Kemp’s Reporting Services

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Overview

Has the management of your organization overtaken your life? Do you schedule hours out of each week, or days out of each month, to run reports and review data in your system? Do you wish you could spend more time on management and less time running reports and gathering data? If you use Prime 16 hosted on Venture Technologies, we have just the thing for you: Kemp's Reporting Services (KRS)!

KRS is the newest, optional benefit offered for hosted Prime 16. It gives you administrative support using automated/scheduled reports, data mapping, and long term comparison reports. Instead of performing standard management by running through pages of plain data, KRS takes that data and provides it visually. A simple glance at the graphics tells you all you need to know about your organization. You can even use graphical mapping by county to tell your data story.

KRS is now available to administrative users in your program. With this system, we provide more than 15 reports for your use.

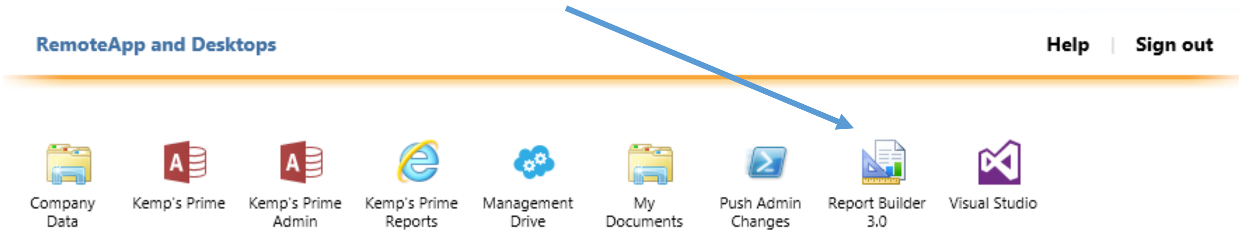
Administrators can use these reports to keep abreast of events in their organization. Like Prime, you can run these reports manually, when you desire. However, you can automate these reports, so they are waiting for you in email when you arrive in your office, automating your management—allowing you to concentrate on managing your organization and letting the reports you desire come to you on your schedule. Not happy with the reports provided? You may modify existing reports and create your own. The reports you create may also be automated and emailed when you want.

You can schedule each report to be run and emailed to you as often as hourly, daily, weekly, or monthly. You can even specify a time to stop the reports, so they run for a period and then stop. For a report that allows parameters (for example, the selection of running a report just for a specific office), you can schedule the report to run with different parameters at different times.

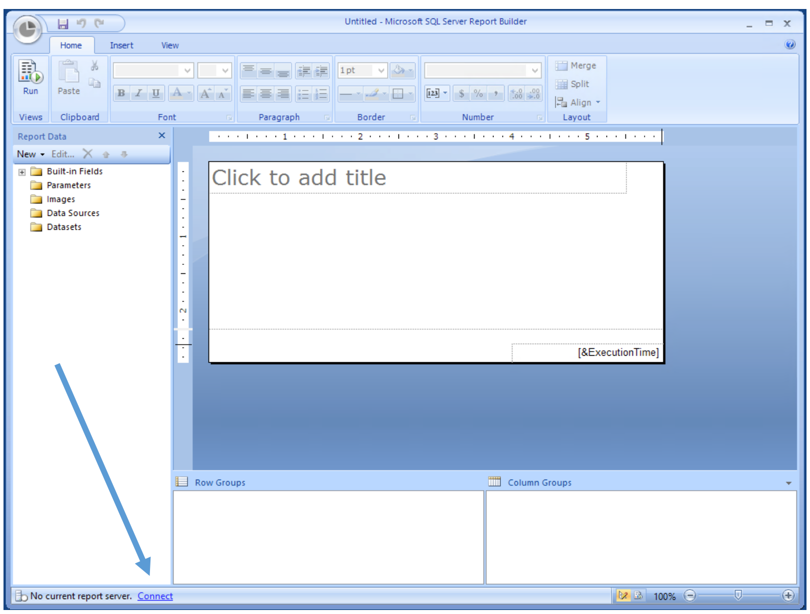
Setup and Use

Modifying Existing Reports

To modify existing reports, administrators may use the Report Builder icon from the web portal.

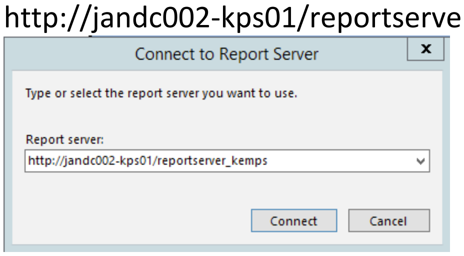


This starts the Report Builder. A "Getting Started" box may show up first, close this box to access the Report Builder directly. In the lower left corner, click the "Connect" link.



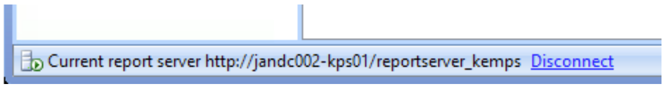
In the "Connect to Report Server" box, type in:

http://jandc002-kps01/reportserver_kemps

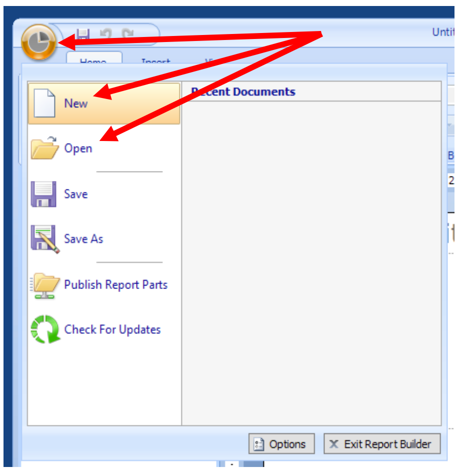


Then click "Connect".

