field to be filtered'.

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.

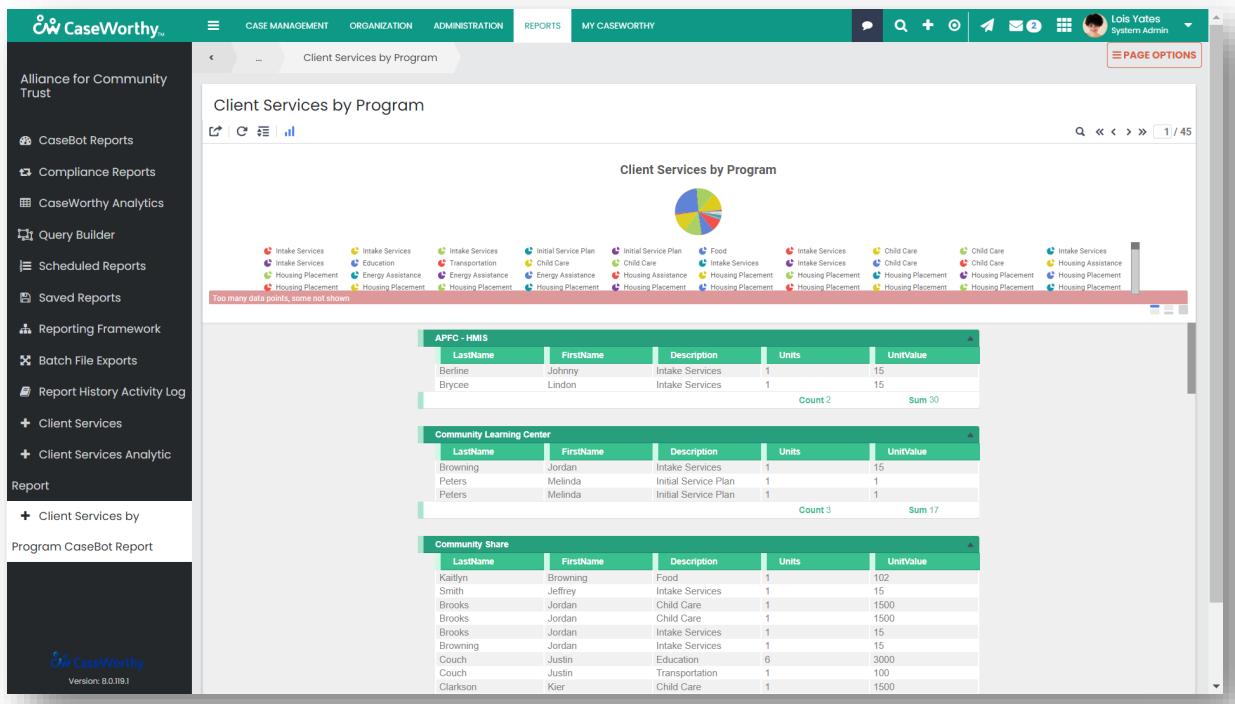
Let's save the report one last time.

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.

