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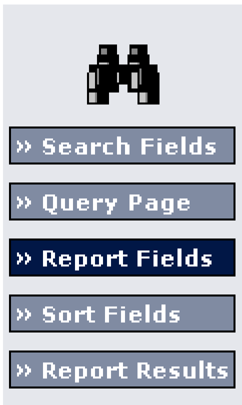
General Information

General Navigation

Beginning with version 3.0, a new navigation feature has been added to custom search and reports. On the left side of the screen you will see the following buttons:



This feature allows you to view where you are in the search and report process. These buttons are not hyperlinks and will not access any screens. It is a visual guide only. Buttons will highlight as you enter screens associated with that portion of the process. The example at the left has the Report Fields button highlighted.

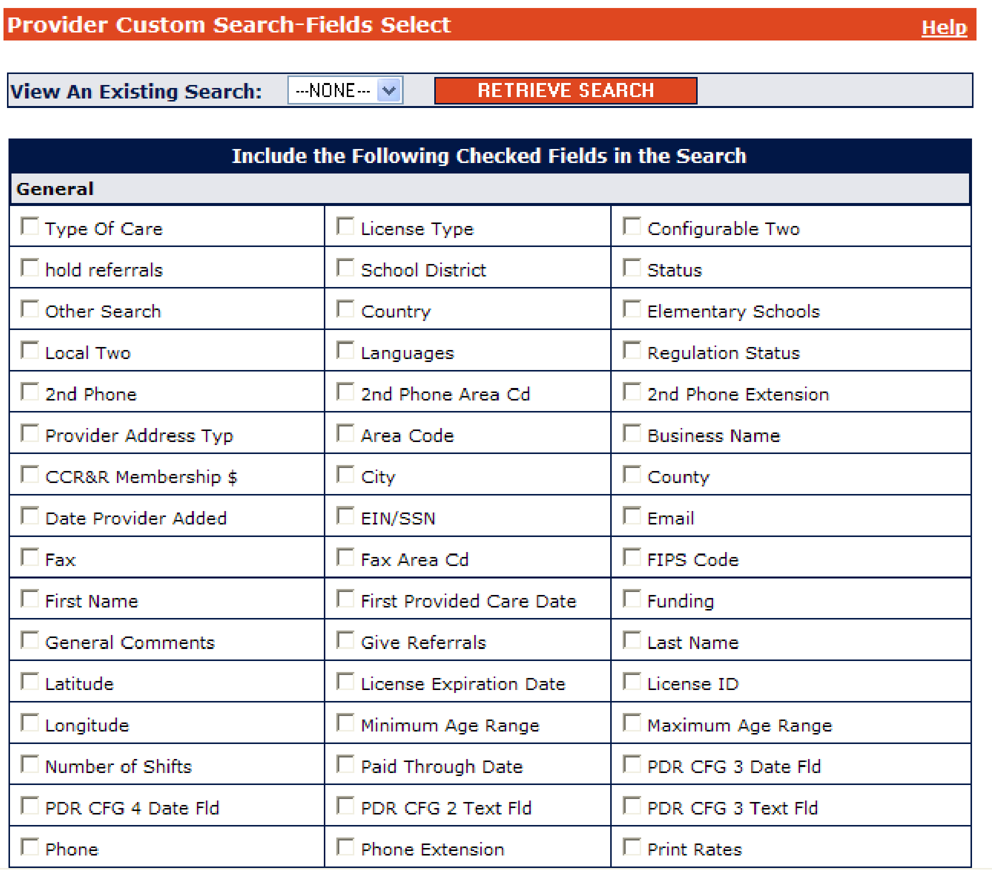
Navigation Note: Navigation is best done using your mouse. Just click the left mouse button on the field you want to enter and start typing. As an alternative, you can use the **<Tab>** key to move to the next field, or **<Shift><Tab>** to move back one field. In most cases, you want to select buttons that appear within the NACCRRA*ware* application. Using your browser's **<Back>** button or other browser buttons will not work reliably within NACCRRA*ware*, so their use is not recommended in most cases; in a few cases, however, you will need to use the **<Back>** button on the browser to return to a previous page; do so only when the Help pages instruct you to do so

NACCRRA*ware* collects a great deal of information on the clients, providers and community partners. Often times, users need to find a subset of information and print the same, or another, subset of data on the selected records. The Custom Search function allows the user to locate a subset of information and the Custom Reports allows the user to create a report of another subset of data based on specific needs at the time of the request.

Creating a Custom Search

The Custom search function allows a user to search the entire database for a specific piece of information. For instance, to locate how many Family Child Care homes are in a specific city is a simple custom search that will be developed in this section.
To complete a custom search, the user builds a query to find the desired information. The following steps describe the basic process to do a custom search of the database.

