

Contents

Ad Hoc Reporting.....	2
What is Ad Hoc Reporting?	2
SQL Basics	2
Select	2
From	2
Where	2
Sorting and Grouping	2
The Ad Hoc Query Builder	4
The From Tab.....	7
The Select Tab	8
The Where Tab	9
The Sort Tab	10
The Report Grouping Tab	11
Understanding the Ad Hoc Views.....	11
Table 1	11

Ad Hoc Reporting

What is Ad Hoc Reporting?

AESEngenuity, otherwise known as Safe Harbors, includes a customizable reporting tool referred to as Ad Hoc Reporting. Ad Hoc Reporting allows users to create basic data requests that are structured similar to SQL (Structured Query Language) queries. These SQL statements are built with the Ad Hoc Reporting query tool using the basic commands used in SQL – Select, From, Where and include sorting and grouping of the final output. Instead of requiring users to possess a detailed understanding of the database structure, including table names, cardinality and Primary/Foreign Key constraints, the SQL data requests are made against aggregate collections of data referred to as Views.

SQL Basics

Each Ad Hoc query is created by making requests of the data set, or View, using the following format.

Select

The **Select** portion of the request, or SQL (Pronounced see'-qual) statement describes which fields form the View you wish to see in your final output.

For example:

Select LastName, FirstName, SSN, Race

In this case, the First Name, Last Name, Social Security Number and Race will be included in the data set returned.

From

The **From** portion of the SQL statement determines from which View the data is being requested.

For example:

From vADHOCActivities

In this case, the request is being made from the View called vADHOCActivities.

Where

The **Where** portion of the SQL statement defines conditions that exist in the data that further describe the data that will be returned.

For example:

Where FirstName Like "Bill"

In this case, the request is being made for only those records for which the First Name of the person is "Bill".

Sorting and Grouping

Sorting and Grouping determine the way in which the data is arranged and presented. Sorting is simply the order in which the data is arranged.

In SQL, Sorting is invoked by the **Order By** statement.

For example:

Order By LastName, FirstName

In this example, the data will be Sorted by Last Name and then by First Name. The resulting data set would appear as follows:

LastName	FirstName
Anderson	Bill
Anderson	Frank
Anderson	Tom
Anderson	Zachary
Davis	Peter
Peterson	Mitch
Peterson	Sam
Rosen	James

In SQL, Grouping presents the data in Groups defined by the **Group By** statement.

For example:

Group By LastName

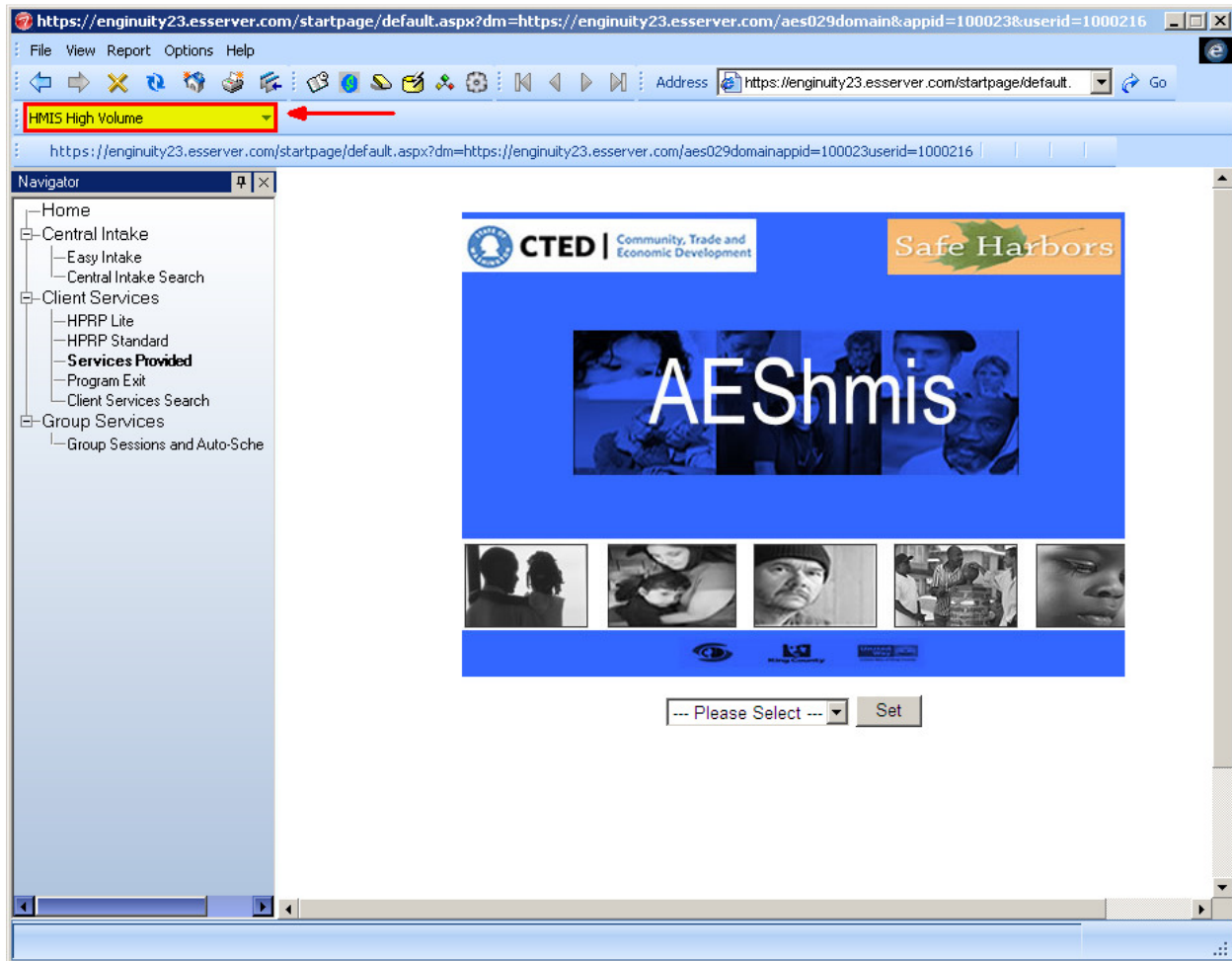
In this example, the data will be Grouped by Last Name. The resulting data set would appear as follows:

LastName	FirstName
Anderson	Bill
	Frank
	Tom
	Zachary
Davis	Peter
Peterson	Mitch
	Sam
Rosen	James

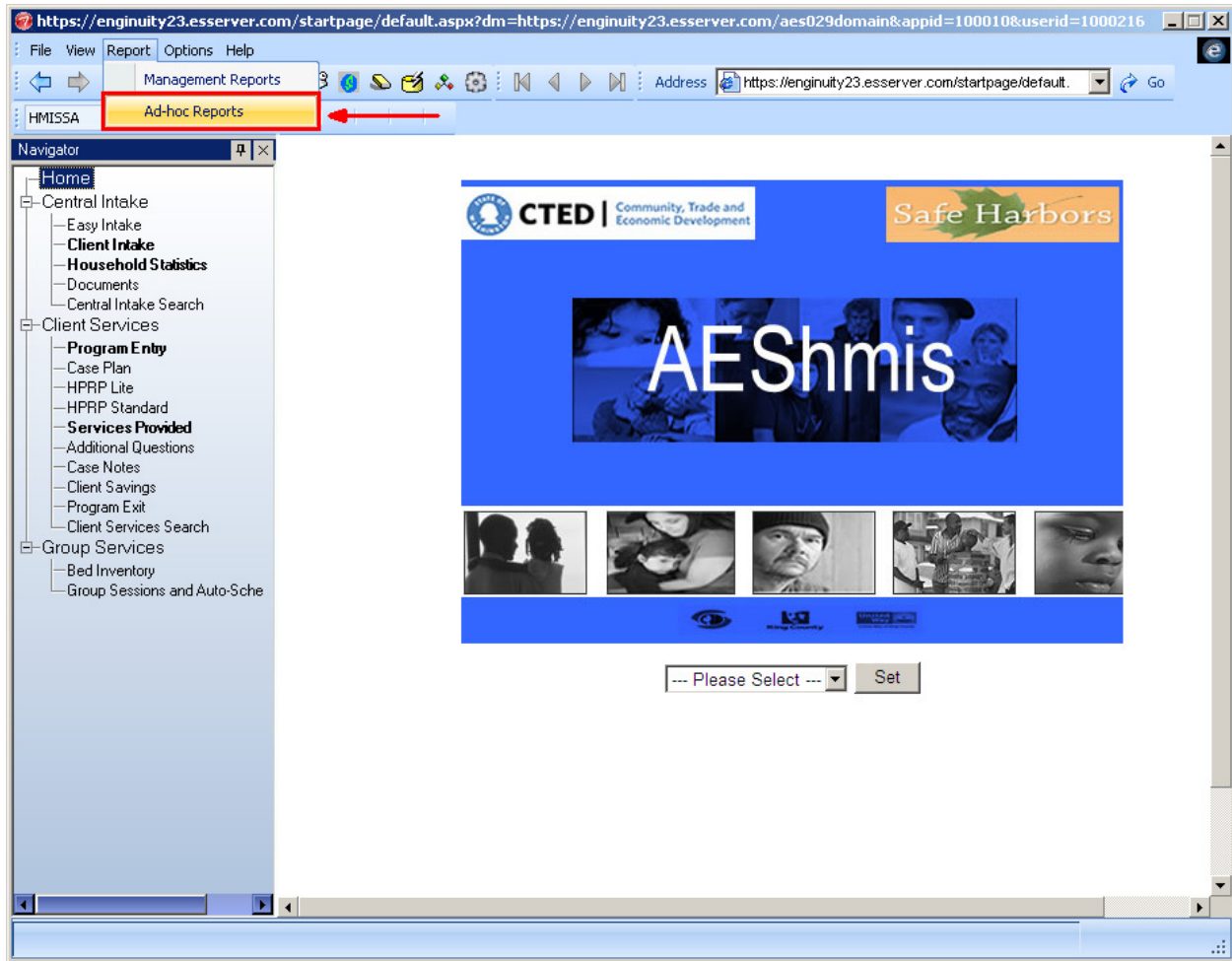
The Ad Hoc Query Builder

The Ad Hoc Query Builder is accessed by selecting **Ad-hoc Reports** from the Menu in Safe Harbors. The data that is accessed by the Ad Hoc Query Builder is related to the User's Agency affiliation. For example, if a User is associated with