WorkinTexas.com Reports Training Exercise Workbook

Approved by the

Texas Workforce Commission

Training and Development Department

TEXAS WORKFORCE COMMISSION

Training and Development

Training and Development Mission

We are here to help TWC and our partners enhance employee workplace skills and productivity through the development, coordination, and delivery of quality learning opportunities.

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Contents

Reports Training

This manual contains the exercises for the WorkinTexas.com (WIT) Reports training class.

You may also use this book as a desk aid to assist you with completing activities at work.

Note: The data, examples, and images in this manual are taken from the training database system and do not contain any Personal Information (PII). Individual, employer, and service provider data are fictitious. The resemblance to any real people or companies is strictly coincidental. As you work through the exercises, do not enter any personal information into the training environment.

Note: In the WIT environment there are multiple ways to complete the same actions. Different choices made for the same actions can lead to different results and/or screens in the software. If you get lost in an exercise, use the browser back button at the top of the page to go back to a familiar step, or you can return to the Dashboard to start over.

Guidance for Using This Workbook

In the exercises:

- Hyperlinks are **bolded** and **underlined**.
- The term Customer and Individual are used interchangeably.

Staff Functions

The exercises in this manual attempt to simulate the functions you will perform to manage reports in the WIT system.

Exercise #1: Login as Staff

Objective: Login as Staff.

Assumption: You are in the WIT training environment **WIT Case Management Training Site**

Purpose: This exercise is to become familiar with how to log in to the WIT environment.

To log in as a staff user type, follow these steps:

1. Access the Home page according to the trainer’s directions.
2. Click **Sign In / Register**.
3. Enter your assigned staff username.
4. Enter your assigned password.
5. Select the **I’m not a robot** checkbox for reCAPTCHA, if applicable.
6. Click **Sign In**.
7. Review Staff Sign-in Notice text.
8. Click **I agree**.

Exercise #2: Pin Links on My Staff Dashboard

Objective: Create shortcuts to popular staff commands.

Assumption: You are in the WIT training environment [**WIT Case Management Training Site**]() and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To set the Create Individual pinned link:

1. Access the left navigation menu by selecting the **Menu** link.

Tribar / Menu Link

2. Select **Manage Individuals > Create an Individual**.
3. Select the push pin displayed in the top left corner of the screen.
4. Select **Dashboard** from the top menu bar to return.
5. Do you see this pinned link displayed?

To set the Assist an Individual pinned link:

1. Access the left navigation menu.
2. Select **Manage Individuals > Assist an Individual**.
3. Select the push pin displayed in the top left corner of the screen.
4. Select **Dashboard** from the top menu bar to return.
5. Now you should have two pinned links. Moving forward, you may select either pinned link instead of accessing each command from the left navigation menu.

Note: Staff account logins will be reused throughout pre-deployment training. If these links already exist, that’s OK. Now you have practice and know how to pin additional links as desired.

Exercise #3: Configure Dashboard Widgets Display

Objective: Set a preferred display for your dashboard widgets.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To configure the display of your dashboard widgets:

1. Select the Configure Dashboard Widgets link, located at the bottom of the Dashboard screen.
2. Select the **Check All** link.
3. Select **Save**. All available widgets should be displayed.

Note: Staff account logins will be reused throughout pre-deployment training. If staff dashboard widgets already display, that's OK. Now you have practice turning on/off their display.

Exercise #4: Configure Dashboard Widgets Location

Objective: Set a preferred location for your dashboard widgets.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To configure the location of your dashboard widgets:

1. Locate a desired widget.
2. Select and hold the top right corner of the widget.
3. Drag the widget to a different location within columns 1, 2 or 3, according to the **placement line** displayed.
4. Release the widget.

Exercise #5: Set Preferences within My Staff Account

Objective: Establish desired settings to control system behavior.

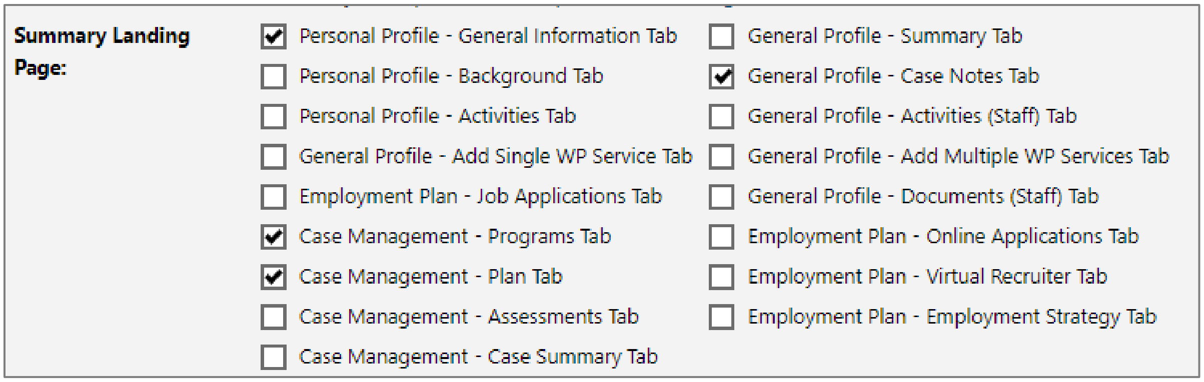
Assumption: You are in the WIT training environment **WIT Case Management Training Site** and accessed My Staff Dashboard.

Purpose: This exercise will help you work more efficiently in the WIT system.

To set preferences within My Staff Account:

1. Select **My Staff Account** from the top of My Staff Dashboard.
2. Locate the Preferences section.
3. For the Assist Individual Landing Page setting, select **Case Management – Programs Tab**.
4. For the Display # of Most recently assisted individuals and employers setting, select **20**.
5. For the Display new registrants in the most recently assisted individual and employer links: field, select **Yes**.
6. For the Summary Landing Page setting, select the following:
    i. Personal Profile – **General Information Tab**
    ii. General Profile – **Case Notes Tab**
    iii. Case Management – **Programs Tab**

iv. Case Management – **Plan Tab**



Summary Landing Page Options

7. For the Detail Landing Page setting, select the same checkboxes as the Summary Landing Page setting.
8. In the Staff Signature section, select **Capture Signature**.
9. Hold down the left mouse button and draw your signature, releasing the left mouse button to set spaces.
10. (Optional) select **Remove My Signature** if you want to retry and repeat Step 9.
11. Select **Update Account**.

Exercise #6: Access the Reports Options Screen

Objective: Practice reports navigation.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** as a staff user.

Purpose: This exercise will help staff identify navigational pathways and anticipated outcomes.

To access the Reports:

1. Select the **Menu** link in the top left corner of the screen to access the left navigation menu.
2. Locate the Reports group.
3. Select the **Reports** hyperlink title. The Reports Options screen displays.
4. Select the **Menu** link again in the top left corner of the screen to access the left navigation menu.
5. Select the **Summary Reports** hyperlink title to see the Summary Reports category open and expanded under the Reports Menu section.
6. Select **Master Summary** to access the report titles contained in this report subcategory.
7. Select **Summary Reports** to collapse the menu.

Exercise #7: Explore the Reports Options Screen

Objective: Select each option to access the contents.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and are authorized to access system reports.

Purpose: This exercise helps staff become familiar with the data contained within each Reports option.

Note: Federal reports apply to the following programs in the WIT system: WP, WIOA, TAA, SNAP E&T, and Choices.

To review the components of the Reports Options screen:

1. Select the **Expand All / Collapse All** hyperlink located on the top right corner of the Report Tools window.

Expand All / Collapse All Hyperlink

2. Notice that all sections are now open and expanded.
3. Select the **Expand All / Collapse All** hyperlink. Notice that all sections are now closed/collapsed.

4. Select the **Report Tools** section heading to open and expand its contents.

5. Select the **My Reports** link within the Report Tools section.

6. Practice opening/closing each row within the My Reports container.

Note: There may not be any saved reports to view, initially.

7. Select **Return to Manage Reports**.

8. Select the **SQL Query Tools** link within the Reports Tools section. Displayed are the options available, which will be addressed in another lesson.

9. Select **Return to Manage Reports**.

10. Select the **Last Viewed** option. This is where WIT maintains **on demand** reports and ad hoc reports you previously viewed. Select a report title, if one exists for your staff login.

Note: If you select a report title link, you will access the Selection Criteria screen for that report.

11. Select **Return to Manage Reports**.

12. Select the **Reports Finder** option. Staff may perform two distinct searches: KEYWORD and DRILL-DOWN search.

13. To conduct a KEYWORD search for desired reports:

    i. Enter the word **application** and click **Search**.

