



Reports Navigation

This CalSAWS Quick Guide (QG) provides the end-user with functional instructions on reviewing Reports within the System.

The QG can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The QG may include functional instructions, as well as screenshots from the System. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

CalSAWS Process

In CalSAWS users with the appropriate security rights can view information for various System reports.

This guide provides information on the following report types:

- On Request
- Scheduled
- Business Intelligence


On Request Reports

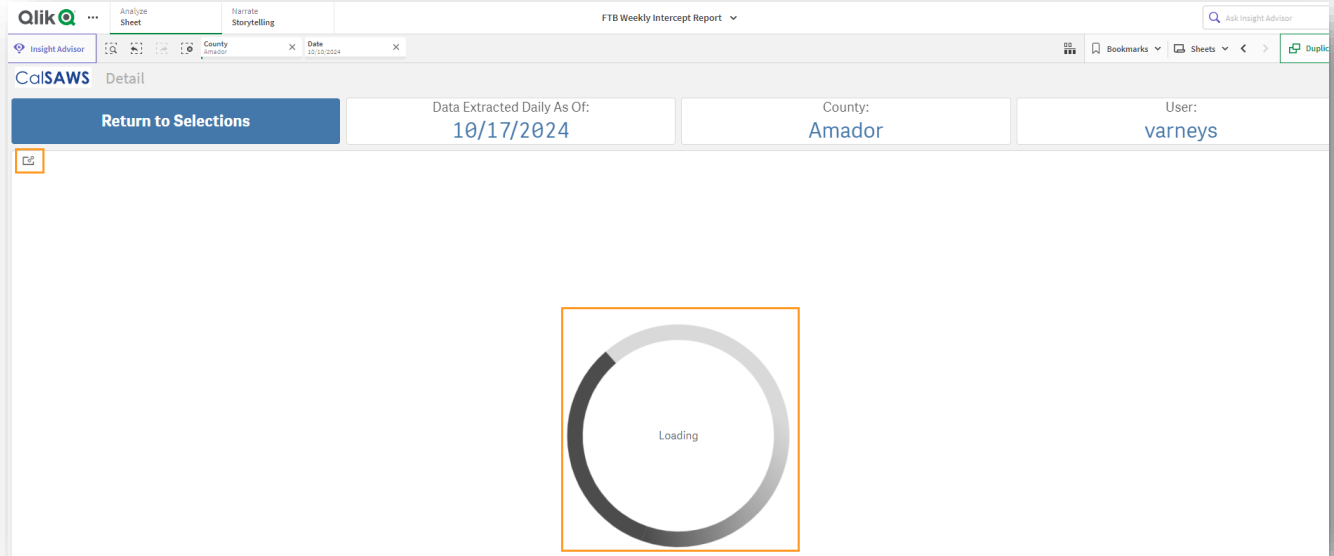
On Request reports are generated by the System based on your entered criteria.

The following On Request reports are available:

- Administrative
- Case Activity
- Employment Services
- Fiscal
- Resource Databank
- Special Units

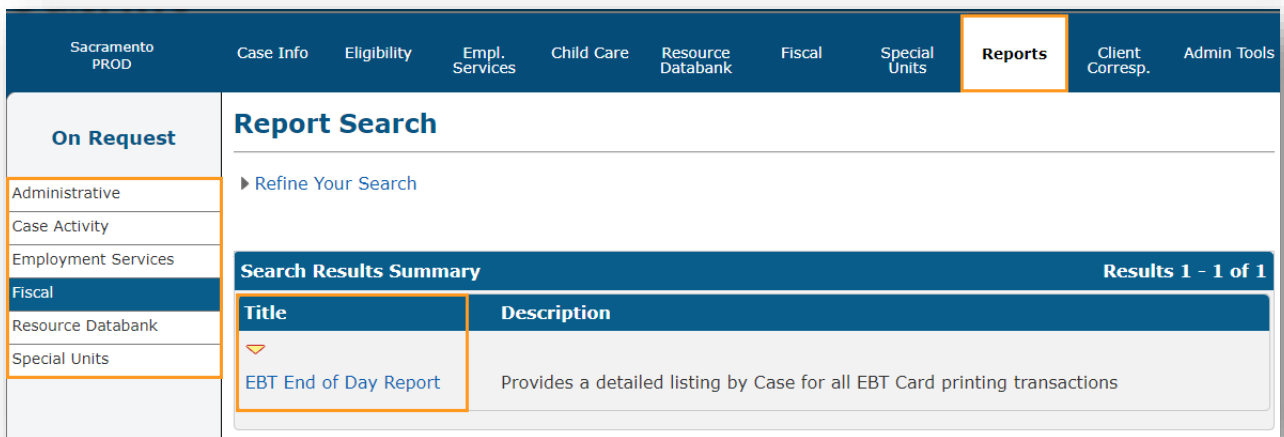
There are two types of On Request Reports:

- Curated – Data is preloaded daily
- Dynamic View – Data is loaded in real time
 - Dynamic reports have the <  > icon in the top left corner and display a spinning loading wheel when the report is generated



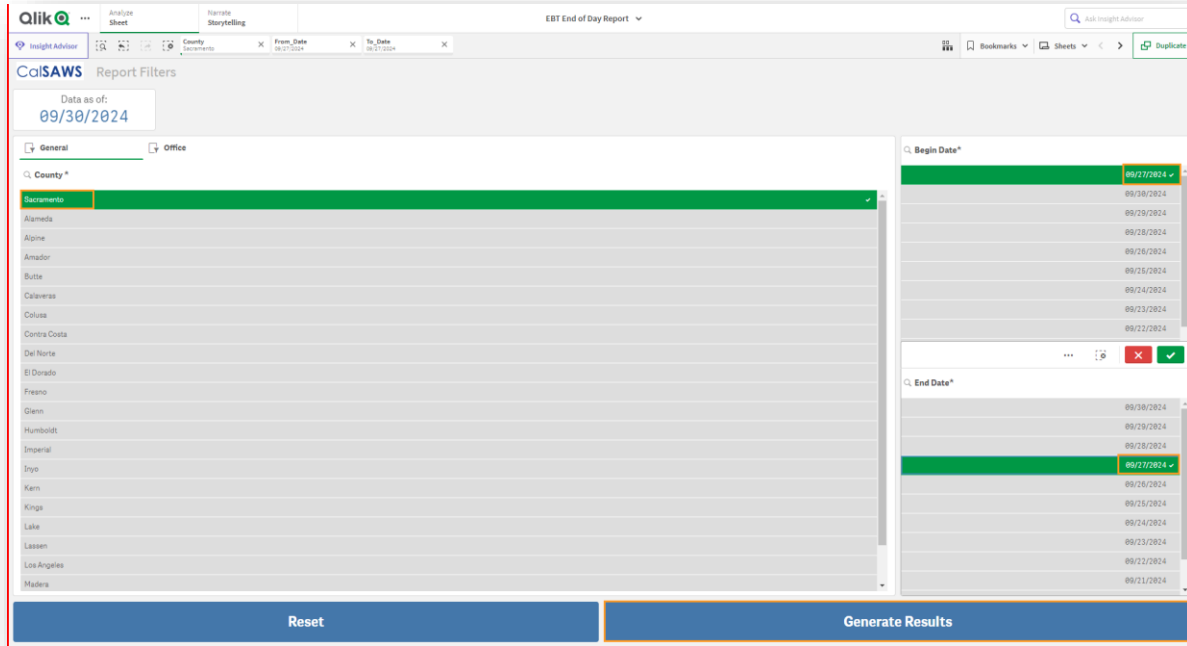
The steps below outline the process for navigating On Request reports:

1. Place the cursor over the **Reports** tab on the **Global** navigation bar and select **On Request** from the **Local** navigator
2. Select **<On Request Type>** link from the **Task** navigation bar
3. On the **Report Search** page:
 - A. Enter **<Title and/or Description>** then click the **Search** button in the **Refine Your Search** page section
 - B. Click the **<Title>** hyperlink



