eLINK Guidance Document

Queries and Reports

June 2013

> **Purpose:** This document provides basic guidance on how to produce standard queries and reports, as well as details about available reports and queries.

Quick Reports

The **Home** page contains a section called **Quick Reports**. Reports accessed through this feature are standard, grant-based reports, e.g. data in the report is only for the grant selected. These reports are all generated in Microsoft Word so that they can be reformatted for various uses outside of eLINK. The following is a list of the reports available in **Quick Reports**.

- ■ **Grant All-Details**: comprehensive report of financial and activity accomplishments reported. Used to review complete data entry associated with the grant. PDF of the all-details report is automatically generated and saved in the system when progress reports are submitted and approved.

- ■ **Grant Application**: comprehensive report of grant application information. PDF of the application is automatically generated and saved in the system for the review process and as a record of the original application.

- ■ **Grant Workplan**: comprehensive report of grant workplan information. PDF of the workplan is automatically generated and saved in the system when submitted and approved as a record of the original workplan.

- ■ **Grant Financial**: Summary of financial data reported. The system does not automatically generate or store the Grant Financial Summary. This report must be printed, signed appropriately, scanned, and resubmitted by the grantee to BWSR as an attachment on the grant. The signed financial report certifies completion of a particular milestone within a grant or the grant as a whole, and documents reimbursement or payment requests.

- ■ **Grant Story**: summary report of the accomplishments of the grant. Can be used to achieve web reporting requirements of grant. Add your own logo if desired.

Note that the system also generates PDFs of the some of the above reports when users change the status on the grant, e.g. application, workplan, or progress report is submitted editable. These .pdf reports are saved

Generating a Quick Report

Within the Quick Report Window:

- Enter the **Grant Title:** ELink will provide autocomplete prompts that will indicate the grants that are open to the specific user as the user types information in this window. The user can enter the full name of the grant or they can select an autocompleted grant by highlighting this option.

- **Grant Reports**: Select the appropriate report from the drop down box.

- **Go**: Generates the report.

- **Pop-up Window**: User can either open the report in Microsoft word or can save the generated report onto a local drive.

Adhoc Search

The Adhoc Search functionality allows the user to define a set of one or more grants by defining criteria. After the desired set of Grants is obtained, users may generate eight different predefined report types for grant details. Adhoc search functionality is accessed via: **Search Tab-> Adhoc Search**

The user is then taken to the Report Criteria Panel, shown below. This panel is used to define search criteria for reports that can be printed & downloaded. At this panel, users can select a variety of Grant attributes and define amounts and specific search terms. Results meeting the specified criteria will be shown below the criteria in a separate grid and can be exported as an MS Excel spreadsheet. Users will also be able to run reports that provide additional details (risk, financial, work plans, etc.) for the selected Grants.
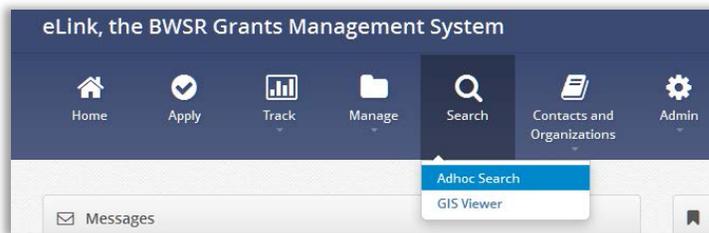
Entering Search Criteria

1. Click the [⊕ Add Criteria] button. This populates a blank row in grid. The system has a pre-defined set of fields that can be queried. Steps 2-5 will be based upon an example using the "GRANT_TITLE" criteria. Users can select other criteria from the drop down box and use different operators and values to generate reports of use within their own offices.

2. Select the "GRANT_TITLE" field as your first criteria.

3. The operator select options contain a variety of mathematical operators and "Contains". Select "Contains".

4. Enter a value of "2014" in the value field. This criteria setting will return records with "2014" in some part of the Grant Title.

5. Click the [Search] button. In the lower portion of the screen the application shows the first 100 of the 107 matching results.

GRANT TITLE	AWARDED AMOUNT	ORGANIZATION	GRANT START DATE	GRANT END DATE
2014 NC Local Water Planning(Chisago SWCD)	$50,000.00	Chisago SWCD		
CWF - RoR 2014 App 44 (to)		Crow River Organization of Water	04/04/2013	08/14/2013
CWF - ROR 2014 App 11 (to)		Crow River Organization of Water	04/04/2013	08/14/2013
CWF RoR 2014 - App 444		Crow River Organization of Water	04/04/2013	08/14/2013
2014 LWM Challenge (Houston County)	$45,000.00	Houston County	04/12/2013	04/26/2013
2014 LWM Challenge (Cottonwood				

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Refining your Search

If you know the organization and/or the award amount of the grant you're looking for you can refine the search. In the Report Query criteria panel:

1. Click the ⊕ Add Criteria button again.
2. Now select 'AWARDED_AMT' from the field, it should be above the previous choice of "GRANT_TITLE."
3. Enter >= as the operator and 70000 as the value.
4. Click the Search button. Note the radio select option, below the search criteria window, is set to: "AND"

   Select ⦿ AND ○ OR with above criteria

   Your search results should now be filtered down to 42 matching results. Repeat the process again. If you knew the organization for the grant, you could sort the result grid by clicking the Organization header.

