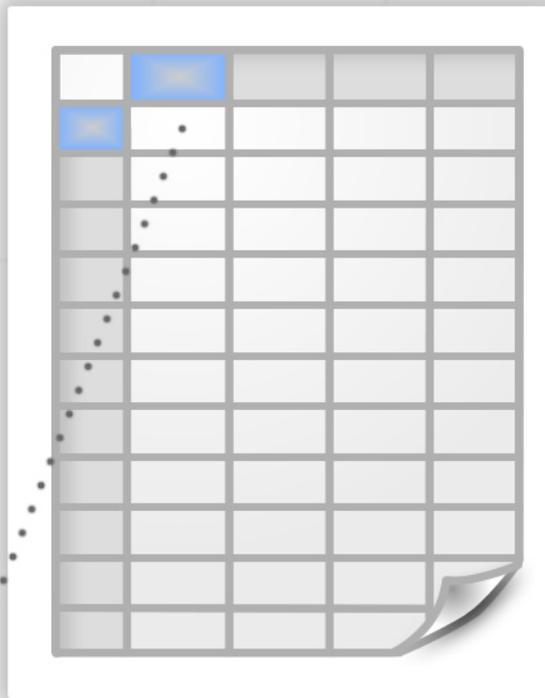


Using Export Wizard *for Client Registry*



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OR

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Section 1

Introduction

What is Export Wizard?

Export Wizard is a Web-based application for generating client data exports based on a query of any active field in the Client Registry selected by the user.

This flexible report-generating application creates user-defined reports based on specific criteria. These reports may then be previewed in the Web browser and/or exported to a downloadable file and opened in any spreadsheet application.

- ① Export Wizard is the reporting tool for Client Registry; while Export Tool allows users to export resource data from the Resource Directory.

About This Guide

“Using Export Wizard for Client Registry” explains the fundamentals of creating exports and the related concepts. This guide is designed for individuals with proficiency in Client Registry and users are expected to understand the basics of casework management.

Users should complete training for Client Registry and understand how to use that Web-based application before continuing on to use Export Wizard.

This manual replaces all previous documentation.

Getting the most From Export Wizard

Familiarity with spreadsheet functions, including filtering and pivot tables, will allow users to use the export file to further utilize exported data.

Section 2

The Client Info Tabs

Export Wizard guides users through the process of building an export and downloading an export file.

The general processes included for each steps are:

Step 1: Working With New and Saved Reports

- Choose to start a new export
- Edit, run, or delete an existing export
- Download the file of the last export
- Cancel an active export

Step 2: Select Report Fields

- Select the fields to define the export file

Step 3: Re-Order Column Fields

- View and modify the column order of the export file

Step 4: Set Criteria

- Define criteria to select the client records to be included in the export

Step 5: Define Export File

- Define the sorting of data by rows in the report
- Limit the information included in the report by number or rows
- Select the best file type for export
- Define save options
- Select Preview or Export

2.1 The Export File Explained

The export file is a tab delimited text file in a compressed Zip archive which may be opened in MS Excel or any spreadsheet program.

In Export Wizard, you select the fields (columns), the order (column order), criteria (data) and sorting (order of rows); these steps determine the content and look of the export file.

2.2 Accessing the Export Wizard

Getting Access

Access to the Export Wizard is limited to the individuals handling an agency's reporting or monitoring. The POC for your organization determines who should be approved for training and access to the tool.

For more information regarding access to Export Wizard, please register for training on <http://www.CAN.org/training>. The registration process contains more information about the process and prerequisites.

2.3 Navigating to the Export Wizard

For users with access permission to Export Wizard, follow these steps to begin running reports:

1. Go to the **MyTools** link on top of any page; navigate to the appropriate Regional Portal for the client records you want to export.
2. Select **Client Export** link.
3. Select **Client Registry Export Wizard** link to advance to Step 1 of 5.

The screenshot shows the CAN Region I website interface. At the top left is the CAN logo with the text "COORDINATED ASSISTANCE NETWORK" and "CAN Region I". To the right is the tagline "A Network of People, Information and Tools to Help Communities Recover". A search bar and navigation links for "Answers: Training | Support | FAQs" are visible. A user profile bar shows "Welcome JAyre, July 30, 2010" and a "Logout" button. Below this is a horizontal navigation menu with buttons for "Getting Started", "Library", "Resources", "Calendar", "User Profile", and "MyTools".

