

ART Gallery Report 1305

2-1-1 U.S. Problem/Needs Report

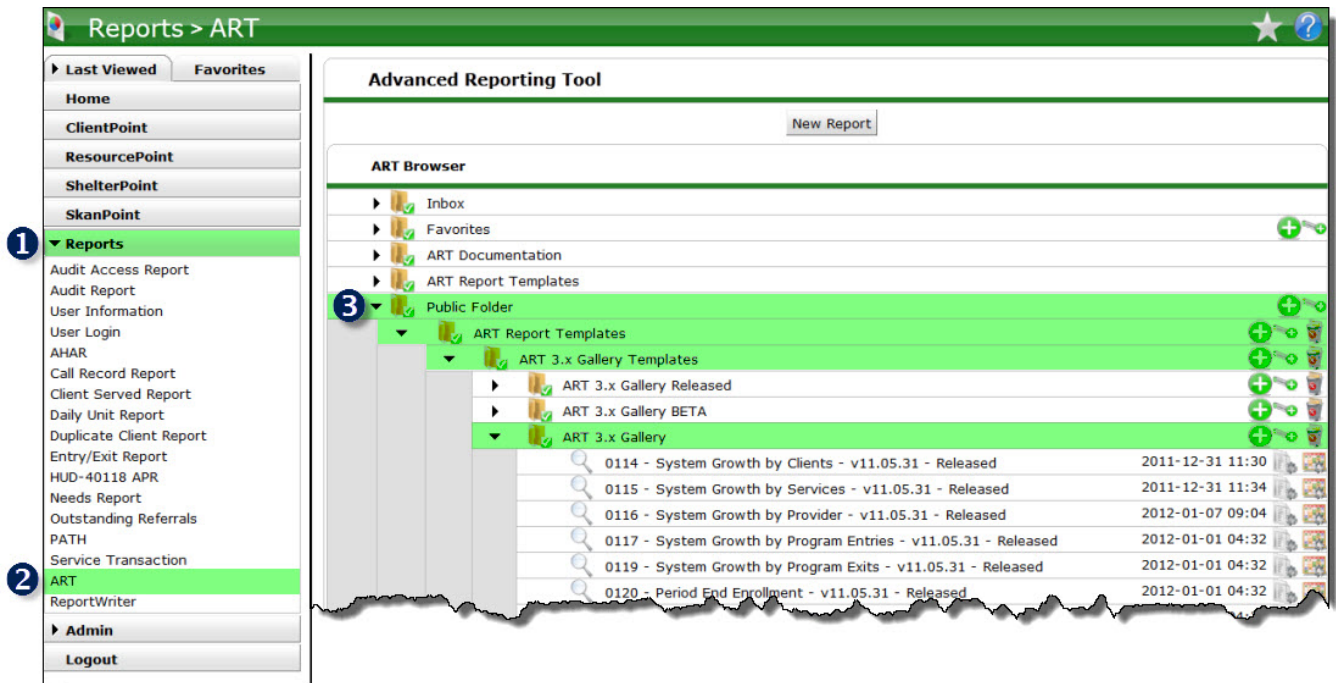
Call Point Report

EXECUTIVE SUMMARY:

This report is designed to enable I&R/211 operations to aggregate and report call data in conjunction with US Need/Problem categories. Needs recorded according to AIRS taxonomy are divided into one of the sixteen categories. Call counts and client counts are broken down in the same manner. Input controls and user prompts allow the user to focus the data on a specified provider, date range, call type, caller types, zip code or any combination of these.

INSTRUCTIONS:

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:



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

Before running the report: Prior to running the report the user must determine the providers to be included in the report and a date range on which to base the results.

How to run:

Upon opening the report, the user will be prompted (see Figure 1) 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 “Run Query” button to generate the report.