★ Total Records: 42   Reports [▾] Go   Show By [By Grant ▾] Go 🖫

| GRANT TITLE	AWARDED AMOUNT	ORGANIZATION ▲	GRANT START DATE	GRANT END DATE
2014 LWM Challenge (Faribault County SWCD)	$100,000.00	Faribault County SWCD	04/12/2013	04/26/2013
2014 LWM Challenge (Goodhue SWCD)	$100,000.00	Goodhue SWCD	04/12/2013	04/26/2013
2014 LWM Challenge (Lyon County)	$100,000.00	Lyon County	04/12/2013	04/26/2013
2014 LWM Challenge (Ramsey Conservation District)	$100,000.00	Ramsey Conservation District	04/12/2013	04/26/2013
2014 LWM Challenge (Red Lake SWCD)	$100,000.00	Red Lake SWCD	04/12/2013	04/26/2013

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5. After clicking the header, the list of results will sort from A-Z. You can use the scroll bar on the right to scroll down to verify the results of your query, or click the download button 🖫 to open the search results as an excel spreadsheet file. There is also a page navigator if your criteria resulted in more than 100 Grants.
6. If you wish to run reports on The Lyon County grant, use the ⊕ Add Criteria button and set the ORG_NAME to contain "Lyon" and click the search button. The grid should now show the result you are looking for.
7. If you wish to modify your adhoc query, you can revisit your criteria and remove one by clicking the ✕ Delete button in the row that you wish to remove.
8. You can also clear your search criteria to start again by clicking the Reset Criteria button below the Report Criteria Panel.

9. Use the radio option ⬤ AND ○ OR with above criteria to toggle whether you wish query results to have ALL criteria specified (AND), or if you'd rather your results to contain matches to any of the criteria (OR). The AND option will enforce that all criteria specified must be matched in a Grant.

Sort Results by Activity

You have the ability to view and sort the adhoc search results by activity.

1. Select "By Activity" and click the Go button next to the Show By section.

2. All header columns of the results grid are sortable. Click on ACTUAL START DATE to sort by earliest date. Click it a second time to see the most recent dates.

3. As with the By Grant view, the results can be exported to excel by clicking the ⬇ button.
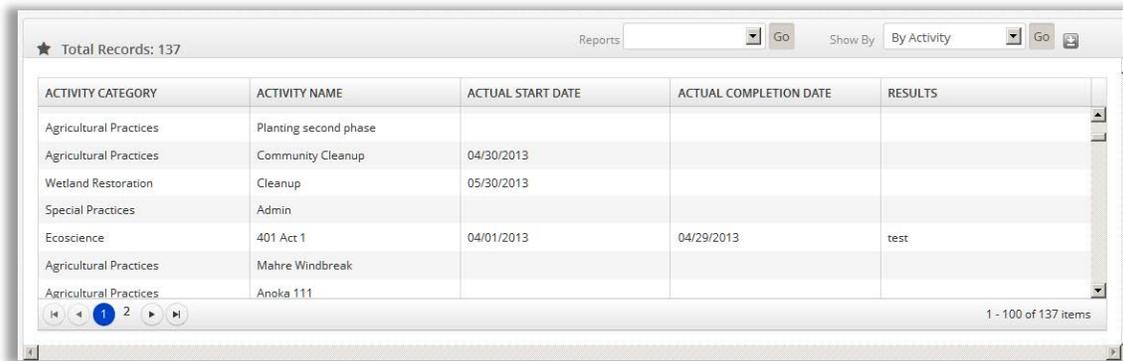
Reports

At the Reports dropdown Reports ▼ select one of the pre-defined report types, such as "Grant All Details Report" and click the Go button next to the select option. Your browser will give you the option to save or open the report in MS Word.

The eLINK system contains 8 pre-defined reports that can be generated for the grants that show in the Adhoc search results grid.

Report Name	File Type
Allocation List Report	Excel
Grant All-Detail Report	Word
Grant Application Report	Excel
Grant Financial Report	Word
Grant Story Report	Word
Grant Workplan Report	Word
Grant All-Detail Report	Excel

Ad Hoc Criteria List

1. Action End Date
2. Action Installation Date
3. Activity Category Description
4. Activity Description
5. Activity Lifespan
6. Activity Lifespan Desc
7. Activity Name
8. Activity Number
9. Activity Status Description
10. Activity Subcategory Desc
11. Actual completion Date
12. Agreement Name
13. Agreement Start Date
14. Agreement End Date
15. Allocation Name
16. Allocation Type
17. Application Deadline
18. Awarded Amount
19. Awarded Date
20. BC (this finds the orgs the BC is associated with and finds the grants the org is associated with)
21. Calc Tool Desc
22. Cooperator Name
23. County
24. CWS (this finds the orgs the CWS is associated with and finds the grants the org is associated with)
25. Day to Day Contact
26. Final Score
27. Grant County
28. Grant Fiscal Year
29. Grant HUC
30. Grant ID
31. Grant Status
32. Grant Title
33. Indicator Value
34. Indicator Name
35. Indicator Type Desc
36. Indicator Subtype Desc
37. Indicator Unit
38. Org Name
39. Org Type
40. Rate Description
41. Region
42. RFP Title
43. Source Type
44. Waterbody Name