14. Select the **Application** report title displayed.

Note: We will practice generating this report in another lesson.

15. Select **Return to Manage Reports**.

16. Select the **Reports Finder** option again.

17. To conduct a DRILL-DOWN search for a desired report title:

    i. Select **Detailed Reports** from the Navigation box.

    ii. Select **Case Management Reports** from the Group box.

    iii. Select **Case Status** from the Category box.

    iv. Select **Case Load** from the Subcategory box.

    v. Select **Search**.

18. Select the **Application** report title displayed. This pathway brings you to the same location when using a keyword search.

Note: We will practice generating this report in another lesson.

19. Select **Return to Manage Reports**.

20. Select the **Reports Menu** option.

21. Select **Detailed Reports**.

22. Select **Case Management Reports**.

23. Select **Case Status**.

24. Select **Case Load**.

25. Select the **Application** report title. Once again, we arrive at the same location.

Note: Remain here for the next exercise.

Exercise #8: Generate a System Report

Objective: Select a report title, select report filters, and generate a system report.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and are authorized to access system reports.

Purpose: This exercise will help staff anticipate the level of effort required to generate a system report.

To generate a system report:

1. Select the following report filters to form the scope of the report output:

    i. Program filter = no selections

    ii. Region/LWDB = **Capital Area WF Board**

    iii. Office Location=**123 WF SOL Capital Area East**

    iv. Location, Staff, and Veteran filters = no selections

    v. Date Range = **This Year to Date**

    Note: The report filter options will vary depending on the report type that has been chosen.

2. Select **Run Report**.

3. Review report details.

Note: Remain here for the next exercise.

Exercise #9: Share Report via Email

Objective: To send a generated report to an authorized staff member via email.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and successfully generated a report.

Purpose: This exercise helps participants practice using email to send a report to an authorized staff member.

Note: Staff must follow all State and local policies and procedures regarding securing PII/SII and access control, because emails are unencrypted.

To share a report via Email:

1. Select the **Staff Email Search** option located in the top left section of the report controls bar.

Staff Email Search Option with Report Controls Bar Options

2. Enter **Staff099 Trainer** from the list box displayed and select the staff from the list.

3. Select the **PDF drop down icon** to reveal the different file types.

4. Select **Excel**.

5. Select the **Send** link.

Email Option Selection

Note: Remain here for the next exercise.

Exercise #10: Navigate a Multi-Page Report Using Page Controls

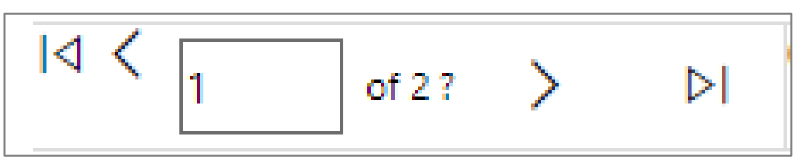
Objective: Navigate through the report using the built-in control buttons and page number box.

Assumption: You are in the WIT training environment [WIT Case Management Training Site]() and successfully generated a report.

Purpose: This exercise helps participants practice using the page control options to access each page of the report.

To navigate a multi-page report Using Page Controls:

1. Select the next page button to access page 2 of the report.
2. Select the last page button.
3. Select the previous page button.
4. Enter the page number to access a specific page of the report.



Page Navigation Controls

Note: Remain here for the next exercise.

Exercise #11: Adjust the Report's ZOOM Level

Objective: Increase and/or decrease the report's magnification level.

Assumption: You are in the WIT training environment [WIT Case Management Training Site](#) and successfully generated a report.

Purpose: This exercise helps participants drill down to more detailed information and return to the original report view level.

To adjust the report's ZOOM level:

1. Select the drop-down arrow of the ZOOM level box Page in the Navigation Controls bar.
2. Select **150%**.
3. Use the up/down scroll bars in the window to access the lower portion of the report.
4. Use the left/right scroll bars to access the entire width of the report.
5. Return to the ZOOM level box and select **100%**.

Note: Remain here for the next exercise.

Exercise #12: Save Report as a Designated File Type

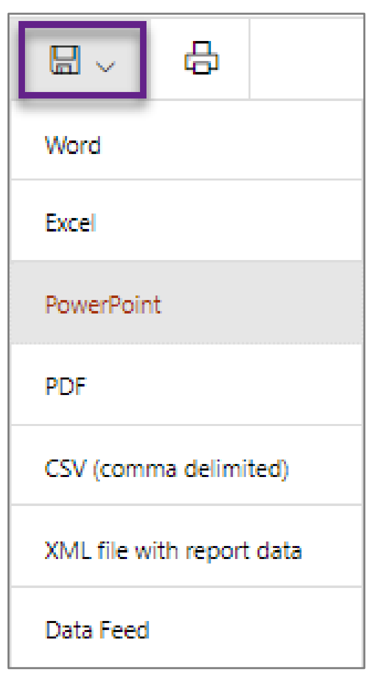
Objective: Save the report output as a designated file type such as a Microsoft Excel spreadsheet.

Assumption: You are in the WIT training environment [WIT Case Management Training Site](#) and successfully generated a report.

Purpose: This exercise helps participants save reports outside of WIT according to their preferred file type.

To save a report as a designated file type:

1. Select the diskette icon on the Page Navigation Controls bar.



Save As List Box

2. Select **Excel**.

3. To retrieve the downloaded report, access the Downloads folder of your computer’s hard drive.

Note: Remain here for the next exercise.

Exercise #13: Print a Report

Objective: Print a hard copy of a report.

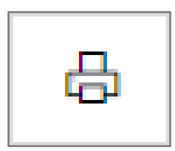
Assumption: Assumption: You are in the WIT training environment **WIT Case Management Training Site** and successfully generated a report.

Purpose: This exercise helps participants practice printing a report.

Note: Staff must follow all State and local policies and procedures regarding security and access controls.

To print a report:

1. Select the printer icon on the Page Navigation Controls bar.



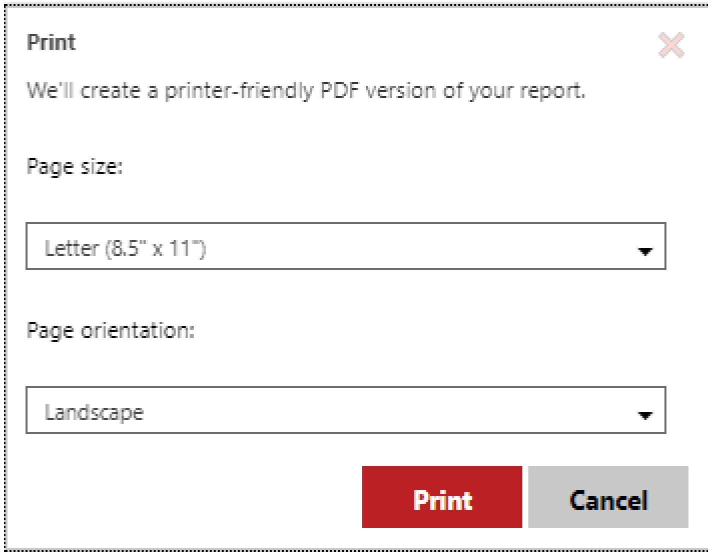
Print Button

2. (Optional) Select the desired page size from the list box.

3. (Optional) Select the desired page orientation from the list box.

Note: Staff will **NOT SELECT** the Print button!

4. To execute the print command, staff can select **Print** (see following figure).



Print Dialogue Box

Exercise #14: Regenerate the Same Report

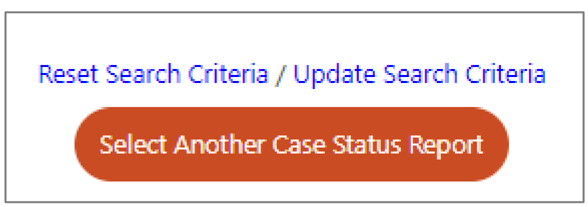
Objective: Maintain the same report title but regenerate the report using new or modified search criteria.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and successfully generated a report.

Purpose: This exercise helps participants differentiate between resetting and updating report search criteria.

To regenerate a report:

1. Scroll down past the bottom of the report.
2. Locate the link commands to reset or update search criteria, as shown in the figure that follows.



Reset and Update Search Criteria Links

3. To regenerate this report using new search criteria:
   i. Select the **Reset Search Criteria** link.
4. To regenerate this report using existing search criteria:
   i. Select the **Update Search Criteria** link.

5. Select the desired search criteria.
6. Select **Run Report**.

Exercise #15: Manage Parent/Child Report Levels

Objective: Access the child level of the report and return to the parent level of the report.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and successfully generated a report.

Purpose: This exercise helps participants drill down to more detailed information and return to the original report view level.