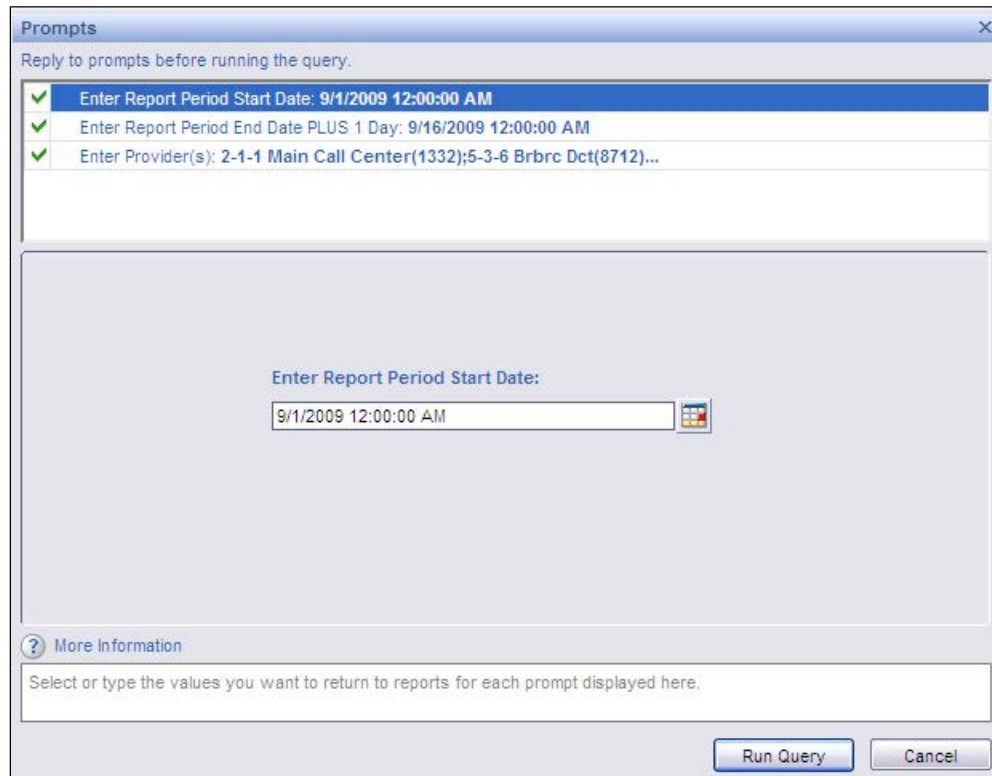


Figure 1

The three user prompts contained in this report are:

1. **Enter Report Period Start Date:** The user should enter (or select from the calendar) the first day of the desired reporting period.
2. **Enter Report Period End Date PLUS 1 Day:** The user should enter (or select from the calendar) the first day immediately following the end of the desired reporting period.
3. **Select Provider(s):** Click the “refresh list” icon and wait for the left window to refresh. Now select the providers to include by highlighting them in the left window and moving them into the right window using the right selection arrow.

2-1-1 U.S. Problem/Needs Report Summary

Report Period: 1/1/14 - 12/31/14

Need Category	Need Count	Percentage	Call Count	Percentage	Client Count	Percentage
Arts, Culture and Recreation	856	0.52%	734	0.58%		
Clothing/Personal/Household Needs	5,680	3.46%	3,855	3.05%		
Disaster Services	445	0.27%	403	0.32%		
Education	2,591	1.58%	2,009	1.59%		
Employment	2,334	1.42%	1,778	1.41%		
Food/Meals	17,912	10.93%	15,662	12.38%		
Health Care	13,477	8.22%	10,150	8.02%		
Income Support/Assistance	14,235	8.68%	12,743	10.07%		
Individual, Family and Community Support	9,055	5.52%	7,260	5.74%		
Information Services	29,148	17.78%	27,899	22.06%		
Legal, Consumer and Public Safety Services	13,189	8.04%	10,658	8.43%		
Mental Health/Addictions	5,725	3.49%	3,939	3.11%		
Other Government/Economic Services	2,644	1.61%	2,335	1.85%		
Transportation	4,736	2.89%	3,617	2.86%		
Volunteers/Donations	2,664	1.62%	2,356	1.86%		
None Identified	240	0.15%	12,160	9.61%		
Housing	23,721	14.47%	17,071	13.50%		
Utility Assistance	15,296	9.33%	14,177	11.21%		
Total:	163,348	100.00%	126,486	100.00%		

