Tabular Reporting

Tabular reporting is a system in Case Manager that allows users to create and run reports using specified pieces of data in the system.

Figure 1 Top navigational bar

To get started, click Reports in the top navigational bar.

You will then be presented with the following screen which displays the reports already in the system.

Figure 2 Reports

On this screen, the symbol next to each report shows you what type of report it is.

 Tabular Report: These kinds of reports can be written by end users

 Advanced Report: These kinds of reports are written using Freemarker, and can be written by technical end users

 Common Transform Report: These are old-style reports and new reports can't be created this way

There are terms used in this manual that you might not be familiar with. For example: data type and property. Data types have properties and can also be properties of other data types. The Client data type and a few of its data types and properties are shown in the diagram below. The data types are shown in blue and properties in green. You could think of it as data types being like branches that can have other branches and/or leaves, and properties being like leaves. IE. a name c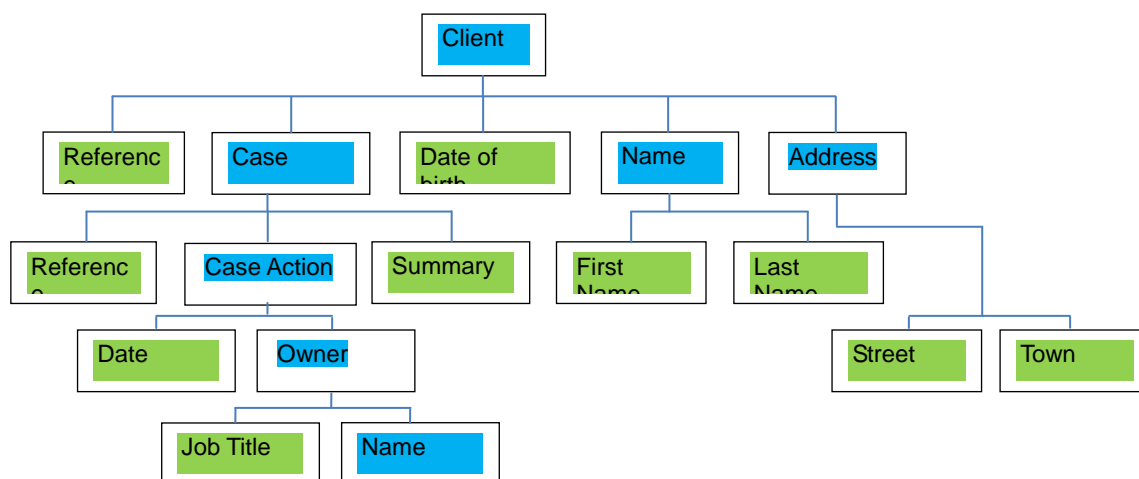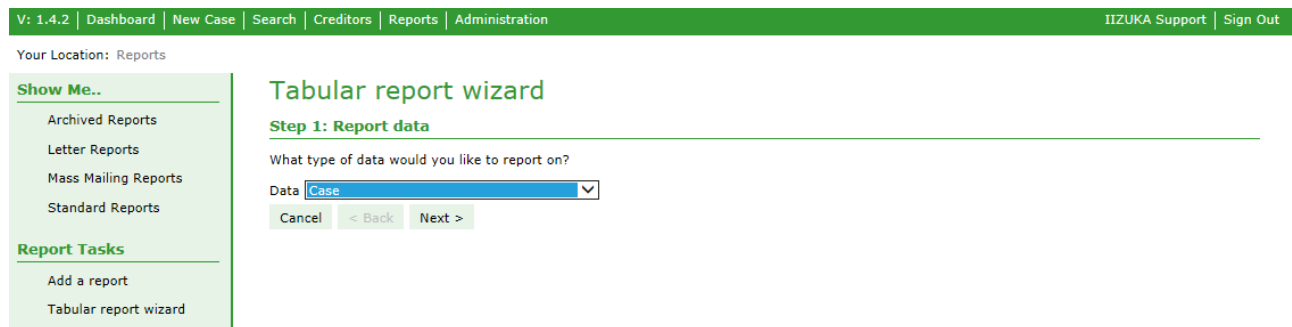an have a title, first name and last name. Title is a data type as it can have one of a collection of values, but first name and last name are properties, as they are just simple strings of characters.

```
                          ┌──────────┐
                          │  Client  │
                          └─────┬────┘
     ┌────────────┬─────────────┼──────────────┬─────────────┐
┌─────────┐  ┌────────┐   ┌──────────┐    ┌────────┐    ┌──────────┐
│Reference│  │  Case  │   │ Date of  │    │  Name  │    │ Address  │
└─────────┘  └───┬────┘   │  birth   │    └───┬────┘    └────┬─────┘
                 │        └──────────┘        │              │
      ┌──────────┼──────────┐         ┌───────┴────┐    ┌────┴─────┐
 ┌─────────┐ ┌────────────┐ ┌────────┐ ┌────────┐ ┌────────┐ ┌────────┐ ┌──────┐
 │Reference│ │Case Action │ │Summary │ │ First  │ │  Last  │ │ Street │ │ Town │
 └─────────┘ └─────┬──────┘ └────────┘ │  Name  │ │  Name  │ └────────┘ └──────┘
                   │                   └────────┘ └────────┘
         ┌─────────┴───────┐
    ┌────────┐        ┌────────┐
    │  Date  │        │ Owner  │
    └────────┘        └───┬────┘
                ┌─────────┴────────┐
          ┌───────────┐       ┌────────┐
          │ Job Title │       │  Name  │
          └───────────┘       └────────┘
```