1. Click on Custom Search from the Main Menu.
2. Choose Provider (or client or community) from the drop down list.
3. On the Custom Search--Fields Select page (see example below), place a check mark in any combination of fields that correspond to the information requested. For instance, choose Type of Care, City and Address Type to search for all family child care in the city of Normal.

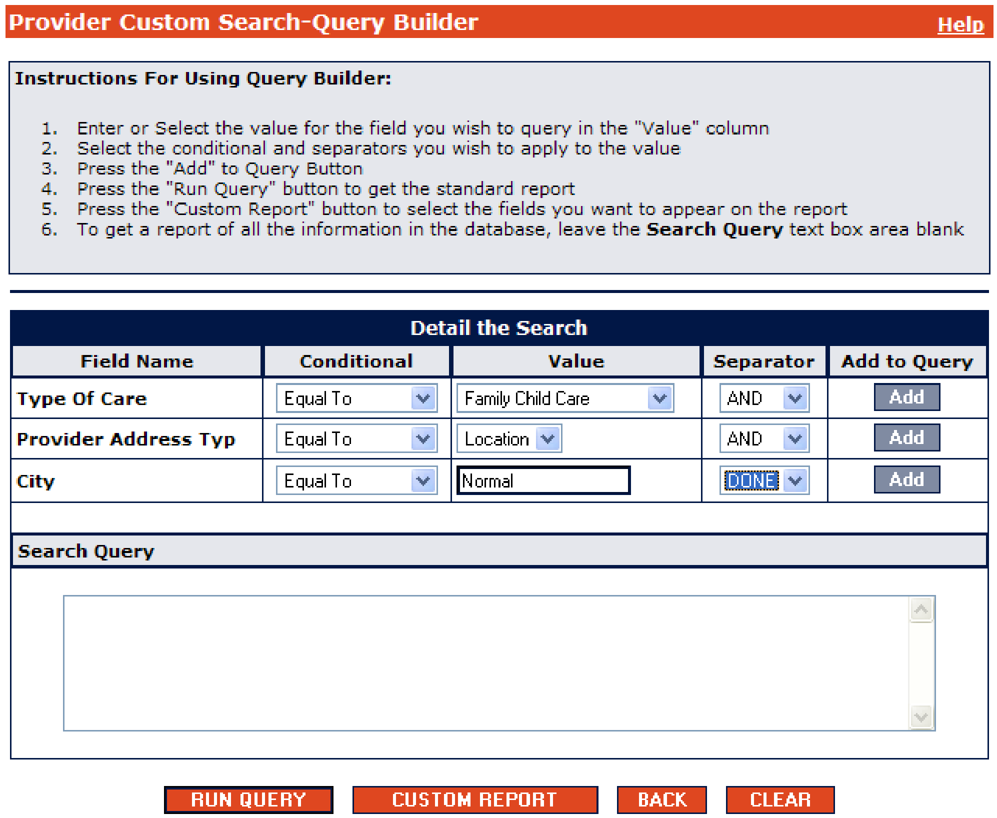


Provider Custom Search-Fields Select Help

View An Existing Search: --NONE-- RETRIEVE SEARCH

Include the Following Checked Fields in the Search		
General		
Type Of Care	License Type	Configurable Two
hold referrals	School District	Status
Other Search	Country	Elementary Schools
Local Two	Languages	Regulation Status
2nd Phone	2nd Phone Area Cd	2nd Phone Extension
Provider Address Typ	Area Code	Business Name
CCR&R Membership $	City	County
Date Provider Added	EIN/SSN	Email
Fax	Fax Area Cd	FIPS Code
First Name	First Provided Care Date	Funding
General Comments	Give Referrals	Last Name
Latitude	License Expiration Date	License ID
Longitude	Minimum Age Range	Maximum Age Range
Number of Shifts	Paid Through Date	PDR CFG 3 Date Fld
PDR CFG 4 Date Fld	PDR CFG 2 Text Fld	PDR CFG 3 Text Fld
Phone	Phone Extension	Print Rates

4. When all the desired fields for the search are selected, scroll to the bottom of the page and click **<Next>**.
5. On the Custom Search-Query Builder page (*see picture below*), build the search criteria. (*see **Using the Query Builder** in this section for more information on how to build a query*).



6. When the query is complete, click **<Run Query>**.
7. Once the query has completed, a new Custom Search Results window will open and a list of records that match the query will be listed in random order and the total number of records that match the criteria listed at the top.

