

ART Gallery Report Growth Measurement Series

0111 Measuring Growth by Referrals, 0114 Measuring Growth by Clients, 0115 Measuring Growth by Services, 0117 Measuring Growth by Project Entries, 0119 Measuring Growth by Project Exits

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1. INTRODUCTION:

This series of ART reports is designed to monitor system growth by reporting on several types different additions to the system over a specified period of time.

- 0111 System Growth by Referrals
- 0114 System Growth by Client
- 0115 System Growth by Services
- 0117 System Growth by Project Entries
- 0119 System Growth by Project Exits

Monitoring system growth and identifying non-participating providers and/or users is a critical aspect of administrative activity. Administrators and team leaders will also find the report's appealing graphic representation of system growth to be useful for presentations and/or to help facilitate discussion.

Each report contains three tabs. The tabs report any increase in volume on a yearly, quarterly and monthly basis. Each report includes two bar charts, one showing the total volume added and the other representing the volume added each reporting period. Each report also contains a data table which displays the actual counts. Users can easily control the amount of data shown and the corresponding look of the charts by specifying the "start date" for each of the three tabs or by utilizing the provider, CoC Code (CoC Retired) or Project Type Code prompts.

This series of reports has application for users at various levels, but it is primarily intended for System Administrator IIs, since only users at this level will have access to the all of counts. System Administrator IIs can utilize these reports to monitor both long term and short term system growth.

- Please note that User Access level may alter the results contained within each report based on the visibility settings. See technical notes for more detail.

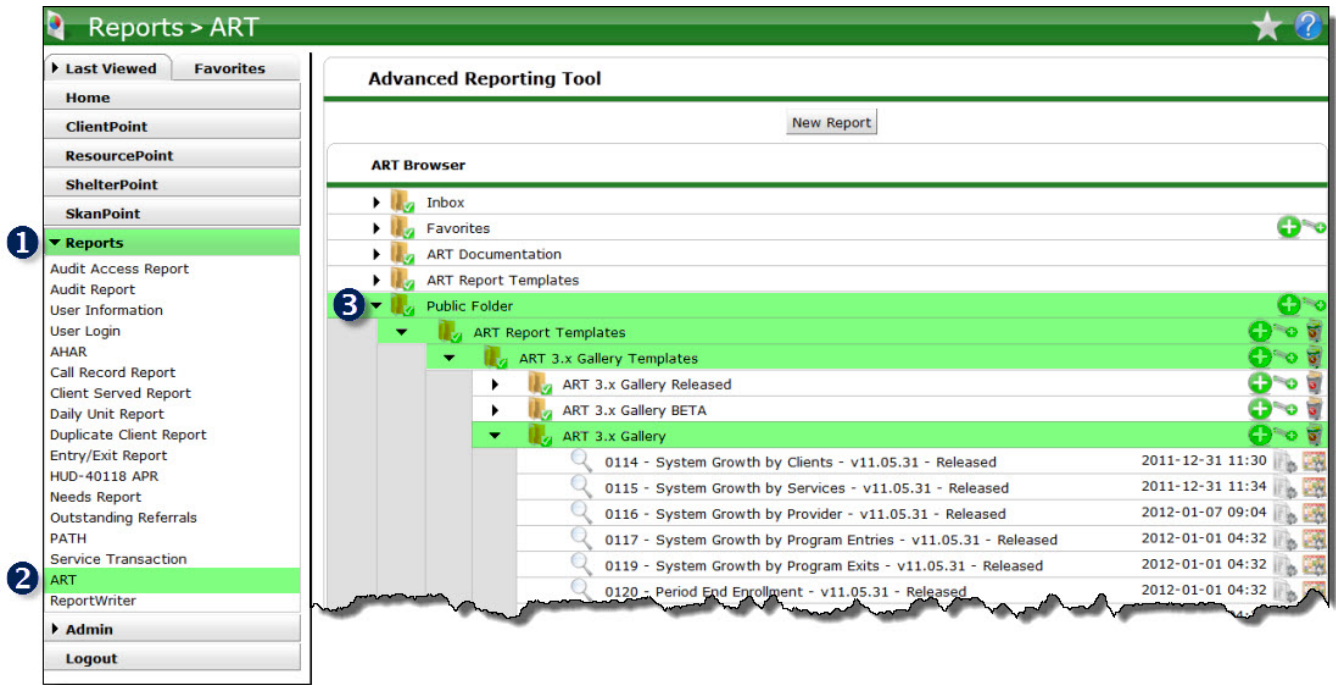
The frequency of use will be dependent upon the manner in which the report is being utilized. For monitoring system growth, monthly use is recommended.