There is another data type that client has that is not shown in the diagram above to make the diagram simpler. Client has a Person data type. This has the data types and properties that relate to a person rather than to a client such as a date of birth, a name, an address, a gender. When writing a report and choosing a data type, you work backwards up the tree. If you choose Client, you can get properties of client and person. You can't get properties of the case or cases belonging to the client as there could be more than one, so the report wouldn't know which case to report on. If you choose Case as the data type, you can get the properties of the case as well as the properties of the client that the case belongs to, but again, you can't get the properties of the case actions belonging to the case as the report wouldn't know which one to report on.

Writing an Ungrouped Data Report

The easiest way to write a report is by using the tabular reporting wizard. From the reports screen, click Tabular Report Wizard to begin the process. (See *Figure 2*)
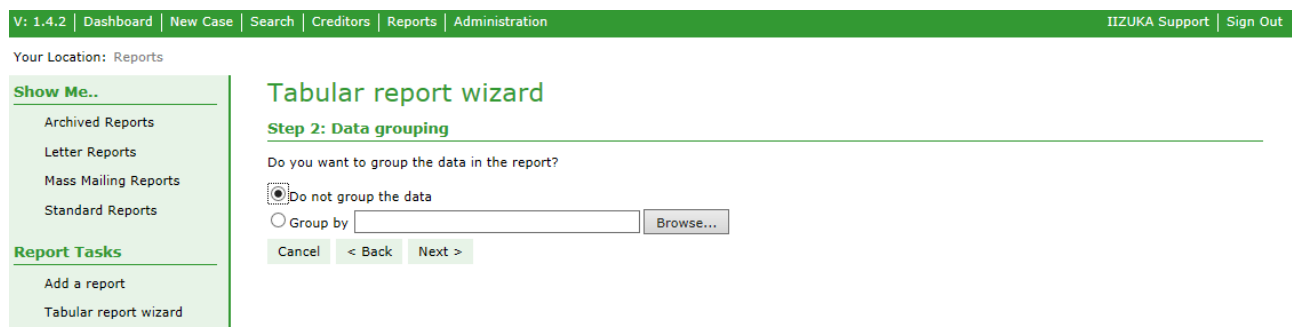
Figure 3 Step 1: Report data

This report is going to be based on Case as the data type. Choose Case from the drop down list, and click the Next button.

Figure 4 Step 2: Data grouping - ungrouped

Once you've selected the data type, you need to decide whether you want the data to be grouped or not. You use grouped reports when you want to find out the answer to 'how many'. For example, how many open cases are there of a particular case type, how many cases were opened last month, or how many clients with open cases are retired. You use ungrouped reports when you want to see details. For example, you might want to see the client names, case references and open dates for all the open cases of a particular case type, for all the cases opened last month, or for all the clients with open cases who are retired.

This report is going to be an ungrouped report and is going to show some case details and some client details. It is only going to show open cases which have been opened within a chosen date range, and only cases that have a particular case state. The report will be sorted by the owner, so that all cases belonging to the same owner will be grouped together, and it will be ordered by open date and within that date alphabetically by client name. Please note that as this is a tabular report based on cases rather than on clients, if a client has more than one case they will appear in the list for each of their cases. In a Freemarker report, you would be able to just show the client once.