Provider Custom Search Results

Total records: 61

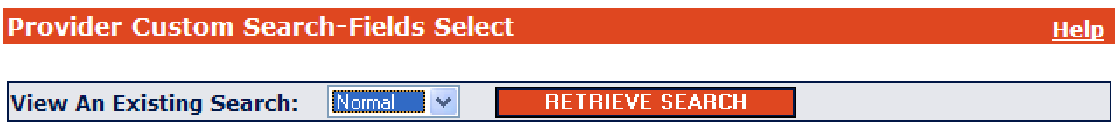
ID	Name	Business Name	Address	City	State	Zip	Primary Phone	Secondary Phone
3	Tanya O'Brien	NW-il.net	/	/	IL	61761	309	309
57				Normal	IL	61761	309	309
13	Connie Schultz	Singing Bow	422 North 300 East	Providence	UT	61761	435-792-3039	309
39	Harm* Do-No			Normal	IL	61761	309	309
34	Brook Herrera		3910 S Rural Road	Tempe	AZ	85282		
28	Lorraine Leavitt	Child Care Finder, Southwest Wyoming Region	P.O. Box 4445	Marbleton	WY	83113	307-276-3378	307-276-5406

Saving a Search

If the search will be run on a regular basis, the query can be saved for retrieval at a later time.

1. To save the custom search query, close or minimize the Custom Search Results window.
2. In the Search Name box, type a name that will help future users identify the search.
3. Click **<Save Search>**

4. The response will be a message stating the search has been saved and to return to the Custom Search screen.
5. On this page it is possible to retrieve the saved search by clicking on the down arrow to the right of the **View An Existing Search** field.



6. Once the desired Existing report is selected and showing in the **View An Existing Search** box, click **<Retrieve Search>**.
7. The field names previously chosen will appear checked in the boxes below.
8. Scroll to the bottom and click **<Next>**.
9. The query builder box will be filled with the previously saved query.
10. To modify any data, a user can place the cursor in the query box and manually change items, such as dates or city names.
11. Click the **<Clear>** button below the query box to completely clear the query and begin rebuilding.
12. To run the search, click **<Run Query>**.
13. The Custom Search-Report Results page will appear, and a new window Custom Search Results will open with the search results.
14. If the random list and/or the number of matches is not necessary to view and the user wishes to run a report on the data, click **<Custom Report>** to go immediately to the Custom Report process.
15. To build a report after viewing the search results, close or minimize the Custom Search Results Window and click **<Build Custom Report>**to continue with the report process.
16. To view or modify a record on the report, from the Custom Search Results page, click on the desired record and it will open in the window below, minimizing the Custom Search Results screen.
17. To return to the search results, locate the Custom Search Results page in the open windows on the bottom of the page and maximize it.
18. Click another record to view or modify the next record.

Once a record is chosen from the Custom Search Results list, the search is out of the system memory and the user must re-run a search to regain all results, or to run a report of the search results.

Deleting Saved Searches

Once a search has been saved, it will appear in the list of Saved Searches. If a search is no longer needed, it may be deleted by using the Delete Save Search function.

1. To delete a saved search, go to Custom Search and choose client, provider or community.
2. Beside View Existing Search, open the drop down box to choose the search which needs deleted.
3. Once the correct search is highlighted, click **<Delete Search>**.

WARNING: The user will not receive a confirmation that the search is being deleted. Once the search is deleted, it is gone and may not be retrieved.

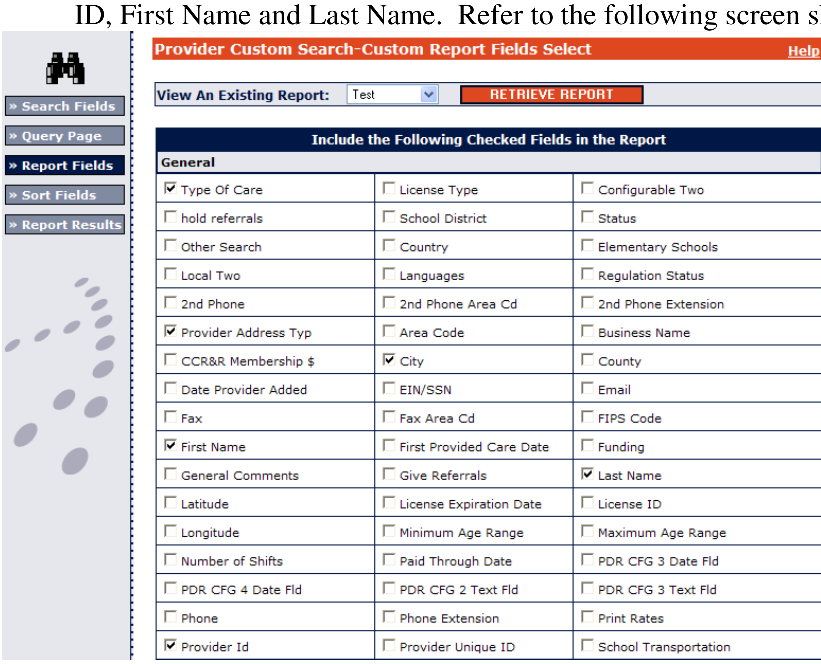
4. The Custom Search Client Message page appears stating the custom search was successfully deleted from the database. It also provides links to return to reports.

