



DYS – Access, View and Run Reports Job Aid

User

- All DYS Users

Process

These Job Aid tables describe the actions needed to access, view, and run DYS Reports.

Introduction

- Reports are available to run in three different ways depending on the report:
 - On-line = report is real-time.
 - Batch = report must run in a batch process before it is generated.
 - Both = report can either be run in batch or in real-time.

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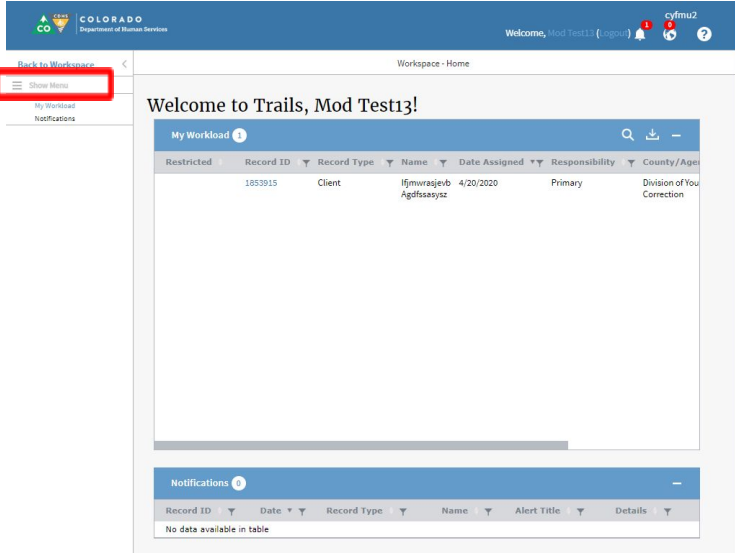
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Access and View the DYS Reports

- Reports will show and be executed based on the user’s profile.

Steps/Output	Screenshot
<p>From the <i>Modernized Trails</i> home page:</p> <ol style="list-style-type: none"> 1. Click Show Menu. <p>The <i>Left Navigation</i> expands to show those items the user has access to view.</p>	 <p>The screenshot shows the user interface of the Modernized Trails system. At the top, there is a header with the Colorado Department of Social Services logo and the user's name 'Mod Test13'. Below the header, there is a navigation bar with a 'Show Menu' button highlighted in red. The main content area displays a 'Welcome to Trails, Mod Test13!' message and a 'My Workload' table. The table has columns for Record ID, Record Type, Name, Date Assigned, Responsibility, and County/Age. A single record is visible with Record ID 1853915, Record Type Client, Name Ifjmwrajev6 Agdfssaayz, Date Assigned 4/20/2020, Responsibility Primary, and County/Age Division of You Correction. Below the table, there is a 'Notifications' section with a table that currently has no data available.</p>

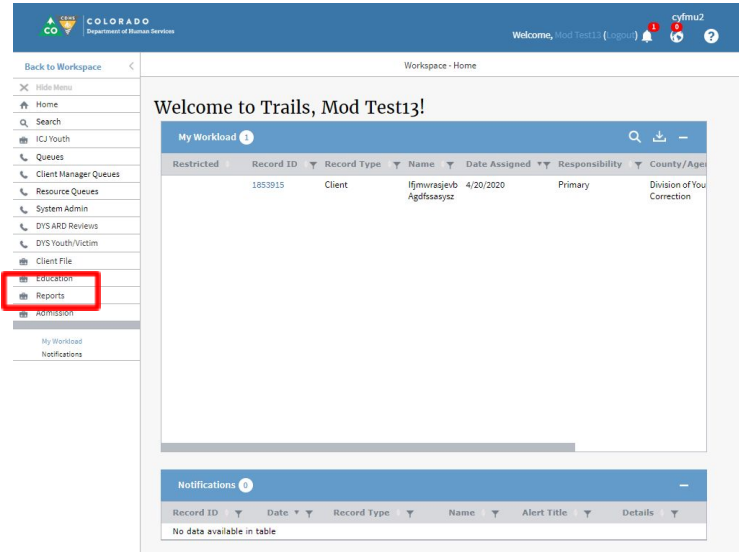


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From the *Left Hand Navigation*:

2. Click **Reports**.

The *DYS Reports Workspace* displays.

