# DDDWeb Business Object Report Development

- How to Create basic Waitinglist Report
- How to Execute the report
- How to Export the report





Step1: Login to Business Object info View URL: https://dddwebreports.hcpf.state.co.us:8443/BOE/BI

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Step2: To create a NEW report, click the Web Intelligence Tool icon. It is on the Home tab



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# Step 3: After opening the Web Intelligence –Click the 'New' report icon

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Step 6: The different types of packages are listed under the CCMS.unx. The Consumer Folder <u>have</u> contains all the consumer related information. The Agency List tab has all the agency related information. You can select any object or field -you need.

The Results Objects panel holds the data elements that you select to use on the report.

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Step 7: To create a Waitinglist Report, you can pull the information from the consumer folder/package

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Step 8: Select the objects to include on the report, then double click or drag and drop them to the Result Objects section.



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Step 9: Select the 'Waitinglist Status Code Desc' object and drag and drop it into the "Query filters" section. The first drop-down lists the operand/query filters available.



Step 10: In the Query Filters drop-down, select Equal to. From the second drop-down field, select the "Value(s) from list".

The resulting Query Filter is "Waiting List Status Code Description/is Equal To/Values from list"

On the "Waitinglist status code desc" object, select "Yes-Waiting" for your waiting list report.

#### 📋 Query Panel 🞁 Add Query 🔹 🖬 🐺 🖬 🖬 🖓 Run Query 🛛 🚽 Clo 🞁 Add Query 🔹 🔲 🤯 📺 🗈 🖓 Run Query 🛛 🗟 Close TXX 🔆 Universe outline 👖 Result Objects TXX ሂ Universe outline 🗾 Result Objects CCMS 🖠 Consumer D 🥑 Fuil Name 🔰 Medicaid D 🔰 Watilist D 🔰 Program Description 🔰 Watinglist Status Code Desc 🦸 Need Dentification Date 🥑 Time on Wating List 🔰 Ces Pro Date 🔰 Watinglist Level Code | CCMS 🕽 Consumer D 🔰 Ful Name 🔰 Medicaid D 🦸 Wattist D 🔰 Program Description 🦸 Wattingist Status Code Desc 🧳 Need Dentification Date 🗳 Time on Waiting List 🔰 Ces Pro Date 🔰 Waitingist Level Code Desc 40. 0101 Type here to fiter tree 48 ⊕∔⊕† Type here to filter tr 🖡 Funding Source Name 🤳 High Risk 🥑 Waitinglist Time Code Desc Funding Source Name Program Descriptic - 🥖 Agency CODE Active Consumer Program - 🥖 Program ID – 👂 Program Start Date 🛯 🥖 Program Code - 🖉 Program End Date Program Description 🎯 📍 📑 Selected Value(s) Waitinglist Status Code - 🔰 Active Consumer Program Waitinglist Status Code Desc > Yes-Waiting Waitinglist Status Code Desi 🛯 👂 Program Start Date Need Dentification Date Int Mgmt Removed 🛯 🥖 Program End Date Time on Waiting List 🛛 🥖 Waitinglist Status Code oternal Management Need Identification Month Removed 🛯 🥖 Waitinglist Status Code Desc - 🥼 Ces Pro Date Yes-Waiting Need Dentification Date - 🥖 Pro Mail Date Time on Waiting List – 🔰 Waitinglist Level Code Need Identification Month - 🔰 Waitinglist Level Code Desc - 🥼 Ces Pro Date 🗩 🎘 🃍 🔖 📰 🔁 🃍 📚 Query Filters - 👂 Funding Source ID Y Query Filters 🚽 🖉 Pro Mail Date Funding Source Name 🛯 🥖 Waitinglist Level Code - 🔰 Funding Source Code Waitinglist Status Code Desc Equal to Waitinglist Status Code Desc Equal to 🛛 🥖 Waitinglist Level Code Desc - 👂 Funding Source Unique Flag - 🔰 Funding Source ID Constant Funding Source Start Date Funding Source Name - 🖉 Funding Source End Date 🛛 🥖 Funding Source Code Value(s) from list 🚽 🖉 Other Funding 🔰 Time Line Date Funding Source Unique Flag Prompt Funding Source Start Date Waitinglist Time Code Funding Source End Date – 🔰 Waitinglist Time Code Desc Object from this query Data Preview 2 Refresh - 🖉 Other Funding Data Preview Refresh - 🔰 Time Line Change Date Result from another query (Any) Removal Reason Code 🗉 🥼 Time Line Date March 8, 2019 11:16:53 AM GMT-07:00 Removal Reason 🖉 🖉 Waitinglist Time Code - 🥖 Removal Date Enter search pattern **M** • - 🖉 Waitinglist Time Code Desc 🚽 🖊 Res Offer 🛯 🥖 Time Line Change Date 🚽 🖊 Res Offer Date 🛛 🥖 Removal Reason Code OK Cancel – 🔰 High Risk Primary Code 🛯 🥖 Removal Reason - 🔰 High Risk 🛛 🥖 Removal Date Q. Type a text to filter the values - Decision . Q. Type a text to fiter the values - 🥖 Res Offer 🔁 Query 1 4 1 1 📋 Query 1 🦯 4 ▷ 8 Last refresh date: (This document has never been refreshed.) Last refresh date: March 8, 2019 11:21:31 AM GMT-07:00

Step 11: After you have selected the Proper object (Report field information), you are ready to execute the Query . Click the "Run Query" button



### Step 12: Wait while the query runs

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Step13: The report output will be created based on the selection criteria. The columns are in the order they were set up in the Results Objects panel

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Step14: You are able to change the format. For example, change the report title by double clicking on "Report1" and changing the name . Change the alignment by using Format tab functionality

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Step 15: After executing the query, save the report on your "My Favorites" folder .

Click the save button. It will pop-up another window. You can save the report in the Name field. Click Save

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### Step 16: The report will be saved

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### Step 17: Execute/Run the report

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Step 18: Report will open. Click the "Refresh" icon. The report will be refreshed with latest data

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19. To Export the report to Excel version, click the Export icon, you can export the report in different formats. Select Excel ( visy) St.

Step20: Once you have selected Excel, the report export to Excel format In the bottom browser window, you can either Save or Open the spreadsheet for the report.

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Step 21: When you click open, the report will open in Excel format.

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