Creating a Custom Report

In NACCRRA*ware,* it is possible for a user to create a custom report of data to print or to export to another program. The Custom Report allows R&Rs to choose virtually any fields from within NACCRRA*ware,* thereby enabling the user to create different reports for different needs and requests. To run a report and then export any number of fields into an ASCII text file, use the following steps. The same general steps are used for Provider, Client and Community. The directions use the Provider records, but the process is the same for all three areas.

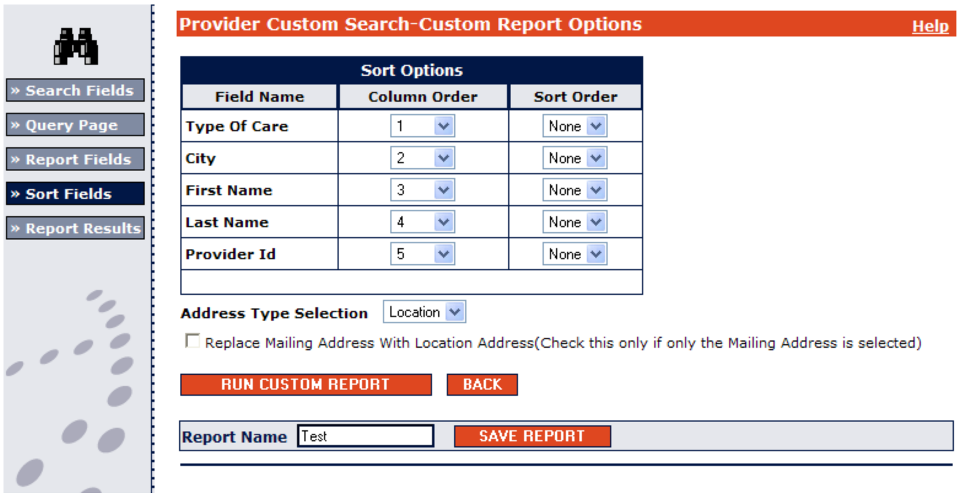
To Create a Custom Report/Export

1. Click on Custom Search on the Main Menu
2. Choose Provider (or client or community) from the drop down list.
3. On the Custom Search Field Select screen, select the fields desired as criteria for the subset of records to report or export. For instance, choose Type of Care if only Family Child Care information is desired. If all records are desired, scroll to the bottom and choose **<Next>**.
4. When all the fields for the search are selected, scroll to the bottom of the screen and click **<Next>**.
5. On the Query Builder page, build the search criteria. For instance, Type of Care equal to Family Child Care (2). When the query is complete, click **<Run Query>**.
6. Running the query will move to the Custom Search-Report Results, and then a new window called Provider Custom Search Results will open.
7. Minimize or close the Provider Custom Search Results screen and click **<Build Custom Report>**.
8. On the Custom Report –Custom Report Fields Select page, select the fields needed for the report or export. For instance, choose Type of Care, City, Provider Address Type, Provider ID, First Name and Last Name. Refer to the following screen shot.



9. When all the desired fields have been chosen, scroll to the bottom and click **<Next>**.

10. The next screen, NACCRRAware-Custom Report Options gives several choices. All choices are shown below.



- **Column order** determines in what order (left to right) the information will shown on the report and the export. If unchanged, the default will be as presented on screen.
- **Sort** allows the user to sort by up to three items. If unchanged, the results will be randomized.
- **Address Type Selection** is used to select which address field will show on the report or export.
- **Mailing**--If the "Mailing street" field is chosen on the Custom Report Field selection screen, a check box will appear with the statement "**Replace Mailing Address with Location** (Check only if the Mailing Address is selected)." Check the box to have the location address inputted in the data field if no mailing street address is present.

11. After all desired options are selected, click **<Run Custom Report>**.
12. The Custom Report-Results screen appears, and another window with the Custom Search-Custom Reports Results page opens on top. At the top of the Custom Search-Custom Reports Results page, total records for the report are shown.