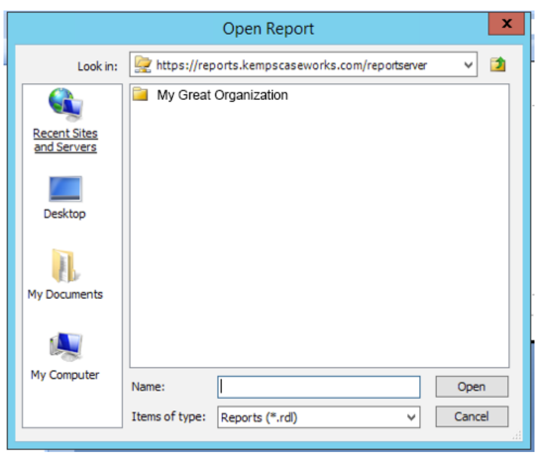
Once connected, this information should appear in the lower left of the Report Builder.



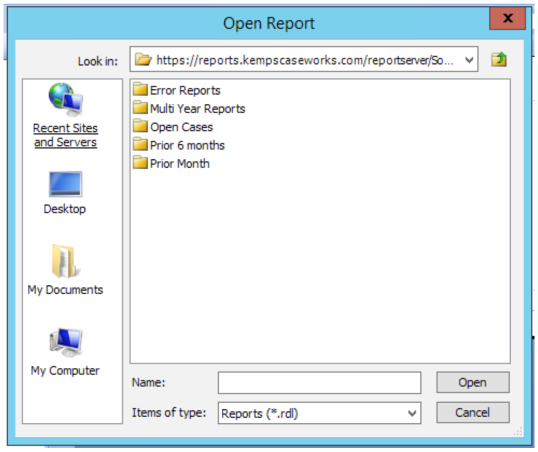
Use the menu button at the top left to access the "New" and "Open" options for creating a new report and for opening an existing report, respectively.



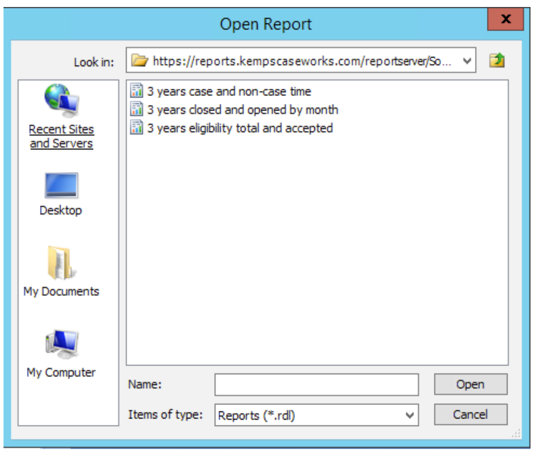
Clicking "Open" brings up the "Open Report" box. Find and double-click on your organizations folder.



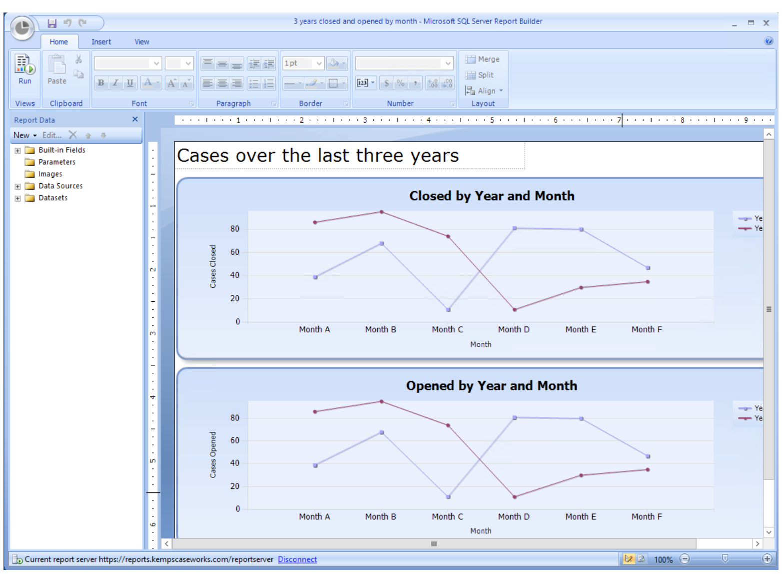
Subfolders separate the various types of provided reports:



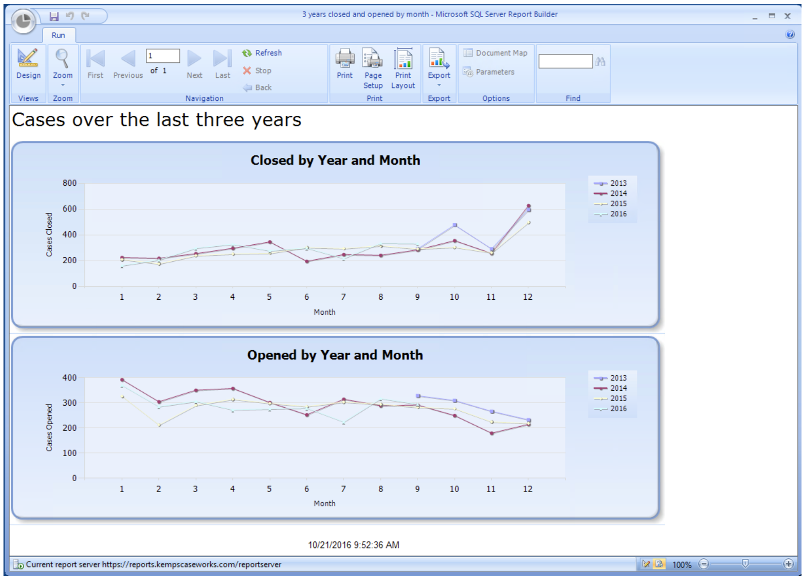
Double-click on a folder to see the reports available, for example, here are the Multi Year Reports:



Choose a report to open by double-clicking on it. Here is the 3 years closed and opened by month report:

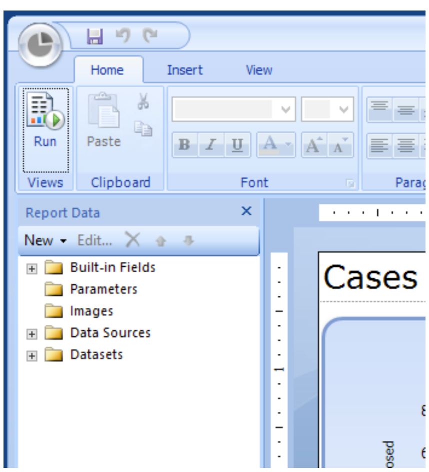


To run the Report, click the “Run” button in the Home→Views menu. The report runs and displays its data:



To get back to the design view, click “Design” in the Run menu.