Note: To demonstrate this functionality, staff will generate another report.

To manage parent/child report levels:

1. Select **Return to Manage Reports**.

Note: If this button is not displayed, access the left navigation menu, and select the **Reports** title link from the Reports group.

2. Select the **Reports Menu** section of the Reports Options screen if not already opened.
3. Select **Detailed Reports**.
4. Select **Services Reports**.
5. Select **Services Provided Individual**.
6. Select **Service**.
7. Select **by Services** (in column one).

8. Select the following selection criteria:

    i. Program = **WIOA**

    ii. Region/LWDB = **Capital Area WF Board**

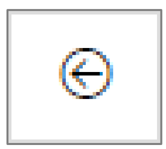
    iii. Date = **This Year to Date**

9. Select **Run Report**.

10. From the report displayed (parent level), select any link under the Activity/Description column heading.

11. View the details for the selected activity (child level).

12. Select the **left-facing arrow** in the Page Navigation Controls bar to return to the parent (original) level of the report.



Return to Parent Level Button

13. Select **Return to Manage Reports** button.

Exercise #16: Save a Report to the My Reports Directory

Objective: Generate and save a report for future use.

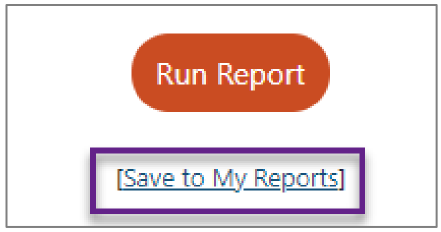
Assumption: You are in the WIT training environment **WIT Case Management Training Site** and are authorized to generate and save reports.

Purpose: This exercise helps participants practice the steps required to save (and potentially share) a report.

To save a Report to the My Reports directory:

1. Select the **Reports Menu** section of the Reports Options screen to open it.
2. Select **Detailed Reports**.
3. Select **Case Management Reports**.
4. Select **Case Status**.
5. Select **Case Load**.
6. Select **Exited Cases** (in column two).
7. Select the following selection criteria:
    i. Program = **WIOA**
    ii. Region/LWDB = **Capital Area WF Board**
    iii. Date = **Last 7 days**

8. Select the **Save to my Reports** link as shown below.



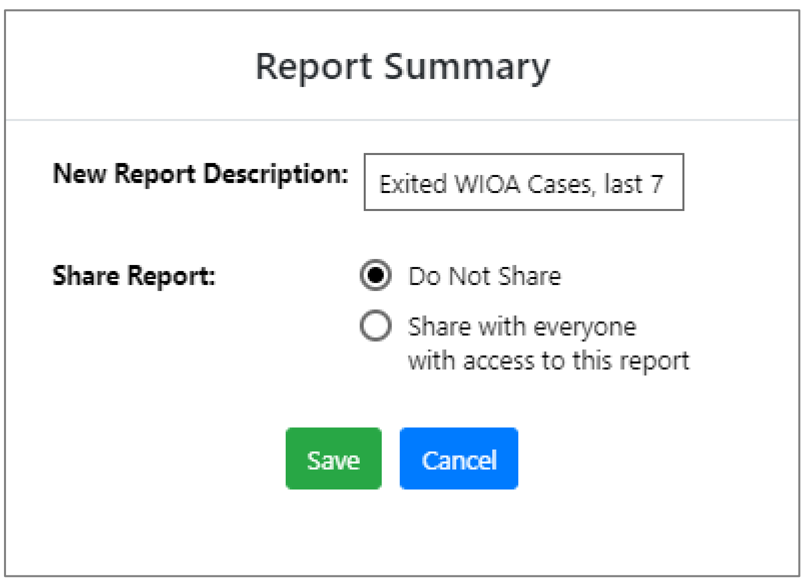
Save to My Reports Link

9. In the Report Summary window that displays:

    i. Enter **Exited WIOA Cases, Last 7 Days** for the report description.

    ii. Maintain the **Do Not Share** default selection.

    iii. Select **Save**.



Save to My Reports Dialogue Box

10. Select **Run Report**.

Note: If there are no report results, that's OK, because there could be results the next time you run this report.

Exercise #17: Schedule (a Saved) Report to Run Automatically

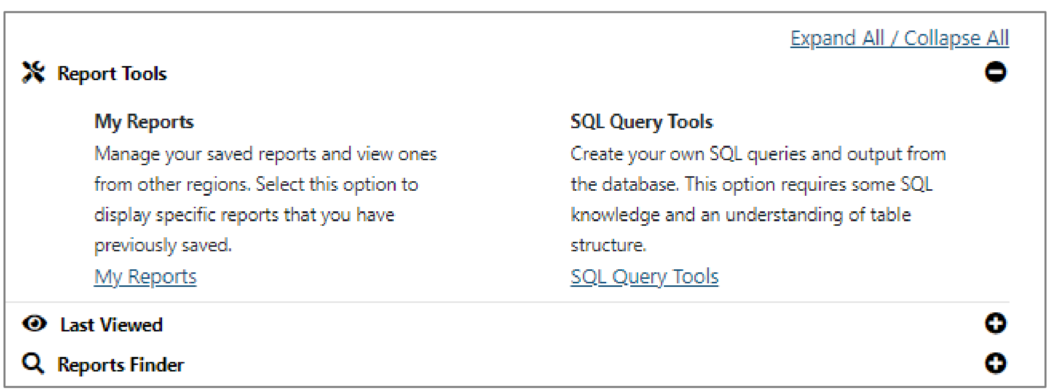
Objective: To create a repeated schedule for the system to automatically generate a report you saved.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and have at least one report you wish to schedule for automatic generation.

Purpose: This exercise helps participants practice the steps required to establish a scheduled routine for automated report generation.

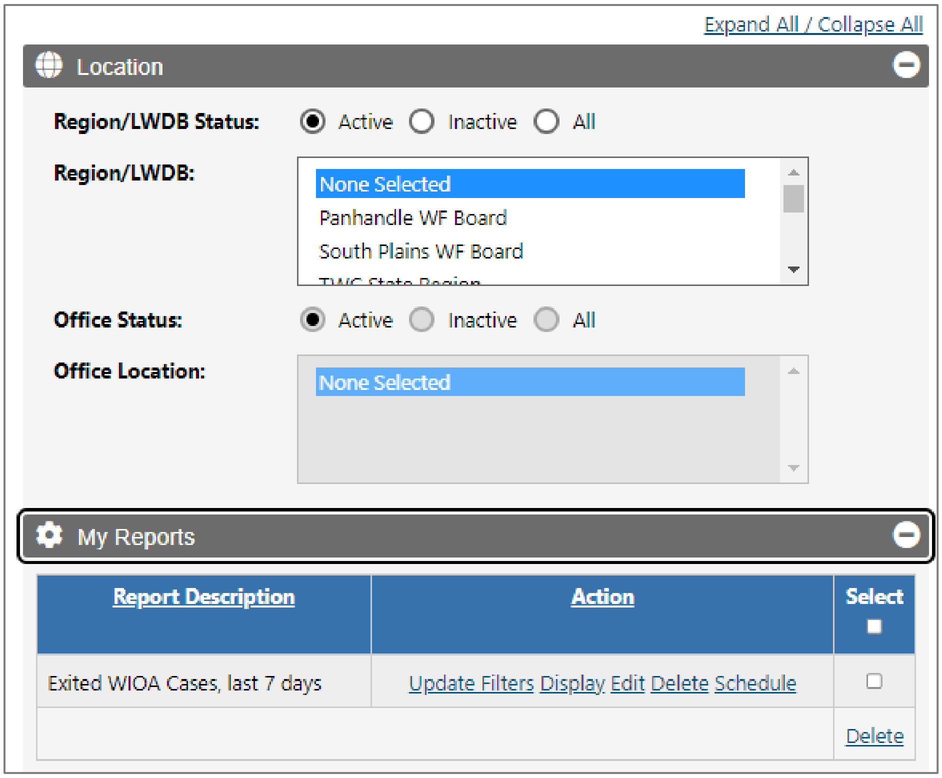
To schedule a report to auto-generate:

1. Access the Report Tools section of the Reports Options screen.



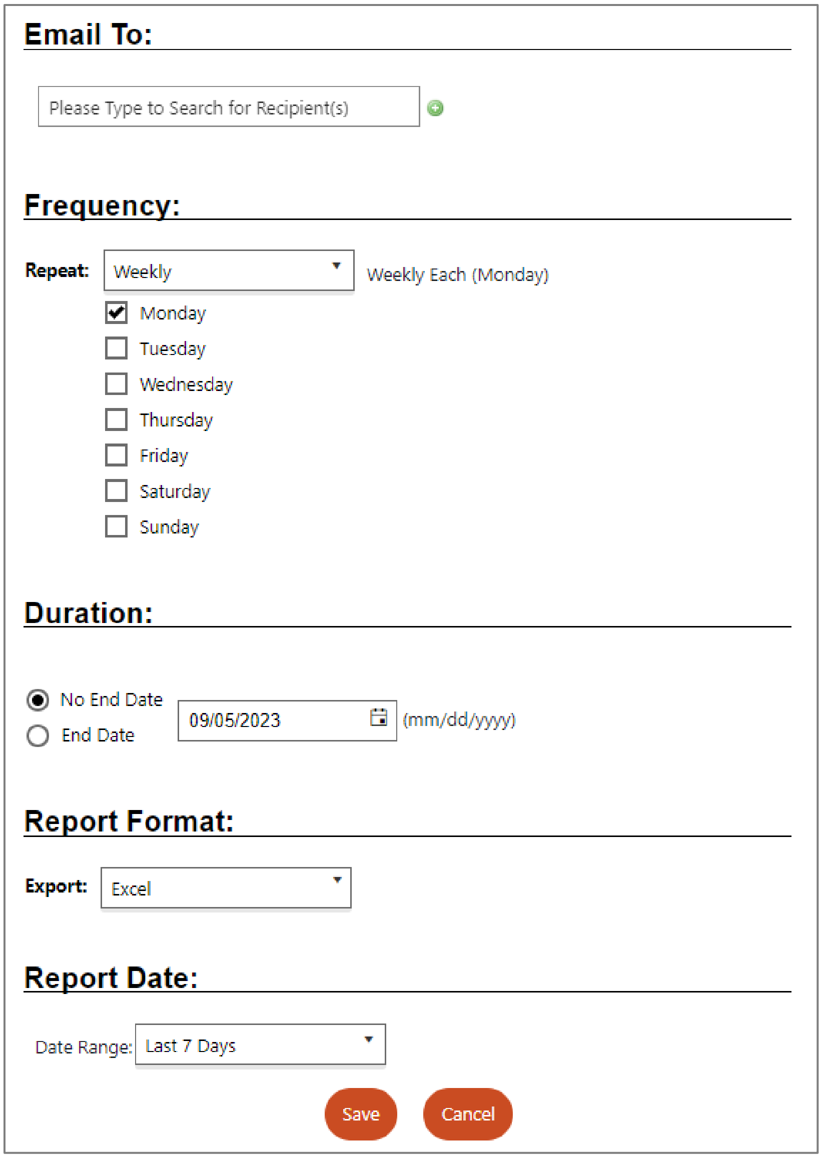
Report Tools Section of the Reports Options screen

2. Select the **My Reports** link.
3. Select the **My Reports** name bar to open and expand its contents.



My Reports Directory

4. Select the **<u>Schedule</u>** link displayed under the Action column heading.



Schedule Report Details Screen

5. To create the report schedule:

   i. Frequency = **Weekly**, and select the **Monday** checkbox

   ii. Duration = **No End Date**

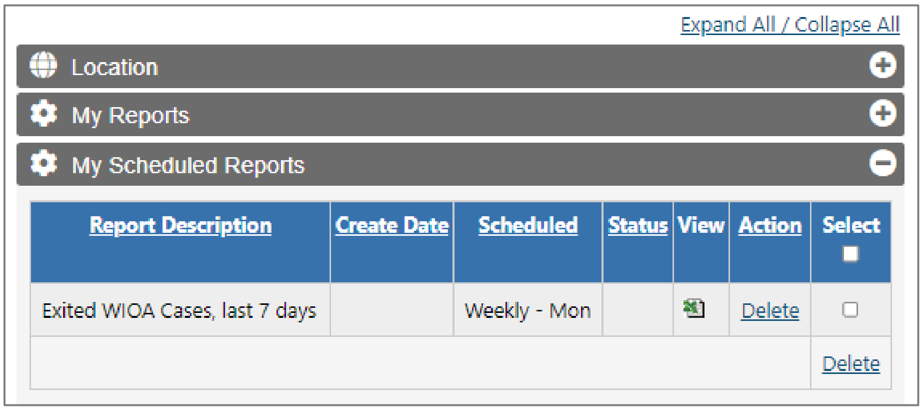
   iii. Export = **Excel**

   iv. Date Range = **Last 7 Days**

v. Select **Save**.

vi. Select **OK** for the displayed prompt.

6. To confirm your selection, select the My Scheduled Reports name bar.



My Scheduled Reports Section

Exercise #18: Using the Ad-Hoc Query Tool

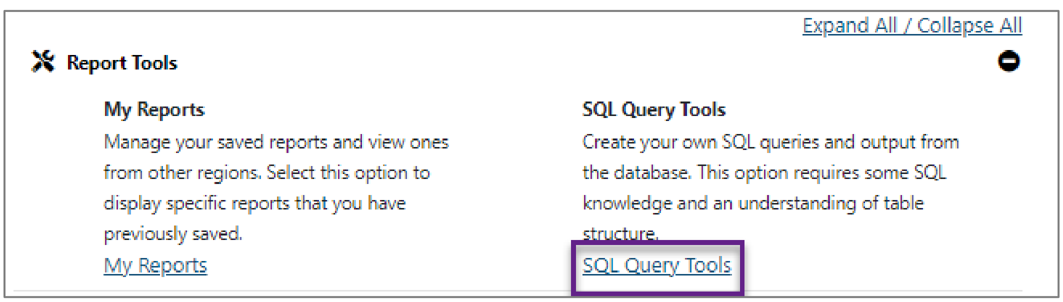
Objective: To create a custom report using this report tool.

Assumption: You are in the WIT training environment [WIT Case Management Training Site](#) and have experience querying a database.

Purpose: This exercise helps participants understand how knowledge of the database structure is crucial to Ad Hoc report creation.

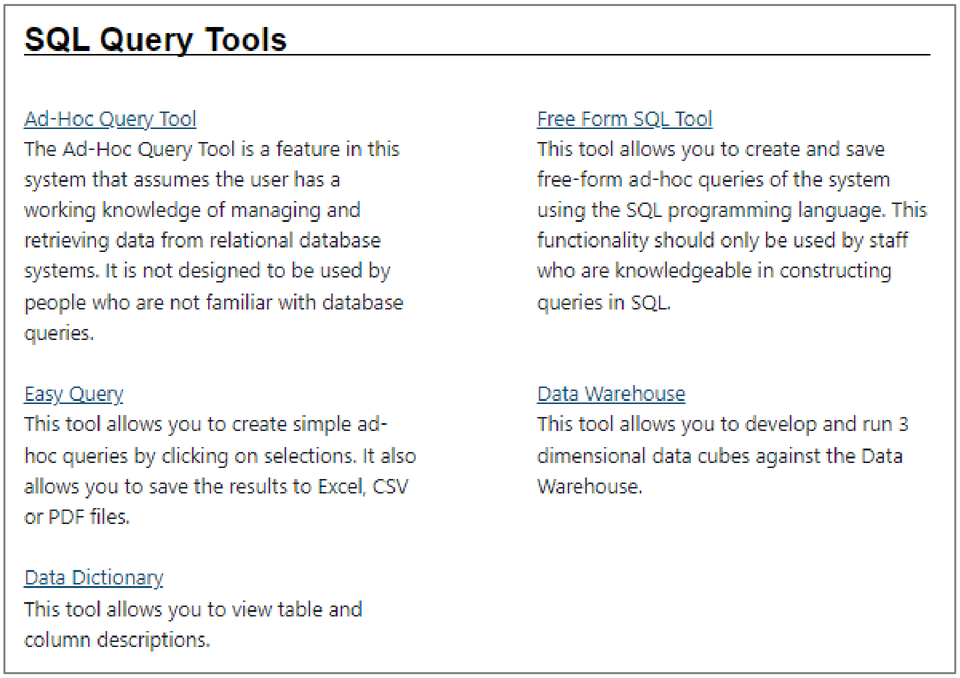
To create a custom report using the Ad-Hoc Query Tool:

1. Access the Report Tools section of the Reports Options screen.



Report Tools Section of the Reports Options Screen

2. Select the **SQL Query Tools** link to access the menu screen, as shown below.



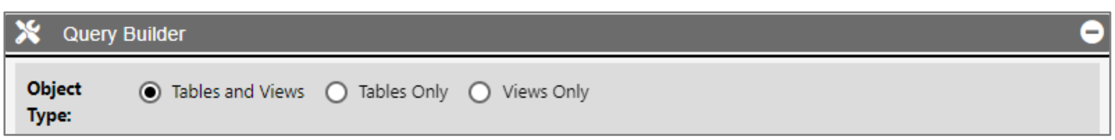
SQL Query Tools Options Screen

Note: The Data Warehouse option is not in use at this time.