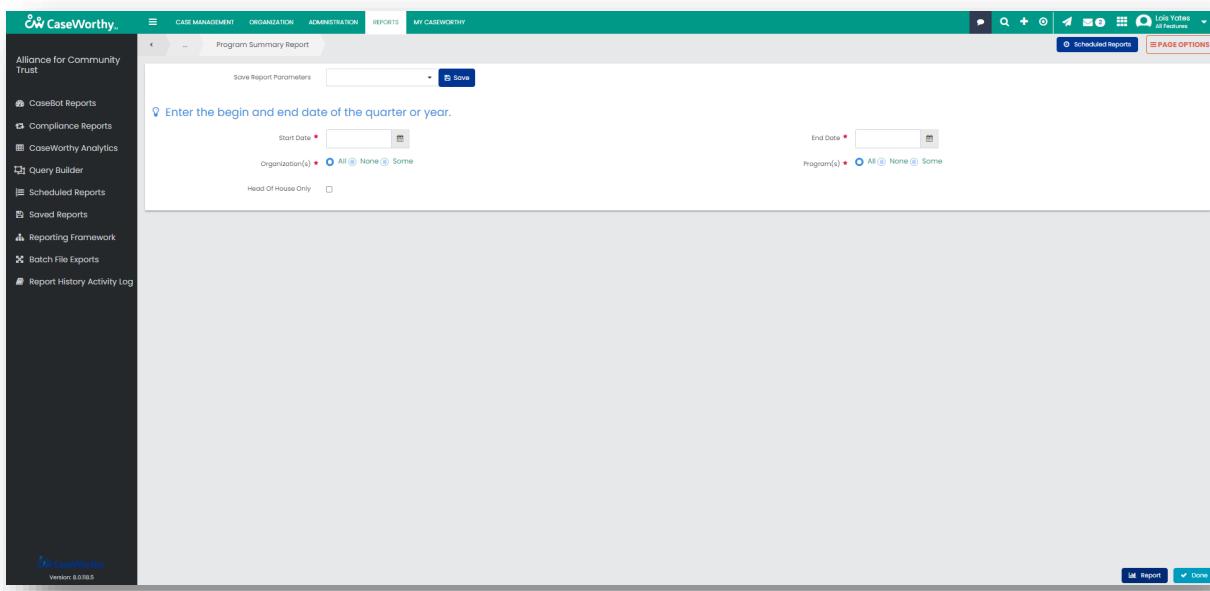
SSRS Reports

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.

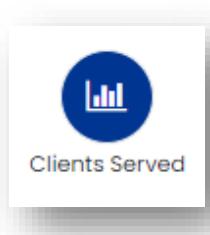


First, when you initially open an SSRS Report, you will be prompted to set multiple parameters before generating the report. This allows you to easily choose what data should be included in the report. For example, you can select the start and end dates, the Organizations, the Programs, and more!

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.



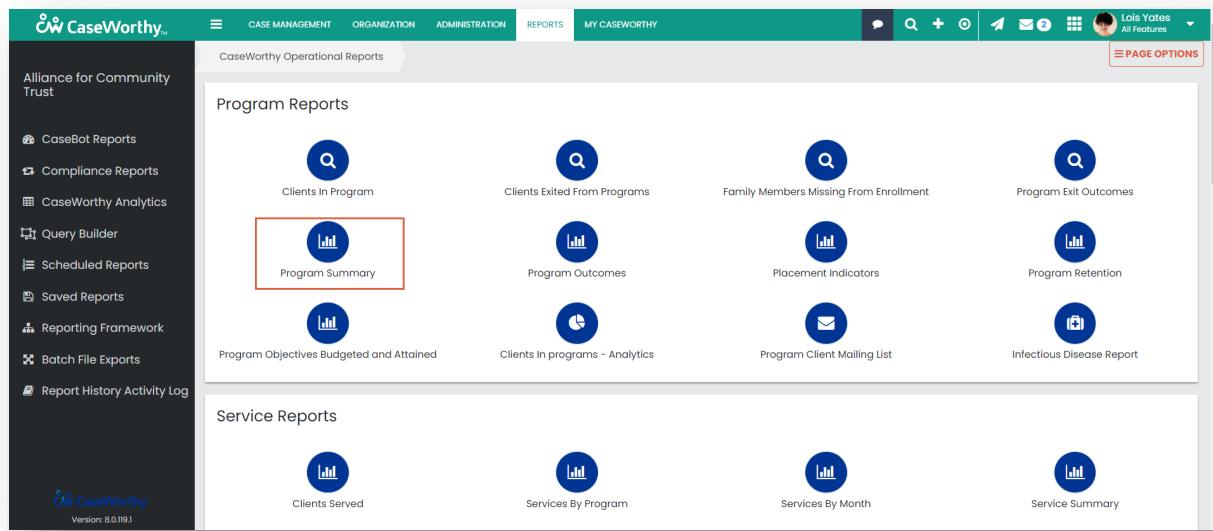
You can create your own SSRS report, but it requires SQL knowledge and direct collaboration with a CaseWorthy Support Analyst.

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.