In the design view, the “Report Data” pane shows all the information about the data that will be used in the report:



The “Data Sources” folder contains the connection information to get to your database. We provide a single connection item for your report system. That connection information should not be changed.

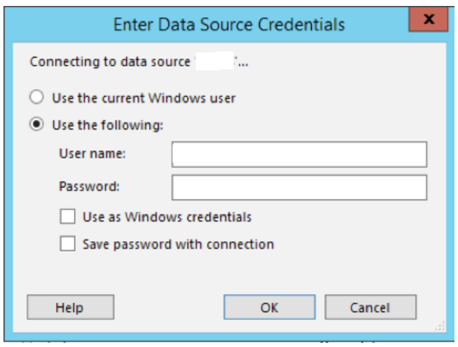
The “Datasets” folder contains the data that will be used in the report. There may be more than one data set, depending on the nature and complexity of the report.

If your report has parameters that must be entered, information about those parameters is shown in the "Parameters" folder. Finally, other fields that are available in the report are shown in the "Built-in Fields" folder—this includes items such as page number, report name, etc.

You can get more information about the Report Builder and how to use it from this Microsoft website:

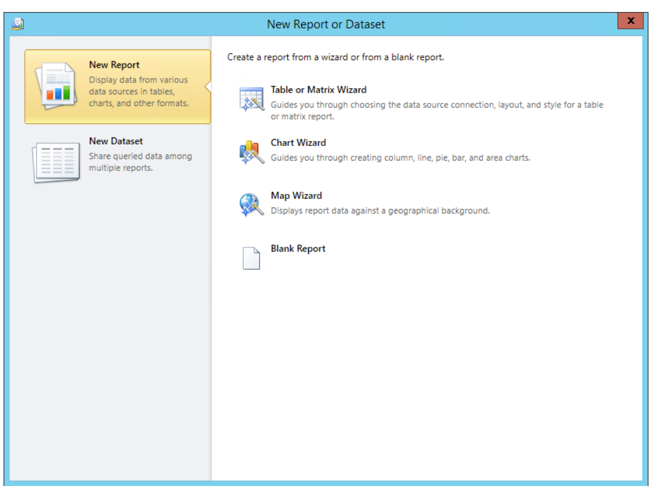
https://msdn.microsoft.com/en-us/library/dd239338(v=sql.120).aspx

When working with data sets, if you are ever prompted to "Enter Data Source Credentials" as shown here, simply select "Use the current Windows user" and press OK:



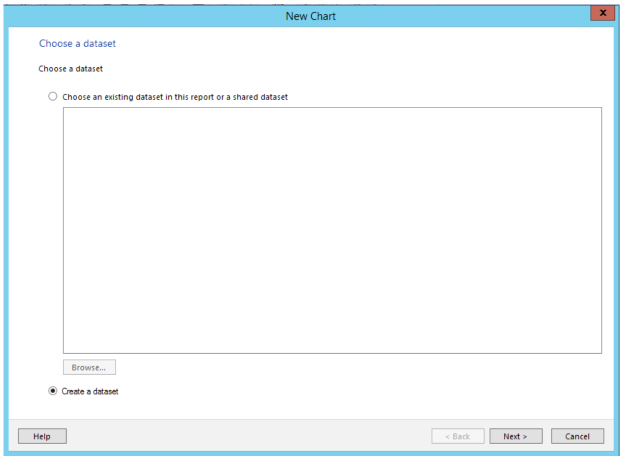
Creating a New Report

Within Report Builder, click on the menu button and choose New. Choose "New Report" in the "New Report or Dataset" box. On the right, choose the type of report you want to create.

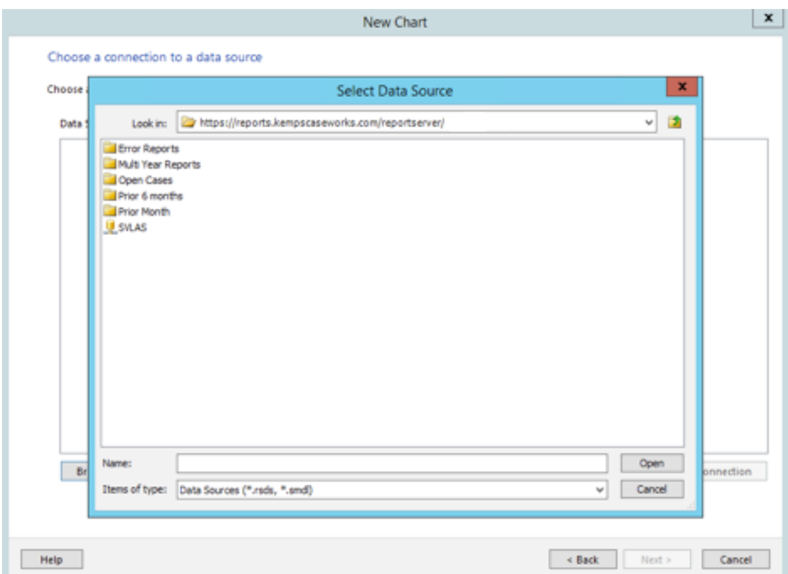


For this example, we are going to choose "Chart Wizard".

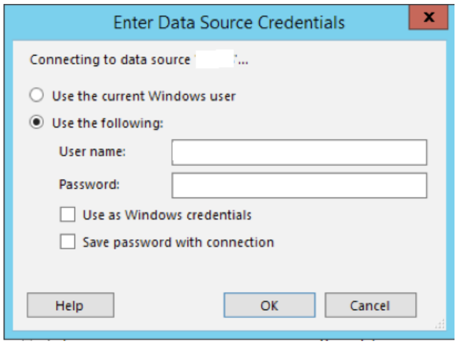
In “Choose a Dataset”, select “Create a dataset” and choose “Next”.