3. Select the **Ad-Hoc Query Tool** link.

4. Perform the following steps in the Query Builder section:

    i. In the Object Type section, select **Tables and Views**.



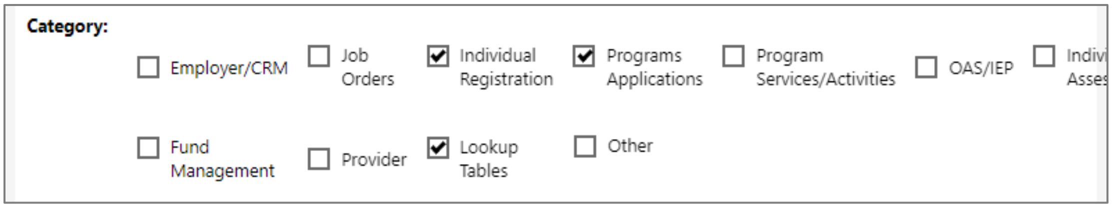
Object Type Section of the Ad-Hoc Query Tool

    ii. In the Category section, select the following checkboxes:

        1) Individual Registration

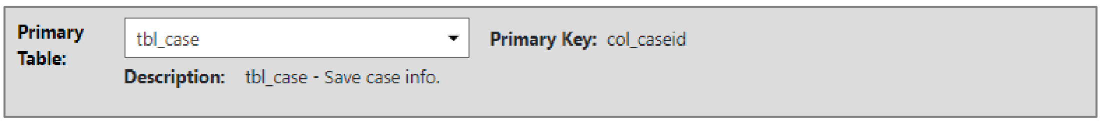
        2) Programs Applications

3) Lookup Tables



Category Section of the Ad-Hoc Query Tool

iii. In the Primary Table section, select **tbl_case**.



Primary Table Section of the Ad-Hoc Query Tool

iv. In the Optional Joins section

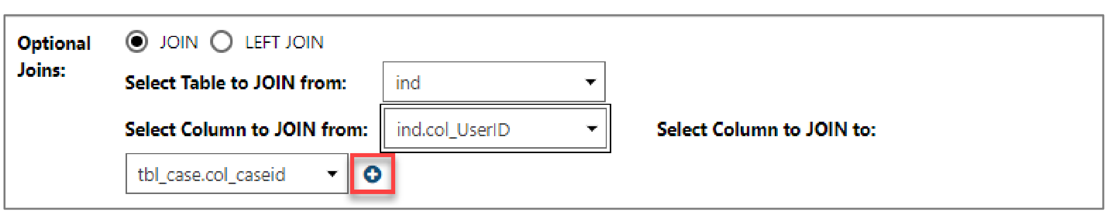
1) Maintain the **JOIN** radio button selection.

2) From the Select Table to JOIN from list box, select **ind**.

3) From the Select Column to JOIN from list box, select **ind.col_UserID**.

4) Maintain the value of **tbl_case.col_caseid** in the Select Column to JOIN to list box.

5) Select the **plus sign** ⊞ in the right margin to save your selections.



Optional Joins Section of the Ad-Hoc Query Tool

v. In the Selected tables section, select **ind**.

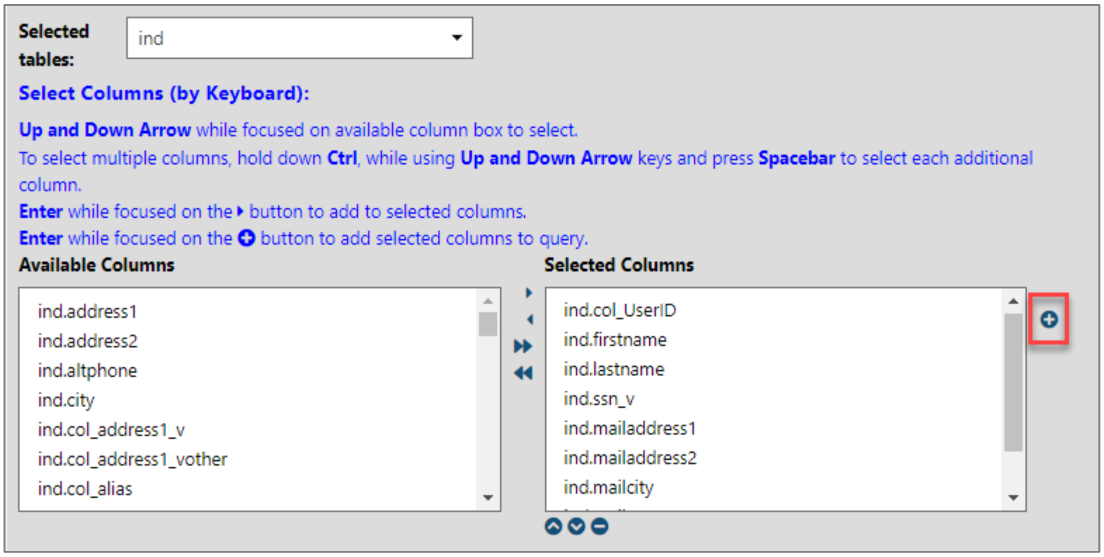
vi. In the Available Columns list box, select the following column names and then select the right-facing arrow to push these columns to the Selected Columns list box:

Note: Experienced users might prefer to hold down the **Ctrl** key while selecting desired column names.

1) Ind.col_UserID
2) Ind.firstname
3) Ind.lastname
4) Ind.ssn_v
5) Ind.mailaddress1
6) Ind.mailaddress2
7) Ind.mailcity
8) Ind.mailstate
9) Ind.mailzip

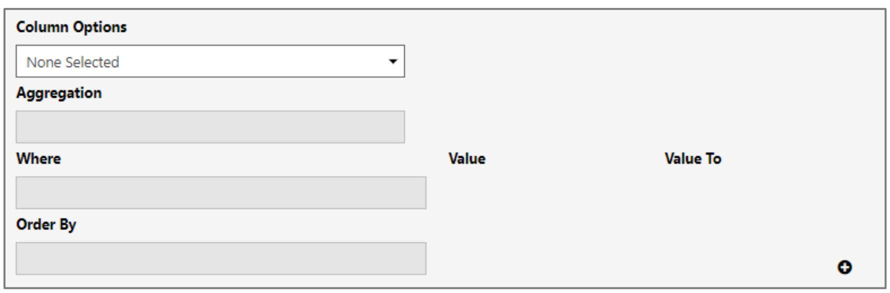
Note: Staff can remove a selected columns name by clicking that name and then clicking the left-facing arrow to put the column name back in the Available Columns list box. Staff can also change the display order by clicking a selected column name and then clicking the up or down arrows displayed beneath the list box.

vii. Click the **plus sign** in the right margin to save your selections.



Selected Tables Section of the Ad-Hoc Query Tool

viii. Ignore the Column Options section.

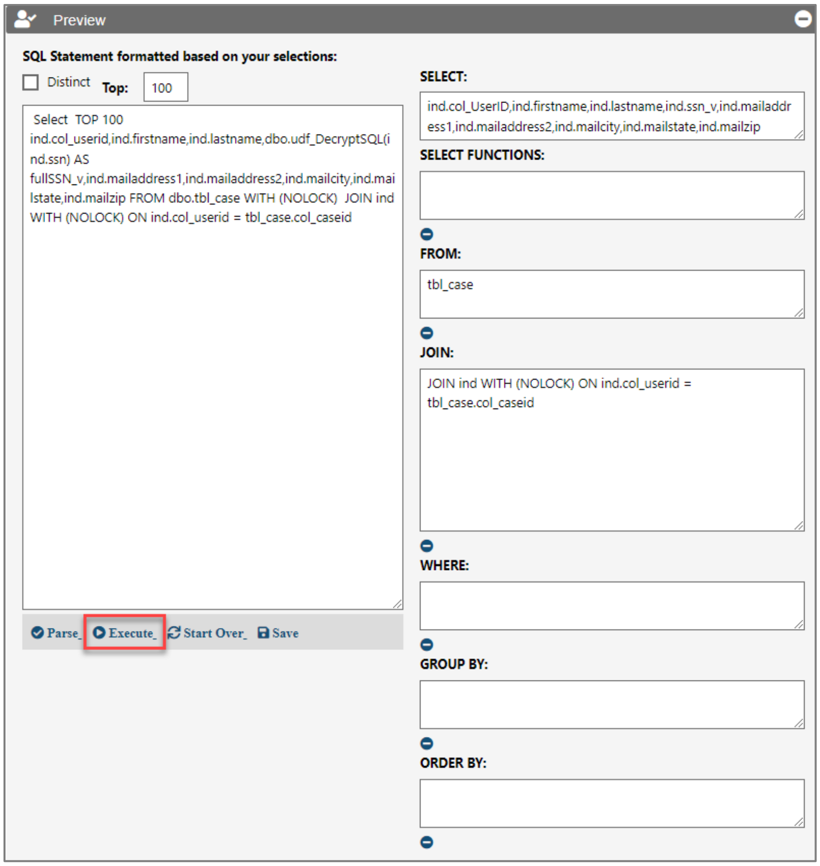


Column Options Section of the Ad-Hoc Query Tool

5. Perform the following steps in the Preview section:

   i. Select **Execute**.