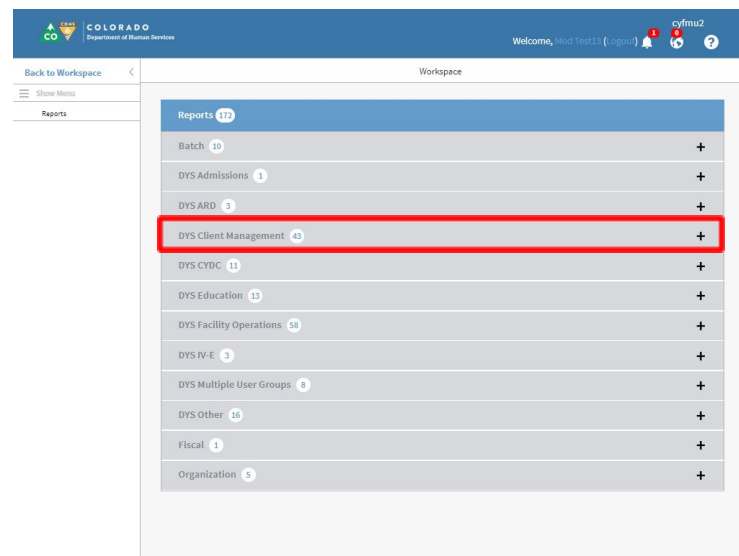


In the *DYS Reports Workspace*:

Note: Any set of reports can be expanded to see all reports for that section. *Client Management* reports are shown as an example.

3. Click the + icon to the right of the **DYS Client Management** Header.

Note: The number of reports in *DYS Client Management* displays in the badge.





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4. Use the icons to the right of each column heading to sort or filter the table.

Note: Navigate through the *DYS Client Management* reports by using the scroll bar at the right of the page.

After expanding the section (or all sections) hit Ctrl+F and type the report name or number, it will appear highlighted in the list.

The screenshot shows the CDHS workspace interface. At the top, there is a navigation bar with the Colorado Department of Human Services logo and the text 'Welcome, Mod Test13 (Logout) cyfmu2'. Below this, there is a 'Workspace' section with a 'Back to Workspace' link and a 'Show Menu' button. The main content area displays a list of reports under the 'DYS Client Management' section. The list has two columns: 'Report Title' and 'Report Mode'. A red box highlights the 'Report Title' and 'Report Mode' columns, and another red box highlights the scroll bar on the right side of the list. The reports listed include:

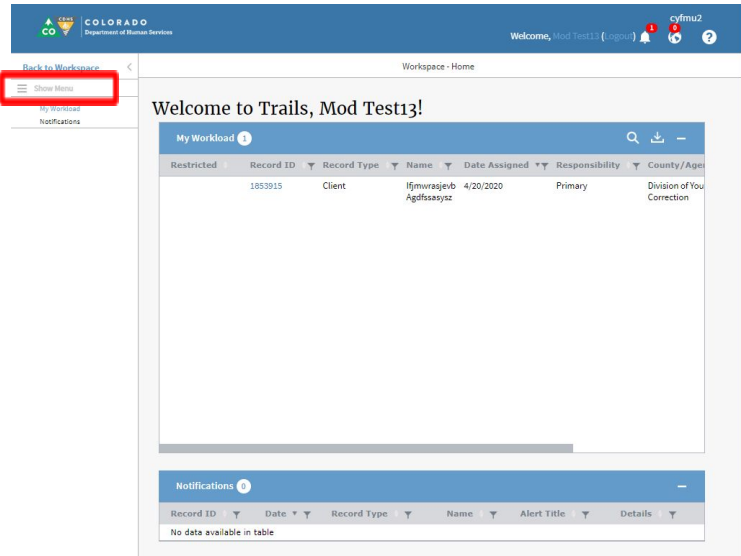
Report Title	Report Mode
Case Audit(R416)	On-line
Case Services Report(R466)	On-line
Chafee Independent Living Groups Report(R578)	On-line
CJRA QA Report(R476)	On-line
Community Service Tracking(R600)	On-line
Contacts By Client Manager(R375)	On-line
DCP Approval Report(R420)	On-line
Discrete Case Plans(R573)	On-line
DYC Client Progress Summary(R220)	On-line
DYC Family Engagement Plan(R648)	On-line
DYC IVE ELIGIBLE(R159)	On-line
DYC MEDICAID ELIGIBLE(R160)	On-line
DYC Medicaid(R22)	On-line
DYC Parole Board Report(R540)	On-line
DYC Service Authorization Leave Reason(R359)	On-line
DYS CYDC 11	+
DYS Education 13	+
DYS Facility Operations 58	+
DYS IV-E 3	+
DYS Multiple User Groups 8	+



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Run the DYS Reports

- Reports will have varying parameters required/optional for running the reports.
- Reports can be viewed as an Excel file, or as a PDF.