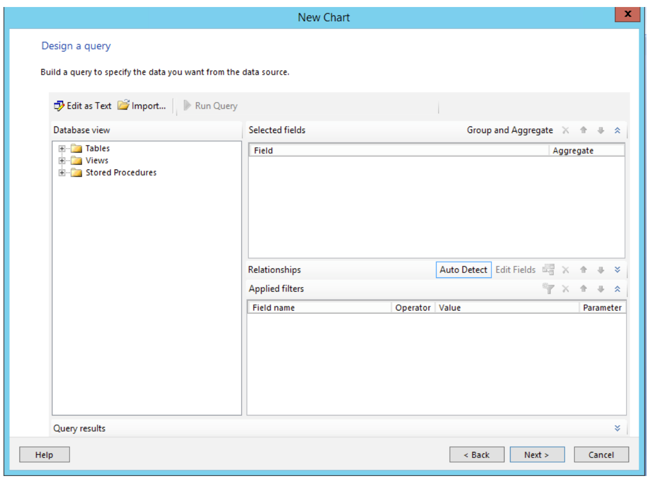
In “Choose a connection to a data source”, select “Browse” and double-click on your connection in your organization’s folder:



Click “Next”. Again, if you are prompted to enter data source credentials, click the “Use the current Windows user”:



Use the “Design a Query” box to manually set up your data set:



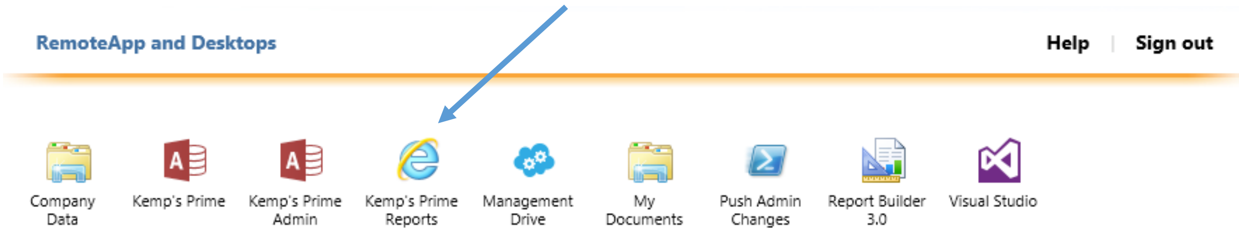
You can also create the query manually by clicking on the “Edit as Text” button.

Again, for assistance with using this form, please refer to the tutorials located here:

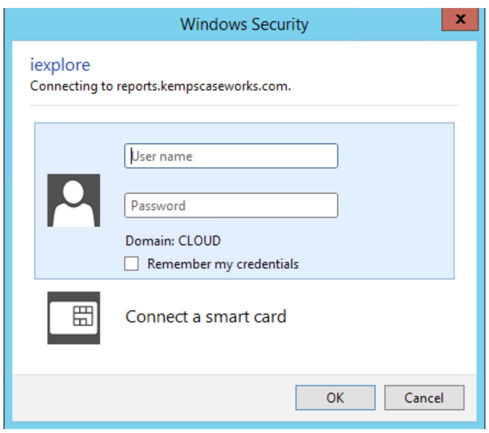
https://msdn.microsoft.com/en-us/library/dd239338(v=sql.120).aspx

Scheduling Reports

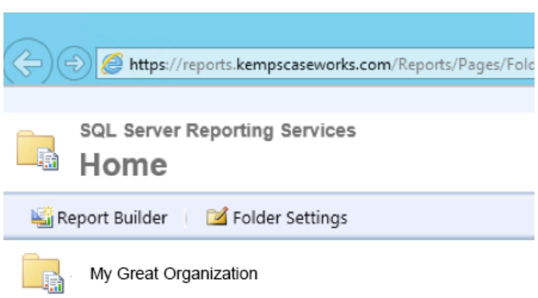
To schedule and automate reports, run the “Kemp’s Prime Reports” system.



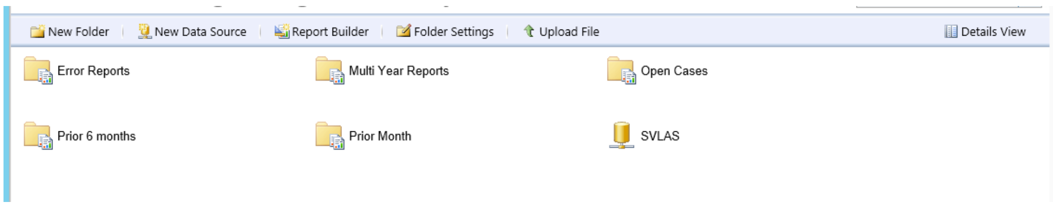
This opens Internet Explorer pointed to the report system. Enter your Venture username and password in the “Windows Security” box:



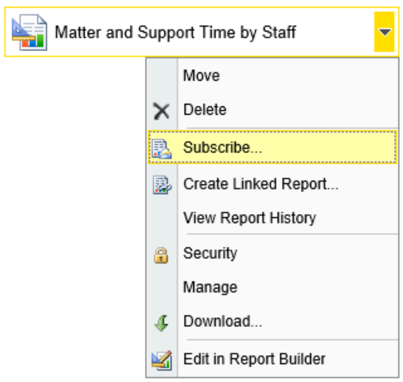
After entering your credentials, give the system a moment to set up your environment. When complete, you should see your organizations folder in the report system.



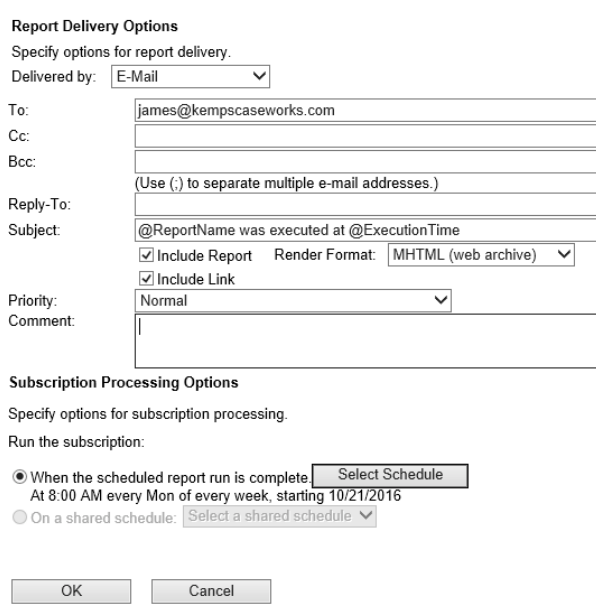
Click on that folder to view the reports and data connections available. Remember that the provided reports are broken up into several subfolders.