The screenshot shows the CaseWorthy software interface. At the top, there's a navigation bar with tabs for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS (which is currently selected), and MY CASEWORTHY. To the right of the navigation bar are various icons for messaging, search, and user profile. Below the navigation bar is a header for "CaseWorthy Operational Reports". The main content area is divided into two sections: "Program Reports" and "Service Reports". Under "Program Reports", there are several icons representing different reports: "Clients In Program", "Clients Exited From Programs", "Family Members Missing From Enrollment", "Program Exit Outcomes", "Program Summary" (which is highlighted with a red box), "Program Objectives Budgeted and Attained", "Program Outcomes", "Placement Indicators", "Program Retention", "Program Client Mailing List", and "Infectious Disease Report". Under "Service Reports", there are four icons: "Clients Served", "Services By Program", "Services By Month", and "Service Summary". On the left side of the interface, there's a sidebar for "Alliance for Community Trust" containing links for CaseBot Reports, Compliance Reports, CaseWorthy Analytics, Query Builder, Scheduled Reports, Saved Reports, Reporting Framework, Batch File Exports, and Report History Activity Log. At the bottom left is the CaseWorthy logo and version information (Version: 8.0.119.1).

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

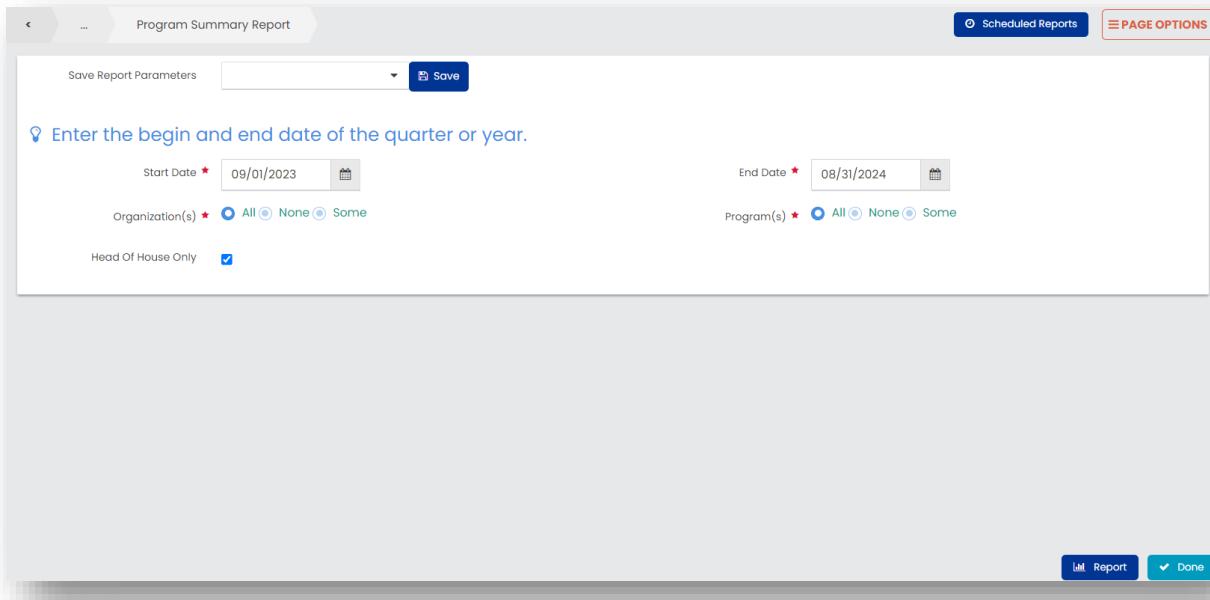
Run the Report

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.



The screenshot shows the 'Program Summary Report' page. At the top right are 'Scheduled Reports' and 'PAGE OPTIONS' buttons. Below is a 'Save Report Parameters' dropdown and a 'Save' button. A note says 'Enter the begin and end date of the quarter or year.' The 'Start Date' is set to '09/01/2023' and the 'End Date' is '08/31/2024'. Under 'Organization(s)', 'All' is selected. Under 'Program(s)', 'All' is also selected. A checkbox for 'Head Of House Only' is checked. At the bottom right are 'Report' and 'Done' buttons.

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.