Steps/Output	Screenshot												
<p>From the Modernized Trails Home page:</p> <ol style="list-style-type: none"> 1. Click Show Menu. <p>The <i>Left Navigation</i> expands to show those items the user has access to view.</p>	 <p>The screenshot shows the user interface for the Modernized Trails system. The top navigation bar includes the Colorado Department of Human Services logo and the user's name 'cyfmu2'. The left navigation bar has a 'Show Menu' button highlighted with a red box. The main content area displays a 'Welcome to Trails, Mod Test13!' message and a table with one record.</p> <table border="1" data-bbox="820 745 1364 1045"> <thead> <tr> <th>Record ID</th> <th>Record Type</th> <th>Name</th> <th>Date Assigned</th> <th>Responsibility</th> <th>County/Age</th> </tr> </thead> <tbody> <tr> <td>1853915</td> <td>Client</td> <td>Ifjmwrajevb Agjllsaayzc</td> <td>4/20/2020</td> <td>Primary</td> <td>Division of You Correction</td> </tr> </tbody> </table> <p>Below the table, there is a 'Notifications' section with a table that currently has no data available.</p>	Record ID	Record Type	Name	Date Assigned	Responsibility	County/Age	1853915	Client	Ifjmwrajevb Agjllsaayzc	4/20/2020	Primary	Division of You Correction
Record ID	Record Type	Name	Date Assigned	Responsibility	County/Age								
1853915	Client	Ifjmwrajevb Agjllsaayzc	4/20/2020	Primary	Division of You Correction								

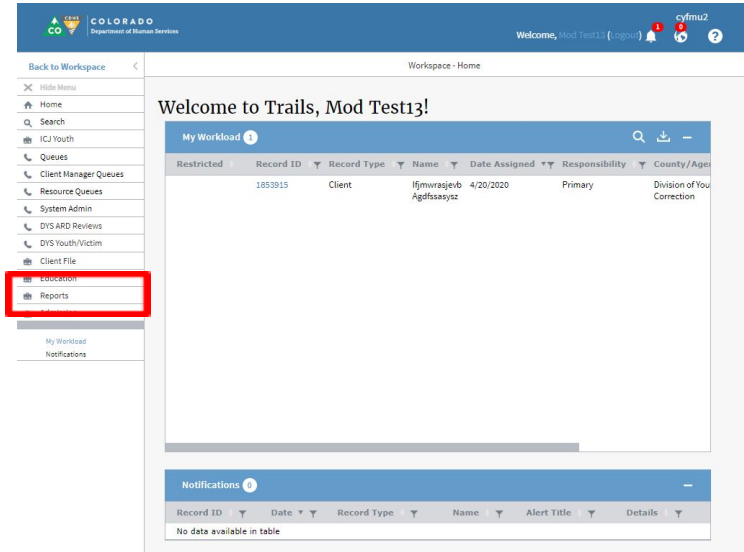


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From the *Left Hand Navigation*:

2. Click **Reports**.

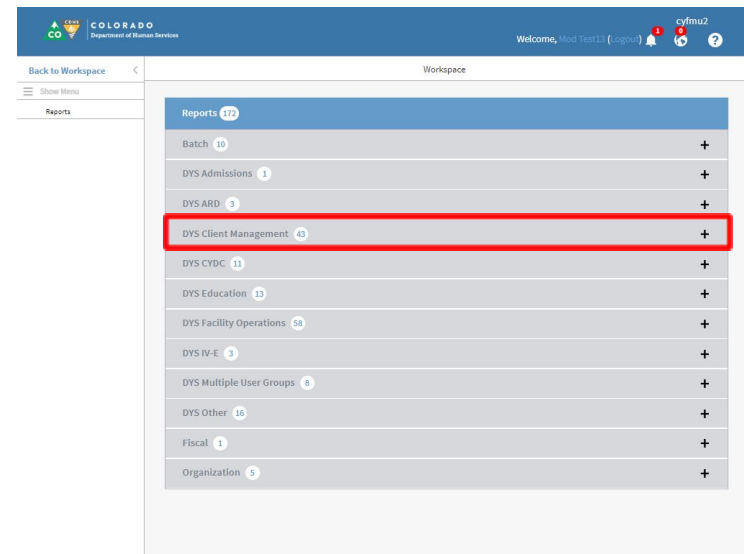
The *DYS Reports Workspace* displays.



From the *DYS Reports Workspace*:

Note: Any set of reports can be expanded to see all reports for that section. *Client Management* reports are shown as an example.