See example screen below:

Custom Report Results				
Type Of Care	**City**	**First Name**	**Last Name**	**Provider Id**
Family Child Care	Normal			57
Family Child Care	Normal	Ben	Stiller	66
Family Child Care	Normal	Teresa	Whiting	20
Family Child Care	Normal	gayle	broberg	15
Family Child Care	Normal	Test	Provider	8
Family Child Care	Normal	Test	Provider	1
Family Child Care	Normal			59
Family Child Care	Normal	NW-IL.net TEST	PROVIDER	2

13. If a report is all that is desired, print this page (by clicking on the printer icon in the browser toolbar) or copy and paste the information into another program like Microsoft Excel to modify margins or add headers and footers.
14. To export this data into an ASCII text file, close the Custom Search-Custom Reports Result window and click **<Create File>** on the Custom Search-Report Results page.
15. The Custom Search Provider Message page opens.
16. Right click on the **Click here** link. See example of message below:

Custom report file successfully created!
Right Click on the 'Click Here' link and select the save target as option to save to your local drive

Click here to download file.

Click here to go back.

Right click on **Save Target As**….

17. A dialog box will appear. Browse to the appropriate directory to save the file and give it a name that will identify it in the directory. The default name is the user ID.
18. For mailing labels and mail merge, the file must be saved as a specific name. For instance, the file must be saved as provider_address_data.doc for provider mailing labels.

Saving a Report

If the report will be run on a regular basis, the report can be saved for retrieval at a later time. Saved reports will save the chosen fields, the column order and the sort order for retrieval at a later time.

1. To save the custom report, close or minimize the Custom Search-Custom Report Results window.
2. In the Search Name box, type a name that will help future users identify the search.
3. Click **<Save Report>**
4. The response will be a message stating the report has been saved and to return to the Custom Report Options screen.
5. On the Custom Report page it is possible to retrieve the saved report by clicking on the down arrow to the right of the **View An Existing Report** field.
6. Once the desired Existing report is selected and showing in the **View An Existing Report** box, click **<Retrieve Report>**.
7. The field names chosen previously will appear checked in the boxes below.
8. Scroll to the bottom and click **<Next>**.
9. The Sort Options box will be filled with the previously saved column and sort options.
10. It is possible for a user to modify the column or sort options by manually changing the desired items.
11. To run the report, click **<Run Custom Report>**.
12. The Custom Search- Report Results page will appear, and a new window Custom Search-Custom Report Results will open with the search results.

Deleting a Saved Report

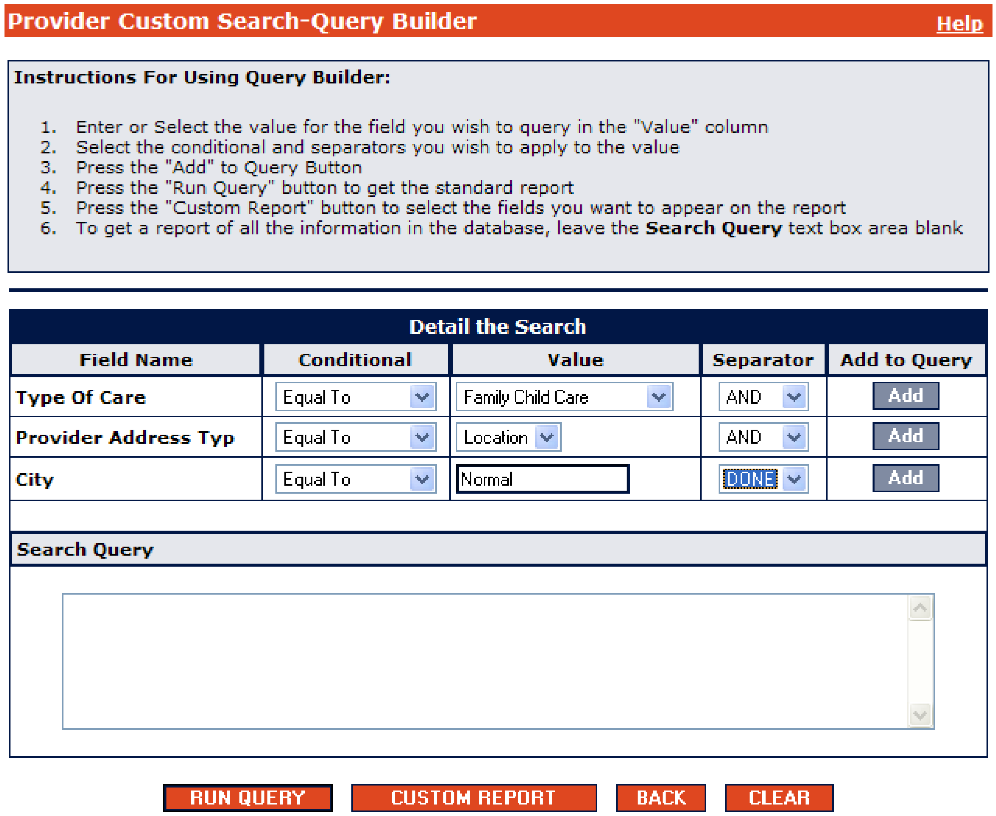
Once a report has been saved, it will appear in the list of Saved Reports. If a report is no longer needed, it may be deleted by using the Delete Save Report function.