Click on the radio button by 'Do not group the data' and click the Next button. You will

notice that from Step 2 onwards, there is the opportunity to go back to a previous screen if you're not happy with what you have added.
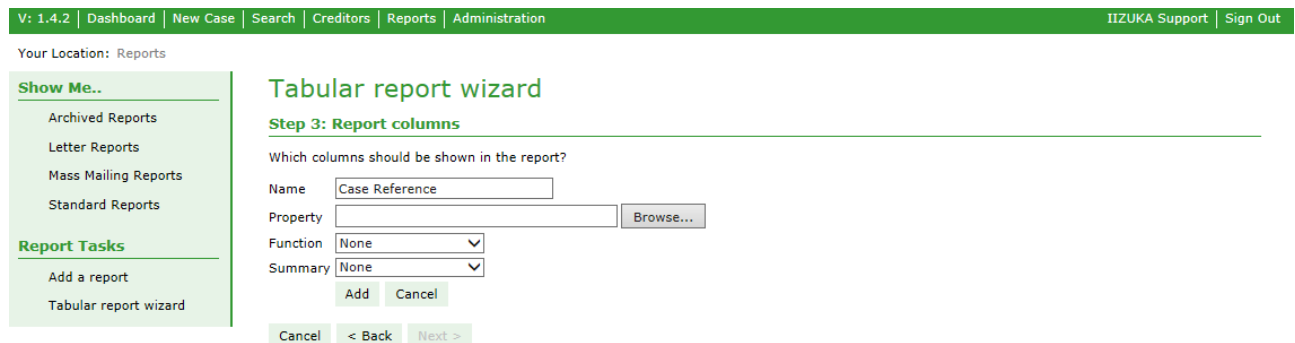

Figure 5 Step 3: Report columns - choose first column

The next screen is Step 3 and this is where you add the columns that you want in your report. The first column in the report is going to show the case reference. Enter the name of the column in the Name text box and click on Browse to bring up the Property Browser so you can choose Reference.
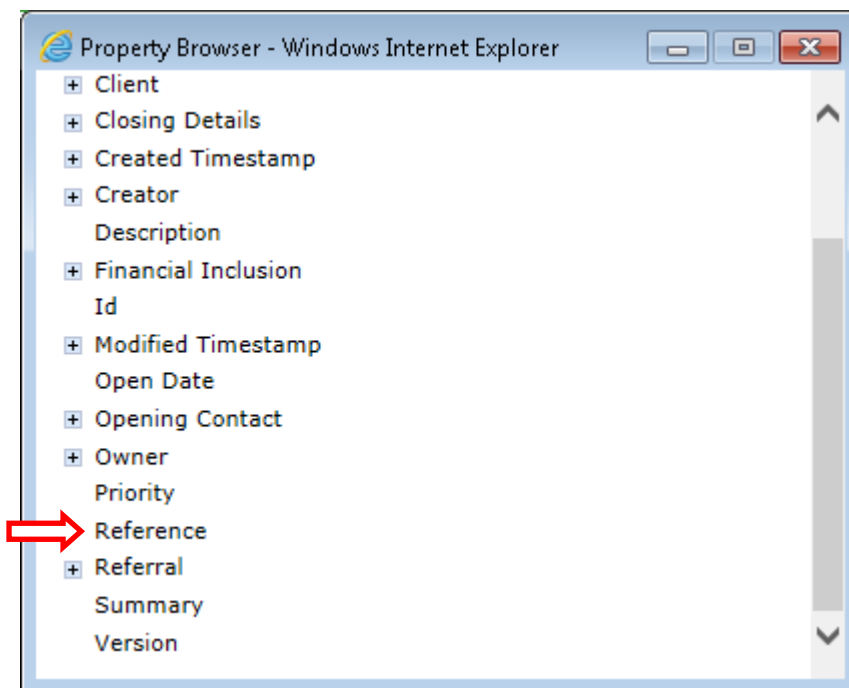

Figure 5 Property Browser – choose reference

You will see that the property browser displays the properties of a case, as case was the data type chosen in the first screen of the Tabular Report wizard. When you hover with your mouse over the list, properties that can be selected will change colour. Some of these properties have a plus sign next to them. This means that they have their own properties that can be seen and chosen when you click on the plus sign. Click on 'Reference' to select it.

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Figure 6 Step 3: Report columns - case reference

Click Add to add the Case Reference column. You will notice that there are two drop down lists that you did not use: Function and Summary. As you go through this manual, you will see how these can be used.