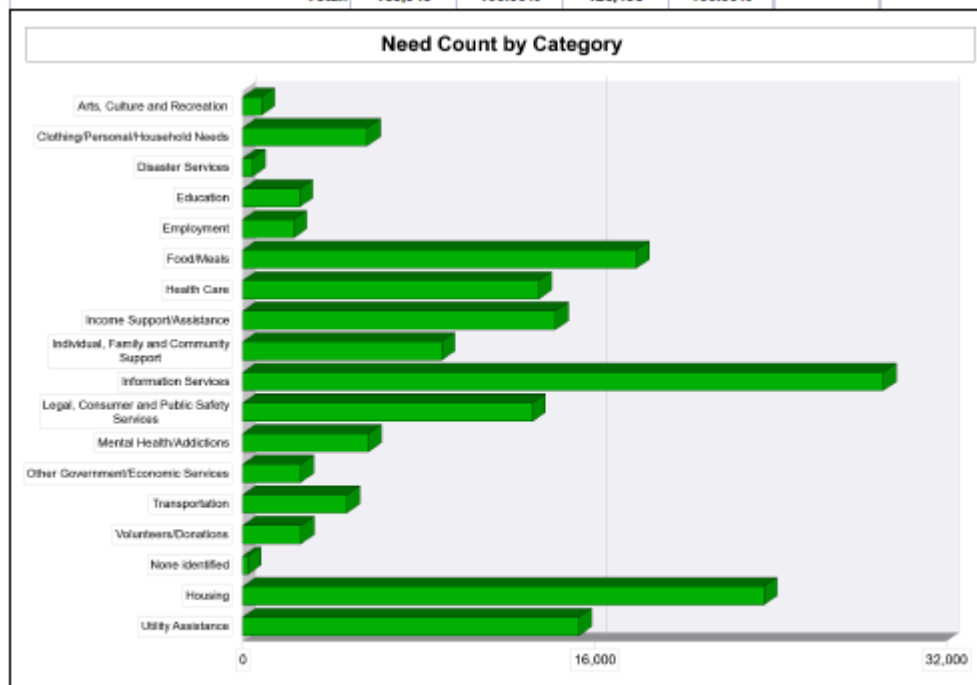


Figure 2

Tab A – Summary (Figure 2): This tab contains a table that breaks down need, calls and clients into the seventeen US Need/Problem categories, reporting counts and percentages for each. The table is sorted by frequency of need. The table is accompanied by a horizontal bar graph which visually displays the need data for the reporting period. In Version 4 of this report a “None Identified” category was added to both the table and the graph, to show calls/and clients without a specified need, and to allow the totals to balance with the totals in Tab D.