The Compass Center, then only data related to The Compass Center will be included in the results of the Ad Hoc Report. In addition, the Views and data are also related to the Application Role that is active when the Ad Hoc Query Builder is invoked.

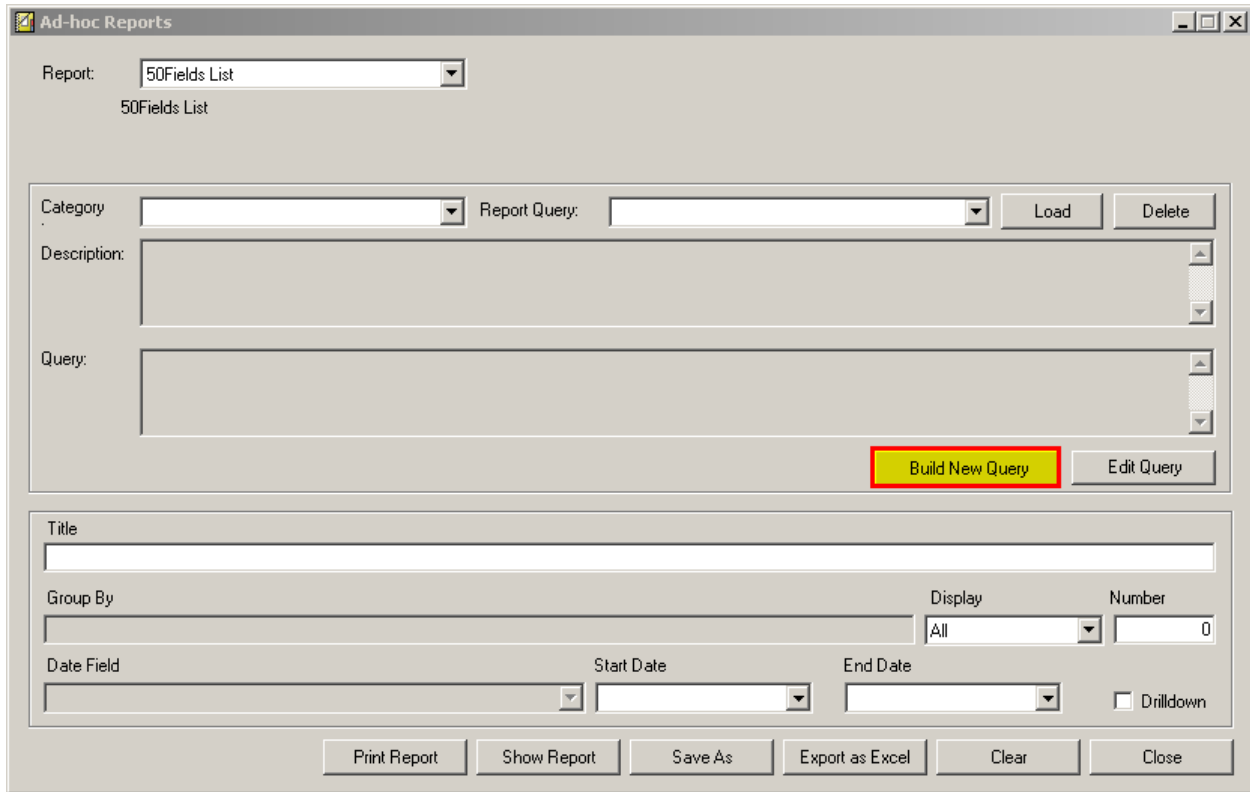
To begin, be sure that the HMIS (HMIS, HMIS High Volume, HMIS High/Low Volume or HMIS Low Volume) Role is chosen.