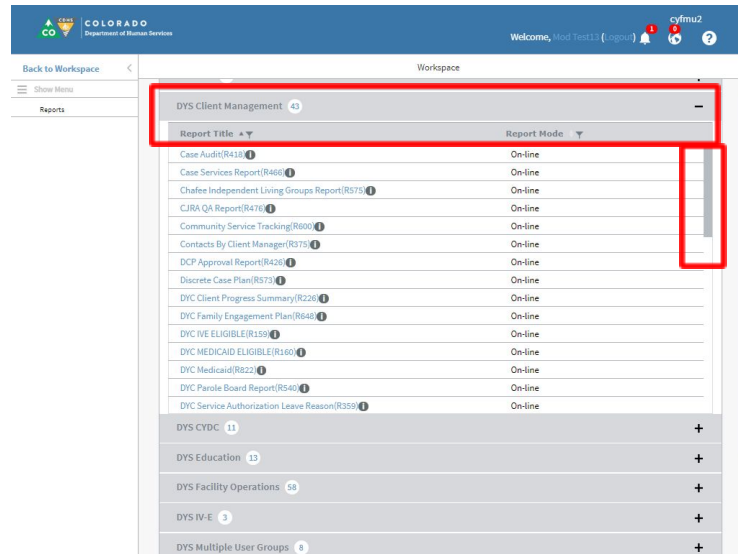
3. Click the + icon to the right of the **DYS Client Management** Header.





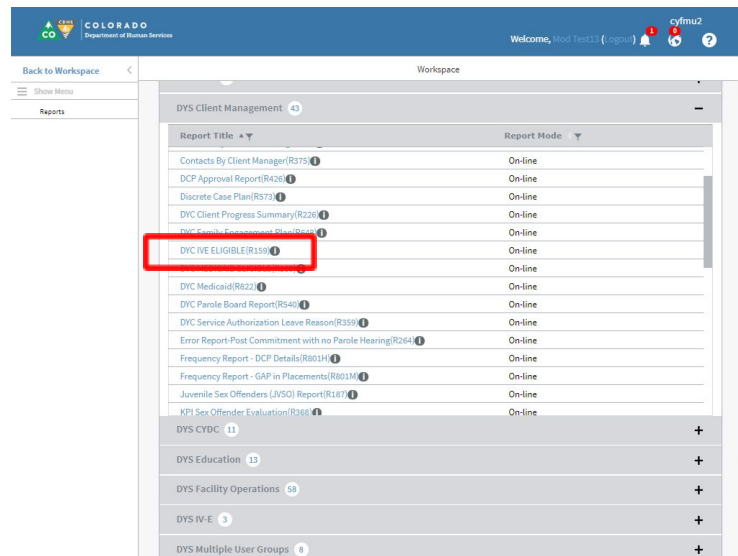
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4. Use the icons to the right of each column heading to sort or filter the table.
5. Find the report by using the scroll bar at the right of the page.



6. Click the **Report Title** link of the report needed.

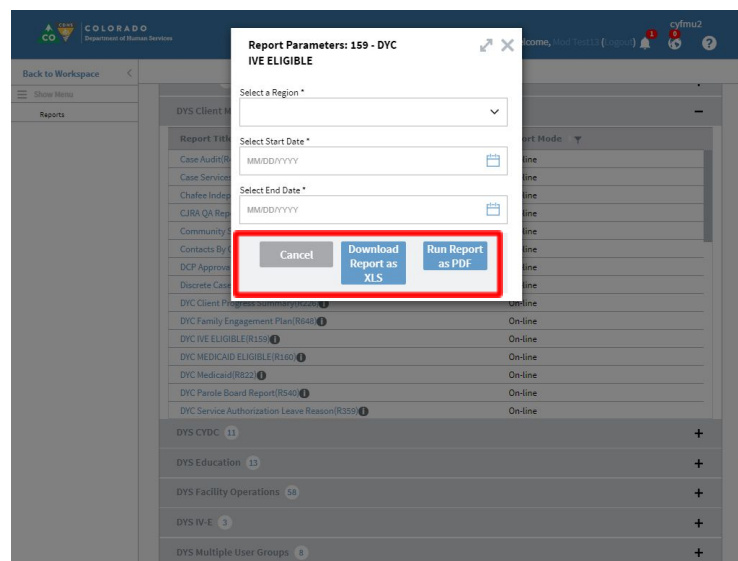
The *Parameter list* pop-up displays.