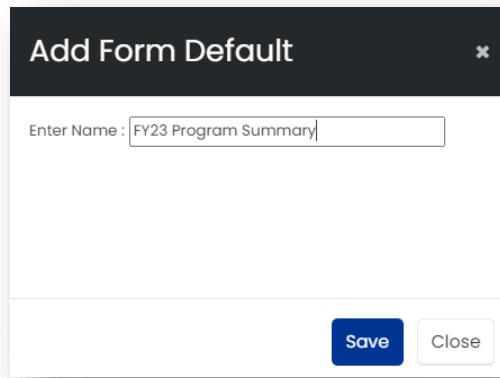
Then select the **Organizations** that should be included on the report. Options allow you to include 'All' Organizations, 'None', or 'Some', which allows you to individually select one or more Organizations. Notice this field is set to 'All' by default.

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.

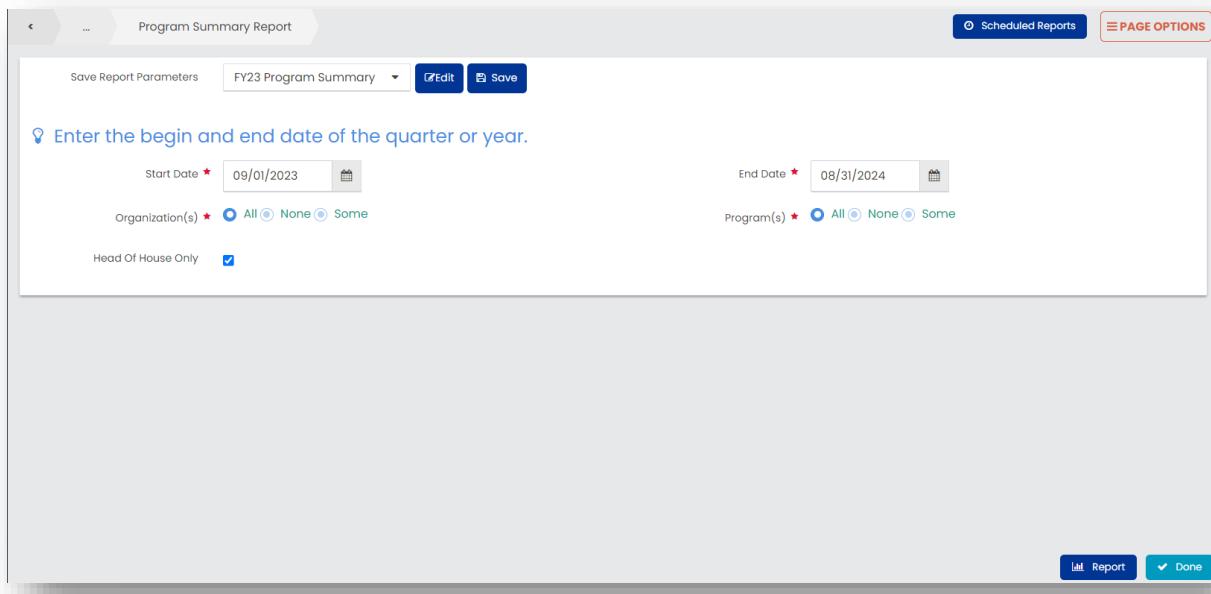
Next to the **Save Report Parameters** dropdown, select SAVE to save the report. You are prompted to enter a name for the report.



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.

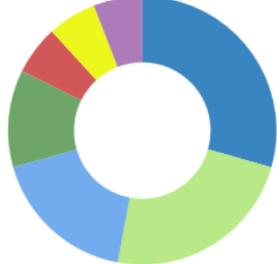
1 of 2 | Find | Next

Program Summary

Run by lyates - Alliance for Community Trust on 9/16/2024 at 9:48 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	

Top 10 Programs by Distinct Client



Program Name	Distinct Client Count
Community Learning Center	1
Emergency Shelter	5
Employment Assistance Program	4
Family Services	3

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 | 100% | Find | Next | Refresh | Print | Back | Forward | Home | Help

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 | 100% | Find | Next | Refresh | Print | Back | Forward | Home | Help

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.