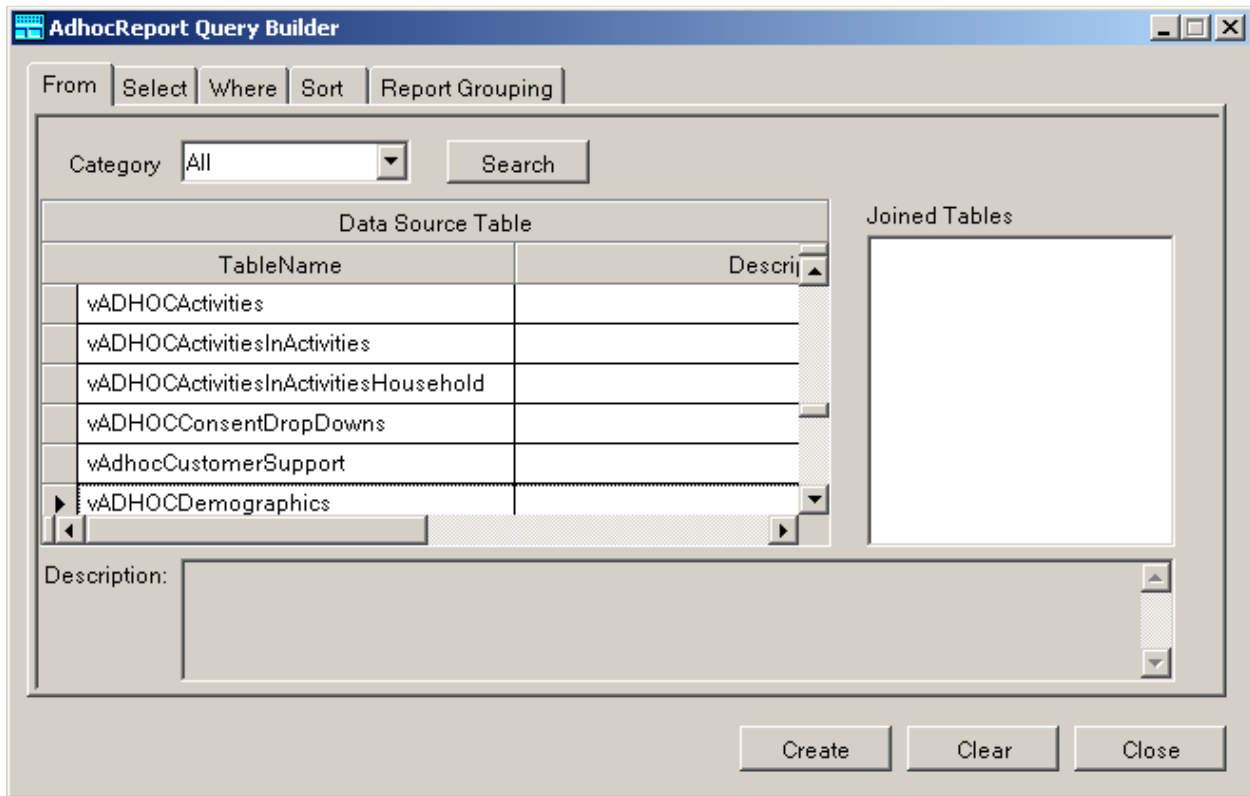
Next, select **Ad-hoc Reports** from **Report** in the Menu.



The **Ad-hoc Reports** screen will be presented.