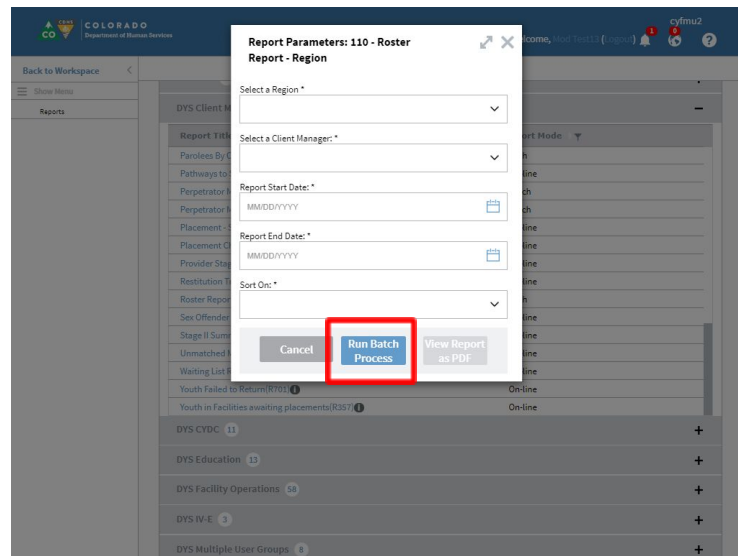
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7. Enter all required fields.
8. Choose **Download Report as XLS** to receive the report in an Excel spreadsheet.
<OR>
9. Choose **Run Report as PDF** to display the report as a PDF in a separate tab.
<OR>
10. Choose **Cancel** to cancel the report request.



If the report is a batch process:

11. Click **Run Batch Process** if the report requires that it must be run in a batch process, or **Cancel** to cancel the report request.



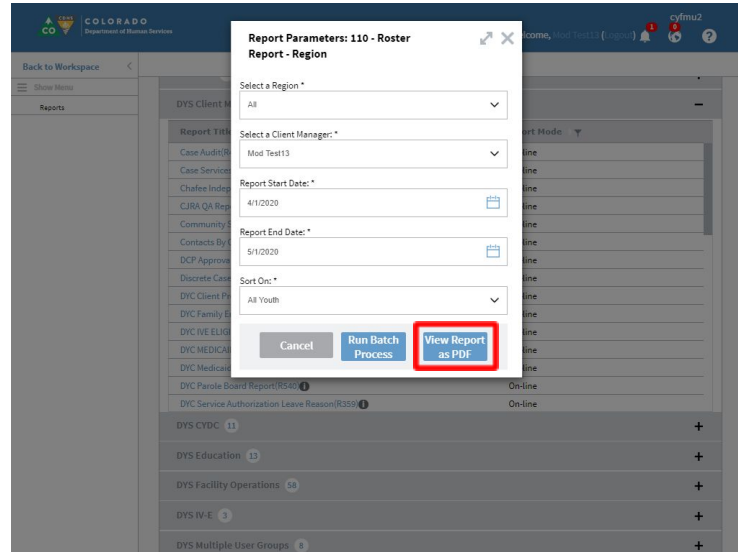


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Once the Batch Process runs:

12. Click **View Report as PDF**, or **Cancel** to cancel the report request.

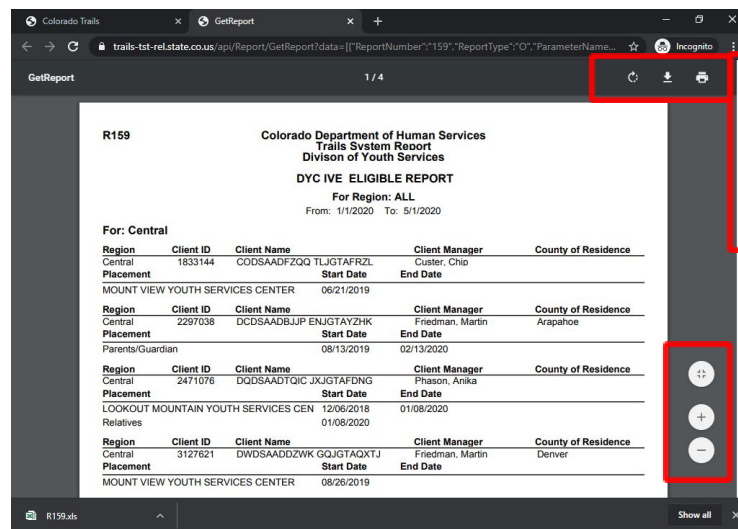
Report displays in a separate tab.



Report displays in the *GetReport* tab.

13. Use the scroll bar to scroll through the report.

Note: Report can be made smaller or larger, saved and/or printed using the icons displayed.





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If the report is created as an XLS file:

14. Click the link at the bottom of the page to open the Excel file into the Microsoft Excel tool.

