

# Ad Hoc Reporting 101

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## The Basics:

1. Format ('Report')
  - a. Excel Spreadsheet ('50 Fields List')
  - b. Bar Graph ('Cylinder Chart')
  - c. Pie Chart ('Pie Chart')
  - d. Crosstab ('Matrix...')
2. 'From' (Where does the data come from? What screens do you enter the data into on the front end?)
3. 'Select' (What fields do you need to have on the report? What information do you want to see?)
4. 'Sort' (What field do you want data to be sorted by?)
5. 'Report Grouping' (What grouping do you want data in? This matters depending on what format you've chosen, too)
6. 'Title' (Give your report a title)
7. 'Show Report' or 'Export to Excel'

## The Fancy Stuff:

- Distinct on 'Select'
  - Unduplicate rows that have the exact same information in all selected fields
- Up & Down Arrows
  - Move column order up and down
- Check boxes on 'Sort'
  - Change from ascending order to descending order
- 'Where'
  - Filter out data before the report runs
- 'Date'
  - Only show data from certain date ranges
- 'Drilldown'
  - Checked means you'll get individual records (rows of data) on the report (default)
  - Unchecked means you won't
- 'Export' from 'Show Report'
  - Options on ways to view output
- 'Save As'
  - Save the query you created
- Running a saved report 'Report Table' & 'Load'
  - Run the query you saved
- 'Clear'
  - Clear the data from the Ad Hoc Report screen

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## Sample Queries to try:

How many people served by my program have GAU as an income source? (See example a. on “Ad Hoc Report Query Step by Step”)

How many males vs. females have I served? (See example b. on “Ad Hoc Report Query Step by Step”)

What are the family types of the persons I’ve served? (See example c. on “Ad Hoc Report Query Step by Step”)

Where did my clients exit to? (See example d. on “Ad Hoc Report Query Step by Step”)

What services have I provided? What services have I provided in a particular time period?

Who is receiving services from my program (Demographics of population served?)

How much of a particular type of service have I provided?

What is the average length of stay in different program types (by program standard name)?

What is the number of nights stayed by each client at any particular program over a specified time period (i.e.: number of nights in cold/wet weather shelter in one season by an individual or household)

What is the average income at entry and average income at exit for graduates and non-graduates of different program types?

What is the average change in income from entry to exit?

What is the destination at exit for graduates vs. non graduates for different program types?