Figure 7 Step 3: Report columns - open date

The second column will show the date the case was opened. Select Open Date from the property browser. When a date value is chosen, functions suitable for dates are added to the Function drop down list. There is a function that shows just the date and one that shows the date and time. Not all dates in the system record the time as well as the date, but open date does so you might want to show the date and time.

Figure 8 Step 3: Report columns - referral source

5 PUBLIC

The third column is referral source. This is a custom field that appears in the Referral accordion box or field list which appears when the case isn't an Advice & Information case. It appears as a drop down list. This means it has a number of values that you can choose from, so the Function drop down list has defaulted to 'Value' as it is going to display the value that has been chosen from the drop down list. The type of field that supplies values for a drop down list is called a vocabulary field. It should be noted that custom fields that relate to particular case types or particular case actions – for example the 'destination' custom field for Signposts – will appear in the property browser whatever case type or case action is being reported on. They just won't return any values if the case type or case action they belong to is not included in the report.
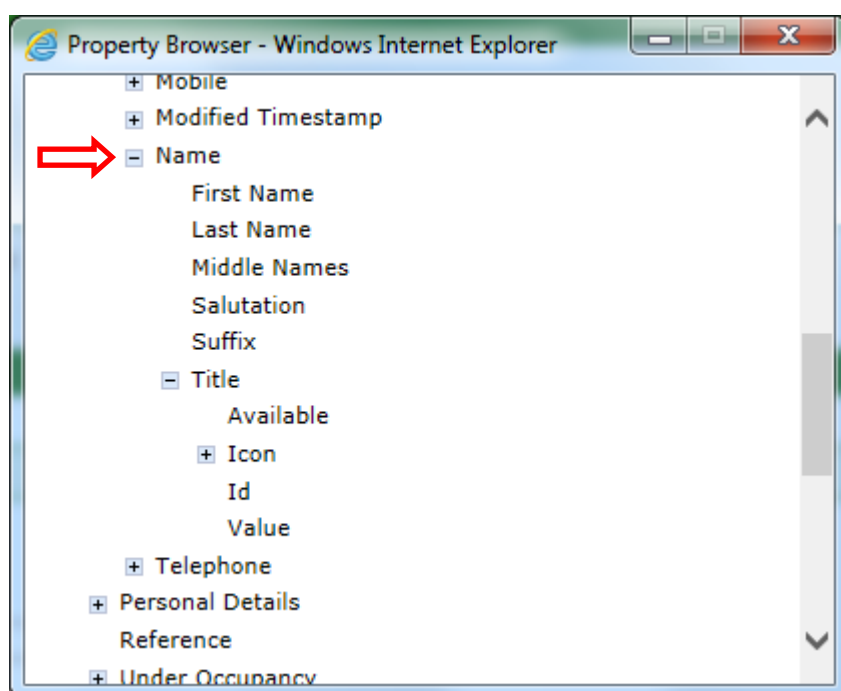

Figure 9 Property browser – choose client name

We next want to display the client name. There are two ways to do this. If you select Name – shown in the property browser above – by clicking on Client, then Person, then Name – you will find that the Function drop down list will default to Name (First | Last). This is useful if you do not need to sort by the client's last name. If you do need to, you will need separate columns for First Name and Last Name, and then you can sort first by Last Name and then by First Name. In this report we are going to add three columns for client name as we will show the client's title as well.

Figure 10 Step 3: Report columns - title

Title is another vocabulary field, ie. you select the value from a drop down list, so the Function drop down list defaults to the special function for vocabularies that shows the value chosen.

Figure 11 Step 3: Report columns - address

You can see that columns have been added for First Name and Last Name and now Address is being added. You will see that Function has defaulted to AddressFunction. This will display a client's address without having to have a different column for each part of the address.

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Step 3: Report columns

Which columns should be shown in the report?

This report has the following columns:

Name	Property	Function	Summary			
Case Reference	Reference	–	–		▼	Delete
Open Date	Open Date	Date (dd/mm/yyyy hh:mm:ss)	–	▲	▼	Delete
Referral Source	Referral > Referral Source	Value	–	▲	▼	Delete
Title	Client > Person > Name > Title	Value	–	▲	▼	Delete
First Name	Client > Person > Name > First Name	–	–	▲	▼	Delete
Last Name	Client > Person > Name > Last Name	–	–	▲	▼	Delete
Address	Client > Person > Address	AddressFunction	–	▲		Delete

Add another column >>

Name	Telephone ✕
Property	Client > Person > Telephone Browse...
Function	Number ▾
Summary	None ▾

Add   Cancel

Figure 12 Step 3: Report columns – telephone

Next is a column for the client's telephone number and you can see that Function has defaulted to a function to display the telephone number.