Note: The system displays all staff's selections in this section. Besides executing the query, staff can parse the query (to check the SQL syntax), start the query over again, or save the query for future use.



Preview Section of the Ad-Hoc Query Tool

6. In the Results section, staff can view the results of the query as shown below.

Results

CSV Export Print

Records per page: 10

Total Rows: 100

1 2 3 4 5 6 7 8 9 10

COL_USERID	FIRSTNAME	LASTNAME	FULLSSN_V	MAILADDRESS1	MAILADDRESS2	MAILCITY	MAILSTATE
2895	Barack	Obama	1000	1451 South Main St		Austin	TX
2936	Michelle	Obama	2000	265 Long Beach Dr		Houston	TX
2937	Roxy	Jobseeker	1003	123 Bell Ave		Cedar Park	TX
10000	Pancho	Pantera	0248	123 Main St		Houston	TX
10001	Mitsy	Owens	0368	92 Travis		Houston	TX
10002	Blue	Pineapples	0319	12345 Sesame Street		Houston	TX
10003	New	User	0250	1234 Any St		Houston	TX
10004	Lynda	Carter	0390	777 Wonder Way		Houston	TX
10005	John	Smith	0101	12710 S DAIRY ASHFORD RD		Houston	TX
10006	Pickles	TheChi	0376	1239 Jean Street		Houston	TX

1 2 3 4 5 6 7 8 9 10

Results Section of the Ad-Hoc Query Tool

Exercise #19: Using the Free Form SQL Tool

Objective: To create a custom report using this report tool.

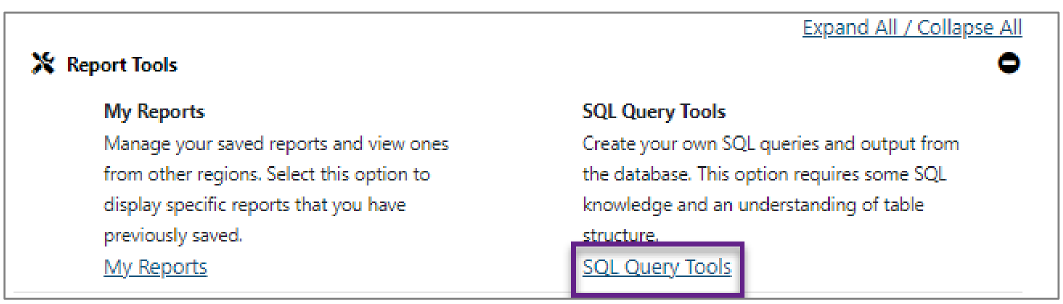
Assumption: You are in the WIT training environment **WIT Case Management Training Site** and have experience querying a database.

Purpose: This exercise helps participants understand how knowledge of the database structure is crucial to Free Form SQL report creation.

Note: This exercise might be performed as an instructor demonstration.

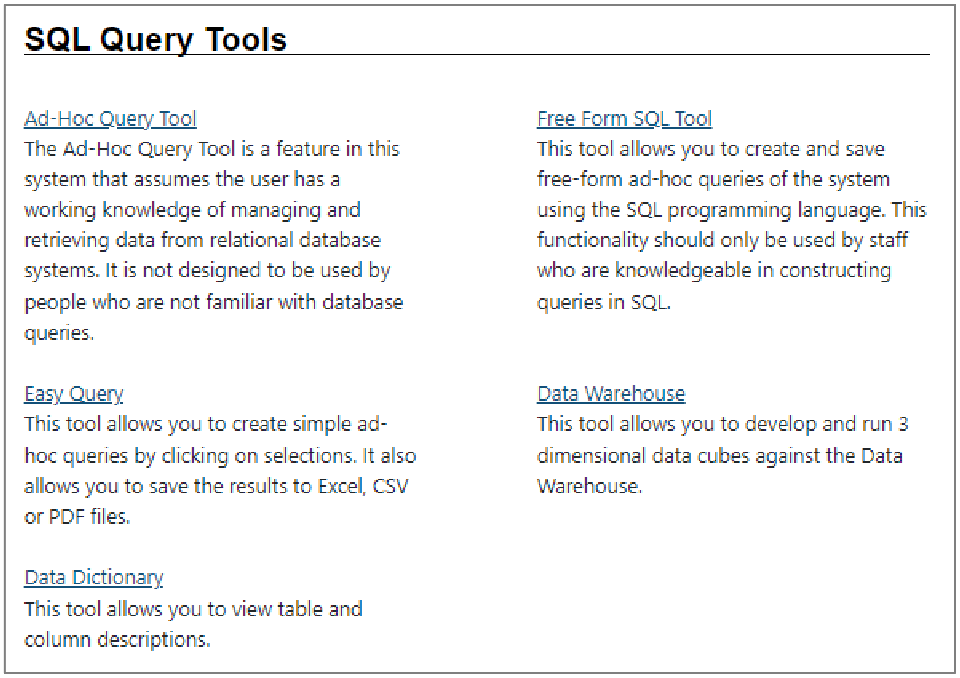
To create a custom report using the Free Form SQL Tool:

1. Access the Report Tools section of the Reports Options screen.



Report Tools Section of the Reports Options Screen

2. Select the **SQL Query Tools** link to access the menu screen, as shown below.


SQL Query Tools

Ad-Hoc Query Tool
The Ad-Hoc Query Tool is a feature in this system that assumes the user has a working knowledge of managing and retrieving data from relational database systems. It is not designed to be used by people who are not familiar with database queries.

Free Form SQL Tool
This tool allows you to create and save free-form ad-hoc queries of the system using the SQL programming language. This functionality should only be used by staff who are knowledgeable in constructing queries in SQL.

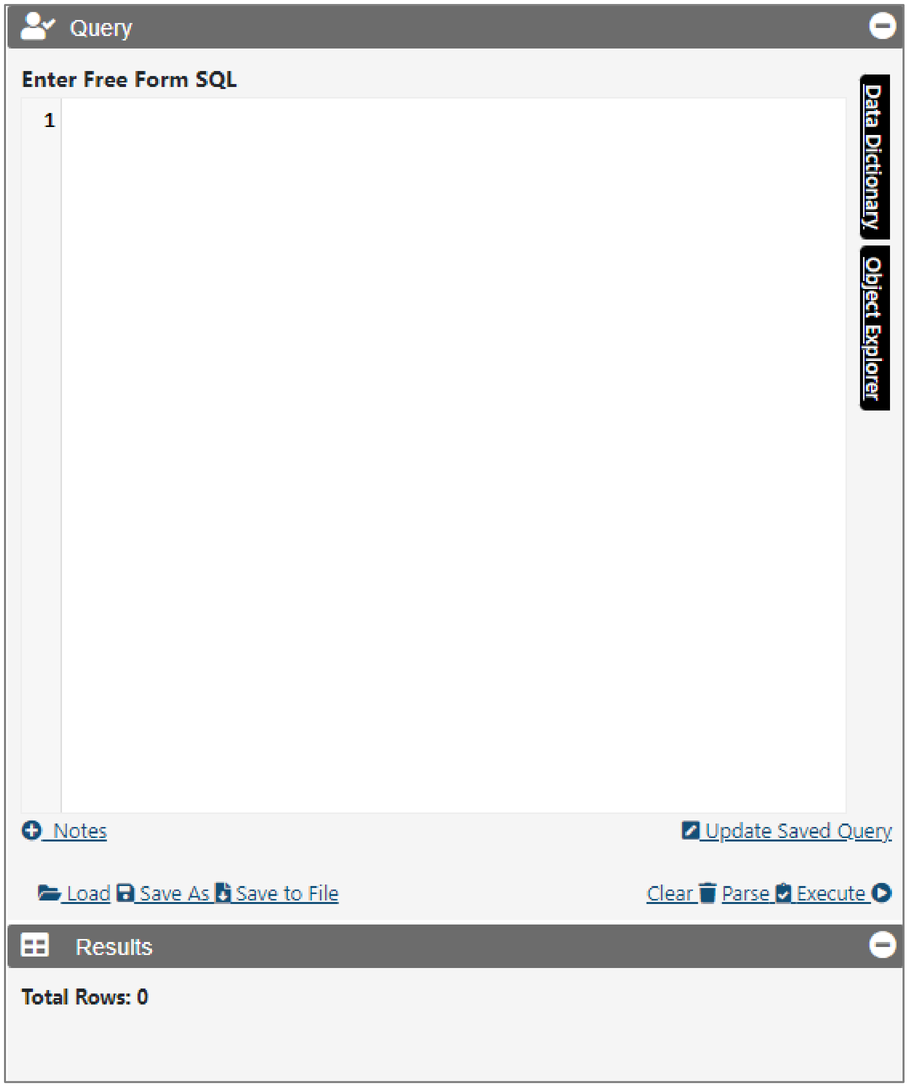
Easy Query
This tool allows you to create simple ad-hoc queries by clicking on selections. It also allows you to save the results to Excel, CSV or PDF files.