1. To delete a saved report, go to corresponding Custom Report area.
2. Beside **View Existing Report**, open the drop down box to choose the report which needs deleted.
3. Once the correct report is highlighted, click **<Delete Report>**.

WARNING: The user will not receive a confirmation that the report is being deleted. Once the report is deleted, it is gone and may not be retrieved.

4. The Custom Search Client Message page appears stating the custom report was successfully deleted from the database. It also provides links to return to reports.

Using the Query Builder



Instructions for using the Query Builder is located at the top of the screen when you access the Query Builder. The **Detail the Search** section displays the fields you had selected on the Custom Search Screen. Following the **Field Name** column is the **Conditional**. Select the appropriate conditional from the drop down list. The next column is the **Value** column. Either select a value from a drop down list or type in a value if it is a text field. Following the Value column is the **Separator**. The separator separates the values in your query with an "**AND**" or "**OR**". After building each statement, click the **<Add>** button to add the statement to the Search Query box below. To finish or complete a Query, select the separator "**DONE**" and click the **<Add>** button. ***Note: You can click inside the Search Query text box and make changes or add parenthesis.***

<RUN QUERY> will run the query in the Search Query Box and will bring up another window showing your search results.

<CUSTOM REPORT> will take you the Report fields where you can select fields to use in a report and build a custom report.

<BACK> will take you back to the Custom Search fields where you can select or deselect fields in your custom search.

<CLEAR> will clear all data in the Search Query box. If you want to clear all information from the Search Query box and start over with a new query, use this button.

Using Conditions Correctly

The following is a basic description of Search Conditions used in NACCRRA*ware*.

- **Equals To** will find all responses Equal to the value. Example: **Type of Care equal Family Child Care** will locate all Family Child Care programs.
- **Not Equal To** will find all responses where the value isn't equal to the value chosen. Example: **Type of Care does not equal to Family Child Care** will locate Child Care Centers, School age child care and Preschools.
- **Contains** will find all responses that contain the value, regardless of the position of the value in the response. Example: **Location City Contains SON** will locate the cities Sonata, Jackson, and Johnsonville.
- **Greater Than** will find all responses greater than the value. Example: **Total Vacancies greater than 1** will find records with 2 or more total vacancies. In NACCRRA*ware,* this process is designed for date and numeric values only.
- **Greater Than or Equal To** will find all responses greater than or equal to the value. Example: **Total Vacancies greater than or equal to 1** will find records with 1 or more total vacancies. In NACCRRA*ware,* this process is designed for date and numeric values only.
- **Less Than** will find all responses less than the value. Example: **Total Licensed Capacity less than 10** will find all records with 9 or less total Licensed Capacity. In NACCRRA*ware,* this process is designed for date and numeric values only.
- **Less Than or Equal To** will find all responses less than or equal to the value. Example: **Total Licensed Capacity less than or equal to 10** will find all records with 10 or less total Licensed Capacity. In NACCRRA*ware,* this process is designed for date and numeric values only.

Using Separators Correctly

Combining "AND" and "OR" in a statement can generate mixed results. If you build a query using both "AND" and "OR", you will need to group the values together to separate the query into smaller queries. Using the parenthesis () to separate statements within the query divides the values into logical parts. After building your query, click inside the Search Query box where you need to enter the parenthesis and manually enter them before clicking **<Run Query>**.

When to Use Parenthesis

<u>All queries that combine "AND" and "OR" statements requires the use of parenthesis.</u>

For example: If you build a query around Type of Care and Date Provider Added, your query might be:

Type Of Care Equal To "Family Child Care" OR Type Of Care Equal To "Child Care Center" AND Date Provider Added Greater or Equal "01/01/2003"

If you clicked **<RUN QUERY>** at this point, NACCRRAware will generate a list of all family child care providers and add that to all the child care centers added on or after January 1, 2003. You need to add parenthesis to the query to separate the query into (Type of Care) and then date added:

(Type Of Care Equal To "Family Child Care" OR Type Of Care Equal To "Child Care Center") AND Date Provider Added Greater or Equal "01/01/2003"

Please Note: The parenthesis must be placed directly before the first letter of the first value affected and directly after the last quotation of the last query value in the string If you do not get the parenthesis entered correctly, you will get a number of error messages depending upon what was entered incorrectly.