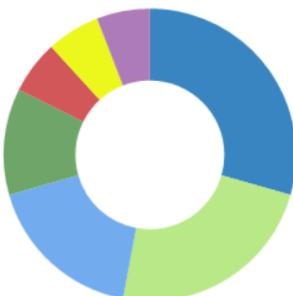
|< < 1 / 2 > >> ⌂ ⌂ 100% ⌄ ⌅ ⌆ ⌇ ⌈ ⌉ ⌊ ⌋ ⌁ ⌂ Find | Next

Program Summary

Run by lyates - Alliance for Community Trust on 9/16/2024 at 10:02 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	

Top 10 Programs by Distinct Client



Program Name	Distinct Client Count
Community Learning Center	1
Emergency Shelter	5
Employment Assistance Program	4
Family Services	3

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.

Program Summary

Run by lyates - Alliance for Community Trust on 9/16/2024 at 10:02 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

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.

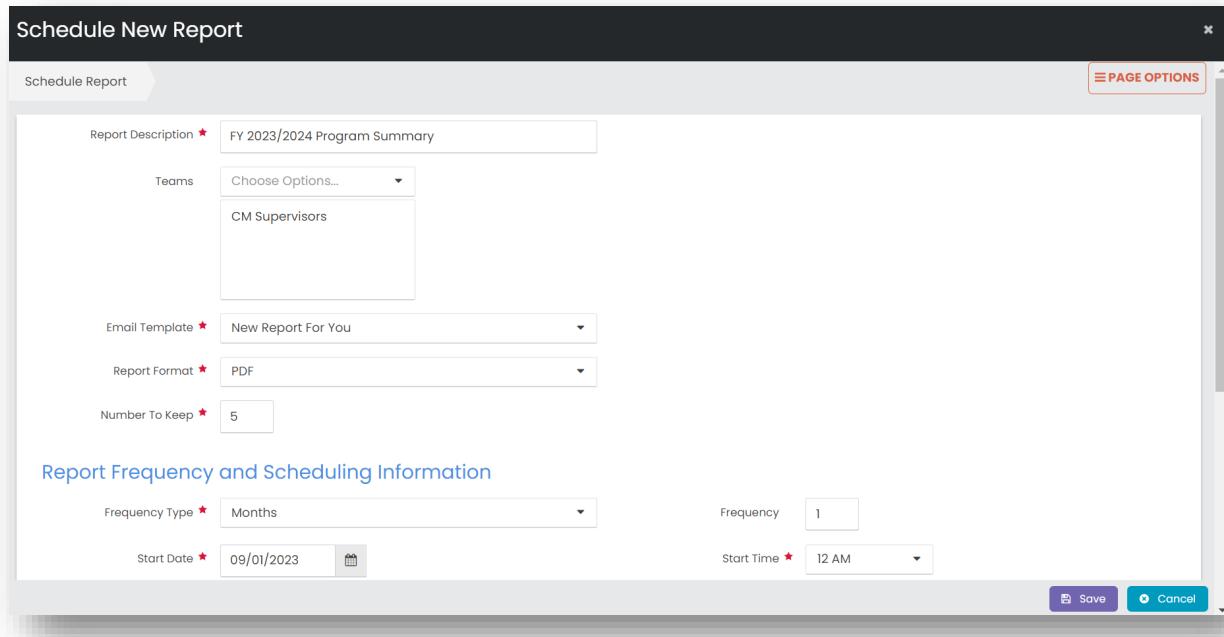
The vertical ellipsis allows you to edit or delete each scheduled report.

Scheduled Reports					
Scheduled Reports					
Description	Created	Created By	Last Modified	Last Modified By	Report Schedule ID
 	4/28/2023 11:26 AM	Mindy Cottrell	4/28/2023 11:26 AM	Mindy Cottrell	60
 	9/16/2024 12:19 PM	Lois Yates	9/16/2024 12:20 PM	Lois Yates	62

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.