US Problems / Needs Report

Detail

Report Period: 9/1/09 - 9/16/09

Call Record ID	Call Record Start Date	Client ID	Call Record Caller Type	Call Record Call Type	Call Record Call Zip Code	Need AIRS Code	Need Category
258029	9/1/09	n/a	Self	Find Help Referral		BD-1800.2000	Food/Meals
258030	9/1/09	n/a	Don't Know	Hang Up			
258031	9/1/09	n/a	Self	Find Help Referral		BH-3500.3400-900	Housing/Utilities
258031	9/1/09	n/a	Self	Find Help Referral		TJ-3000.1500	Information Services
258032	9/1/09	n/a					
258033	9/1/09	n/a	Self	Find Help Referral		BD-1800.2000	Food/Meals
258034	9/1/09	n/a	Self	Find Help Referral		TJ-3000.1500	Information Services
258035	9/1/09	n/a	Self	Counseling			
258036	9/1/09	n/a	Don't Know	Wrong Number			
258037	9/1/09	n/a	Don't Know	Static			
258038	9/1/09	307441	Self	Counseling		BH	Housing/Utilities
258038	9/1/09	307441	Self	Counseling		ND	Employment
258038	9/1/09	307441	Self	Counseling		RR-5000.5000-200	Health Care
258038	9/1/09	307441	Self	Counseling		RT-1900	Health Care
258039	9/1/09	n/a	Self	Find Help Referral		BD	Food/Meals
258039	9/1/09	n/a	Self	Find Help Referral		DD-1500.3750	Legal, Consumer and Public Safety Services
258039	9/1/09	n/a	Self	Find Help Referral		DF-8000.1800	Legal, Consumer and Public Safety Services
258039	9/1/09	n/a	Self	Find Help Referral		DF-8000.1800-200	Legal, Consumer and Public Safety Services
258039	9/1/09	n/a	Self	Find Help Referral		TJ-3200.2500-160	Information Services
258040	9/1/09	n/a	Organization	Find Help Referral		TJ-3000.1500	Information Services
258041	9/1/09	n/a					
258042	9/1/09	n/a	Self	Find Help Referral			
258043	9/1/09	n/a	Self	Information		BV-8900.9300	Housing/Utilities
258044	9/1/09	n/a	Self	Counseling			
258045	9/1/09	n/a	Self	Find Help Referral		BH-1800.8500	Housing/Utilities
258046	9/1/09	n/a	Self	Information		PH-5000.0500-180	Mental Health/Addictions
258047	9/1/09	n/a	Self	Information		BV-8900.9300	Housing/Utilities
258048	9/1/09	n/a	Self	Find Help Referral		BD-1800.2000	Food/Meals
258049	9/1/09	n/a	Self	Find Help Referral		BD-1800.2000	Food/Meals
258049	9/1/09	n/a	Self	Find Help Referral		BM	Clothing/Personal/Household Needs
258049	9/1/09	n/a	Self	Find Help Referral		BT	Transportation
258050	9/1/09	n/a	Self	Find Help Referral			
258051	9/1/09	n/a	Self	Counseling			
258052	9/1/09	n/a	Self	Counseling			
258053	9/1/09	n/a	Self	Counseling			
258054	9/1/09	n/a	Self	Find Help Referral		BV-8900.9300	Housing/Utilities
258055	9/1/09	n/a	Self	Find Help Referral		BV-8900.9300	Housing/Utilities
258056	9/1/09	n/a	Self	Counseling			
258057	9/1/09	n/a	Self	Find Help Referral		BV-8900.9300	Housing/Utilities
258058	9/1/09	n/a	Self	Find Help Referral		BH-3800.7000	Housing/Utilities
258059	9/1/09	n/a	Self	Find Help Referral		BV-8900.9300	Housing/Utilities
258060	9/1/09	n/a	Self	Hang Up			
258061	9/1/09	n/a	Self	Hang Up			

Bowman Systems
1305 - US Problems / Needs Report
Tab B - Detail

Page 1 of 94

v10.09.15
Printed: 9/20/2010
2:27:14 PM

Figure 3

Tab B – Detail (Figure 3): This tab contains a listing of the call detail contained in the report showing Date of the call, Client Id (if applicable), Caller Type, Call Type, Zip Code, AIRS Need Code and US Need/Problem Category.

US Problems / Needs Report

Crosswalk

Report Period: 9/1/09 - 9/16/09

Category Number	Category Name	AIRS Code	Service Codes Description
AR-100	Arts, Culture and Recreation	PL-1800.1250	Breakfast Cafés
AR-100	Arts, Culture and Recreation	PL-1800.1300	Brunches
AR-100	Arts, Culture and Recreation	PL-1800.1350	Burmese Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1400	Cambodian Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1450	Caribbean Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1450-150	Cuban Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1450-350	Jamaican Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1500	Chilean Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550	Chinese Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-150	Cantonese Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-180	Chui Chow Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-300	Hunan Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-500	Mandarin Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-800	Muslim Chinese Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-750	Shanghai Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1550-800	Szechuan Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1570	Chinois Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1800	Coffee Bars
AR-100	Arts, Culture and Recreation	PL-1800.1850	Colombian Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1700	Continental Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1750	Crepe Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1800	Czech Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1830	Delicatessens
AR-100	Arts, Culture and Recreation	PL-1800.1850	Dessert Establishments
AR-100	Arts, Culture and Recreation	PL-1800.1870	Eatertainments
AR-100	Arts, Culture and Recreation	PL-1800.1900	Ecuadoran Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1930	Egyptian Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1950	English Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.1950-050	Afternoon Tea Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2050	Family Fun Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2100	Fast Food Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2100-200	Fast Food Chicken
AR-100	Arts, Culture and Recreation	PL-1800.2100-250	Hamburger/Hot Dog Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2100-850	Pizza Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2200	Filipino Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2400	French Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2500	Game Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2800	German Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2900	Greek Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.2950	Guatemalan Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3000	Halal Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3050	Honduran Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3100	Hotel Dining
AR-100	Arts, Culture and Recreation	PL-1800.3150	Hungarian Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3250	Indian/Pakistani Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3300	Indonesian Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3350	International Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3400	Irish Restaurants
AR-100	Arts, Culture and Recreation	PL-1800.3500	Italian Restaurants

Figure 4

Tab C – Crosswalk (Figure 4): This tab provides the complete service crosswalk between the AIRS service/need codes and the sixteen US Need/Problem Categories.