The "My Tools" page is displayed below the menu. It features a "CAN Region I" header and a "Jump to: CAN Region I" dropdown. Under "Portal Updates:", there are two columns: "Client Management" and "Resource Management". The "Client Management" column includes links for "Client Search/New Clients", "Client Export", "Manage FastTrack Service Lists", and "System Administration". The "Resource Management" column includes links for "Search Resources", "Update Existing Agency", "Update Existing Program", "Update Existing Service", "Create New Agency", "Create New Program", "Create New Service", and "Resource Exports". A large blue arrow points from the "Client Export" link to the "Client Management" column. On the right side of the page, there is a "System Updates" section with text about updates to the recovery portals and contact information for support@can.org.

- i** Be sure to navigate to the appropriate Regional Portal prior to running an export. The Regional Portals organize client data and if a user has access to multiple Regional Portals, no client records will be returned if the export includes an Associated Disaster as a criteria.

Section 3

Using Export Wizard

3.1 Step 1: Working With New and Saved Reports

Creating a New Report

To start a new export:

1. Enter a unique descriptive name for the export.
2. Select the Continue button to advance to Step 2.

The screenshot shows the top navigation bar of the CAN (Coordinated Assistance Network) website. The logo is on the left, and navigation links for Training, Support, and FAQs are on the right. Below the navigation bar is a horizontal menu with buttons for Getting Started, Library, Resources, Calendar, User Profile, and MyTools. The main content area is titled "Client Export Wizard" and "Step 1 of 5: Export Menu". A note at the top of the wizard states: "Please note, before you can open the exported files you will need to have a program that can expand ZIP compressed files such as WinZip, 7-Zip, Aladdin, or Stuffit Expander." The "Customizable Export" section contains a text input field for the export name, a checked checkbox for "Save this export?", and a "Continue" button. The "Saved Reports" section contains a table with columns for "Action Report Name" and "Last Update".

Answers: [Training](#) | [Support](#) | [FAQs](#)

Search

Welcome JAyre, July 28, 2010 [Logout](#)

Getting Started Library Resources Calendar User Profile MyTools

Client Export Wizard

Step 1 of 5: Export Menu

Please note, before you can open the exported files you will need to have a program that can expand ZIP compressed files such as WinZip, 7-Zip, Aladdin, or Stuffit Expander.

Customizable Export

To start a new export, give it a name:

Save this export?

[Continue](#)

Saved Reports

Edit, Run, or Delete an existing report.

Action Report Name	Last Update
--------------------	-------------

Using Saved Reports

In addition to creating a new export, there are other actions users may take with Saved Reports.

- **Edit:** Change the fields, field order or logic statements to achieve a different report. Click the edit button to start edit, Step 2.
- **Preview:** Shows the first 25 rows of the export.
- **Export:** Executes the export and creates export file.
- **Delete:** The delete function removes the report from the system.

-  It is important to delete extra reports which are no longer used.

3.2 Step 2: Select Report Fields

Selecting fields to include in a report simply determines the column headings in the export file.

The export should contain those fields needed to select a group of client records as well as the entire related client data fields desired in the export.

-  The Client ID field must be included in all reports.

Selecting Fields

The fields on Step 2 appear in the order in which they appear in the Client Registry formset. Identify the fields to be included in the export by section, and select each field by clicking the checkboxes next to those fields.



Client Export Wizard

Step 2 of 5: Select Fields

Select fields to export from each section below.

[Previous Step](#) [Next Step](#)

Check/Uncheck (all fields)

Client Info

Check/Uncheck (all fields in this form)

Client/Caller Information

Check/Uncheck (all fields in this section)

System Generated Client Fields

Check/Uncheck (all fields in this sub-section)

- Client: Create Date/Time
- Client: Last Edit Date/Time
- Client: Agency ID
- Client: Agency Name
- Client: Creator
- Client: Last Editor
- Client: Last Editor Agency ID
- Client: Last Editor Agency
- Client ID

3.3 Step 3: Re-Order Column Fields

Setting the Column Order for the fields (top to bottom) determines the where the column headers appear (left to right) in the export file when opened in a spreadsheet program.