Compatibility and system requirements: This report requires ServicePoint 5x and ART 3x.

2. REPORT INSTRUCTIONS AND PROMPTS:

The easiest way to start using this report is to navigate to the automapper. This is a folder that has the reports automatically mapped to your site, so that you don't have to map them yourself. You can navigate to the automapper as shown in Figure 2.1 below:

Figure 2.1



Requests for additional information concerning the report function/design should be directed to Bowman Systems' Customer Support Specialist (CSS) staff.

How to run: Upon opening the report, the User will be prompted (see Figure 2.2) to specify parameters which control the data returned by the report. Once the User has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The User should then single-click the "Refresh Data" button to generate the report.

Figure 2.2

Prompts

Select or type the prompt values for each prompt below.

Select Providers: (optional) If no value is selected, this filter will be removed.

Select Program Type Codes: (optional) If no value is selected, this filter will be removed.

Select CoC Code(s): None Selected;BTown - Bassett;BTown - Black;BTown - Brown;BTown CoC

Select CoC Code(s) RETIRED: None Selected;BTown - Bassett;BTown - Black;BTown - Blue;BTown -

Enter Start Date: 1/1/2012 12:00:00 AM

Enter End Date PLUS 1 Day: 1/1/2015 12:00:00 AM

EDA Provider -Default Provider-

Refresh values

Select Providers:

Provider

1 Abyssinian PT:ES TA1:YMF(1238)

1 Albatross PT:ES(2055)

1 Alligator PT:ES TA1:SMF+HC(2804)

Last Refresh Date: January 16, 2015 3:07:14 PM ...

Enter your search pattern

Refresh Data Cancel

The user prompts contained in the Growth Measurement report series are:

1. **Select Provider(s):** The user should select the provider(s) to include for the report. This is an optional prompt and if no value is selected, the filter will be left blank.
2. **Select CoC Code(s):** The user should select the CoC Code(s) to include for the report. This field pulls from the new CoC Code Sub-Assessment.
3. **Select CoC Code(s) RETIRED:** The user should select the CoC Code(s) to include for the report. This field pulls from the new CoC Sub-Assessment. This field pulls from the retired CoC Code.
4. **Select Project Type Code(s):** The user should select the Project Type Code(s) to include for the report. This is an optional prompt and if no value is selected, the filter will be left blank.
5. **Enter Start Date:** The user should enter (or select from the calendar) the first date in the range of interest.
6. **Enter End Date PLUS 1 Day:** The user should enter (or select from the calendar) one day after the last date the range of interest.
7. **EDA Provider:** The user should select the EDA provider to run the report as, or leave it at the "-Default Provider-" if the default has the appropriate security level.

3. DESCRIPTION AND LAYOUT:

3.1. Tab A – Growth by Year

This tab contains data about the growth of the system aggregated by year.

Figure 3.2



Column Explanations:

- **Year:** This column displays each year selected in the prompts
- **Type of Data (by report type selected):** This column displays the total growth for the year indicated
- **Cumulative:** This column displays the cumulative total for each year
- **Percentage total:** This column lists the percentage total of the cumulative amount for each year specified
- **Cumulative percent:** This column lists the cumulative percent for each year

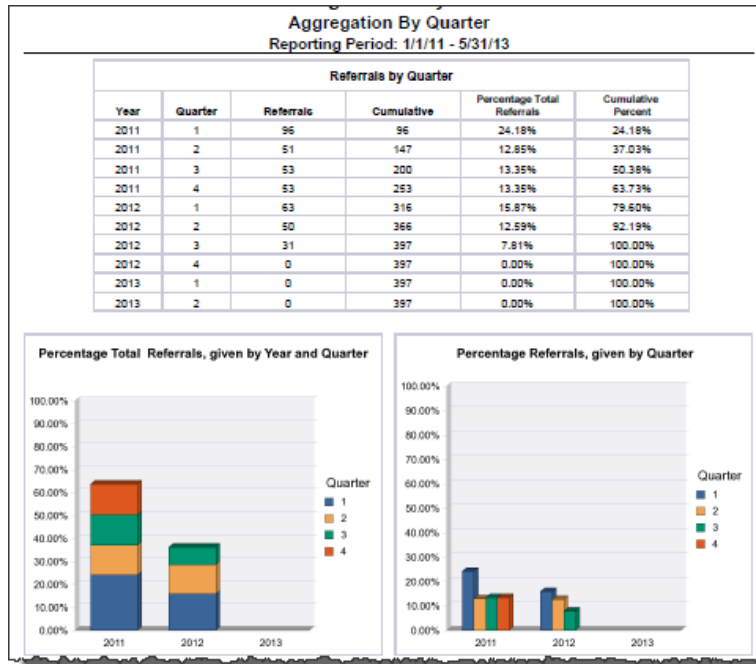
Chart Explanations:

- **Percentage Total by Year:** This chart graphically displays the data contained in column five of the table
- **Percentage by year:** This chart graphically displays the data contained in column four of the table
- **Cumulative percentage by year:** This chart graphically displays the data contained in column five of the table

3.2. Tab B – Growth by Quarter

This tab contains data about the growth of the system aggregated by quarter.

Figure 3.3



Column Explanations:

- **Year:** This column displays each year selected in the prompts
- **Quarter:** This column displays the numbered quarter (1 through 4) for the dates selected in the prompts
- **Type of Data (by report type selected):** This column displays the total growth for the quarter indicated
- **Cumulative:** This column displays the cumulative total for each quarter
- **Percentage total:** This column lists the percentage total of the cumulative amount for each quarter specified
- **Cumulative percent:** This column lists the cumulative percent for each quarter

Chart Explanations:

- **Percentage Total by Year and Quarter:** This chart graphically displays the data contained in column six of the table
- **Percentage by Quarter:** This chart graphically displays the data contained in column five of the table

3.3. Tab C – Growth by Month

This tab contains data about the growth of the system aggregated by quarter.

Figure 3.4

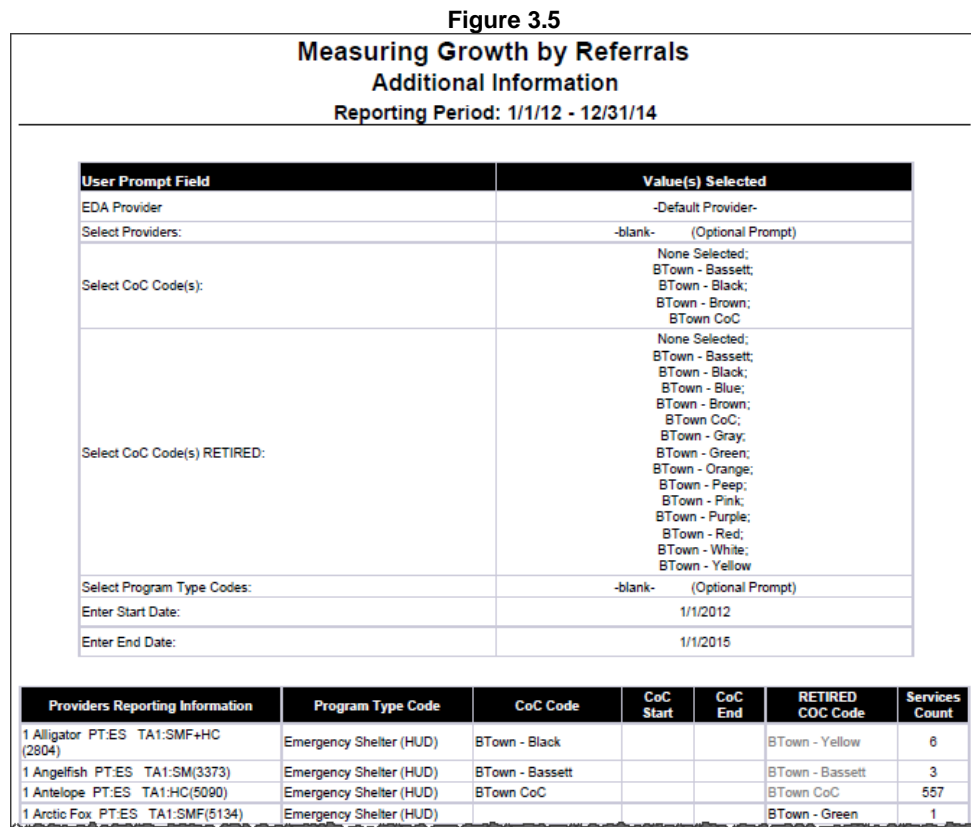
Aggregation By Month					
Reporting Period: 1/1/11 - 5/31/13					
Referrals by Month					
Year	Month	Referrals	Cumulative	Percentage Total Referrals	Cumulative Percent
2011	January	22	22	5.54%	5.54%
	February	41	63	10.33%	15.87%
	March	33	96	6.31%	24.18%
	April	16	112	4.03%	28.21%
	May	15	127	3.78%	31.99%
	June	20	147	5.04%	37.03%
	July	18	165	4.53%	41.56%
	August	23	188	5.79%	47.36%
	September	12	200	3.02%	50.38%
	October	5	205	1.26%	51.64%
	November	20	225	5.04%	56.68%
	December	28	253	7.05%	63.73%
2012	January	37	290	9.32%	73.05%
	February	20	310	5.04%	78.09%
	March	6	316	1.51%	79.60%
	April	19	335	4.79%	84.38%
	May	19	354	4.79%	89.17%
	June	12	366	3.02%	92.19%
	July	11	377	2.77%	94.96%
	August	20	397	5.04%	100.00%
	September	0	397	0.00%	100.00%
	October	0	397	0.00%	100.00%
	November	0	397	0.00%	100.00%
	December	0	397	0.00%	100.00%
2013	January	0	397	0.00%	100.00%
	February	0	397	0.00%	100.00%
	March	0	397	0.00%	100.00%
	April	0	397	0.00%	100.00%
	May	0	397	0.00%	100.00%