The screenshot displays the 'Schedule New Report' dialog box. At the top, there's a 'Report Description' field containing 'FY 2023/2024 Program Summary'. Below it is a 'Teams' section with a dropdown menu showing 'Choose Options...' and a list box containing 'CM Supervisors'. Underneath are fields for 'Email Template' (set to 'New Report For You'), 'Report Format' (set to 'PDF'), and 'Number To Keep' (set to '5'). The bottom section is titled 'Report Frequency and Scheduling Information', featuring a 'Frequency Type' dropdown set to 'Months', a 'Frequency' input field with the value '1', a 'Start Date' field showing '09/01/2023' with a calendar icon, and a 'Start Time' dropdown set to '12 AM'. At the very bottom are 'Save' and 'Cancel' buttons.

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.

Schedule New Report

Schedule Report

Report Frequency and Scheduling Information

Frequency Type *	Months	Frequency	1
Start Date *	09/01/2023	Start Time *	12 AM
End Date	08/31/2024		

Report Parameters

Start Date *	Beginning Of This Month	End Date *	End Of This Month
Organization(s) *	<input checked="" type="radio"/> All <input type="radio"/> None <input type="radio"/> Some	Program(s) *	<input checked="" type="radio"/> All <input type="radio"/> None <input type="radio"/> Some
Head Of House Only	<input type="checkbox"/>		

Disable Report

Disable	<input type="checkbox"/>
---------	--------------------------

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.

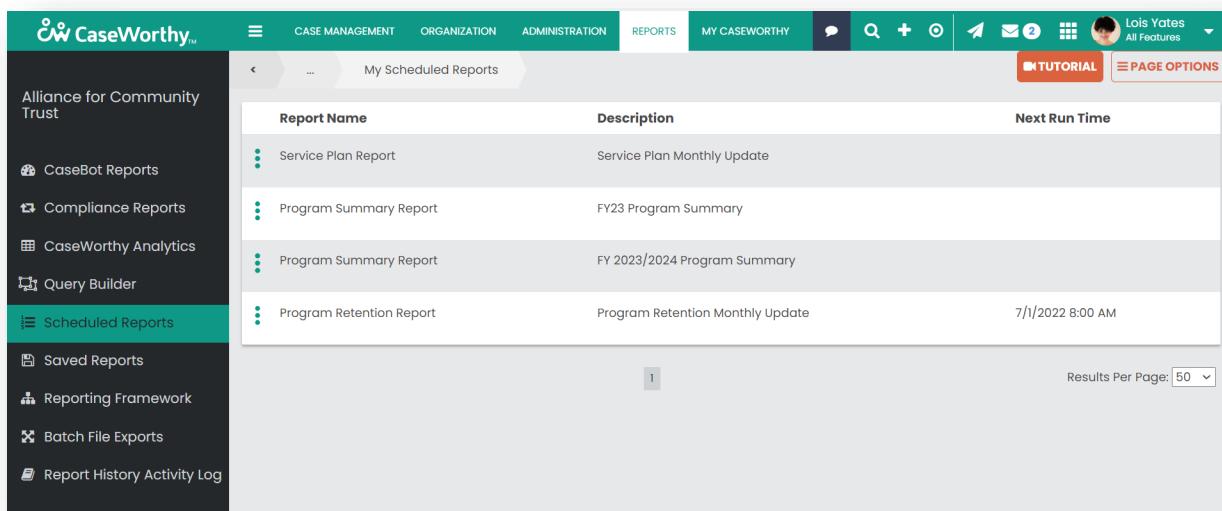
Select SAVE when done.

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.

