

CalSAWS

California Statewide Automated Welfare System

Ad Hoc Report Request Process

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Revision History

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/17/2015	15-09	Updated UniCenter Templet Instruction	Taras Shemchuk
12/04/2015	15.12	Updated Process	Larry Risser
04/20/2020	20.04	Updated Information	Paul Robertson
09/29/2021	21.09	Updated for CalSAWS Ad-Hoc report Process	Data Integration Services

Introduction

The CalSAWS Project Team provides Ad Hoc Report support to CalSAWS Counties. This support is provided by the Data Integration Services (DIS). This resource will gather reporting requirements from the counties to design and deliver reports. The process includes:

- Working cooperatively with county representatives to create ad hoc reports using Oracle APEX, SQL, and or flat files. Flat file report(s) may be delivered to counties with CalSAWS security compliance. Support for Crystal Reports has been **terminated** with CalSAWS migration (09/2021).
 - Assisting county report writers in understanding and preparing ad hoc reports.
 - Preparing detailed report designs based on county requests.
 - Interpreting non-technical report requests to create detailed and accurate reports.
 - Data Integration Services will do limited data validation, but County representative will be responsible for the report and data accuracy.
- Supporting the Ad Hoc User Community Workgroup.

This document and all supporting documents described below are available on the CalSAWS Web Portal.

CalSAWS Web Portal Location:

Process

Step	Action
1	County submits Ad Hoc Report Request with requested criterion in ServiceNow.
2	County will attach Ad Report Request Form and necessary supporting documents to ServiceNow ticket as a part of requested criterion.
3	DIS completes prioritization of the Ad Hoc Report Request form.
4	DIS will update the status of the report request to ServiceNow ticket, notifying county of ETA on Ad Hoc Report turnaround.
5	DIS updates the ticket, as needed, throughout lifecycle of report creation.
6	DIS reviews Request form, creates report design document, and attaches it to the ticket and notifies via emails to the Requestor.
7	Requestor reviews report design and logs approval into the ticket and confirms it via email (optional) to DIS.
8	Upon request approval, DIS creates report, County will test and validate report/data.
9	Upon County final approval, DIS uploads final product to APEX, or deliver the flat file report via secured platform as needed and posts final SQL to CalSAWS Web Portal and update the catalog. DIS closes the ticket.

See Appendix A to view the Ad Hoc Report Request form.

Note: This form may require internal county review prior to a request being submitted. This review should include looking at the “Ad Hoc Report Catalog” in the folder [REDACTED] on the CalSAWS Web Portal to verify the requested report has not already been created from another request.

During county internal review, county will also verify that, needed Ad Hoc report request is not addressed by the CalSAWS Dashboard and or Management Reports. County can also use “CalSAWS Portfolio tool” to review the hundreds of data measures available in the CalSAWS dashboards as well as the hundreds of existing reports in CalSAWS. Please ensure you are logged in to your county virtual private network (VPN), as it is required to access the tool. The tool can be found at the following link: [REDACTED]

If the county has a mockup or initial coding completed by the county for the requested report, this can be attached to the ServiceNow ticket along with the Ad Hoc Report Request form. These items will be reviewed by DIS, along with the Ad Hoc Report Request form, to assist in the development of a report that meets the county’s needs and vision.

All Ad Hoc Report Requests will be reviewed by the CalSAWS Project and prioritized based on a set criterion.

Requests will be prioritized based on Purpose, Source, Impact and Need by Date as entered on the Ad Hoc Report Request form. Prioritization of the Ad Hoc Report Request form will be completed within 7 to 14 business days. Prioritization will be determined by considering the information provided and the current request queue state. Once this prioritization is completed, DIS will update the ticket, and county will be notified via e-mail (optional) and an estimated time of completion will be stated along with the ServiceNow ticket number.

In instances where the priority is disputed, counties should reach out to their Regional Manager(s) (RMs) and RMs should agree to arrange priorities in the work queue.

It is the requesting county’s responsibility to log their approval/confirmation in the ticket.

Ad Hoc Shared Reports- CalSAWS Web Portal Location: [REDACTED]
[REDACTED]

All completed reports will also be logged in the “Ad Hoc Report Catalog” located in the same location on the CalSAWS Web Portal.

Submitting Issues and Questions

Counties can submit issues through their existing request process.

If a county has questions on a report they are developing or need assistance with report creation, the county can submit an Ad Hoc Report request via the outlined request process and DIS will address the need.

Appendix A – Ad Hoc Report Request

Please refer to Ad Hoc Report Request Form from Web Portal

CalSAWS Web Portal Location:

