

Overview

Several types of reports are available in SMART FACTS (SF) to Site and Program Managers. Reports only show data that has already been entered in SMART FACTS, so for accurate and up-to-date data entry it is essential for each SMP to “report as you go”.

This job aid provides:

- instructions to install Crystal Reports software
- an overview of reports, letters, forms and more in SMART FACTS
- the basic steps to access reports
- detailed instructions on how to access and export flat file reports
- a list of report resources

Installing and Viewing “Crystal Reports” Software

Crystal Reports software is used to view reports in SMART FACTS, and must be installed on your computer prior to viewing reports. To install Crystal Reports, take these steps:

Step	Action
1	Log in to SMART FACTS and click Support in the lower right corner.
2	At the top next to Having trouble viewing Crystal reports? click View Help , then click Open and Run .
3	If you need assistance having the Crystal Reports software installed, contact Social Solutions: 866-732-3560, extension 2 / support@socialsolutions.com

Tip: When viewing reports, only one Crystal Report can be opened at a time.

Types of Reports in SMART FACTS

Report	Description	SMART FACTS Path
Reports on the Letters, Forms & Reports page	Reports are sorted by category: Complex Issues, Outreach & Education, Volunteers, OIG Report, Query reports.	Reports > Letters, Forms & Reports
Query Reports	Provide aggregate data for the specific information indicated in the name of each report.	Reports > Letters, Forms & Reports > Query Reports
Flat File Reports	Provide detailed data which can be saved into an Excel document in order to search, sort, or otherwise manipulate the data.	Reports > Letters, Forms & Reports > Complex Issues / OIG Report
OIG Report	SMP performance measures reported to the OIG include data about activity in three areas: outreach & education, volunteers, complex issues & referrals.	Reports > Letters, Forms & Reports > OIG Report
ETO Reports	View aggregate data for each field of data entry for each program (i.e. # of simple inquiries resolved).	ETO Reports <i>Tip: Click “See Details”</i>
“My Work” Reports	Use the My Work menu to review and edit your own data; use the Program Administration menu to review and edit data for staff.	My Work or Program Administration

Letters, Forms, and more in SMART FACTS

In addition to the reports that are found in SMART FACTS, several other items are available on the “Letters, Forms & Reports” page.

Item	Description	SMART FACTS Path
Letters and Forms	Several letters and forms are also available on the letters, forms & reports page: Simple Inquiry form, Outreach Tracking form, Release of Information cover letter and form, etc. Letters and forms can be used as-is or saved and edited by each SMP.	Reports > Letters, Forms & Reports > <i>(by topic)</i>
Contact Lists	Complex issues referrals contact lists are subject to change. For confidentiality purposes, some contact lists are housed in SMART FACTS; others are available on the Center’s website. All contact lists are also distributed by email to the AoA-SMP listserv.	Reports > Letters, Forms & Reports > Complex Issues
Certificates	Two SMP Foundations Training certificates are available, for participants who attend and/or complete training. See the Center’s website for more information: www.smpresource.org > Resources for SMPs > Training > SMP Foundations.	Reports > Letters, Forms & Reports > Volunteers

Accessing “Letters, Forms and Reports” in SMART FACTS

Many types of reports can be accessed from any program in SMART FACTS using the Reports menu. Additional menus for ETO reports and My Work are available in all programs but complex issues & referrals. Sub-topics within each menu vary based on the program. To access letters, forms and reports, take the following steps.

Step	Action
1	Select the appropriate program, as needed.
2	Select the main menu option desired (i.e. Reports or ETO Reports)
3	Select the menu sub-topic as needed (i.e. Letters, Forms & Reports).
4	<p>On the Letters, Forms & Reports page, scroll down to the find the desired report by topic. Click the link to access the report and follow the prompts.</p> <ul style="list-style-type: none"> • Query reports: Select the date parameters from the drop down-menu (i.e. all dates greater than a certain date, all dates between two certain dates, etc.). Then enter the applicable date or dates and click Continue. • Flat file reports: See p. 3 of this job aid. • Other reports (i.e. OIG report): Enter the desired date range using the drop-down boxes or the links to select this month, previous month, this quarter, previous quarter, or year to date, then click Submit. • Forms: Open the file to view and/or print it, or Save it to your desktop to update and use as desired. • Tip: <i>If saving, use the drop-down options to save the form to an appropriate area of your computer.</i>

Printing Reports


To print letters, forms and reports from SMART FACTS, simply click on the printer icon and select the printer (see graphic in step #2 below), and print as usual.

NOTE: This option can also be used to “print” as an Adobe Acrobat PDF file.

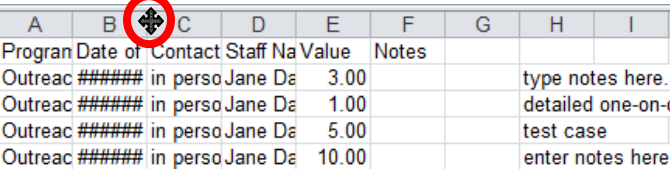
Exporting / Saving Reports

To export and save reports from SMART FACTS, take the following steps.






NOTE: For instructions on how to save Flat File report data, see page 4.