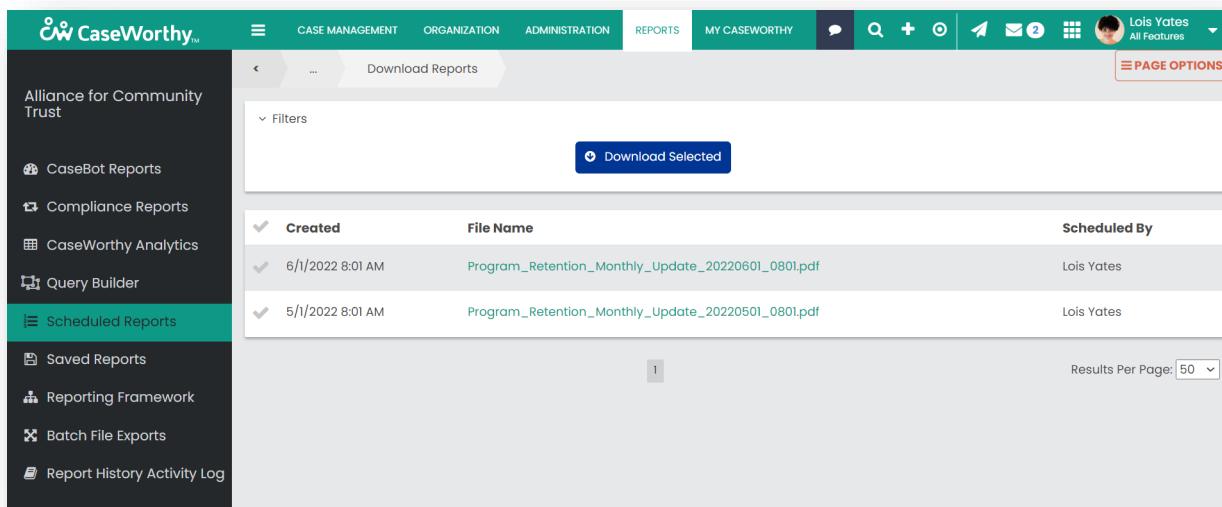


The screenshot shows the CaseWorthy application interface. On the left is a dark sidebar with various reporting options. The main area is titled 'My Scheduled Reports' and displays a table of scheduled reports. The columns are 'Report Name', 'Description', and 'Next Run Time'. There are four entries in the table:

Report Name	Description	Next Run Time
Service Plan Report	Service Plan Monthly Update	
Program Summary Report	FY23 Program Summary	
Program Summary Report	FY 2023/2024 Program Summary	
Program Retention Report	Program Retention Monthly Update	7/1/2022 8:00 AM

At the bottom right of the main area, there is a 'Results Per Page:' dropdown set to 50.

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



The screenshot shows the CaseWorthy application interface. On the left is a dark sidebar with various reporting options. The main area is titled 'Download Reports' and displays a table of scheduled reports. The columns are 'Created', 'File Name', and 'Scheduled By'. There are two entries in the table:

Created	File Name	Scheduled By
6/1/2022 8:01 AM	Program_Retention_Monthly_Update_20220601_0801.pdf	Lois Yates
5/1/2022 8:01 AM	Program_Retention_Monthly_Update_20220501_0801.pdf	Lois Yates

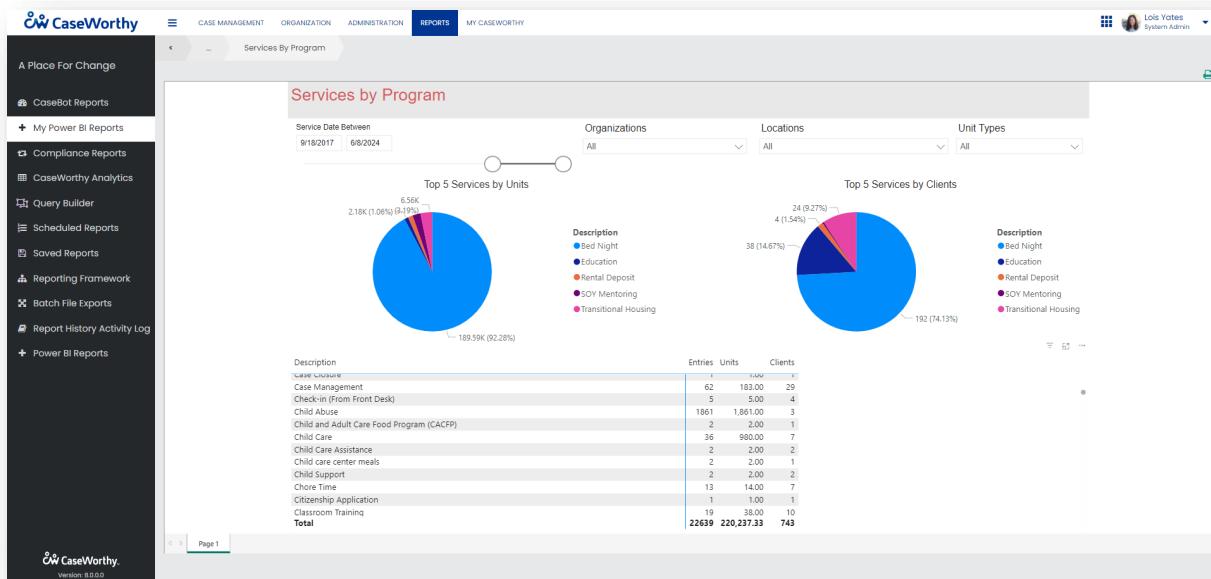
At the top right of the main area, there is a 'Download Selected' button. At the bottom right, there is a 'Results Per Page:' dropdown set to 50.