<u>Examples of NACCRRAware errors when parenthesis are used incorrectly:</u>

The number of parenthesis () do not match, check the Query Search box and try again.

Reason: The query was missing one of the ().

Syntax error or access violation: You have an error in your SQL syntax

Reason: Incorrect placement of the (). Check your placement and try again.

Error in Selected Field Name - Unable to find Selected Field Name in the database

Reason: Incorrect placement of the (). Check your placement and try again.

Unable to parse Search Query Command, invalid character after Conditional operator

Reason: Incorrect placement of the (). Check your placement and try again.

Tips on Searching in NACCRRAware

1. When using date fields in the Query Builder, be sure to type in all four digits for the year. Example: 01/01/2003 not 01/01/03
2. When searching on address fields such as Street Address, City, State, ZIP, you have to place a check in the **Provider Address Type** or **Client Address Type** field to specify if it is a Location or Mailing address. By placing a check in the field, the field will show up in the Query Builder. There you can choose either the Location address or Mailing address. Otherwise, it will pull from both.
3. Anytime you search on the tables in Shifts, you need to select the corresponding Age Group Field to search on a particular age.
   a. To search on the **Rates Table**, use the **Rate Age Group** field. This will allow you to choose the age group (example: 6 weeks to 14 months) in the Query Builder to search.
   b. To search on the **Population Table**, use the **Population Age Group** field to search on a particular Age Group in those tables. (example: 6 weeks to 14 months) in the Query Builder to search.

Example of Query Builder Search using Rate Age group field:

Detail the Search				
Field Name	**Conditional**	**Value**	**Separator**	**Add to Query**
Full Time Weekly Rate	Greater Than	100.00	AND	Add
Rate Age group	Equal To	6 Weeks to 14 Months	AND	Add

4. Query statements that use both "**AND**" and "**OR**" need parenthesis to operate correctly. (More information on this can be found in this manual section under “When to Use Parenthesis”).
5. Use the Action Log Report under Standard Reports when running a query on any action log item. It will give accurate results whereas running a query on Action Log items under Custom Search will not. (*It is the nature of the program not a bug*.)

Provider and Client Custom Report Examples

New Providers
This is a sample custom report built to show new providers and some information regarding the new providers such as capacity, type of care, date added (status date) and regulation status. This report can be saved to run monthly, quarterly, etc.

Sample Custom Search for this report:

Status Date Greater or Equal "01/01/2003" AND Status Date Less or Equal "03/31/2003"

(This will show all providers added in the 2nd quarter.)

Provider Custom Search-Custom Report Options

Sort Options

Field Name	Column Order	Sort Order
Type Of Care	6	None
Regulation Status	7	None
Business Name	4	None
City	5	None
First Name	2	None
Last Name	3	None
Provider Id	1	None
Status Date	9	1
Total Licensed Capacity	8	None

Sample Results:

Total Records for this Report:10

Custom Report Results

Provider Id	First Name	Last Name	Business Name	City	Type Of Care	Regulation Status	Total Capacity	Status Date
606	LESLIE	REAM		SAYBROOK	Family Child Care	Regulated/Licensed	5	1/6/2003
601	MAGGIE	PARKER		BLOOMINGTON	Family Child Care	Regulated/Licensed	7	1/8/2003
597	KARIN	INSALATA		BLOOMINGTON	Family Child Care	Regulated/Licensed	6	1/8/2003
603	PAM	LARSON		PONTIAC	Family Child Care	Regulated/Licensed	7	2/13/2003
609			FARMER CITY ECE	FARMER CITY	(CCC)ISBE Pre-K Only	Exempt	25	2/14/2003
610			FARMER CITY PRE-K	FARMER CITY	(CCC)ISBE Pre-K Only	Exempt	50	2/14/2003
595	TINA	HOYLE		NORMAL	Family Child Care	Regulated/Licensed	6	2/18/2003

Note: Sorting by the Status Date will put the records in order by Status Date

No Referral Providers

This report shows providers who are marked as "no referral". These providers should also have a reason for no referral under the Referral Status fields. This report also shows the providers phone number, referral status reason and next contact date.