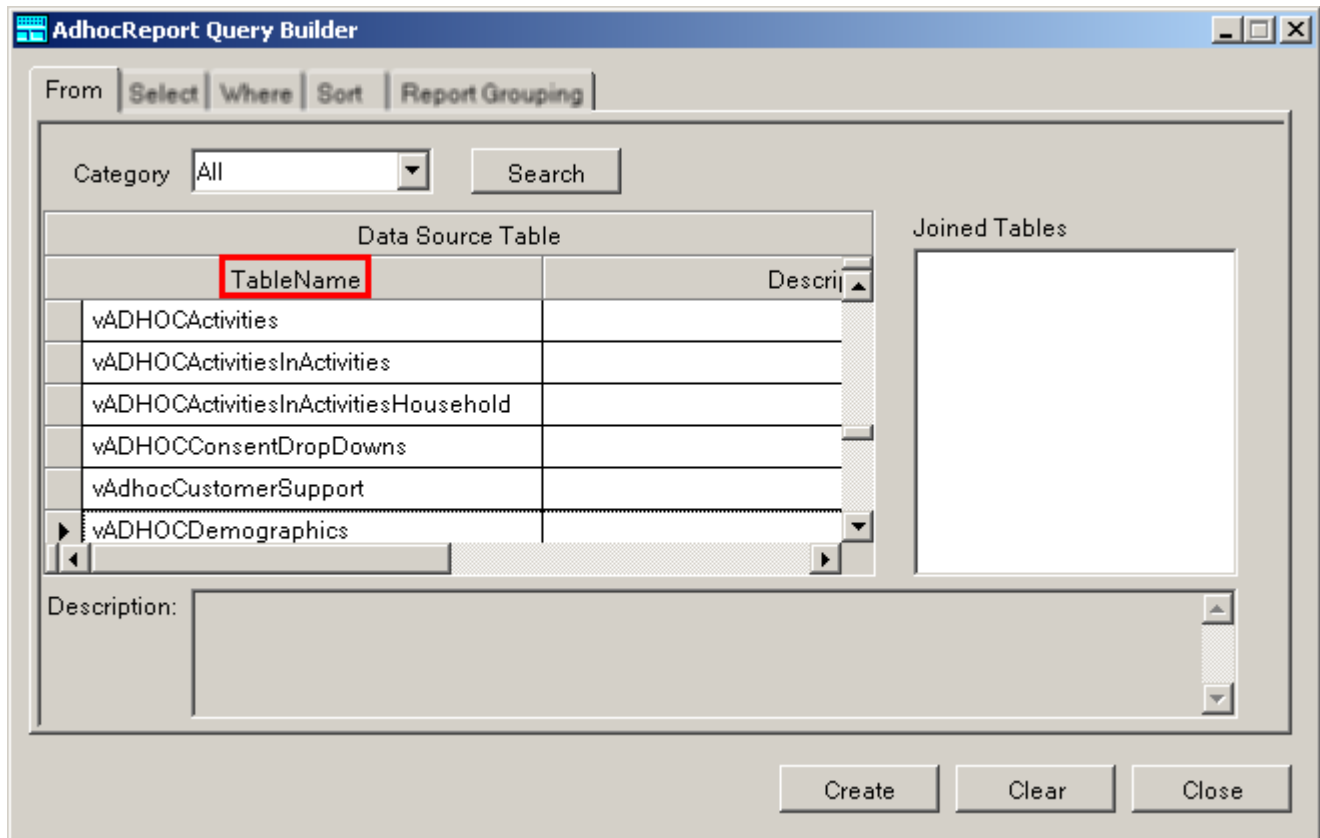
To build an Ad Hoc Query, click the **Build New Query** button to display the **AdhocReport Query Builder**.



Along the top of the window are five (5) tabs that are labeled according to their SQL statement creation function.