Navigate to the report you want to automate. Hold your mouse over that report. A box appears around the report, with a dropdown shown on the right. Click on that dropdown and choose "Subscribe":



Enter appropriate values in the "Report Delivery Options" form, especially the email address you want the report sent:



Use the "Select Schedule" button to set the scheduling of that report. Press OK when finished to subscribe. You can find your subscriptions using the "My Subscriptions" in the top right corner of the web pages.

If a parameter is required for a report, it will appear in the “Report Delivery Options” page. Enter the parameter for that subscription—you can have multiple subscriptions to the same report, each with its own parameter entry.

Manually Running Reports

To run a report, open it using Report Builder, then click the Run button as demonstrated in the Setup and Use/Modifying Existing Reports section. Alternatively, log into the Kemp's Prime Reports system, and click on the report link there.

Example Reports

The following are examples of the reports provided and how they can be useful in managing your organization.

Error Reports

Detailed Weekly Error Report

Shows the errors that exist in the system (as of the moment the report is run) and the name of the person who is shown the error. Also shows the number of errors by staff person, and the number of times each error is made. This information can be helpful in assuring errors are being corrected in the system, as well as knowing what type of training may be necessary.

We suggest scheduling this report to run once a week during the early morning hours (e.g., 5 AM). Keep in mind that times are shown local to Central time.

Example of specific errors and the staff person who would see them, with specific case information:

Staff Person	Error	Casenum	Date Closed
Beeblebrox, Zaphod	Address has trailing spaces.	16D-2040101	
Dent, Arthur	Reason Rejected- CaseType R with no Date Closed .	16F-3010401	

Example of the number of errors a particular staff person is shown in the system:

Staff Person	Number of Errors
Beeblebrox, Zaphod	18
Dent, Arhur	2

Example of the number of times an error appears in the system:

Error	Number of Errors
Client's race is incorrect.	5
Client's sex is incorrect.	5
Eligibility LSC Elig not checked. Applicant may not be eligible	5
No Time on Non-Rejected Case.	3

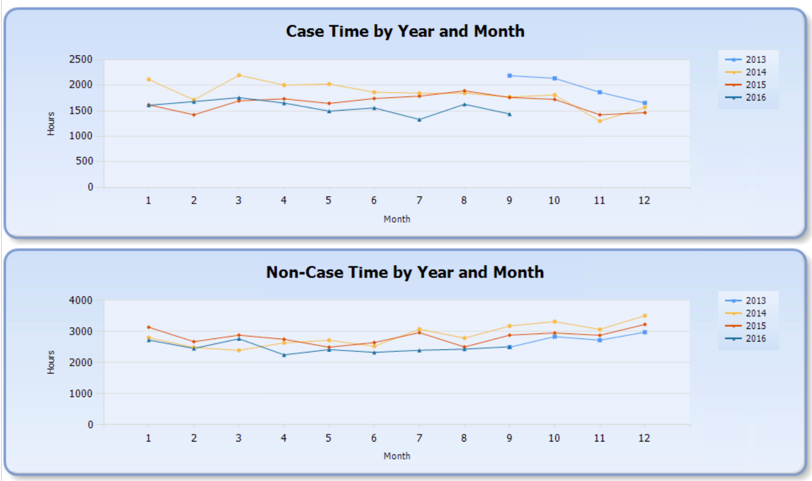
Multi Year Reports

Multi Year Reports generally run three years from the last full month.

3 years case and non-case time

Shows the total of time broken down into two graphs. One shows case time by month; the other non-case time by month. As it covers the last three years, it gives management an idea of how time is being spent on case handling versus non-case time. This can be helpful in diagnosing problems, especially if case time should inexplicably dip. The three-year duration gives a baseline against which you can compare the time breakout.

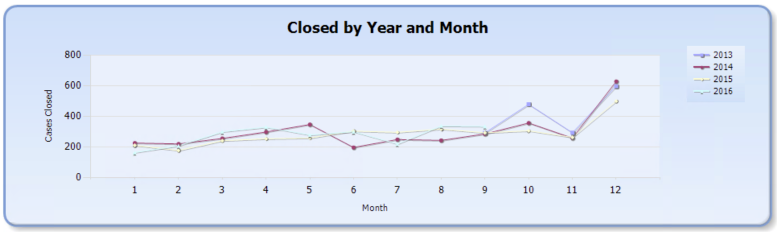
Time over the last three years

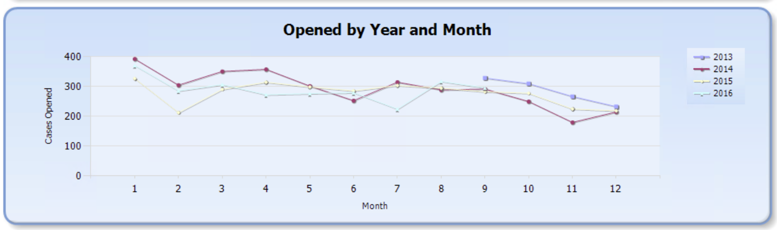


3 years closed and opened by month

Shows the cases that were opened and closed during each month over the last three years. One graph shows the cases closed during that month. The other shows the cases opened during the month. This can be helpful in diagnosing staff changes or other issues that may be represented by a remarkable change in opening and closing cases.