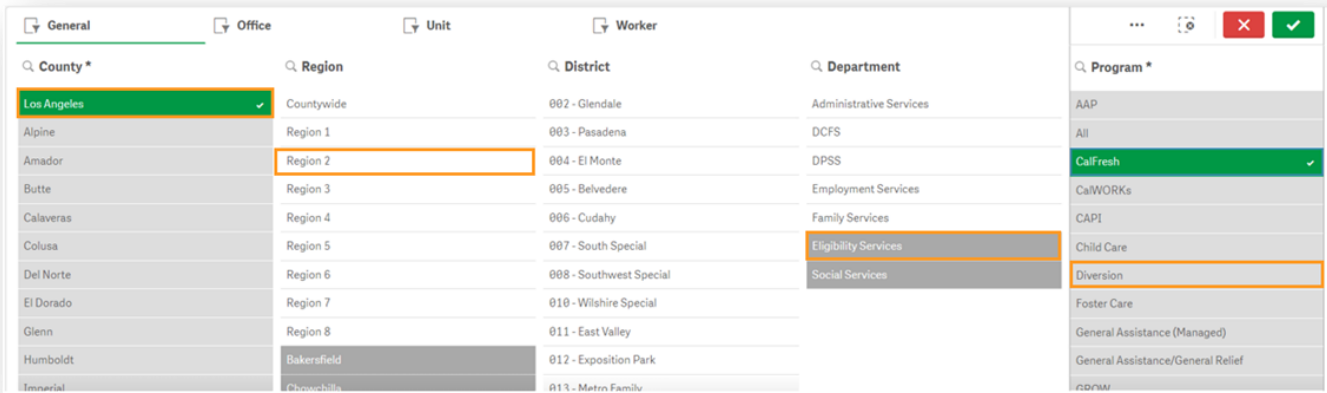
Note: The Report Search page lists all applicable reports sorted via Title and provides a brief description of the information contained on the report.

4. On the **Qlik** window:
 1. Confirm **<County>**
 - A. Select **<Date>**
 - B. Update any additional filters that display as necessary to generate desired report
 - C. Click the **Generate Results** button



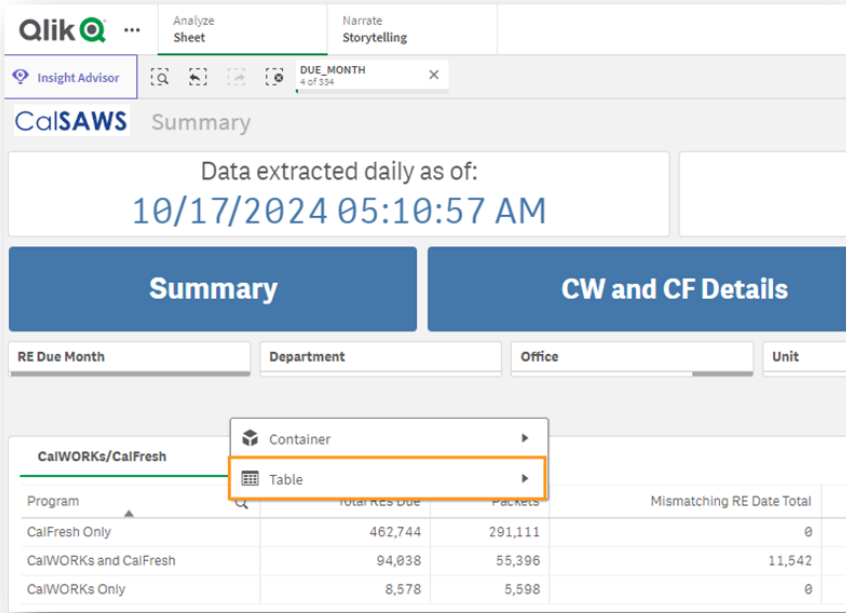
Note: When selecting filter options, the selections may be highlighted in 4 different colors.