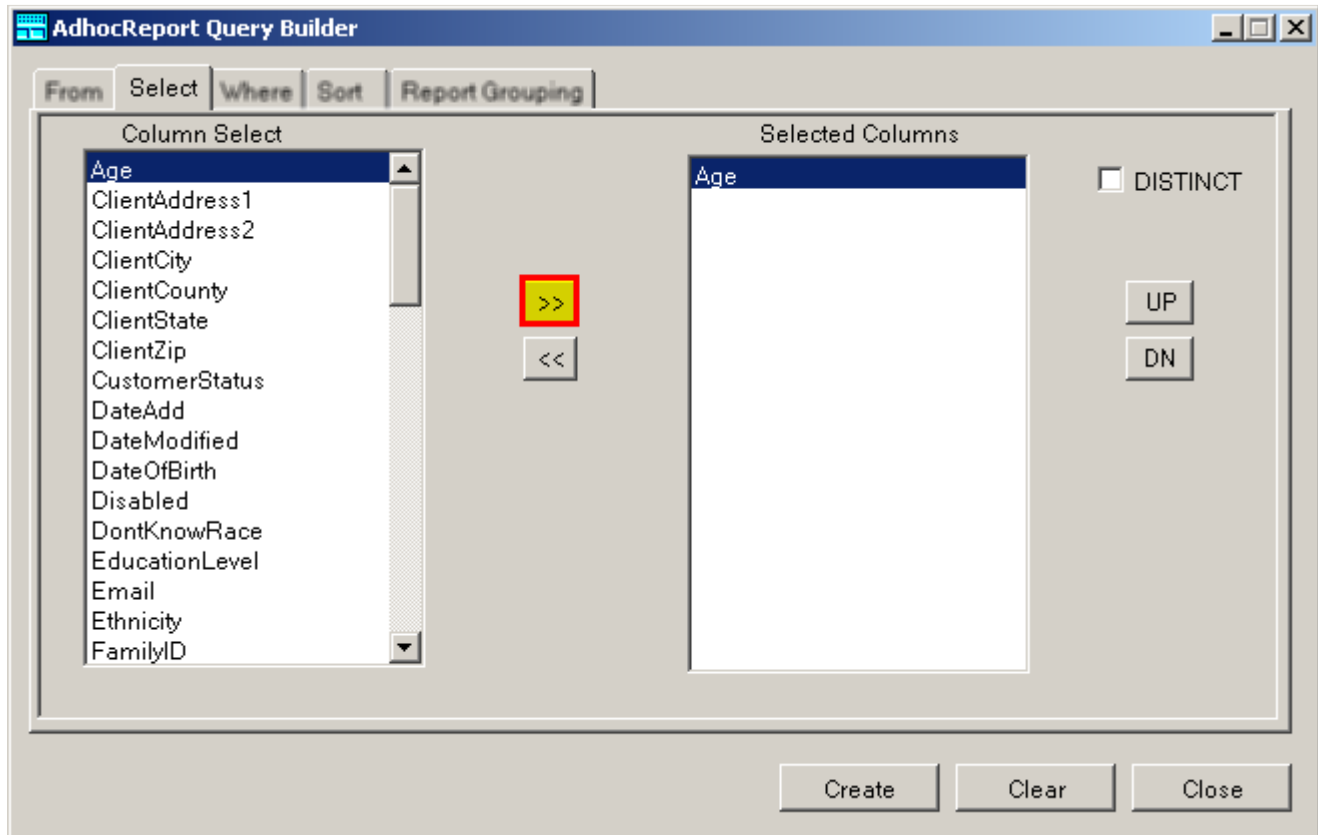
The From Tab

The **From** tab includes a list of all the available Views. The Views are listed in the **TableName** column of the **Data Source Table**.



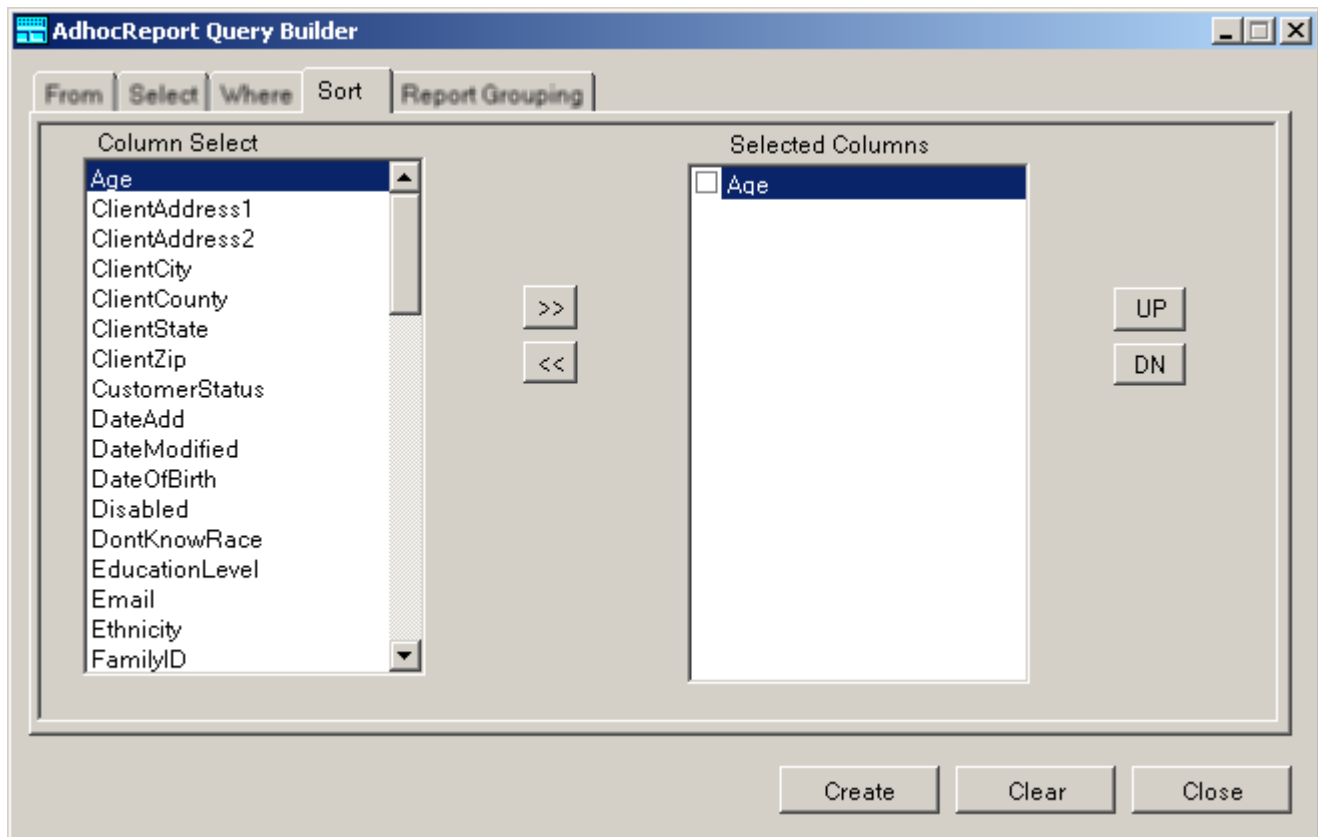
The Select Tab

The **Select** tab includes a list of all the fields available in the chosen View or Table. To select fields to include in the query, highlight the desired field name in the Column Select list and press the double right arrows **>>**. Repeat this selection process for each field needed for the query. The fields will appear in the resulting report in the same order as they appear in the **Selected Columns** box. To re-arrange the fields, highlight the field you wish to move and then use the Up **UP** and Down **DN** buttons to move the field to the desired position.