Cases over the last three years

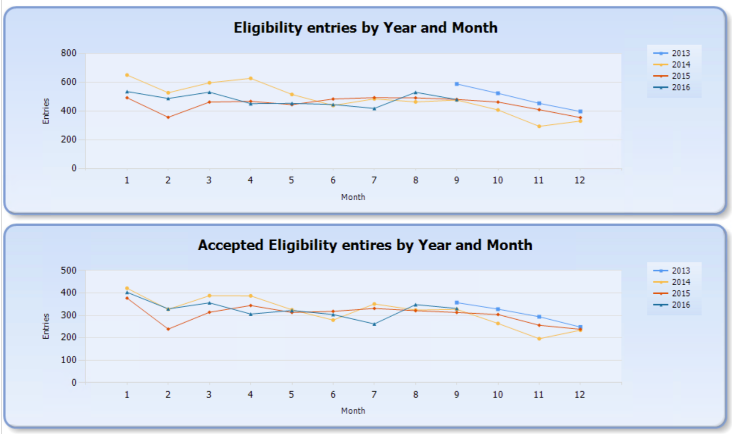




3 years eligibility total and accepted

Shows the total eligibility intakes made by the program over the last three years. A second graph shows the eligibility entries that were accepted (where the application went beyond the eligibility stage). Like other reports, this can help management in determining whether there are efficiency issues that may exist in the organization.

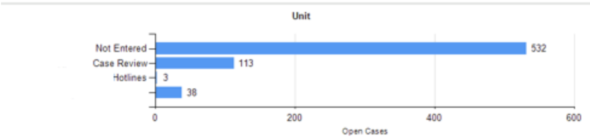
Eligibility entries over the last three years

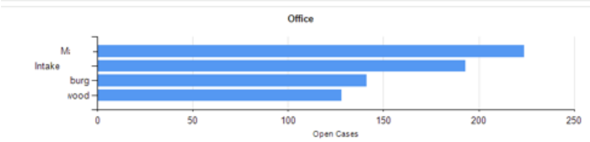


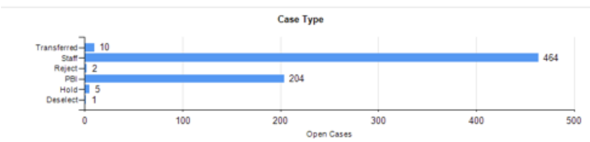
Open Cases

Month Opened_Office_unit_Case Type

Graph 1 – Shows the count of currently open cases by the month when they were opened. This can be helpful in resolving problems with timely closure of cases. Perhaps, in the example data shown below, a case was opened in 2007 and is still open today. (Only months in which a case was opened, that still remains open, will be shown in the graph.)
Graph 2 – Shows the count of currently open cases by the unit to which they are assigned. This can help with overall management in knowing the current case load of specific units.
Graph 3 – Shows the count of currently open cases by the office to which they are assigned. As with the unit report, this can help with knowing the case load of offices.
Graph 4 – Shows the count of case entries by the case type assigned. This will help in knowing the number of case entries that may be awaiting assignment to a PBI attorney, holding for a decision on whether to accept as an actual case, etc.



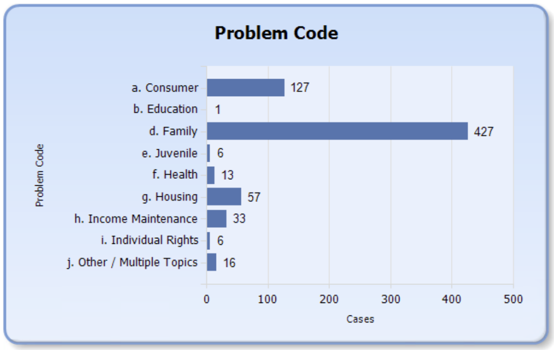


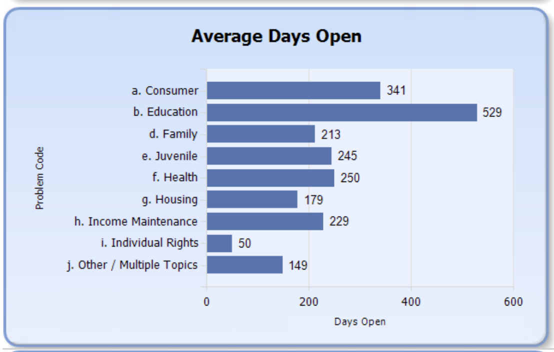


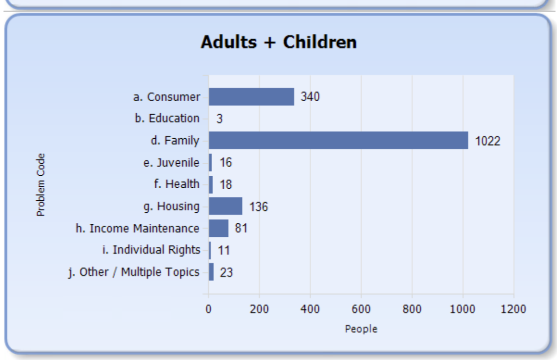
Problem Codes_Days Open_People_Case Type

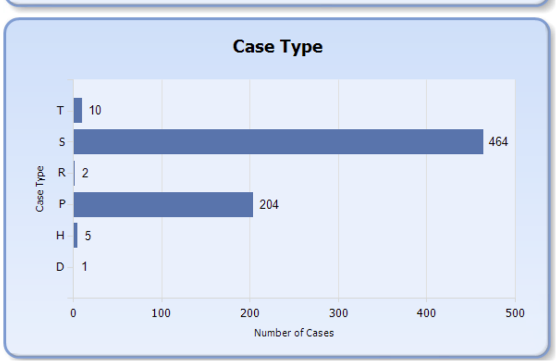
Shows the count of cases by the main problem code group set in those cases, the average number of days open of cases by main problem code group, the total number of adults and children represented in each main problem code group, and the number of cases within each case type.

Open Cases









Staff Member

Shows the number of open cases assigned by staff person. This report is very helpful in reviewing case assignment and load of staff members.