Column Explanations:

- **Year:** This column displays each year selected in the prompts
- **Month:** This column displays the numbered month (1 through 12) for the dates selected in the prompts
- **Type of Data (by report type selected):** This column displays the total growth for the month indicated
- **Cumulative:** This column displays the cumulative total for each month
- **Percentage total:** This column lists the percentage total of the cumulative amount for each month specified
- **Cumulative percent:** This column lists the cumulative percent for each month

3.4. Tab D – Additional Information

This tab contains a table with the information given in the prompts and provider and client count information.



Column Explanations:

- **Providers Reporting Information:** This column provides the name of each provider included in the report.
- **Project Type Code:** This column lists the project type code for each provider.
- **CoC Code:** This column lists the CoC Code for each provider. If there are multiple New CoC Codes for a provider, the provider will have multiple rows.
- **CoC Start:** This column lists the CoC Code Start Date.
- **CoC End:** This column lists the CoC Code End Date.
- **RETIRED CoC Code:** This column lists the CoC Code (Retired).
- **Count:** This column provides the count for each appropriate data field dependant on which Growth Measurement Report is selected.

4. INPUT CONTROLS:

4.1. There are no Input Controls for any of the Growth Measurement Series reports.

5. ALERTERS:

5.1. Tab D – Additional Information

Gray text on a neutral background in the RETIRED CoC Code column indicates that a Provider has a current value in the new CoC Code field.

6. TECHNICAL INFORMATION:

6.1. How the data are pulled:

1. Notes related to ***0111 Measuring Growth by Referrals***
 - a. Referrals are counted as of the date of the referral and not on the date the user created the referral.
2. Notes related to ***0114 Measuring Growth by Clients***
 - a. It should be noted that in Tab D of this report clients are listed under only the provider which “created” the client, and not under providers who have had interactions with the client in other ways. Therefore, each client is listed under one and only one provider.
3. Notes related to ***0115 Measuring Growth by Services***
 - a. It is important to note that this report includes only delivered services and excludes referrals.
4. Notes related to ***0117 Measuring Growth by Project Entry and 0119 Measuring Growth by Project Exit***
 - a. Project entries or exits are counted as of the date of the project entry or exit and not on the date the user created the project entry or exit.
 - b. The reports count project entries and exits and not clients with project entries or exits. Individual clients may have multiple project entries or exits, each of which will be counted in the reports.

6.2. Modification options:

There are no recommended modifications for this report.

7. MAPPING OBJECTS:

A listing of the report objects and their source universe and source folder is provided below.

0111 Measuring Growth by Referrals

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION
Providers Universe: resource_point_u (Resource Point Universe)	Result Objects:	Provider	Provider folder
		HUD Standards Information CoC Code	Provider /HUD Standards Information folder
		CoC Code	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code Start Date	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code End Date	Provider folder / HUD Standards Information / Coc Code folder
		HUD Standards Information Project Type Code	Provider /HUD Standards Information folder
BISData Universe: u (Live Universe)	Result Objects:	Client Uid	Clients folder
		Service Uid	Clients /Services (Outer) folder
		Service Referto Provider	Clients /Services (Outer) folder
		Service Date	Clients /Services (Outer) folder
		Service Inactive	Clients /Services (Outer) folder
Dates Universe: Calendar (Calendar Universe)	Result Objects:	Date	Dates folder