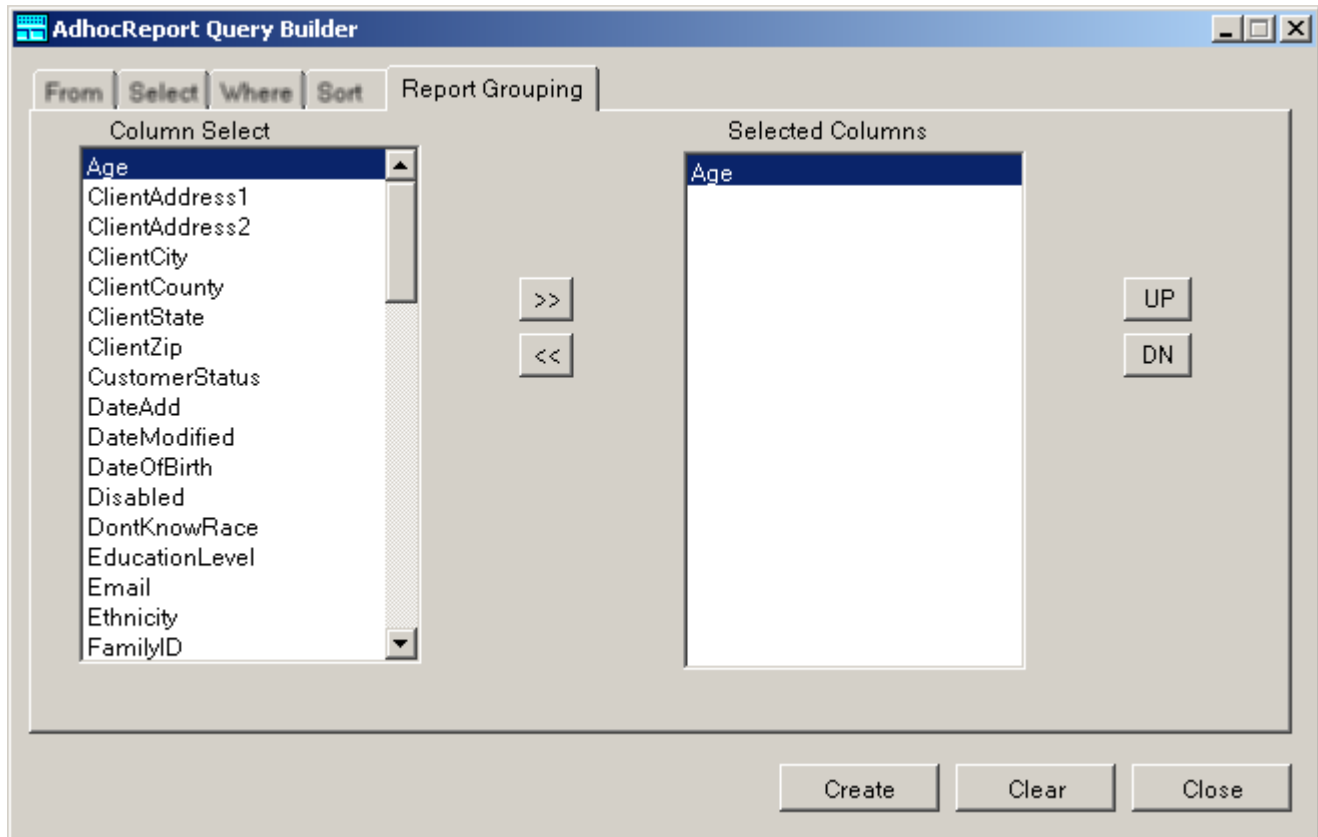
The Sort Tab

The **Sort** tab functions in the same way as the **Select** tab. The results of the query are sorted by the chosen field in an Ascending order (1,2,3... or a,b,c...). To make the results sort in a Descending order, click on the small box next to the desired field to enable the check box.



The Report Grouping Tab

The **Report Grouping** tab functions in the same way as the **Select** and **Sort** tabs.



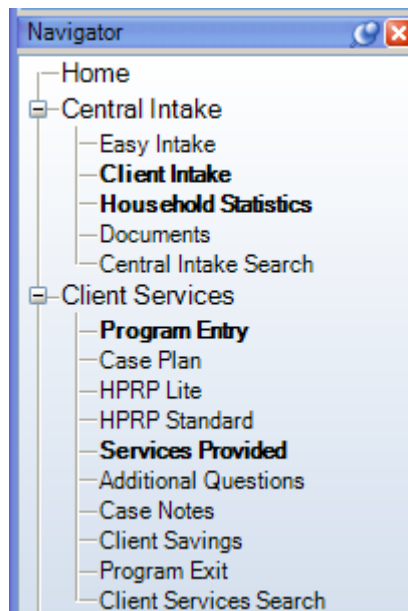
Understanding the Ad Hoc Views

The Ad Hoc Query builder draws from database Views to extract data from the HMIS database. Table 1 includes descriptions of the most useful Ad Hoc Views.

View	Description
vADHOCDemographics	Unduplicated client demographic data with current poverty level and total income. Data comes from Central Intake, Household Statistics and Client Intake pages.
vADHOCIncomeDemographics	Income break down related to client demographic, including income sources. Data comes from Household Statistics and Client Intake pages.
vADHOCProfileQuestions	Profile questions related to client demographic. Data comes from Household Statistics, Client Intake, Income Snapshots, Entry and Exit, Services Pages and Client Profile.
vADHOCQuestions	All questions with the exception of encounter related to client demographic. Data comes from Household Statistics, Client Intake, Eligibility, Income Snapshot, Entry and Exit, Services Pages and Client Profile.
vADHOCServices	Services delivered related to client demographic, including Milestone status. Data comes from Household Statistics, Client Intake, Entry and services Pages. Services must be attached to a Milestone.
vADHOCActivities	All Activities realte to client demographic, including HMIS prior living questions. Data comes from Household Statistics, Client Intake, Entry and Exit and Services Pages. Services do not need to be attached to Milestones.
vADHOCSnapshotIncome	Client details regarding Income from the Entry and Exit Snapshot, including income source and non-cash benefits and also includes services information.

Table 1

It is important to understand how the demographics views differ from other views. Looking at the Navigation pane of the Home screen, demographics data is related to Central Intake pages. Demographics information is client specific.



The remaining views are related to Client Services and the services provided to clients and their situation at Program Entry and Exit. Once entered into a Program, a “snapshot” is created that contains information about the client at that point in time. Another snapshot is created when the client exits the Program. Once a snapshot is created, changes to the client’s demographics may be made, but those changes will not be reflected in the snapshot unless the client is exited and re-entered in to the Program or the snapshot is updated.

In other words, if a change is made to client demographic information and an Ad Hoc report is run using a view that draws from a snapshot, the demographic changes will not be reflected.