2-1-1 U.S. Problem/Needs Report
Additional Information
Report Period: 1/1/09 - 1/1/11

User Prompt Field	Value Selected
Enter Report Period Start Date:	1/1/09
Enter Report Period End Date PLUS 1 Day:	1/1/11
Enter Provider(s):	5-3-6 Brbrc Dct(8712)

Provider Reporting Information in this Report	Call Count	Need Count	Client Count
5-3-6 Brbrc Dct(8712)	73,245	76,331	2

© 2011 Bowman Systems, L.L.C. All Right Reserved.

ServicePoint™ and the ServicePoint™ logo are trademarks of Bowman Systems, L.L.C. All other brand or product names are trademarks or registered trademarks of their respective holders.

Bowman Systems
333 Texas Street, 300
Shreveport, LA 71101
Toll Free: (888) 580-3831
Direct: (318) 213-8780
Fax: (318) 213-8784
Email: ART_Reports@BowmanSystems.com
<http://www.bowmansystems.com>

Figure 5

Tab D – Additional Information (Figure 5): This tab is provided as a reference to the user running the report and lists the parameters specified in the user prompts, as well as the total counts of needs, clients and calls by provider.

TECHNICAL NOTES:

1. It should be noted that ServicePoint allows calls to be connected to a client or recorded as calls not connected to a client. Each client can also have multiple recorded calls, so the ratio of calls to clients can vary depending on workflow and type of call center.
2. It should also be noted that ServicePoint allows multiple needs to be recorded on a single call and allows calls to be recorded without a need specified, so ratio of calls to needs will also vary depending on workflow and type of call center.
3. Deleted/inactive calls, needs, and clients are not included in the report.

REPORT MODIFICATION

Users with ad-hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an ART Gallery report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the “save as” feature or by clicking on the “organize” icon in folder view.

NOTE: The original un-modified version of this report is a template and is retained in ART Gallery Templates folder structure. These template folders are read-only and any reports must be copied to a location in the user’s site (Favorites or Public Folders) then mapped to the site’s data.

MODIFICATION OPTONS

Variations of this report can be created using the input control filters described below, however users may wish to make versions of this report for monitoring growth activity for a specific provider or group of providers, or perhaps for a specific project need type or call type of other specific variation can be easily and quickly accomplished by adding simple “equal to” or “in list” type filters to the appropriate field(s) in the “project entries” query.

Users may also wish to create an alternative version of the report that excludes the detail and crosswalk tabs to facilitate hard copy printing. These report tabs can simply be deleted without affecting the reports summary data.

INPUT CONTROLS

This report has been equipped with input control filters to allow both ad-hoc and viewer license users to easily restrict or filter the report results to a specific parameter or a combination of parameters. When the report finishes running the input control options will appear in the left hand window of the screen. (See Figure # 6 below.) Input control filters contained in this report include:

- Type of Caller
- Callers Zip Code
- Type of Call

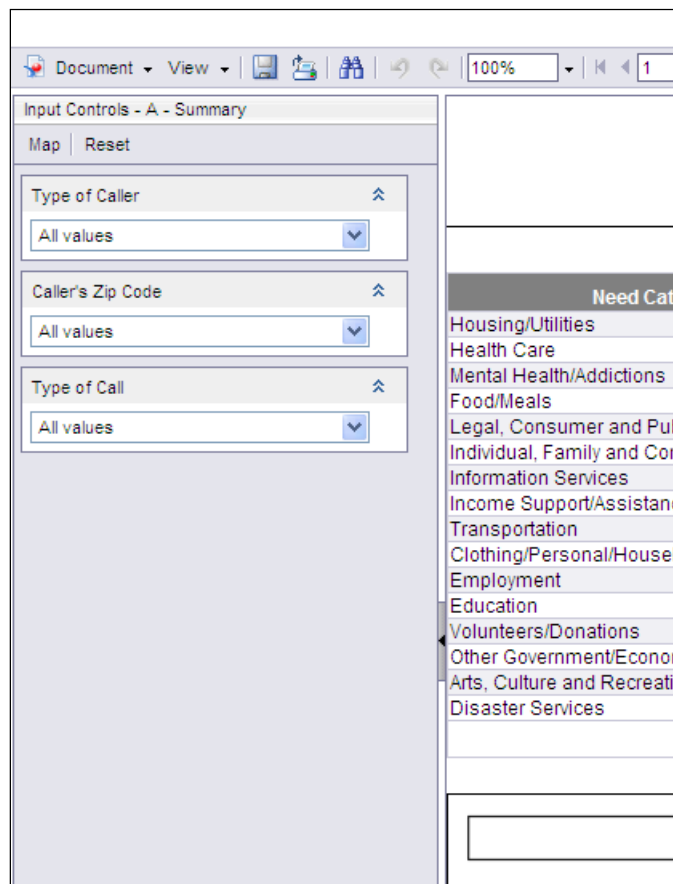


Figure 6

Input controls can be used individually or in combination to customize the report to the users reporting needs. Ad-hoc users can add additional input controls by first adding fields to the query results objects and then to the input control screen. Each report tab can have its own set of input controls. This flexibility is a new feature of ART 3.0 and greatly enhances the report flexibility and usefulness.

MAPPING OBJECTS

UNIVERSE: template_call_point_u
 template_service_code_u

This report is mapped to the CallPoint universe (template_call_point_u) and service code universe (template_service_code_u) and should be copied to your Public or Favorite folder then mapped to the equivalent event universes for your site (ex. *yoursite_call_point_u*).

Mapping for the CallPoint universe can be done from the first query; "Data".
 Mapping for the service code universe can be done from the second query; "Codes".

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
BISData	Call Record ID	Location: Call Record Type: System Field Use: Result Object
	Call Record Start Date	Location: Call Record Type: System Field Use: Result Object
	Client Id	Location: Call Record / Client Type: System Field Use: Result Object
	Need ID	Location: Call Record / Need Type: System Field Use: Result Object
	Call Record Call Type	Location: Call Record Type: System Field Use: Result Object
	Call Record Caller Type	Location: Call Record Type: System Field Use: Result Object
	Call Record Zip Code	Location: Call Record Type: System Field Use: Result Object
	Need Code	Location: Call Record / Need Type: System Field Use: Result Object
	Need Code Description	Location: Call Record / Need / Need Code Type: System Field Use: Result Object
	Call Record Audit Provider Creating	Location: Call Record / Call Record Audit Type: System Field Use: Result Object
	Need Audit Active	Location: Call Record / Need / Need Audit Type: System Field Use: Result Object
	Call Record Audit Active	Location: Call Record / Call Record Audit Type: System Field Use: Filter Object

Codes	Service Codes Code	Location: Service Codes Type: System Field Use: Result Object
	Service Codes External Terms Name	Location: Service Codes / Service Code External Terms Code Type: System Field Use: Result Object
	Service Codes External Terms Code	Location: Service Codes / Service Code External Terms Code Type: System Field Use: Result Object
	Service Codes Description	Location: Service Codes Type: System Field Use: Result Object
	Service Codes External Terms System	Location: Service Codes / Service Code External Terms Code Type: System Field Use: Query Filters

=====

#1305 Revision History

Version	Description of Changes
V10.10.13	Original version -BETA
V11.01.11	Report name change Missing Copyright information was added
V4	Revision: Accommodates US Problem/Need category terminology change Addition of "None identified" category on Tab A Addition of Input Controls to Tabs A and B Change of Report Period to Reflect Report End Date Minus One Day Addition of EDA Provider to Prompt Information on Tab D Change of Copyright year to 2012 Addition of Revision History to User Manual
V5	Revision: Adjusted query and report to filter out inactive call records and needs. Updated Mapping Instructions section Updated Mapping Objects section
V5 (Doc Only)	Revision: Updated screenshots and wording to reflect 17 need categories as per AIRS update.
V6	Revision: Based input controls on new variables to prevent them from being removed after upgrade.