- Data Selection Color Codes:
 - Green – Selected filter option
 - White – Filter option that can be selected
 - Light Grey – Filter option that can be selected but is not in the filters already applied
 - Dark Grey – Filter option that cannot be selected based on the filters already applied

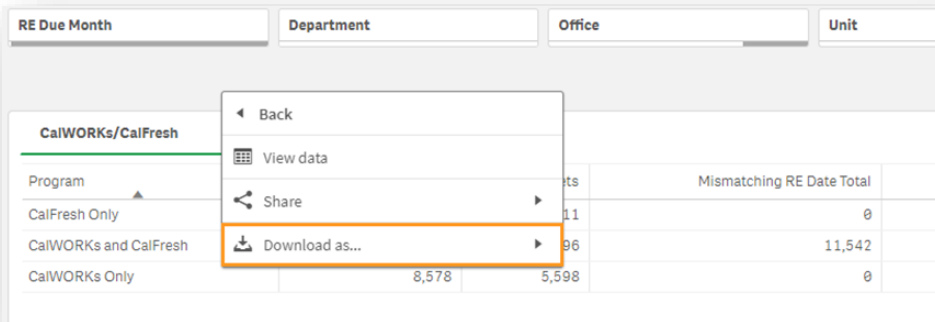


To download a Curated report:

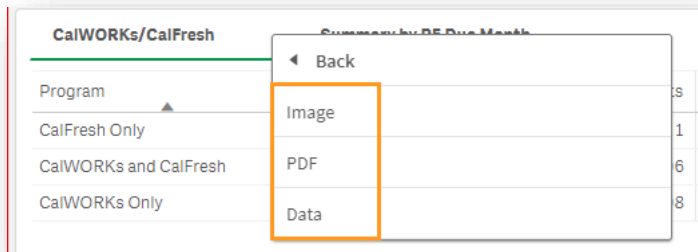
1. Right click on the table you wish to export
2. Click **Table**



3. Click **Download as...**

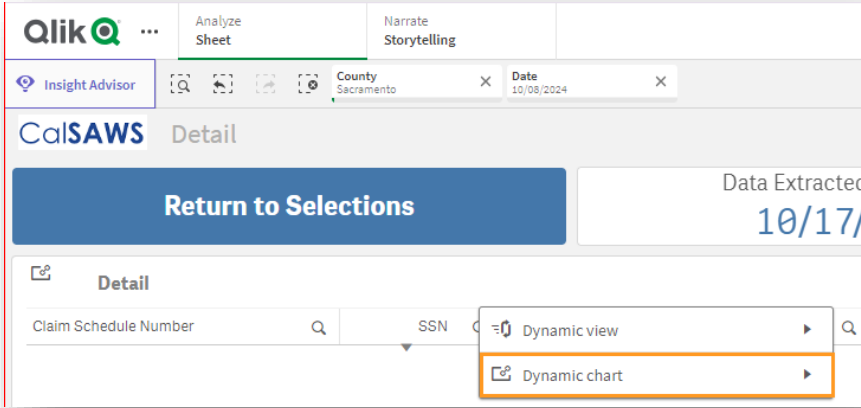


4. Select **Image**, **PDF**, or **Data**

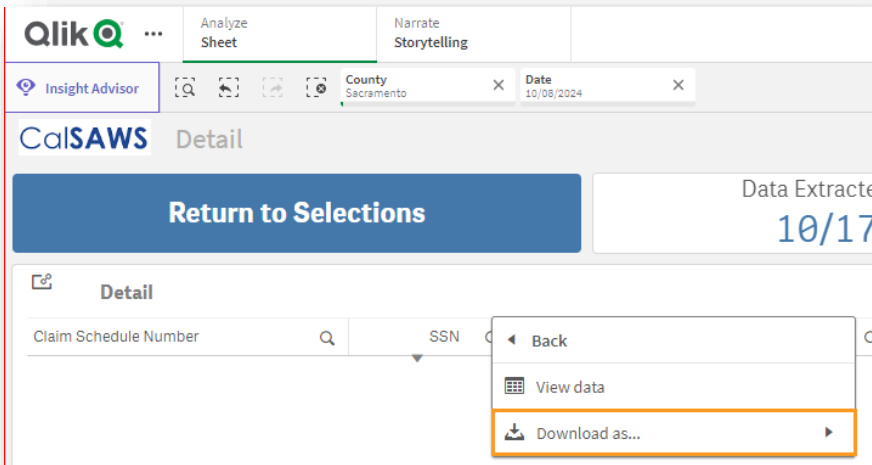


To download a Dynamic View report:

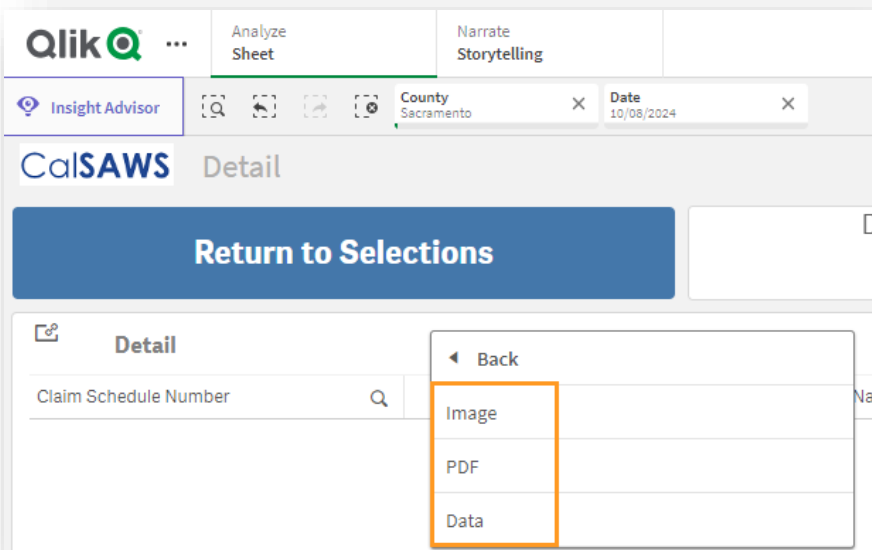
1. Right click on the table you wish to export
2. Click **Dynamic Chart**



3. Click **Download as...**



4. Select **Image**, **PDF**, or **Data**





Scheduled Reports

Scheduled reports are generated by specific CalSAWS batch runs and vary based on the report's date.

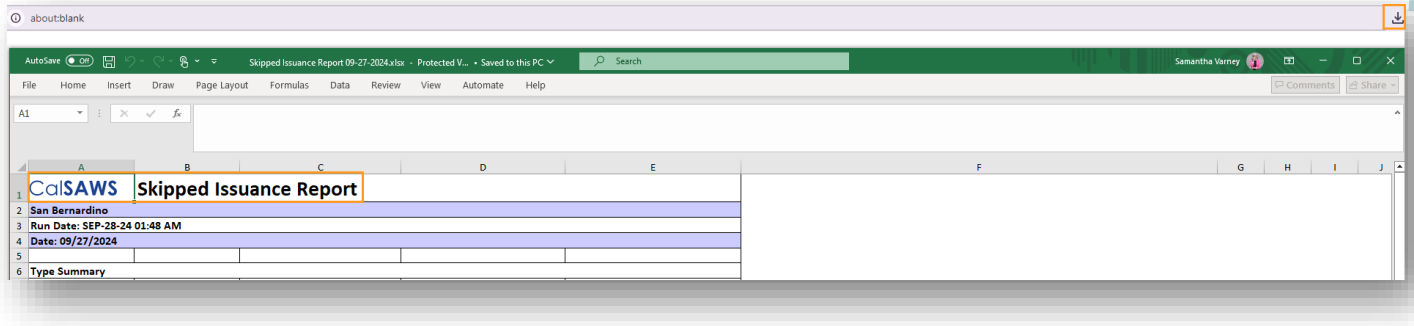
The following types of Scheduled Reports are available:

- Administrative
- Case Activity
- Employment Services
- Fiscal
- State
- Resource Databank
- Special Units

The steps below outline the process for navigating Scheduled reports:

1. Place the cursor over the **Reports** tab on the **Global** navigation bar and select **Scheduled** from the **Local** navigator
2. Select **<Scheduled Type>** link from the **Task** navigation bar
3. On the **Report Search** page:
 - A. Fill out applicable information for your intended report
 - B. Click the **Search** button

- C. Click the **<Title>** hyperlink
4. A new window will open for the user to download the report as an Excel document



Business Intelligence Reports

Business Intelligence (BI) is a reporting tool that supports dashboards, graphical visualizations of data and ad-hoc reporting capabilities. The BI tool utilizes a Data Warehouse that contains key data points that are utilized to present the data in a readable, useful and interactive form.