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.

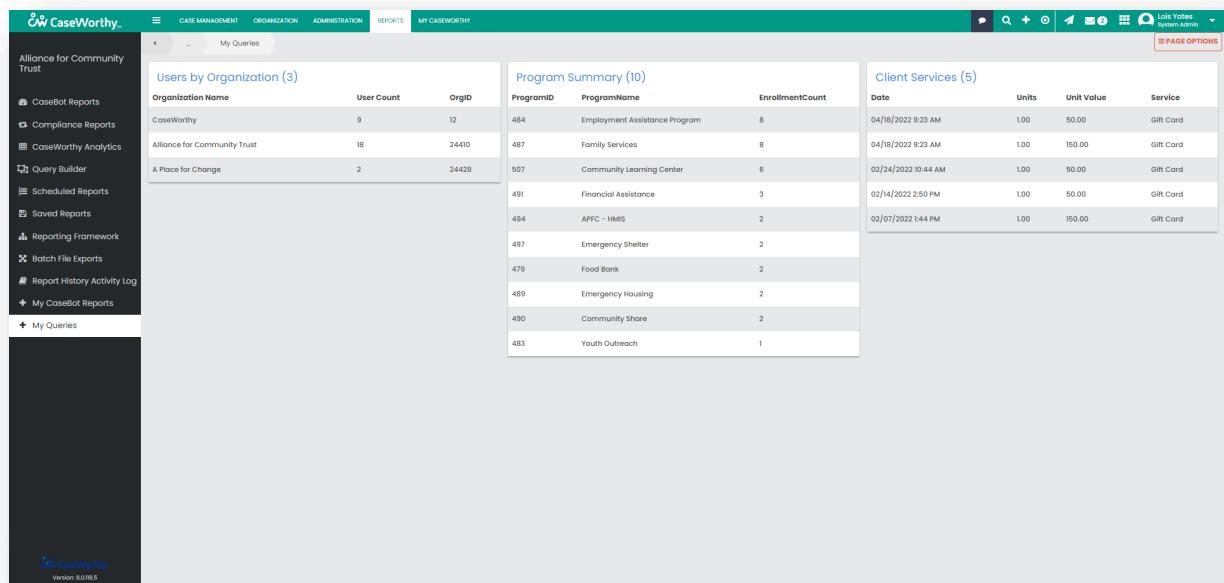
This tool allows you to create your own queries on dashboards, within lists, and even on Case Note and Email templates. It includes multiple options that allow you to fully customize your queries, including table joins, setting parameters, filters, automatic calculations, and much more!

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.



Users by Organization (3)			Program Summary (10)			Client Services (5)			
Organization Name	User Count	OrgID	ProgramID	ProgramName	EnrollmentCount	Date	Units	Unit Value	Service
CaseWorthy	9	12	484	Employment Assistance Program	8	04/18/2022 9:23 AM	1.00	50.00	Gift Card
Alliance for Community Trust	18	24410	487	Food Pantry Services	8	04/18/2022 9:23 AM	1.00	150.00	Gift Card
A Place for Change	2	24428	507	Community Learning Center	6	02/24/2022 10:44 AM	1.00	50.00	Gift Card
			491	Financial Assistance	3	02/14/2022 2:50 PM	1.00	50.00	Gift Card
			494	APFC - HMIS	2	02/07/2022 1:44 PM	1.00	150.00	Gift Card
			497	Emergency Shelter	2				
			479	Food Bank	2				
			489	Emergency Housing	2				
			490	Community Share	2				
			483	Youth Outreach	1				

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.