0114 Measuring Growth by Clients

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION
Providers Universe: resource_point_u (Resource Point Universe)	Result Objects:	Provider	Provider /Provider folder
		HUD Standards Information CoC Code	Provider /HUD Standards Information folder
		CoC Code	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code Start Date	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code End Date	Provider folder / HUD Standards Information / Coc Code folder
		HUD Standards Information Project Type Code	Provider /HUD Standards Information folder
BISData Universe: u (Live Universe)	Result Objects:	Client Uid	Clients folder
		Client Provider Creating	Clients folder
		Client Date Added	Clients folder
	Filter Objects:	Client Inactive	Clients folder
Dates Universe: Calendar (Calendar Universe)	Result Objects:	Date	Dates folder

0115 Measuring Growth by Services

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION
Providers Universe: resource_point_u (Resource Point Universe)	Result Objects:	Provider	Provider /Provider folder
		HUD Standards Information CoC Code	Provider /HUD Standards Information folder
		CoC Code	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code Start Date	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code End Date	Provider folder / HUD Standards Information / Coc Code folder
		HUD Standards Information Project Type Code	Provider /HUD Standards Information folder
BISData Universe: u (Live Universe)	Result Objects:	Client Uid	Clients folder
		Service Uid	Clients /Services (Outer) folder
		Service Provide Provider	Clients /Services (Outer) folder
		Service Provide End Date	Clients /Services (Outer) folder
		Service Provide Start Date	Clients /Services (Outer) folder
	Filter Objects:	Service Inactive	Clients /Services (Outer) folder
Service Provided		Clients /Services (Outer) folder	
Dates Universe: Calendar (Calendar Universe)	Result Objects:	Date	Dates folder

0117 Measuring Growth by Project Entries, 0119 Measuring Growth by Project Exits

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION
Providers Universe: resource_point_u (Resource Point Universe)	Result Objects:	Provider	Provider /Provider folder
		HUD Standards Information CoC Code	Provider /HUD Standards Information folder
		CoC Code	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code Start Date	Provider folder / HUD Standards Information / Coc Code folder
		CoC Code End Date	Provider folder / HUD Standards Information / Coc Code folder
		HUD Standards Information Project Type Code	Provider /HUD Standards Information folder
BISData Universe: ee_u (Entry/Exit Universe)	Result Objects:	Entry Exit Client Id	Entry Exit Folder
		Entry Exit Uid	Entry Exit Folder
		Entry Exit Provider Id	Entry Exit Folder
		Entry Exit Exit Date	Entry Exit folder
		Entry Exit Entry Date	Entry Exit folder
	Filter Objects:	Entry Exit Inactive	Entry Exit Folder
Dates Universe: Calendar (Calendar Universe)	Result Objects:	Date	Dates folder

8. REVISION HISTORY:

0111 Measuring Growth by Referrals

Version	Description of Changes
V11.05.31	Original version –BETA
V2	Revision – Complete redesign to maximize query efficiency and reduce runtime.
V3	Revision: Added New CoC Code objects; adjusted prompts wording; updated Additional Information tab; added alerter.

0114 Measuring Growth by Clients

Version	Description of Changes
V11.04.13	Original Version ART 2.x
V11.05.18	ART 3.x
V2	Edited Tab C to display months in chronological order instead of alphabetical order
V3	Revision – Complete redesign to maximize query efficiency and reduce runtime.
V4	Revision: Added New CoC Code objects; adjusted prompts wording; updated Additional Information tab; added alerter.

0115 Measuring Growth by Services

Version	Description of Changes
V11.05.18	Original version –BETA
V2	Revision – Complete redesign to maximize query efficiency and reduce runtime.
V3	Revision: Added Provider query with new CoC Code objects; adjusted prompts wording; updated Additional Information tab; added alerter.

0117 Measuring Growth by Project Entries

Version	Description of Changes
V11.05.18	Original version –BETA
V2	Revision – Complete redesign to maximize query efficiency and reduce runtime.
V3	Revision: Added Provider query with new CoC Code objects; adjusted prompts wording; updated Additional Information tab; added alerter.

0119 Measuring Growth by Project Exits

Version	Description of Changes
V11.05.18	Original version –BETA
V2	Revision – Complete redesign to maximize query efficiency and reduce runtime.
V3	Revision: Added Provider query with new CoC Code objects; adjusted prompts wording; updated Additional Information tab; added alerter.

0100 Series Growth Measurement Series Document Revision History

Version	Description of Changes
V11.05.18	Original version –BETA
V2	Document revision to combine documents for 0111, 0114, 0115, 0116, 0117, 0119 documents into single document
V3	Revision: Edit manual to remove references to Retired 0116 report and updated references to reports for CoC Code addition.