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Step 3: Report columns

Which columns should be shown in the report?

This report has the following columns:

Name	Property	Function	Summary			
Case Reference	Reference	–	–		▼	Delete
Open Date	Open Date	Date (dd/mm/yyyy hh:mm:ss)	–	▲	▼	Delete
Referral Source	Referral > Referral Source	Value	–	▲	▼	Delete
Title	Client > Person > Name > Title	Value	–	▲	▼	Delete
First Name	Client > Person > Name > First Name	–	–	▲	▼	Delete
Last Name	Client > Person > Name > Last Name	–	–	▲	▼	Delete
Address	Client > Person > Address	AddressFunction	–	▲	▼	Delete
Telephone	Client > Person > Telephone	Number	–	▲		Delete

Add another column >>

Name	Owner ✕
Property	Owner Browse...
Function	Name ▾
Summary	None ▾

Add   Cancel

Figure 13 Step 3 Report columns – owner

The last column to be added is Owner, and Function has defaulted to Name. As in the client name, we could click into the Owner property until we got to the owner's first and last name if we wanted to sort the report by the owner alphabetically by their last name (Owner > Person > Name > First Name, then Owner > Person > Name > Last Name), but for this report it is good enough just to sort by the owner's first name to get all the owner's cases

together.

Figure 14 Step 4: Report sorting

The columns displayed in the second table are in the order that they were selected for sorting. Click on Sort on the row representing the column that you want to sort by. You can select them in the order you want the sort to be carried out. You can always alter the order by clicking on the up and down arrows. The default sort order is 'Ascending'. The sort order toggles between 'Ascending' and 'Descending' so if you click on 'Ascending', it changes to 'Descending' and if you click on 'Descending', it changes back to 'Ascending'.

First of all the cases are to be sorted by owner so that all the cases owned by the same person are grouped together. Next each of these cases is to be grouped by the date it was opened, and then it is grouped by the client's name, last name then first name. As this report is based on Case as the data type, each case that is currently open and was opened within the date range, and is at the chosen status, will be included in the report so if a client has more than one case that meets these criteria, each of their cases will be shown.

Figure 15 Step 5: Report filters - adding a date range filter

In Step 5 you can add filters to the report. Adding a filter allows you to restrict the number of records that are returned in a report. This can be useful in an ungrouped report as if the report is getting a lot of data back from the database, it is good to restrict it where possible to make it run more quickly. The screen uses the same format as the screen to add columns and shows a table of the filters that have already been added, with Add a filter under the table for adding further filters.

The first filter to add for this report is going to be a date range, using OpenDate, to get all cases opened between two dates, so select a Type of 'between'. You will see that, having selected 'between', there are now three radio buttons to choose from for Value. The middle one, where you would choose a property, is not very useful in this circumstance. If you wanted to get cases where the case was opened and closed on the same day, you could use this, choosing the appropriate date from the property browser. The other two methods are more useful. If you choose the first radio button for each value, you can choose a date range by choosing a specific date from the calendar. A way of making the report more flexible is to use the third button (Parameter), as in the screen above. When you generate the report you will choose a date for '1. Start Date' and '2. End Date'. This means you can run the report for any date range you choose. Any date can be used like this. For example you might want to get all cases closed in a particular date range, or all appointments that are scheduled in a particular date range, or all appeal hearings that are to take place over a particular period, and you can enter the dates you want to use in the date range when you generate the report.

One thing to remember when using dates in reports is that when you choose a date from the small calendar next to the date field, it defaults to a time of 00:00, ie. midnight. This means that if you are setting a date range the end date needs to be set to the day after the one you want as the end date, or the time altered, so that you get all the relevant cases on the final date of the range. For example to get all cases opened from April 1st and up to and including April 30th, you could either input 01/04/2014 00:00 and 01/05/2014 00:00 so you include all the cases opened before midnight on April 30th, or you could edit the time and use 30/04/2014 23:59 as the end date.

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Step 5: Report filters

Do you want to filter the data shown in the report?

This report has the following filters:

Property	Type	Value(s)	
Open Date	between	<1. Start Date> and <2. End Date>	Delete

Add a filter >>

Property Case State   [Browse...]

Type [= ▼]

Value ○ [   ] [Browse...]

     ○ Property [   ] [Browse...]

     ● Parameter [State   ]

Add   Cancel

Cancel   < Back   Next >

Figure 16 Step 5: Report filters - case state

The second filter to be added is Case State. As in the date range filter, you could choose a particular case type here by clicking on the plus sign by Case State in the property browser and choosing Name, and clicking on the radio button next to Value and typing a case state name such as 'In Progress'. The reason not to do it this way is that it means the report can only be run for the value you have put in. When the filter chosen can have different values as case state can, if you choose Case State and add a parameter – in this case 'State', when you run the report you will be able to choose which case state you want to use and could run the report for as many times as there are case states and get a different report for each one.

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Step 6: Report name

What do you want to call the report?

Name [Cases: by Open Date and Case State   ✕]

Cancel   < Back   Next >

Figure 17 Step 6: Report name

 Give the report a name.

Figure 18 Step 7: Report summary

If you're happy with the report, click Finish.

Figure 19 Ungrouped report – generate

When the report is generated, dates for the Start and End Date for the open date range can be chosen along with a case state and the type of Output you want. Output of csv can be opened in a spreadsheet.

Writing a Grouped Data Report

Figure 20 Step 1: Report data

This report starts off in the same way as the ungrouped data report.

Figure 21 Step 2: Data grouping - grouped

When data is grouped, instead of showing details of individual records, it will count up the number of records that fit a particular chosen category and show the amount. For example, if you choose to group all cases by their case type, the report will display the number of cases for each case type.

To create this report, select Group by and click on the Browse button to display the property browser.
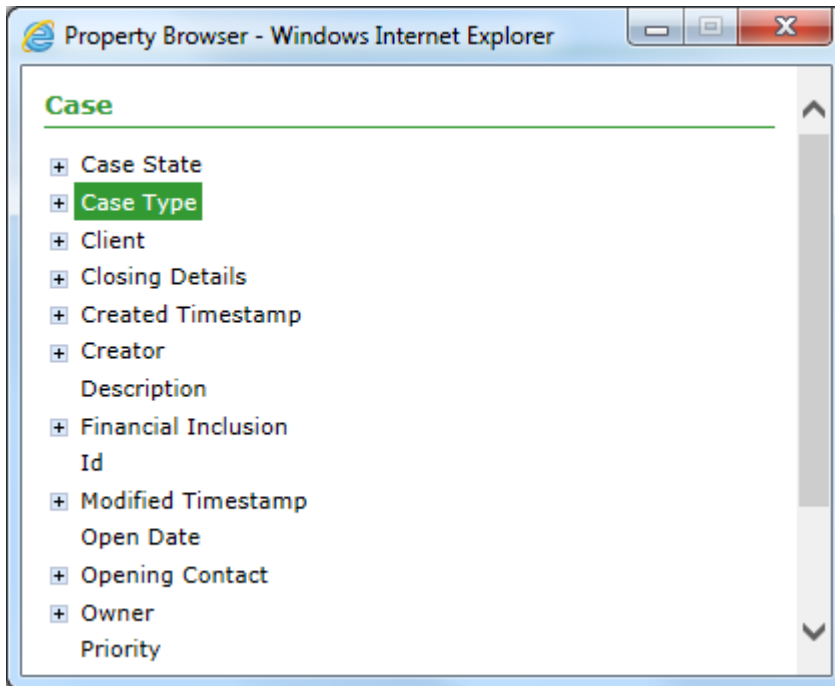
Figure 22 Property Browser – choose case type

You next need to choose the columns to show in the report. Add the name of the first column, in this case 'Case Type', and choose Case Type from the property browser.
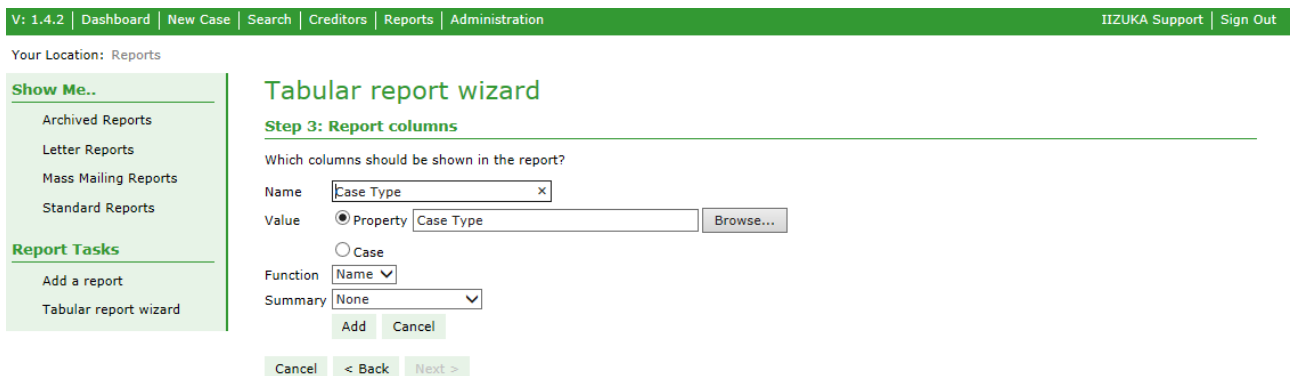
Figure 23 Step 3: Report columns - add first column

