

MINUTES CRYSTAL REPORT USER GROUP

Meeting date: February 5, 2010

Location: ETR Marlborough

Attendees: Mike Doak, Linda Bass, Leslie Abramowitz, Joan Boucher, Maurice Iorio, Cynthia Kruson, Kathy Hoffman, Alison Boisver, April Carvalho, Linda Kent, Julie Papernik, John McCarthy, Joe Verla, Trish Steiblin, Matt Burke, Steve Trueman, Gail Rossitter, Maddrey Goode

Recorder: Julie Papernik

<< **Morning**>>

Introductions.

APRIL NEWS GROUP IDEA

- April Carvalho presented the idea of setting up a Crystal news group where people can share information, post questions and receive answers promptly. There would be a distribution list of all participants and the questions and answers would be forwarded to all. Also, this information would be saved so that participants could do a historical search for the answers they may need. The advantage of having our own group would be that we could forward questions that are specific to the MOSES database.
- Linda Bass suggested that we may be able to start our own Crystal forum using Tech Tips. Tech Tips is a website that offers a wealth of information regarding software and other tech subjects, including the option to post and search specific questions and answers. Joining is free and there are many resources available for public viewing but you may not be able to participate in all the forums. The owner of the forum decides who has access to their forum. Also, there is no capability to share documents unless you use BoxNet.
- Go to www.tek-tips.com. Use key word search to find the Crystal Reports forums.
- Les Abramowitz pointed out that everyone must remember to strictly adhere to the rules regarding confidentiality when using public forums.
- Linda Bass will find out the cost of starting a CRUG forum on the tek-tips website.
- If the cost for starting our own Tech Tips forum is prohibitive, Les Abramowitz wants to know who will volunteer to set up something on our own. Contact Les with any ideas on how to set up, run and maintain the user group.

PRESENTATION – PERFORMANCE DASHBOARDS

Linda Bass – creator and presenter.

- Performance Dashboards were created to show general and historical trends of performance including the number of customers served, demographics, outcomes, and information regarding the labor market.
- The Dashboards were recently posted on www.massworkforce.org under “resources”, “crystal project”, “dashboard”. The current document is named “Dashboard J” and will be updated in the near future as “Dashboard K”.
- The dashboard was designed to run using Crystal Reports XI. Earlier versions of Crystal Reports have limited charting capabilities and will not work appropriately for generating this dashboard.

Dashboard Demo:

Overview:

- The dashboards are based on OSSCAR reports.
- The content of the reports was selected by career center directors.
- There are 8 pages in each report.
- The cover page explains what is contained in the report and how to run it.
- There are five pages of various charts detailing trends, followed by two pages that contain explanations of each chart. The charts include:
 - It is important to use “MOSES2” as the driver.
 - It is advisable to use a colored printer when printing out the reports.
 - It is important to use Crystal Reports version XI.
 - It takes between 5-15 minutes to run this report. You may have to wait several minutes for the prompt screen to appear. Once this screen appears, you can select your parameters.

Prompts:

- The dashboard report can be run for different location levels, i.e. state-wide, by region, by career center and by each local office. Choose the level you want to look at by selecting from the roll-up box. Select “none” for everything else.
- It is advisable to save the report “with data” after downloading it from the Internet, ie choose “save data with report”. The report will run faster.
- Select the start date and the end date for your report. The report is designed to compare trends over several fiscal years; therefore, you may want to choose more than one fiscal year in order to fully utilize this report.
- The start date should always be July 1 of the fiscal year you choose and the end date should always be the last day of the month. If you do not choose the last day of the month as the end date, an alert will pop up reminding you to change the date. If you do not put the last day of the month in the prompt, the data reflected in the report will run through the last day of the month but your report heading which lists the date will not be correct. Example: if you choose December 30, 2009 as your end date, the data in the report will include all data through December 31, 2009 but your report heading will have December 30, 2009.

Difference between Version J and Version K (which will be posted in the near future):

In the job orders chart:

- In version J, there is a spike in 2009 and 2010. This is because the archive job orders table is used since job orders are archived after 14 month or sometimes earlier. Jobs are down-loaded from Job Central to our database and coded with virtual career center codes. Some were coded as Hurley and these appear as code “deleted” in the archive data base. These records may be duplicates
- In version K, the records that came up with “deleted” code and AJE user code, were taken out.

Question to the field: Why are some job orders listed as “deleted”? Are they deleted before they are archived? Please let Linda Bass know if you have any information regarding this matter.

This also affects the last two charts:

- Top ten industries
- Top ten occupational categories
- Job placements are recorded by location. At each location level, the count is distinct. If you take out jobs that were later deleted, the total amount of jobs will be reduced.

Job placements in OSSCAR are based on transaction dates; i.e. when the case worker entered the job not when the customer got the job. The “credit” for job placement goes to the all who provided service. In these dashboards, the count is distinct for each level.

- The statewide count will not include duplicates.
- Distinct count is not used in the denominator. Instead, the total of distinct sum in each category is used which is a larger number.
- “unspecified” category is listed. Questions were raised as to why there is an “unspecified” category.
- Code that Joan Boucher provided was used for “occupational skills”. Question was raised as to whether “education” was included. Linda Bass will check this.

Feedback and questions regarding dashboards:

- Is there a drill down option? Yes, some. Double click on the individual charts.
- Suggestion for Job Seeker Characteristic page: colors should match on the two charts.
- What if person got a job in a previous fiscal year. In Oscar, this doesn’t show up. In the dashboards, it does. How many jobs are back-dated and how significant is this? Same scenario every year, so this may not be statistically significant.

- Is it possible to run the dashboard by month across the fiscal years. For example, at the half year mark (Dec. 31) for all fiscal years, not just the current one? This cannot be done using this report.
- Wage data for local office – the more you drill down, the greater the reduction.

LUNCH

After lunch discussion about auto-enrollments in RES.

- Every customer that received a letter for CCS, was auto-enrolled into RES. If the person did not receive a letter, they were not auto-enrolled. This auto-enrollment started sometime around July, so many customers are now past the 90 day no service exit date. On general screen in Moses, the auto enrollment will show up as “notified to get RES”. Before auto-enrolling, the system will check if the person was already enrolled or enrolled and exited.

Discussion about ARRA Summer Youth Work Readiness Goal. Everyone who is done, should be exited. Older youth (18-24) may be served under a waiver until March 31, 2010. When the older youth who are under waiver leave, they should be exited. This may affect goal because of the denominator. By the end of March, the work readiness goal must be attained.

Build Report from scratch:

Objectives:

- How many people are enrolled in the RES program?
- How many of these people have not received services for 90 days or more?
- Prompt by Region
- Sort alphabetically by name in descending order
- Highlight yellow, the people that had no services for 90 days.

Tables used: CS Adhoc Table Title I; CS Applicant Main and CS Service Delivery Area Table.

This report will be available on CRUG website shortly.

At the next session, Linda Bass will review how to insert an alert into a report.

Next meeting date set for April 9, 2010.