Process Name: Develop and Build Reports and Queries
Date: September 7, 2005
Time: 2:10 p.m.
Location: ACR207
Participants: Cesar Valenzuela, Oscar Jimenez, Carolyn Todd, Tanya Romero, Laura Lannom, Patty Roach, Nieves Kolesar, Liliana Mason
Session Lead: Patty Roach; Visio, Carolyn Todd; Narrative

Narrative/Description: The user expresses a need for building reports in FRS. The user seeks the possibility of finding an existing (FRS or Focus) report. (Often, appropriate departments are contacted to assist in data gathering/reporting.) If the user locates an existing formatted report, the report is run providing the appropriate data. If data is unavailable in a report, user may choose a reporting tool: OIT (generated) report; Pivot Table and (user generated) Focus reports. User may request OIT to refresh data warehouse. User may continue to build a query using EXCEL pivot table from data warehouse file. User verifies accuracy using FRS (example). If user selects a user generated Focus report, the user writes a report and acquires the data. If the report can not be written or easily modified, user contacts OIT for assistance. User sends specifications for the report. OIT creates and runs report. OIT sends data to the user.

Electronic Inputs: email requests, FRS screens, sample report formats, word documents
Manual/Paper Inputs: Memo or hard copy report samples
Key Decision Points (list all): volume of data, time sensitive information, and availability of existing reports
Related Policy(s): none
Interface to Other Systems: Data Warehouse, Access, EXCEL, Focus, FTP
Web Features: none
Electronic Outputs: Word documents, spreadsheets, text files, report printed to screen
Manual/Paper Outputs: Printed reports weekly
Customer(s): Requesting departments
Regulatory Items: Open Records Request
Frequency/Volume: averaging 50 reports requested and run daily, 120 reports are created annually.
Potential Break Points: data element is difficult to locate in FRS, user has difficulty in articulating specifications, system limitations, Plus System unavailable, data entry errors, consistency in data entry
Automation: Pivot Tables
Issues: Users often do not know where to locate the needed data. Users must seek approval from data owner for reporting. Release of vendor data. Security concerns.