By default, the fields selected in Step 2 are presented in the same order on this screen.

-  The Column Order is retained when returning to the Saved Report function.

Drag and Click the Column Order

The fields may be rearranged by clicking, holding, and dragging the field to the desired sequence for the export. Only one field may be moved at a time; however, all fields may be rearranged.



Client Export Wizard

Step 3 of 5: Order Columns

Drag and drop the field names to create the desired column order.

[Previous Step](#) [Next Step](#)

Column Order

Best Phone	
Alias	
Alternate/Emergency Contact Name	
Alternate Contact Phone (Other)	
Associated Disasters	
Alternate Contact Phone (Best)	
Best Time to Contact	
Client: Agency ID	
Client: Agency Name	
Client: Create Date/Time	

-  Older browsers may not support this action. It is recommended that the most recent version of FireFox or Internet Explorer is used.

3.4 Step 4: Set Criteria

Specifying the criteria defines the client records included in a report by filtering off records that do not match those criteria. This is really where *which* client records are included in the export are defined. The criteria are defined by the Criteria Operator and the Criteria Value.

Four Criteria Groups may be defined allowing very sophisticated reports to be run from a very simple interface.

The screenshot shows the top navigation bar of the CAN Region I website. On the left is the CAN logo with the text 'COORDINATED ASSISTANCE NETWORK' and 'CAN Region I'. To the right of the logo is the tagline 'A Network of People, Information and Tools to Help Communities Recover'. Further right are links for 'Answers: Training | Support | FAQs', a search box with a 'Search' button, and a user greeting 'Welcome JAyre, July 30, 2010' with a 'Logout' button. Below this is a horizontal navigation menu with buttons for 'Getting Started', 'Library', 'Resources', 'Calendar', 'User Profile', and 'MyTools'.

Client Export Wizard

Step 4 of 5: Specify Criteria

Choose the appropriate options below to determine what data you'd like to retrieve.

NOTE: Because you have more than 1 clients, you must use a minimum of 3 criteria.

[+/-] Key: Criteria Operator

[Previous Step](#) [Next Step](#)

Criteria Group 1

Logical Connector	Field	Criteria Operator	Criteria Value
[AND]	Client ID	>	0
AND	Associated Disasters	equals	NH Floods (03/2010)
AND	Client: Create Date/Time	on or before	01/01/2005
AND	-		

[Save](#)

Criteria Statements

To specify the criteria for an export, define criteria statements using the drop down menus and text fields. A criteria statement includes:

- **Field:** The Client Registry field used to select the records included in an export.
- **Criteria Operator:** The logic condition applied to the chosen criteria (variable).
- **Criteria Value:** The user-defined variable that is used in conjunction with the Criteria Operator to filter records for an export.

The Export Wizard requires a minimum of three criteria to generate an export. All new and saved client record exports with less than three criteria selected will not run. Users will be prompted to go back and select at least three criteria before clicking either the Export or Preview button.

“Recipes” used by case management agencies and communities appear in the last section of this guide.

Field

Each Field selected in Step 2 appears as a drop down Field value on Step 4 and the Criteria Operator and Criteria Value define the filter. If a required Field does not appear, use the Previous Step button to return to Step 2 and select the appropriate checkbox for the required Fields.

Fulfilling Criteria for Reports

The most common fields and criteria used to set when creating a new case load export recipe include the Agency ID, Pre-Disaster State AND Associated Disasters.

Exporting Records by Associated Disaster

The Associated Disasters field must be selected in Step 2, in order to sort against in Step 4. To retrieve all of the client records for a single Associated Disaster in an export:

1. Use the drop down to select **Associated Disasters**;
2. Set the Criteria Operator to **equals**;
3. Select the **Associated Disasters** as the **Criteria Value**.



All Associated Disasters are exposed as a Criteria Value without regard to the Regional Portal the export is run from.

Criteria Operators

Available Criteria Operators are dependent on the Field chosen and the data type. Once a field is selected for the logic statement, the Criteria Operators load and a logic statement can be created.

Key to Criteria Operators

The Criteria Operators adapt or change based on which field is selected. The table below shows all of the available options for each value.