When you choose you will see that the Function drop down box changes to Name. This is because Case Type has a property of Name and the wizard provides a function to display the Name when this is the case. Click on the Add button to add the column.

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Step 3: Report columns

Which columns should be shown in the report?

This report has the following columns:

Name	Property	Function	Summary	
Case Type	Case Type	Name	–	Delete

Add another column >>

[Cancel]   [< Back]   [Next >]

Figure 24 Step 3: Report columns - add second column

Each time a column is added, it is displayed in a table so you can see which columns have been added so far. There is a Delete button next to each column so you can remove any columns you decide you don't want or you want to change in some way. Click on Add another column to add the next column.

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Tabular report wizard

Step 3: Report columns

Which columns should be shown in the report?

This report has the following columns:

Name	Property	Function	Summary	
Case Type	Case Type	Name	–	Delete

Add another column >>

Name	Number of cases
Value	○ Property [_____] [Browse...]
	● Case
Function	Count ▼
Summary	Sum ▼

[Add]   [Cancel]

[Cancel]   [< Back]   [Next >]

Figure 25 Step 3: Report columns - second column details

The next column in this report is going to show the number of cases there are of each case type. Enter 'Number of cases' in the Name text box. Select the Case radio button for Value. For the first column you chose the property from the property browser that you were grouping cases by – Case Type, and for this second column you choose the data type you are grouping, ie. Case. You will see that the Function drop down list now shows Count as you want a count of the number of cases of each case type. If you select Sum in the Summary drop down list the sum of each count in each column will be added together so that you get the total number of cases in the report. Click Add, then click the Next button.

Figure 26 Step 4: Report sorting

In Step 4, you decide how you want the report sorted. The most obvious column to sort the report by is Case Type. Click on Sort on the Case Type row in the table of columns.

Figure 27 Step 4: Report sorting - sort type chosen

The screen now shows the column that the report is sorted by, and the sort order. In this case you only need to sort by Case Type. Click on the Next button.

Figure 28 Step 5: Report filters

In Step 5 you can add filters to the report. Adding a filter allows you to restrict the number of records that are returned in a report. A grouping report is just doing a count so it does not use much database resource. It would not matter if it was run without any filters, even if there were a large number of cases in the system. However, you might want to see the number of currently open cases by case type, or the number of cases by case type opened within a date range. These two filters can be added to show the number of currently open cases by case type opened within a date range.

Figure 29 Step 5: Report filters - first filter

When a case is closed, a property called Closing Details is added to the case. From this you can find out the date that the case was closed by using the Date property on the Created Timestamp property. You can also get the Primary and Secondary Outcomes of a case. If a case is then reopened, the Closing Details property is still attached to the case. This means it is fine to use the Closing Details properties when the case is closed to get the date and outcomes, but to be sure that you don't also get cases that have been reopened you need to add an additional filter.

When the case is closed, the case state of the case is set to Closed. To be sure that the cases you get back are definitely open even if they have a closing details property, it is best to add the above filter, and check for Case State > Closed that is not equal to true. When you want to get cases that are definitely closed, you would need to select Case State > Closed with Type = (equal) to true.

Click on the plus sign by Case State and select Closed in the property browser. Select != (not equal) from the Type drop down list, and click in the checkbox next to True value. So you are selecting all cases that do not have a case state of Closed (ie. Closed is not equal to true). Click on Add.

Figure 30 Step 5: Report filters - add another filter

Click Add a filter to add the second filter. This is going to be a date range to get all cases opened between two dates, so you need to select a Type of 'between'. This is the same as the filter you added in the ungrouped report. See Figure 15.

Click Add, then the Next button.

Figure 32 Step 6: Report name

Give the report a name and click the Next button.