The following types of Business Intelligence Reports are available:

- Scorecards
- DPSSTATS
- Reception Log
- Statistical Summary Analysis
- Real Time Task Management
- Operations Reports
- Child Welfare Programs STATS
- BenefitsCal

The steps below outline the process for navigating Business Intelligence reports:

1. Place the cursor over the **Reports** tab on the **Global** navigation bar and select **Business Intelligence** from the **Local** navigator
2. Select **<Business Intelligence Type>** link from the **Task** navigation bar
3. On the **Report Search** page:
 - A. Enter **<Title and/or Category>** then click the **Search** button in the **Refine Your Search** page section
 - B. Click the **<Title>** hyperlink



San Bernardino PROD

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units **Reports** Client Corresp. Admin Tools

Business Intelligence

Scorecards
 DPSSSTATS
 Reception Log
 Statistical Summary Analysis
 Real Time Task Management
 Operations Reports
 Child Welfare Programs
 STATS
 BenefitsCal

Report Search

▼ Refine Your Search

Title: Category:

Results per Page: 25

Search Results Summary Results 1 - 8 of 8

Title	Category
Applications	BenefitsCal
Customized Reports	BenefitsCal
Documents	BenefitsCal
Login	BenefitsCal
Messages Dashboard	BenefitsCal
Periodic Reports	BenefitsCal
Renewals	BenefitsCal
eNOAs	BenefitsCal

Dashboard Examples within the Business Intelligence Reports

DPSSSTATS – Application Processing Timeliness Dashboard CalFresh: Data refreshes daily as part of the nightly batch

Filters include Month, Division, Office, Unit, Worker, Language, and CF Type.

San Bernardino SYS4

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units **Reports** Client Corresp. Admin Tools

Business Intelligence

Scorecards
DPSSSTATS
 Reception Log
 Statistical Summary Analysis
 Real Time Task Management
 Operations Reports
 Child Welfare Programs
 STATS
 BenefitsCal

Report Search

► Refine Your Search

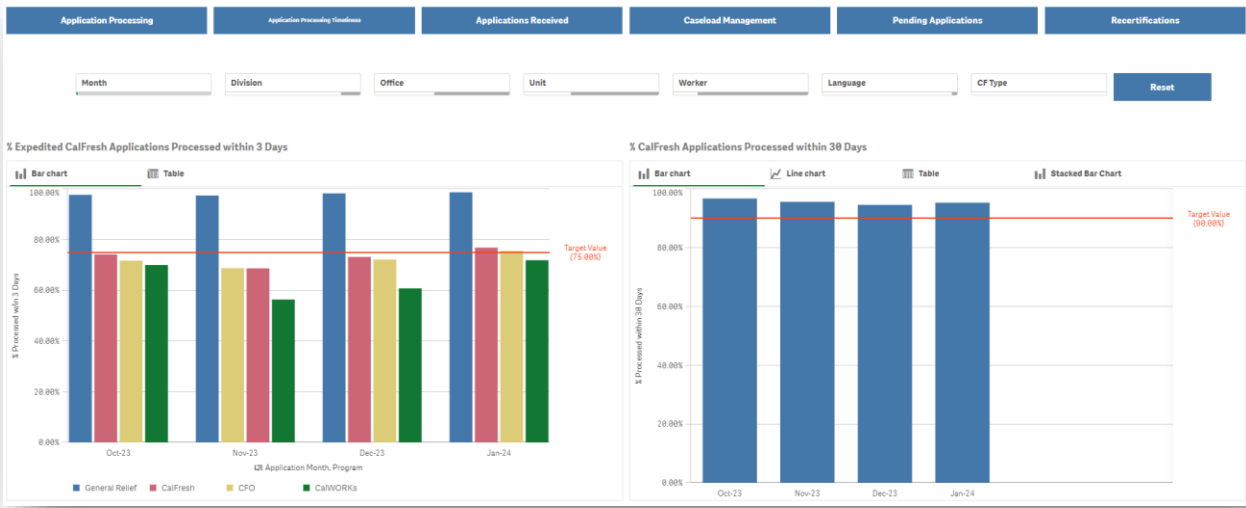
Search Results Summary Results 1 - 25 of 49

1 2 [Next](#)

Title	Category
Application Processing	CalFresh
Application Processing	CalWORKS
Application Processing	General Relief
Application Processing	Medi-Cal
Application Processing Timeliness	CalFresh
Application Processing Timeliness	Medi-Cal



After entering your desired filters for your report, your data displays with the appropriate charts.