Value	Operator	Description
Text	equal to not equal to	Exact, case-sensitive match of text strings.
Text	contains begins with ends with	Case insensitive match of a piece of a text string within a larger text block.
Dropdown/ Look-up	equals is one of	Matches one or more selections from a pre-set drop-down list.
Date	on before after	Matches a date.
Number	= < > <= >= < >	equal to not equal to less than or equal to greater than or equal to less than greater than

Differences In Criteria Values

Criteria values are based on the field chosen. For text, date, and number fields the values are blank and the variable must be entered manually. For Drop-Down and Look-up fields, select the variable from a drop-down list.

Logic Connectors: AND versus OR

Connectors

Any logic statement in a group may be joined with the “AND” or the “OR” connectors. Statements joined using an “AND” connector further refine (limit) the client records included in an export. Statements connected by the “OR” connector expand the client records included in an export.

Connector Example “AND”:

- Case Managing Agency ID: [12121] “AND” Case Status: [Open] “AND” Associated Disasters [TX Hurricanes]

Result: Only client records managed under [Agency ID] and with the Case Status [Open] would be included in the export. Cases which are closed would not be included.

Connector Example “OR”:

- Case Managing Agency ID [111111] “OR” Case Managing Agency ID [222222] “OR” Case Managing Agency ID [333333]

Result: Clients who are either managed by #111111 Agency or #222222 Agency or #333333 included in the export.

Criteria Groups

Criteria Groups are made up of multiple logic statements joined by the “AND” or the “OR” logic connector. This limits how logic statements can be grouped and connected.

Example: Generate an export for all Open Cases for two Agencies (Agency #1 and Agency #2)

- **Group #1:** Case Managing Agency ID [#1 Agency ID] “OR” Case Managing Agency ID [#2 Agency ID]

“AND”

- **Group #2:** Case Status: [Open]

Adding Logic Statements

If more than four logic statements are needed in a Criteria Group, additional logic statements may be added by clicking the Save button below each group. Four additional statements may then be added. This process can be repeated as needed.



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Client Export Wizard

Step 4 of 5: Specify Criteria

Choose the appropriate options below to determine what data you'd like to retrieve.

NOTE: Because you have more than 1 clients, you must use a minimum of 3 criteria.

[+/-] Key: Criteria Operator

Criteria Group 1

Logical Connector Field	Criteria Operator	Criteria Value
AND	-	

AND

3.5 Step 5: Define Export File

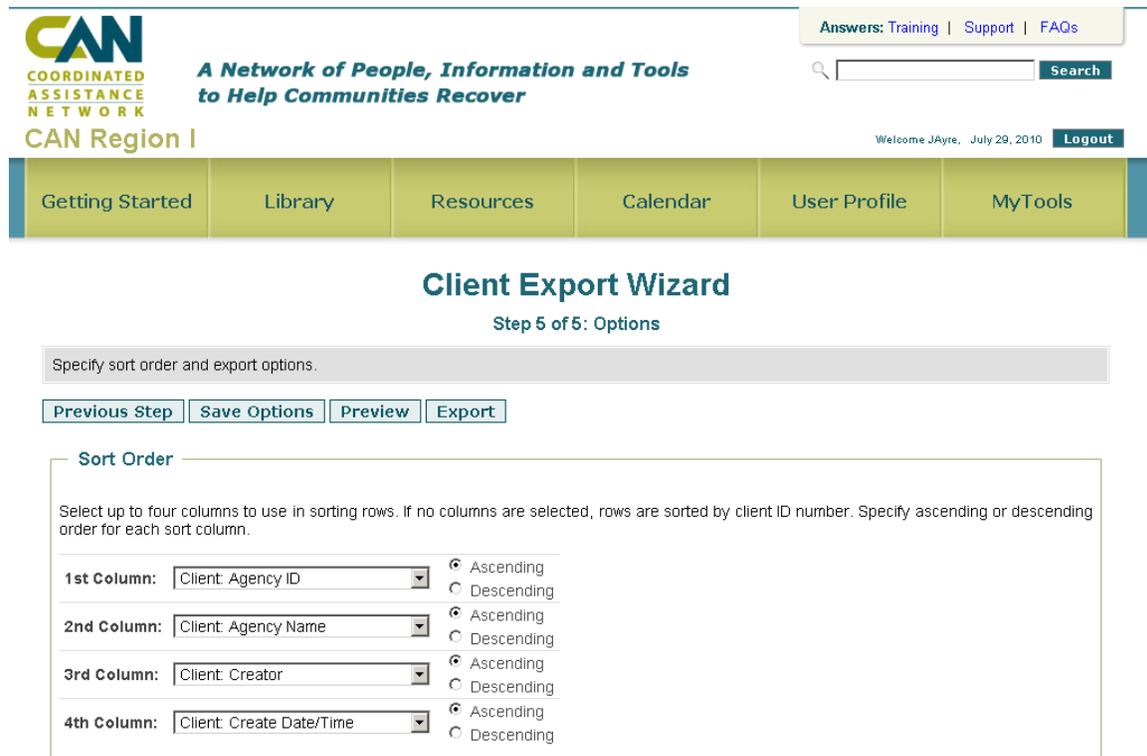
The last step of the Export Wizard sets options for sorting of data, saving the report and options for the export file.

Sort Order: Spreadsheet Rows

It is possible to use up to four different sort fields in the export file—the sequence fields should be sorted in report. Each of the four fields can only be sorted in ascending or descending order.

On this step of the report process, users may choose to sort specific columns of data. Any of the fields that were selected on Step 2 will appear in a drop down for each of the four columns.

-  If no columns are selected, the Client ID field is used as the Sort Order. Many reports do not define a Sort Order.



Client Export Wizard
Step 5 of 5: Options

Specify sort order and export options.

[Previous Step](#) [Save Options](#) [Preview](#) [Export](#)

Sort Order

Select up to four columns to use in sorting rows. If no columns are selected, rows are sorted by client ID number. Specify ascending or descending order for each sort column.

1st Column: Ascending Descending

2nd Column: Ascending Descending

3rd Column: Ascending Descending

4th Column: Ascending Descending

Benefits of Defining a Sort Order

Providing an initial Sort Order may help organize the data and provide context for users opening the document. If an export is designed to be opened with a spreadsheet program, then defining a Sort Order will not prevent future sorts.

Example:

Sorting order and options illustrated below:

1. Case **Manager Last Name** [ascending]
2. Client **Last Name** [ascending]

Spreadsheet File				
Ascending Order				
(a,b,c,....y,z)				
Case Manager Agency ID	Case Manager Last Name	Last Name	First Name	Date of Birth
82345	Brodden	Amherst	Thomas	12/05/72
82345	Brodden	Robertis	Tonya	04/03/71
82345	Thomas	Bridge	Steve	11/23/54
82345	Thomas	Paige	Doris	02/15/61

Export Options

Under the export options section, the number of rows, file format, and report name are set.

- **Limit number of rows in the export to:**
This option is only useful when exporting an audit report on a single client record editor, date/time. Enter a number of rows of information to include.
- **Export file line ending character:**
The default is for Windows. Other computer users can set the option for Mac's or Unix.
- **Save Settings As Report Named**
Enter a name for the report. Each report must have a unique name.

i Including the full date in the file name will help identify this file from other files over time.

Export Name

This field may be used to change the name of the saved or new customized export.

Saving Options

The Save Options button saves any selections for the final Step 5 and returns the user to Step 1 where the export could be run.

Preview

The Preview button allows the report to run and display the first 25 results to determine whether the results match your desired report prior to committing to a full export.

Export

The Export button places your export file in a system queue for the creation of an export file.

Section 4

Exporting a Report File

The export process places the report in a queue to be executed. While the export is in the queue or running, a status screen is displayed. When the export completes the report a new page loads.

Export File Download Page

- Displays the number of rows produced in the export.
- Includes a link to download the export file to your computer.

 The file name will always be the same.

Download Export File

The export file is a compressed data file in the zip format. You will need an application for “un-zipping” the file. Most current operating systems [Windows/Mac] have a pre-installed compression utility. Contact your agency’s technical support department for further assistance.

1. Click the **Export File** link. Your browser should prompt you to open or save the file.
2. Save the file to your desktop and/or extract using unzip application.

 Windows 7, Vista and XP can open compressed Zip archives in Windows Explorer. On Macs, OS X and later support Zip archives from Finder.