Figure 33 Step 7: Report summary

If the summary looks ok, click the Finish button.

Figure 34 Grouped data report- details screen

This is the details screen of the report. If you need to add other columns or filters, or change the name of the report, do it here.

Figure 35 Grouped data report – generate

Generate the report and choose the date range, and output.

Copying Reports

If you want a similar report to a tabular report that you have already written or one that comes with the system, you can copy it and make any alterations that you want such as removing or adding columns or changing filters.

Figure 36 Copy this report

The ungrouped report that you have written could be changed to show cases that have been closed in a date range. A closed date column could be added, and the date range for open date could be changed to get a date range of the dates when a case was closed. It wouldn't be very useful to have a column of case state as all the cases would have a state of Closed so the case state filter could be removed. Perhaps it would be useful to see the primary outcome of the cases. One thing that is not yet possible in tabular reporting is to show columns where there could be more than one value. This is the case with Secondary Outcomes so we can't show those yet. In addition to Closed Date, the report could be filtered by Case Type.

Figure 37 Add a column - Closed Date

Click on Add a column, and add the Closed Date column. You will need to get the date from the property browser by clicking on Closing Details, then Created Timestamp (ie, the date that the closing details were created), then Date. Choose the function that shows the date and time.

Figure 38 Move a column - Closed Date

You will probably want to show the Closed Date column after the Open Date column. You can change the order of the columns by clicking on the up and down arrows. Click on the up arrow in the Closed Date row of the table. This will move it up one row. Continue clicking on the arrow in the Closed Date row until it is under the Open Date row.

Figure 39 Add a column - Primary Outcome

Now you can add the other new column – Primary Outcome. This will also need to be moved up the 'Columns' table so it is underneath Referral Source. As you can see in the above screen, Primary Outcome is a property of Closing Details. As it is a vocabulary (ie. it appears as a drop down list in the system), the Function defaults to Value.

Figure 40 Change sorting – Open Date changed for Closed Date

 While you are on the Columns tab you may want to change the sorting so that the report is sorted first by owner, then by closed date and then by client name. To do this, click on Remove in the Open Date row of the columns listed in the 'Sort' table to remove Open Date from the sort. Then click on Sort in the Closed Date row in the 'Columns' table. This adds it to the 'Sort' table, but it is at the bottom of the table and it needs to be the second in the list under Owner. Use the arrow in the Closed Date row to move it up until it is under Owner.

Figure 41 Column changes completed

Your Columns tab should look like *Figure 40*. Now the filters need to be changed so click on the Filters tab.

Figure 42 Add a filter - Closed Date

Delete both the filters that are listed on the Filters tab, and click Add a filter and click on Browse to bring up the property filter. Add the same filter as you did in Figure 29 but this time set the Type to = (equals) so you are getting all cases where the case state = true.

Next add another filter to get cases with a closed date in the date range chosen by the user. Select Closing Details > Created Timestamp > Date, select 'between' as the type, and add the parameters '1. Start Date' and '2. End Date' as you did for the Open Date filter.

Figure 43 Add a filter - Case Type

Next add a Case Type filter. As before a value can be chosen so that only the cases with the specified case type will be returned but by using a parameter instead you can choose when the report is generated which case type you want to use.

Figure 44 Filter changes completed

If you wanted to show the case type of each case instead of using case type in the filters, you would add another column for Case Type by using Add a column as you have with Closed Date and Primary Outcome and moving it up the 'Columns' table. The logical place to show it would be next to Closed Date and before Referral Source so it would be moved to the position under Closed Date and above Referral Source.

Figure 45 Edit report title

The last thing to do is to change the report title.

Figure 46 Generate report

Tabular reports will run when report parameters have not been selected. If it is generated without a case type being chosen, it will return all cases that have been closed within the date range.

Try selecting some different data types then click on the Browse button on the Data Grouping screen to see which data types and properties are available so you know which data type you need to use to show the data you want in your report. You can close the property browser and use the Back button to change data types. Below are some of the data types you may want to try:

Appointment – this data type gives you information on appointments, their dates and times. You can get to case and client information via Parent Case.

Case Action – this data type will include appointment information as an appointment is a type of case action, as are Tasks, Referrals, Signposts and Service Level Agreements. As in the ones above, access the case and client information via Parent Case.

When you are trying out reports, especially ungrouped reports, it's a good idea to limit them by case open date, closed date or some other appropriate date and run them for a small date range to start with until you are happy with them. Reports that bring back a very large amount of data can slow down the system for you and everyone else using it.