Clicking the headers (ex: Table, Bar Chart, Line Chart, Stacked Bar Chart) expands the view of that chart.

% Expedited CalFresh Applications Processed within 3 Days

Bar chart | **Table**

Application Month: [] Program: []

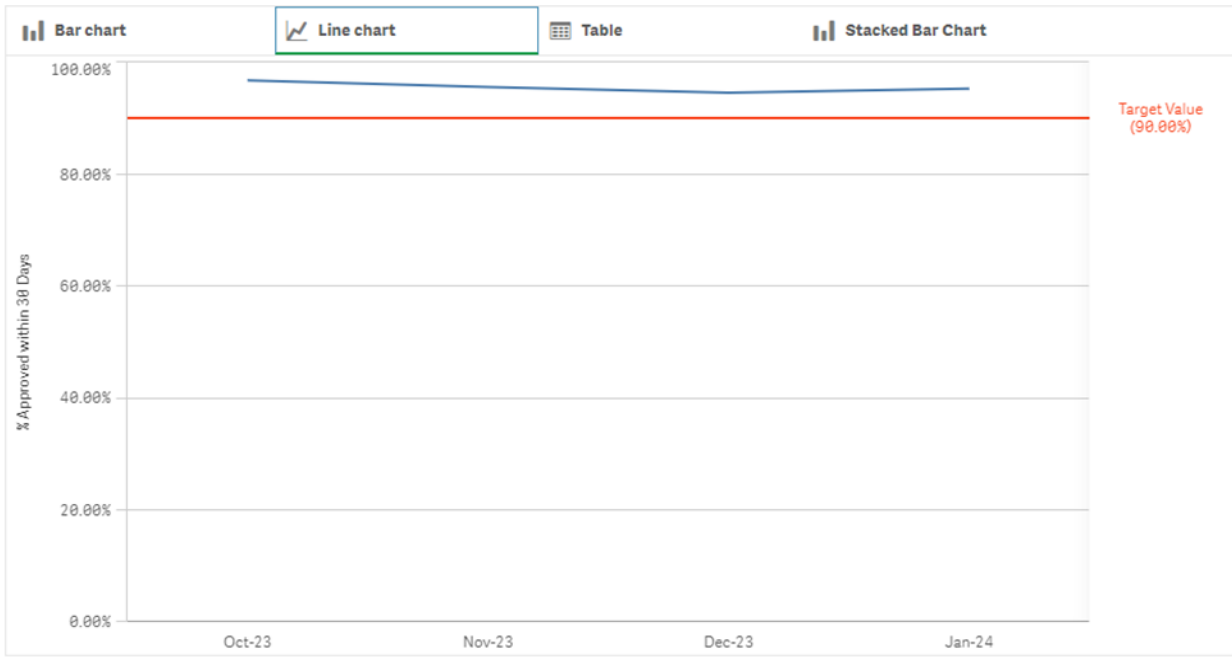
Application Month	CalWORKs	CFO	General Relief	CalFresh
Oct-23	70.00%	71.72%	97.68%	74.17%
Nov-23	56.37%	68.76%	97.41%	68.68%
Dec-23	60.77%	72.14%	98.26%	73.18%
Jan-24	71.88%	75.57%	98.68%	76.84%

Case Number	Applic... Date	Case Name	Dispo...	Disposi... Date	Disposition Reason	Division	Language
1B00B08	8/1/2023	Case Name	Approved	Nov-22-2023	Unknown	Unknown	English