Staff Open Cases

Staff	Cases Open
Beeblebrox, Zaphod	35
Dent, Arthur	8
Franklin, Aretha	1

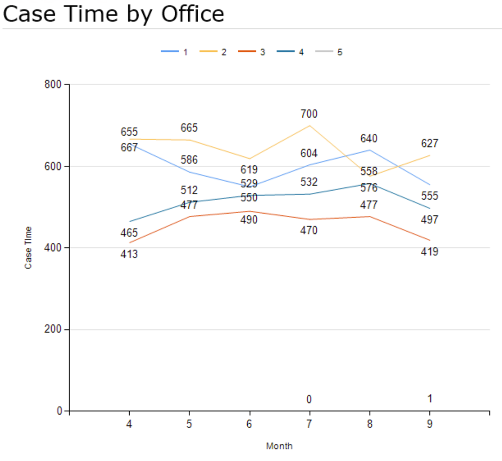
Prior 6 months

These reports all show data from the prior, full six months.

Case Time by Office

Shows the total time entered over the last 6 months by office. Sudden dips or surges change indicate changes in staffing or the caseloads assigned.

Case Time by Office

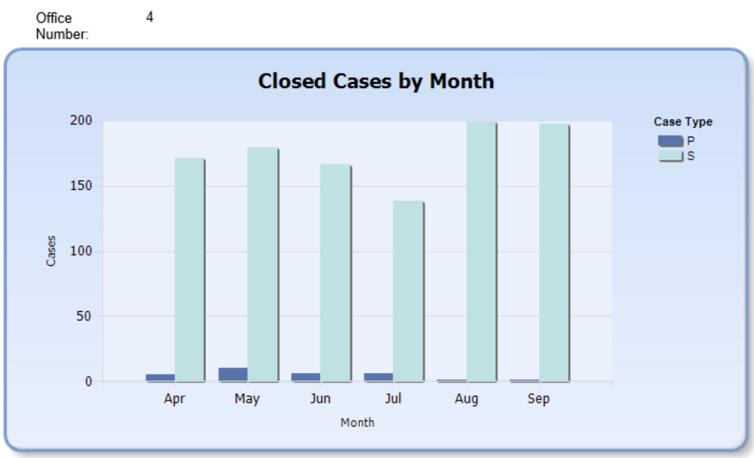


Closed Cases by Month

This report allows the entry of an office number to limit the data displayed to one office. You can, when you subscribe to this report, choose the office on which you report. Subscribe to the report multiple times and enter different office numbers to get reports on each office.

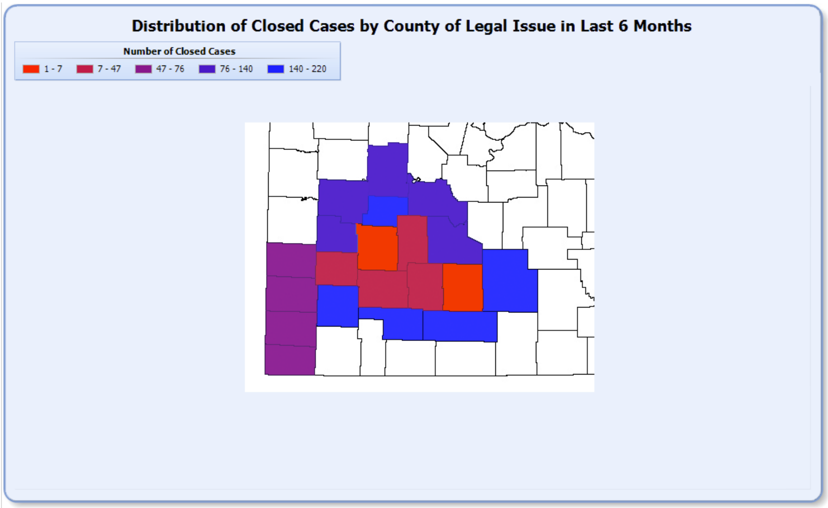
As with other reports, sudden increases or decreases in closed cases can be investigated. The 6-month review allows you to compare the most recent months against one another.

Cases closed in the past 6 months



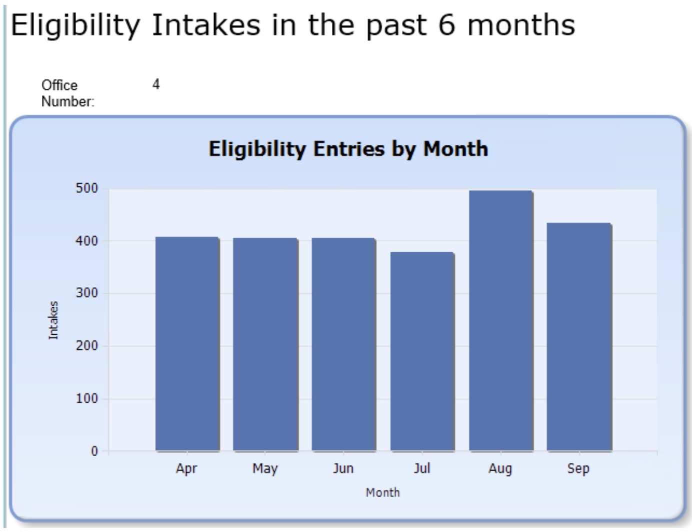
County Map Closed Cases

Show the number of closed cases by county in your service area. Use the maps for reports and other articles you may publish.



Eligibility Intake by Month

This report requires the entry of the office number and then displays the total eligibility entries by month for that office within the last 6 months. You can investigate any sudden changes to determine the reason.

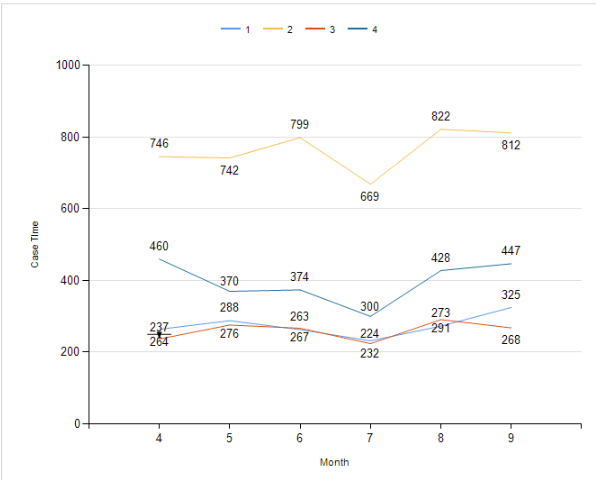


NonCase Time by Office

This report shows totals of non-case time by month for each office. Is one office remarkably different from the others? Is there a valid reason for that, such as being an intake center?