Sample Custom Search for this report:

Gives Referrals Equal To "No"

Provider Custom Search-Custom Report Options

Sort Options		
Field Name	**Column Order**	**Sort Order**
Referral Status	7	None
Area Code	5	None
Business Name	3	None
City	4	None
First Name	1	None
Last Name	2	None
Next Contact Date	8	None
Phone	6	None

Sample Results:

Total Records for this Report:21

Custom Report Results

First Name	Last Name	Business Name	City	Area Code	Phone	Referral Status	Next Contact Date
Kimberly	Valentine		Paxton	217	379-6015	No Survey/Intake , B - Not Contacted	
Deanne	Perring		Bloomington	309	664-0736	Requested No Referrals	
Sandra	Goembel		Strawn	815	688-3440	No Survey/Intake , B - Not Contacted	
Shawn	Snider		Paxton	217	379-4523	No Survey/Intake , B - Not Contacted	
*Paula	Northcutt		Bloomington	309	662-7803	CCR&R No Referral	
Louise	Sprawls	Blessed Day Care	Bloomington	309	829-4087	Phone Disconnect , Accepts Advance Calls	

Fee Paying Clients
This report shows clients who are marked as "fee paying" and have paid their fee. It gives the client's First and Last Name, City, Billing, Fee Amount, Payment Method, Status Date (Date of referral) and Date Payment was received. This report can be run monthly, quarterly or annually.

Sample Custom Search for this report:

Client Type Equal To "Fee Paying" AND (Payment Method Equal To "Cash" OR Payment Method Equal To "Check" OR Payment Method Equal To "Credit Card")

Note: If you have some additional local fields configured in Payment Method that would show payment, you will need to include these in this type of search.

Client Custom Search-Custom Report Options

Sort Options		
Field Name	**Column Order**	**Sort Order**
Billing	4	None
Payment Method	6	None
City	3	None
Fee Amount	5	None
First Name	1	None
Last Name	2	None
Payment Received Date	8	None
Status Date	7	1

Sample Results:

Total Records for this Report:14

Custom Report Results

First Name	Last Name	City	Billing	Fee Amount	Payment Method	Status Date	Payment Received Date
BRENDA	HUBER	NORMAL	Initial Billing	30.00	Check	7/9/2003	7/21/2003
JEANETTE	BLISS	CLINTON	Initial Billing	30.00	Check	7/15/2003	7/22/2003
CARRIE	BANGERT	SHIRLEY	Initial Billing	10.00	Check	7/17/2003	3/20/2003
KAREN	KELLY	NORMAL	Initial Billing	30.00	Check	7/22/2003	4/17/2003
LINDA	MARTIN	CARLOCK	Initial Billing	30.00	Check	7/23/2003	11/1/2002
BRIGETTE	HARLAN	NORMAL	Initial Billing	30.00	Check	7/24/2003	7/30/2003
MARIE	DITCHEN	NORMAL	Initial Billing	10.00	Check	7/28/2003	6/16/2003
DONNA	ZVONAR	BLOOMINGTON	Initial Billing	30.00	Check	7/31/2003	8/6/2003

Non-Fee Paying Clients
This report shows clients who are marked as "fee paying" and have not paid their fee. It gives the client's First and Last Name, City, Billing, Fee Amount, Phone Number and Status Date (Date of referral). This report can be run monthly, quarterly or annually.

Sample Custom Search for this report:

Client Type Equal To "Fee Paying" AND Payment Method Not Equal "Cash" AND Payment Method Not Equal "Check" AND Payment Method Not Equal "Credit Card"

✎ **Note: If you have some additional local fields configured in Payment Method that would show payment, you will need to include these in this type of search.**

Client Custom Search-Custom Report Options

Sort Options		
Field Name	**Column Order**	**Sort Order**
Billing	6	None
Area Code	4	None
City	3	None
Fee Amount	7	None
First Name	1	None
Last Name	2	None
Phone	5	None
Status Date	8	1

Sample Results:

Total Records for this Report:13

Custom Report Results

First Name	Last Name	City	Area Code	Phone	Billing	Fee Amount	Status Date
RAYNA	COFFMAN	WAPELLA	309	287-4300	Initial Billing	10.00	7/1/2003
BRADLEY	DAVIS	HEYWORTH	309	473-9992	Initial Billing	10.00	7/1/2003
JULIE	TOOHILL	HEYWORTH	309	473-2987	Initial Billing	20.00	7/17/2003
TERESA	WIEGAND	FARMER CITY	309	928-3064	Initial Billing	30.00	7/17/2003
LISA	SHELTON	BLOOMINGTON	309	663-1280	Initial Billing	10.00	7/17/2003
ANN	HAUGO	LEROY	309	962-9225	Initial Billing	30.00	7/23/2003
STACEY	MCMILLAN	WAPELLA	217	234-9353	Initial Billing	10.00	7/24/2003
TONYA	AN	BLOOMINGTON	309	446-9533	Initial Billing	10.00	7/28/2003
TRACY	PARSON	BLOOMINGTON	309	820-8576	Initial Billing	10.00	8/4/2003