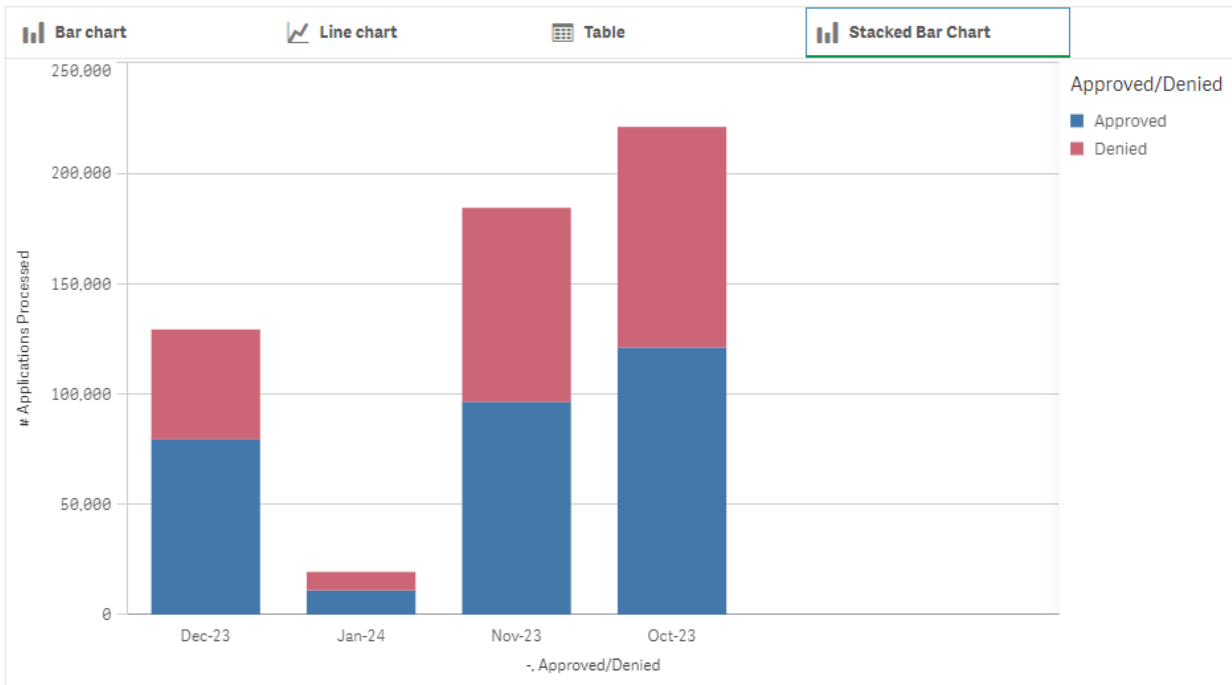
Office	Proce... Time	Program Combination	Re-Evalua... Due	Unit	Worker	Qlik ID
Yolo County - West Sacramento	97	CW, FS	2/29/2020	16 - West Sacramento BQ CalWORKs	57LS021604	4029717938



% CalFresh Applications Processed within 30 Days



% CalFresh Applications Processed within 30 Days



Statistical Summary Analysis – The data refreshes monthly for all Active Cases, Persons, and Expenditures and is available on the 2nd business day.



Month: Reset

All Active - Cases, Persons, Expenditures

Aug-22

<input type="text" value="Dimension"/>	<input type="text" value="Program"/>									
	Grand Total	AAP	CalFresh	CalWORKs	CAP1	Foster Care	General Relief	Kin-GAP	Medi-Cal	Refugee
# Cases	5,706,416	58,919	1,319,260	182,045	6,926	26,905	81,046	11,559	4,027,752	4
# Persons	10,842,064	54,199	2,741,319	537,217	7,886	35,890	103,386	12,960	7,348,933	354
Expenditures (Millions)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Cost Per Case	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

<input type="text" value="Dimension"/>	<input type="text" value="Program"/>									
	Grand Total	AAP	CalFresh	CalWORKs	CAP1	Foster Care	General Relief	Kin-GAP	Medi-Cal	Refugee
# Cases	5,706,416	58,919	1,319,260	182,045	6,926	26,905	81,046	11,559	4,027,752	4
# Cases - Prior Month	0	0	0	0	0	0	0	0	0	0
# Persons	10,842,064	54,199	2,741,319	537,217	7,886	35,890	103,386	12,960	7,348,933	354
# Persons - Prior Month	0	0	0	0	0	0	0	0	0	0
Expenditures (Millions)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expenditures (Millions) - Prior Month	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00