Data Warehouse
This tool allows you to develop and run 3 dimensional data cubes against the Data Warehouse.

Data Dictionary
This tool allows you to view table and column descriptions.

SQL Query Tools Options Screen

3. Select the **Free Form SQL Tool** link.



Query Builder Section of the Free Form SQL Tool

4. If possible, copy and paste the following code. Otherwise, the instructor will conduct a demonstration using this code.

   SELECT

   EMP.[username],

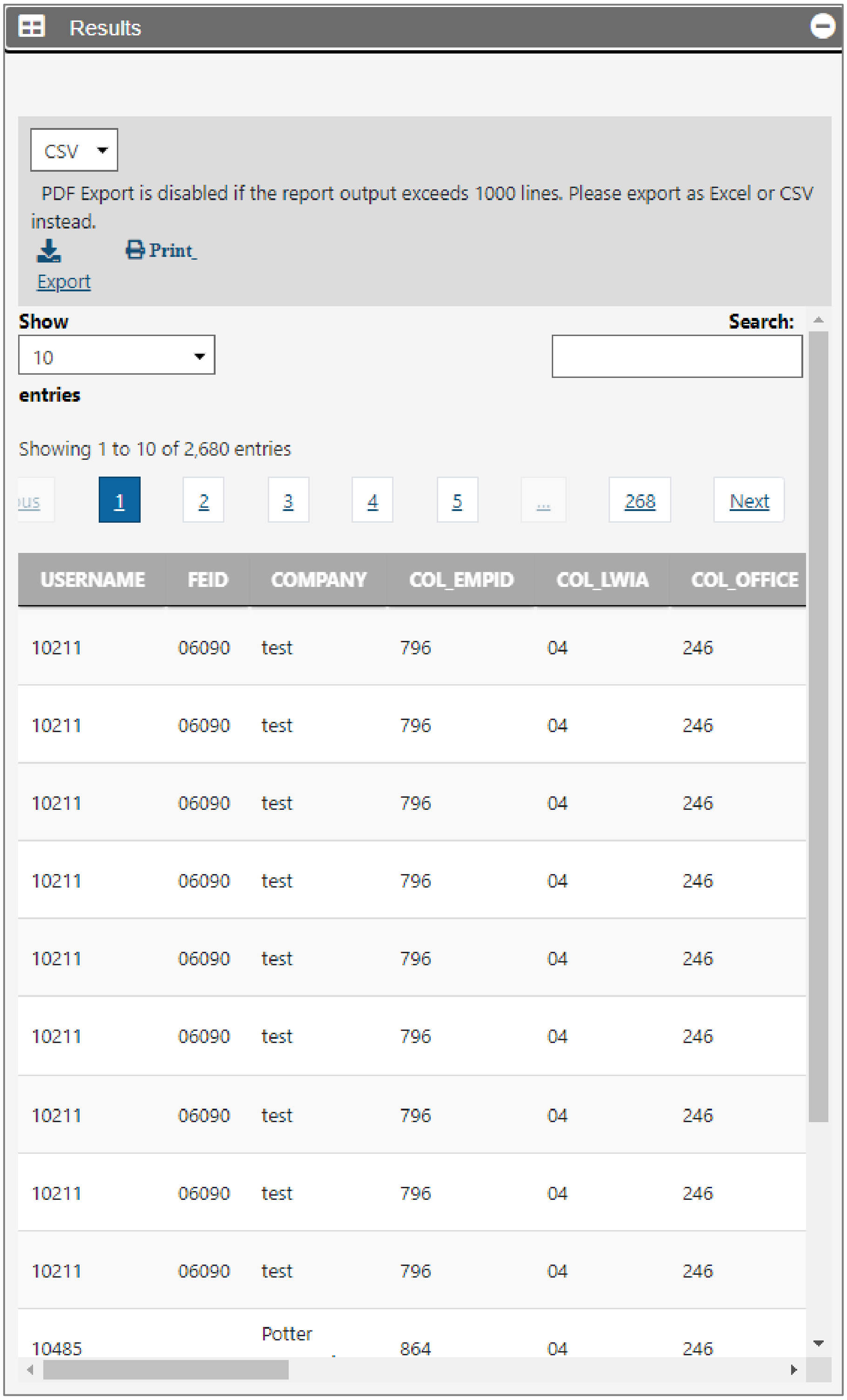
   EMP.[feid],

   EMP.[company],

   EMP.[col_empid],

```
V_SERVICEPLAN_EMP.[col_lwia],
V_SERVICEPLAN_EMP.[col_office],
EMP.[city],
EMP.[zip],
EMP.[email],
EMPCONTACT.[col_email],
EMPCONTACT.[col_altEmail],
V_SERVICEPLAN_EMP.[servicecode],
V_SERVICEPLAN_EMP.[col_createdate],
V_SERVICEPLAN_EMP.[actualdate],
V_SERVICEPLAN_EMP.[completion],
V_SERVICEPLAN_EMP.[col_status]
FROM emp WITH(NOLOCK)
JOIN v_serviceplan_emp WITH(NOLOCK) ON
V_SERVICEPLAN_EMP.[col_username] = EMP.[username]
JOIN empcontact WITH(NOLOCK) ON
EMPCONTACT.[col_empid] = EMP.[col_empid]
WHERE
( V_SERVICEPLAN_EMP.[col_lwia] = '04')
ORDER BY
EMP.[username] ASC,
EMP.[company] ASC
```

5. Select **Execute**. The report will take a while to generate.
6. Access the Results section to view the custom report.



USERNAME	FEID	COMPANY	COL_EMPID	COL_LWIA	COL_OFFICE
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10211	06090	test	796	04	246
10485		Potter	864	04	246

Results Section of the Free Form SQL Tool

Exercise #20: Using the Easy Query

Objective: To create a custom report using this report tool.

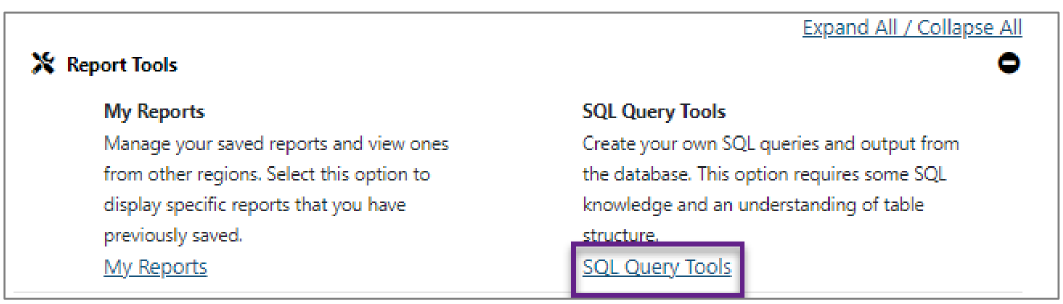
Assumption: You are in the WIT training environment **WIT Case Management Training Site** and have experience querying a database.

Purpose: This exercise helps participants understand how knowledge of the database structure is crucial to Free Form SQL report creation.

Note: This exercise might be performed as an instructor demonstration.

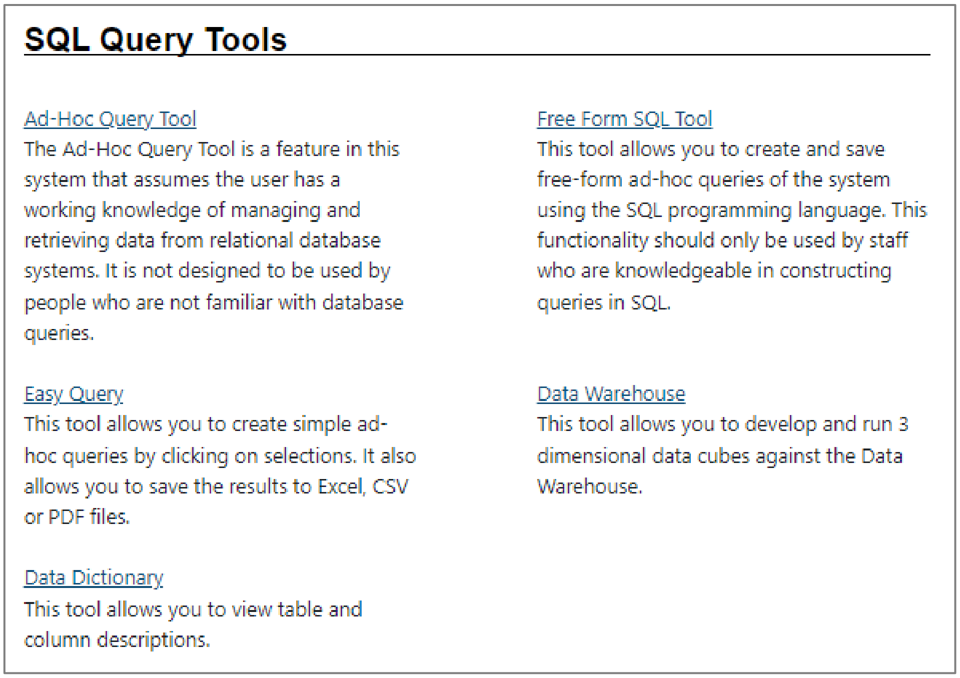
To create a custom report using the Free Form SQL Tool:

1. Access the Report Tools section of the Reports Options screen.



Report Tools Section of the Reports Options Screen

2. Select the **SQL Query Tools** link to access the menu screen, as shown below.

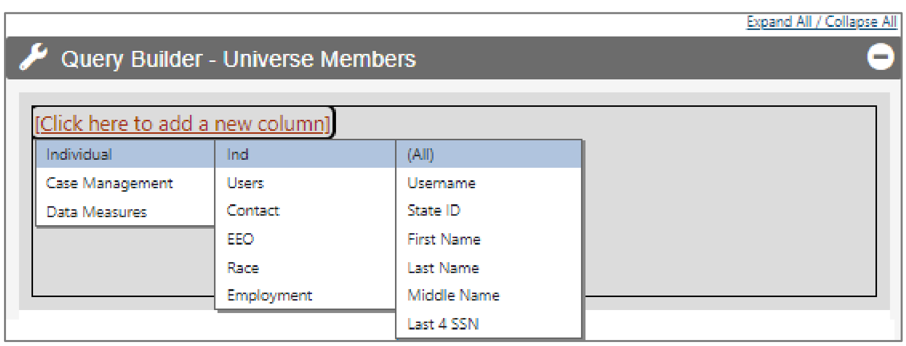


SQL Query Tools Options Screen

3. Select the **Easy Query** link.

4. In the top section, click the **Click here to add a new column** link.

5. Select **Individual > Ind > (All)**.



Column Selection for the Easy Query

6. Skip the section to add new conditions.

7. Access the Preview section to view the system-generated SQL query.

Preview - SQL

```
SELECT ind.username [Username],indstaff.StateID,ind.Firstname,ind.lastname,ind.Middle,
ind.col_lastfourssn as [Last 4 SSN]
FROM (ind AS ind WITH ( NOLOCK )
    LEFT OUTER JOIN indstaff AS indstaff WITH ( NOLOCK ) ON (ind.username =
indstaff.username ))
```

Preview Section of the Easy Query

8. Access the Results section to view the custom report.

Results

Excel CSV PDF Print

Username	StateID	Firstname	lastname	Middl
10000	928	Pancho	Pantera	
10001	929	Mitsy	Owens	
10002	930	Blue	Pineapples	
10003	931	New	User	
10004	932	Lynda	Carter	
10005	933	John	Smith	J
10006	934	Pickles	TheChi	M
10007	935	Boyd	Sheffield	
10008	936	JOHN	DOE	1
10010	937	Chris	Evans	A

Results Section of the Easy Query

Exercise #21: Using the Data Dictionary

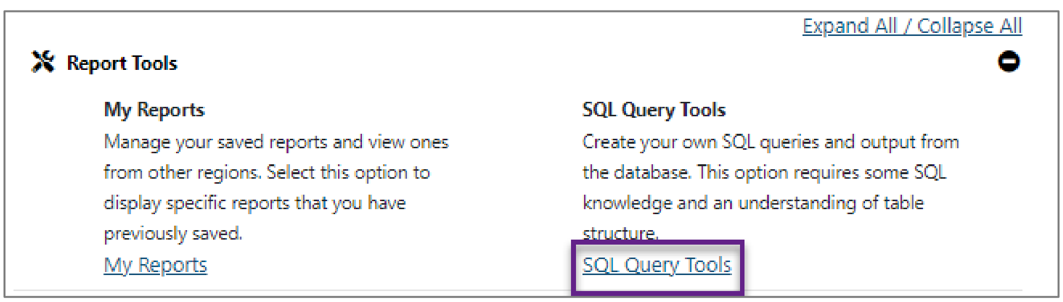
Objective: To view table and column descriptions using this tool.

Assumption: You are in the WIT training environment **WIT Case Management Training Site** and have experience querying a database.

Purpose: This exercise helps participants understand how knowledge of the database structure is crucial to SQL report creation.

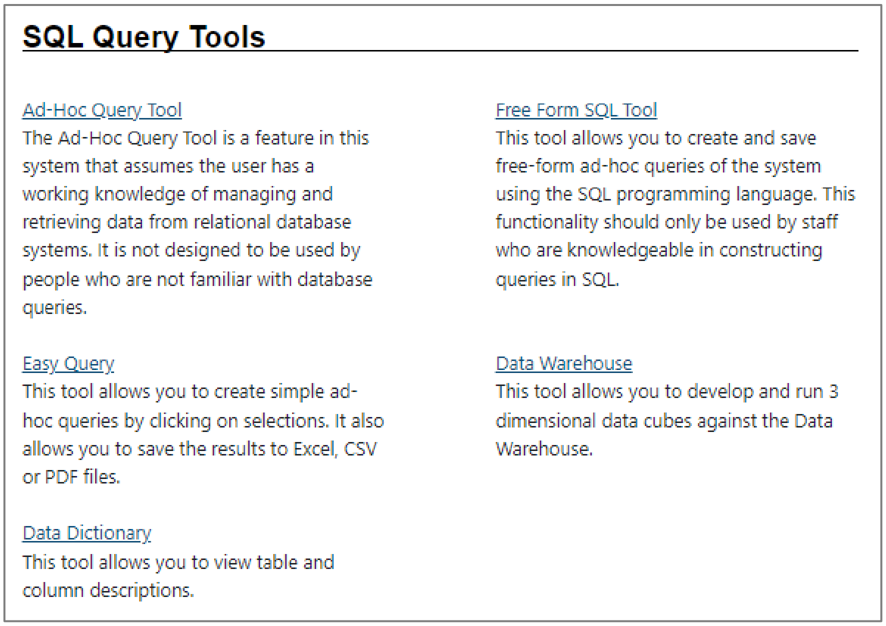
To use the Data Dictionary:

1. Access the Report Tools section of the Reports Options screen.



Report Tools Section of the Reports Options Screen

2. Select the **SQL Query Tools** link to access the menu screen, as shown below.



SQL Query Tools Options Screen

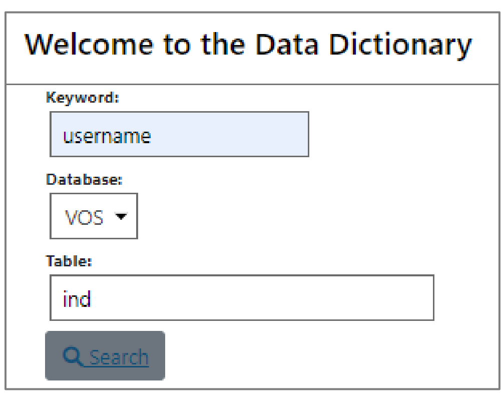
3. Select the **<u>Data Dictionary</u>** link.

4. Enter **username** for the keyword.

5. Enter **ind** for the table name.

6. From the list of match results, select **ind**.

7. Click **Search**.



Keyword Search for the Data Dictionary

8. In response, the system displays the following information:

Table Information: ind

Column Name: username
PK
CHECK
Data Type: varchar(20)
GSI Description: Unique User Name to maintain system integrity
GSI Notes: This cannot be modified.

Data Dictionary Search Results