Step	Action
1	Access the report by following the steps above.
2	 Click the “Export” button (envelope graphic), in the upper left corner of the screen next to the printer icon.
3	Select the desired File Format from the drop-down box (i.e. Word, Excel, Acrobat Adobe / PDF), and click Browse . NOTE: Excel (data only) is recommended for ETO reports because it offers the options of sorting, filtering and modifying for easy reviewing.
4	Save the document as usual. (Select the location from the Save in drop-down menu, type the file name, and click Save .)
5	The location and file name will appear in the File name field. Click OK .
6	A message will appear briefly: “Exporting Report”. Wait until the second message appears: “The report has been exported. Would you like to open it?” Select Yes to open and view the report now, or select No to view the report later from your computer.

Modifying ETO Reports

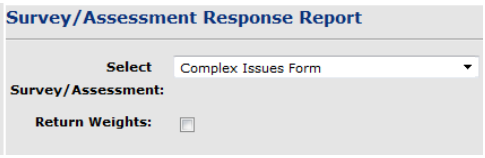
Step	Action
1	Be sure the report is saved as Excel (data only) and open.
2	At the top where the letters are at the top of the page, double click between the columns to expand the column so you can read all the text.  Proceed to do this between all of the columns.
3	Delete any empty rows or columns by clicking on the letter or number at the top or left, right clicking and selecting Delete .
4	Click on the letter above the Value column. It highlights the column.

Modifying ETO Reports, *continued*

<p>5</p>	<p>Select Sort & Filter from your top menu bar. For Microsoft 10 it is under the Home tab. For earlier versions of Microsoft, the sort buttons are right on the menu bar. Select either one of these  or  to sort your list.</p> <p>NOTE:  This is A to Z sorting or smallest numbers to largest.</p> <p> This is Z to A sorting or biggest numbers to smallest.</p>	
<p>6</p>	<p>A warning will appear stating <i>Microsoft Excel found data next to your selection. Since you have not selected this data, it will not be sorted. What would you like to do?</i> Select Expand the Selection then click Sort.</p> <p>NOTE: This will sort by the column you selected but also keep the rest of the data with the row as it is sorted.</p>	

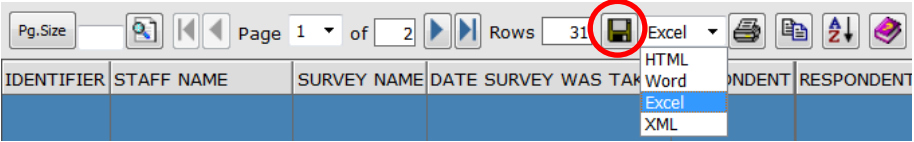
Accessing Flat File Reports

Step	Action
1	In the Reports menu, click Letters, Forms, & Reports .
2	Scroll down to select the appropriate flat file report, i.e.: <ul style="list-style-type: none"> • Complex Issues, Forms and Reports section <ul style="list-style-type: none"> ○ Complex Issues Flat File Report • OIG Report section <ul style="list-style-type: none"> ○ OIG Report Flat-File or OIG Report Flat-File by User
3a OIG Report Flat-File	To access the OIG report flat-file, enter the appropriate date range and click Submit . Once the report is open, scroll to the right as needed to view additional fields of information.
3b Complex Issues Flat File Report	In the Select Survey / Assessment drop-down list, select Complex Issues Form and click Continue . On the following screen, enter the date range and click Submit .




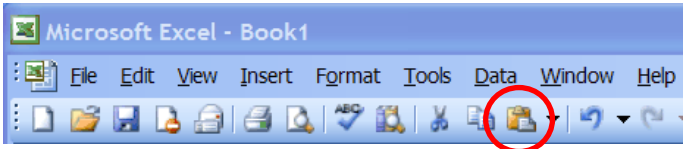
Saving Flat File Report Data

Step	Action
1	Access the flat file report by following the steps above.
2	In the SMART FACTS flat file report, select the desired file format that you would like it saved in then click the Save icon.
3	A pop up appears asking if you would like to open or save it. Select Open to work with it now or select Save to save it to your computer for later use.



Exporting Flat File Data When Saving Doesn't Work

NOTE: *If saving the file does not work it can be exported. Use the following steps to export data to an excel spreadsheet.*

Step	Action
1	If you are unable to use the save icon, follow the steps below to export.
2	In the SMART FACTS flat file report, click the copy grid to clipboard icon (to the right of the printer icon). 
3	A message appears: "Grid data copied to clipboard". Click OK.
4	Open a new Excel document. <i>Tip: Start Menu > Programs > Microsoft Office > Excel</i>
5	In the Excel document, click the Paste icon. The data is pasted into the Excel document. 

Resources: Reports

Resource	Purpose	Access Instructions
SMART FACTS Operations Manual	Reports and data entry in SMART FACTS	www.smpresource.org > Resources for SMPs > SMART FACTS > SF Manual
SMART FACTS Training	Training recordings and corresponding handouts on reports and other SMART FACTS topics	www.smpresource.org > Resources for SMPs > SMART FACTS > SMART FACTS Training
OIG Reports Training	Recordings of OIG Report webinars, and related materials	www.smpresource.org > Resources for SMPs > Training > OIG Reports Training
OIG Report Data Accuracy Checklist	Checklist for cross-checking OIG report data in SMART FACTS	www.smpresource.org > Resources for SMPs > Training > OIG Reports Training
The SMP Resource Center (The Center)	Policy guidance & answers to questions regarding SMART FACTS data entry and SMART FACTS Operations Manual	Email: sengelken@smpresource.org , hflory@smpresource.org or gpaulson@smpresource.org Call: 1-877-808-2468