It is suggested that you immediately save the report with a more descriptive name in the MS Excel Workbook format to prevent overwriting of your file with future downloads from the Export Wizard.

Section 5

Frequently Asked Questions

The system is taking a long time to process my report, what do I do?

When multiple users are running reports on the system it may take longer to run your report. You do not need to wait on the Export Processing screen. Close the screen or even log out of the system to complete other tasks. When you return to the system, your completed report will be available on the Export Wizard start page as the last run report.

I have been waiting several hours for an export to process and it is still not complete, what do I do?

If your export has taken several hours to process, there may be a problem with your report or the system has an error. Check your report logic statements to verify that there are no contradictions. If the logic statements appear sound, notify support@can.org.

How do I set up the logic statements to get the client data I need?

There are sample recipes at the end of this guide. We have posted several generic reports useful for agencies and communities.

Section 6

Example Report Recipes

6.1 Basic Caseload Report

This report provides basic demographic information on an agency's case load and the current status of the case.

Field Selection Order	Export File: Field Column Order	Applied Criteria
(Select Fields Step 2)	(Set Field Order Step 3)	(Apply Criteria Step 4) You must select at least 3 criteria.
# of Disaster Affected Adults	Case Manager Agency ID	Equals: ##### (Agency ID)
# of Disaster Affected Dependents	Case Manager Last Name	Client ID > then 0 [zero]
Associated Disaster	Case Manager First Name	Associated Disaster = (select the disaster portal name)
Client ID	Client ID	
Date of Birth	First Name (Client)	
Ethnicity	Last Name (Client)	
First Name (Client)	Associated Disaster	
Gender	Gender	
Last Name (Client)	Ethnicity	
CAN Release Signature Date	Date of Birth	
Case Manager Agency ID	# of Disaster Affected Adults	
Case Manager First Name	# of Disaster Affected	

	Dependents	
Case Manager Last Name	Case Status	
Case sent to UNTL/LTRC	Date of Intake/Date Case Opened	
Case Status	CAN Release Signature Date	
Date Sent to UNT/LTRC	Date of Case was Closed	
Date of Case was Closed	Case sent to UNTL/LTRC	
Date of Intake/Date Case Opened	Date Sent to UNT/LTRC	
Has Client Developed a Recovery Plan	Has Client Developed a Recovery Plan	
If there was another reason for closure, what was it?	If there was another reason for closure, what was it?	

6.2 Recipe for Total Individuals Report

This information should be used to provide total individuals weekly and monthly reports.

Field Selection Order	Export File: Field Column Order	Applied Criteria
(Select Fields Step 2)	(Set Field Order Step 3)	(Apply Criteria Step 4) You must select at least 3 criteria.
Client ID	Client ID	Equals: ##### (Case Manager Agency ID)
Household Relation: First Name	Household Relation: First Name	Client ID > then 0 [zero]
Household Relation: Last Name	Household Relation: Last Name	Associated Disaster = (select the disaster portal name)
Household Relation: Date of Birth	Household Relation: Date of Birth	
Household Relation: Relationship	Household Relation: Relationship	
Case Manager Agency ID	Case Manager Agency ID	
Case Status	Case Status	

6.3 Report Recipe for Referrals and Services Provided

This information should be used to provide Information and Referral monthly reports.

Field Selection Order	Export File: Field Column Order	Applied Criteria
(Select Fields Step 2)	(Set Field Order Step 3)	(Apply Criteria Step 4) You must select at least 3 criteria.
Client ID	Client ID	Equals: ##### (Case Manager Agency ID)
Referral Agency ID	Referral Agency ID	Client ID > then 0 [zero]
Referral Name	Referral Name	Associated Disaster = (select the disaster portal name)
Services Provided: Agency Name	Services Provided: Agency Name	
Services Provided: Date Provided	Services Provided: Date Provided	
Services provided: Services ID	Services provided: Services ID	
Services Provided: Services Name	Services Provided: Services Name	
Services Provided: Total Cost	Services Provided: Total Cost	
Services Provided: Unit Cost	Services Provided: Unit Cost	
Services Provided: Unit of Service	Services Provided: Unit of Service	
Case Manager Agency ID	Case Manager Agency ID	