Non-Case Time by Office

For the period: 4/1/2016 to 9/30/2016

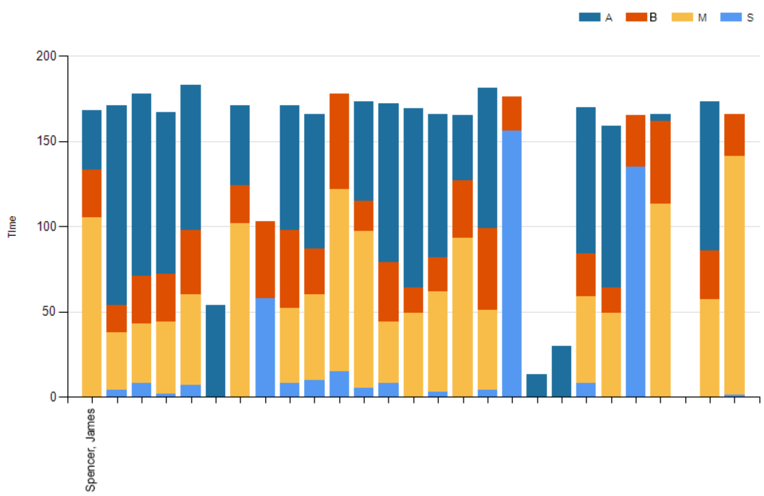


Prior Month

These reports run for data within the prior full month. These reports are good to run at the beginning of a month to get the prior month's information.

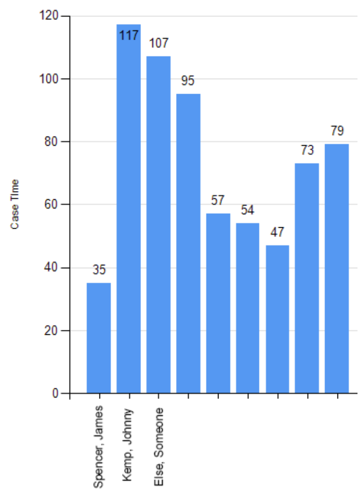
All Time by Staff

Displays the total of each person's time entries during the prior month, broken out into color representing the various activity types (Case, PBI Case, Matter, Support Activity). You can quickly review staff members' entries to ensure total time is correct, as well as be able to tell how their time entries break out by function.



Case Time by Staff

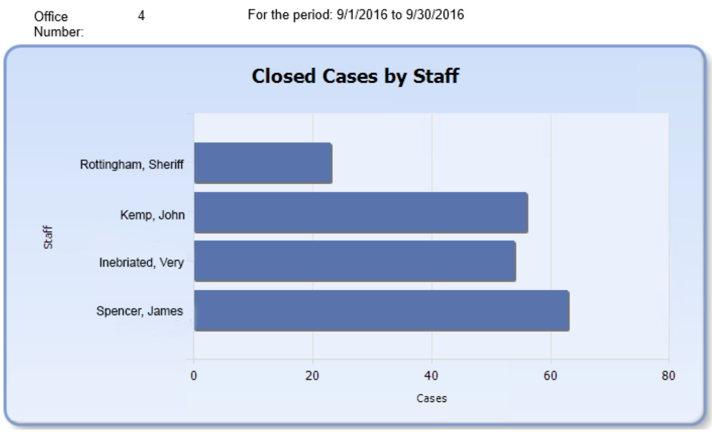
Shows the case time entries of staff during the prior month. See how each staff member's case time entries compares against others.



Closed Cases by Staff

This report requires the entry of an office number. Staff who closed cases in the last month are displayed together with the number of cases they closed during that month. Quickly compare case closures within an office, across staff in that office.

Cases closed in the past month

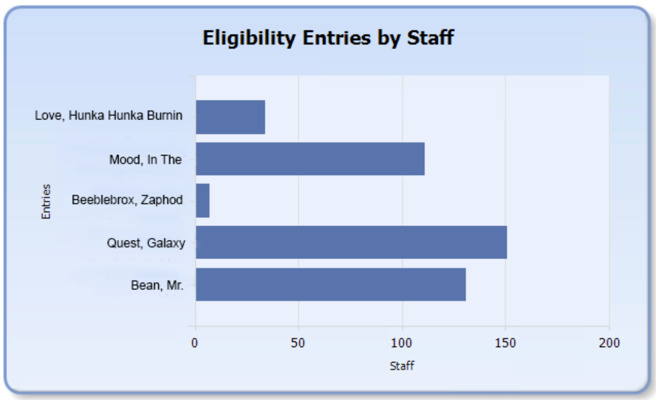


Eligibility Intake by Staff

Shows the number of intakes by a staff person in an office. This report does require the entry of office number to run. Compare intake staff in an office.

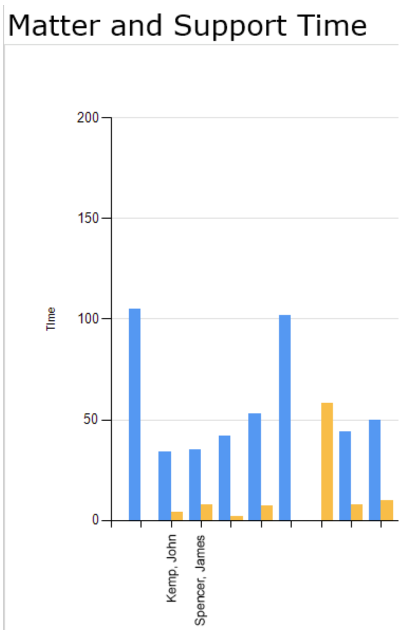
Eligibility Intakes in the past month

Office Number: 4 For the period: 9/1/2016 to 9/30/2016



Matter and Support Time by Staff

Compare the amount of matter and support time entered by staff during the last month. Each staff person has two columns—one representing matter time and the other representing support activity times. Make sure staff are focusing on appropriate time entires.



Top 10 Eligibility Problem Types

See the top 10 eligibility problem code types within a particular office. Office number is required to run this report. See if your office is focused on the right problem types.