



# Performance Reporting Information System Desk Manual

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# Performance Reporting Information System Desk Manual

## Overview

PRISM is a database containing partner submitted transaction information used for analysis and reporting purposes. It is the goal of the PRISM Team to put tools in the hands of our PRISM partners enabling them to better support, manipulate, extract, correct and remove their own agency submitted data. The partners will not be able to view other partner agency's individual transaction records.

PRISM consists of six components:

1. Data Collection Subsystem Application
2. Open Data Base Connectivity (ODBC)
3. SQL\*Plus
4. Oracle Discoverer
5. Secure File Transfer Protocol
6. Oracle Reports

The **PRISM Data Collection Subsystem Application** was developed by PRISM staff to analyze the causes of transaction suspensions and provide a tool for their correction. The subsystem was created using the Oracle Forms application and could not be deployed to partner agency sites until a secure data environment was in place.

The **Open Data Base Connectivity** (ODBC) facility is a third party product which can connect to a non-native database for data retrieval, analysis and reporting purposes. This facility is the avenue used to view the database within another software application, like Access.

**SQL\*Plus** is a command line Oracle tool enabling the partner to analyze partner data.

**Oracle Discoverer** allows partners' to produce ad-hoc reports from their "views" of the PRISM data. It is a customizable GUI tool that allows queries of the data that produce customized reports that can be run, filed and later retrieved for re-run from workbooks created by the user.

**Secure File Transfer Protocol** is proprietary software that provides a high level of security enabling partners to move data from point to point safely to the PRISM domain.

**Oracle Reports** is a report generation tool designed to be used for permanent production type reporting. With an installed reports runtime module and the compiled report programs, partners can run reports from their own workstations.



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## System Components

### *Data Collection Subsystem Application*

#### Introduction

The Data Collection Subsystem Application was developed in Oracle Forms. The Oracle Forms Runtime module needs to be installed on your PC in order to run this application. This interface is your access to the data in the PRISM submission suspense tables.

The purpose of this application is to provide the person(s) in the partner agencies responsible for the submission of partner data with the ability to view and correct transactions that suspended in the edit update process. The application presents the data grouped by type of transaction (intake, outcome, service, goal and ssn). Within transaction type, the transactions are grouped by the transmittal\_number that accompanied the submission. This allows you to deal with the suspensions in the same groupings as they were submitted.

Each time data is submitted to PRISM and processed, a submission summary report is produced and returned to the submitting partner. This report summarizes the results of the processing. If transactions were rejected in the process, you come to this application to view the specific records that were suspended. From here you are able to research the cause of the suspensions by comparing what you sent to PRISM with your own source data and make corrections to clear the suspended items.

Another feature of this application is the ability to look at the contents of all of the validation tables in the system. These tables were used to determine valid values for many of the data items you submitted.

With this application you can see transactions that have been suspended. In the cases where the suspension is due to consistency errors between what was submitted and what is already in the database, the SQL\*Plus and Discoverer products can be used to compare what is already in the database with the suspended transactions to help diagnose the cause of the suspension. In cases where you need to consult your source data to see why you sent the information to PRISM in the first place you will employ the display methods normally used to look at your own data.

Partner transactions get suspended for two basic reasons; first, because there are one or more syntax errors in the transactions. Things like invalid birth dates or zip codes are examples of syntax errors. Second, records that contain no syntax errors can be rejected because of consistency errors between the incoming transaction and information that is already in the database. Duplicate records, overlapping episodes, updates to non-existent records, etc. are examples of consistency errors.

It is crucial that all suspended transactions get resolved as soon as possible because the effect is compounded over time. Submissions build on data that is presumed to already be in the database. If it is not because it is suspended, then additional suspense transactions are going to be generated as a result and so on and so forth. Neglect in correcting suspended transactions will not only result in a skewing of data on the performance reports but it will make it much more difficult to untangle compounded suspensions later on.

You will be accessing the five suspense tables that make up the Data Collection Subsystem. These tables are:

- intake\_suspense,
- outcomes\_suspense,
- services\_suspense
- goals\_suspense and
- ssn\_suspense.

These tables contain the suspended transaction records that did not pass the two verification checks for accuracy: the syntax checker and the consistency validation process.



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## Using the Oracle Forms Application

You will find the icon for the PRISM Data Collection Subsystem Application in a folder named “PRISM DB Queries” on your desktop. This icon was previously setup so when it is opened it also opens the Data Collection Subsystem Application main form.

### Logon

Logging on to the Data Collection Subsystem Application.

- A window appears requesting your Username, Password and Database information. (See Figure 1)
- Fill in and click on **Connect**
- There will be a forced password change the first time you logon after the initial install.

*The logon information was previously provided to you by the PRISM System Administrator. If you need help, please refer to the contact list located at this web link: [www.oregon.gov/prism/contact\\_us.shtml](http://www.oregon.gov/prism/contact_us.shtml).*

The screenshot shows a standard Oracle Forms logon dialog box. It has a blue title bar with the text 'Logon' and a red 'X' close button. The main area is light beige and contains three text labels: 'Username:', 'Password:', and 'Database:'. Each label is followed by a white rectangular input field. At the bottom of the dialog, there are two buttons: 'Connect' and 'Cancel'.

**Figure 1**



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## Logon Errors:

There are several error messages that may appear for various reasons during the log in process.

### Username and Password Error:

- If your Username and/or Password is not correct, an error message will appear. (See Figure 2)
- Click **OK** and try again.



Figure 2

### Database Information Error:

- If your Database information is not correct, an error message will appear. (See Figure 3)
- Just click **OK** and try again.

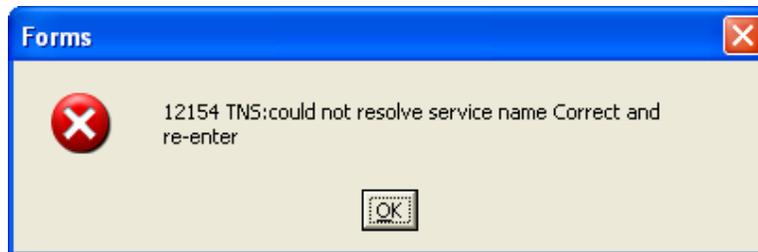


Figure 3

- If you fail three times in a row to log on successfully to the Data Collection Subsystem Application, clicking on **OK** the third time will result in the Oracle Forms Runtime window closing. Reopen the Data Collection Subsystem Application and try again.



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## Password Expired Error:

- You will be required to change your password every six months.
- When your password is within 14 days of expiration, you will start to receive an error message. The number of expiration days shown in the window will decrease by one day each day you put off changing your password. (See Figure 4)

If for some reason you were unable to change your password, please refer to the contact list located at web link:  
[www.oregon.gov/prism/contact\\_us.shtml](http://www.oregon.gov/prism/contact_us.shtml).



Figure 4

## Connection Timed Out Error:

- If you are away from your desk for an extended period of time, there is a possibility of your connection timing out. Should this happen, an error message may appear on your screen when you resume working in the Data Collection Subsystem Application. (See Figure 5)
- Click **OK** to close this window. You will need to reconnect to the Data Collection Subsystem Application. If the error persists, contact PRISM System Administration for resolution.

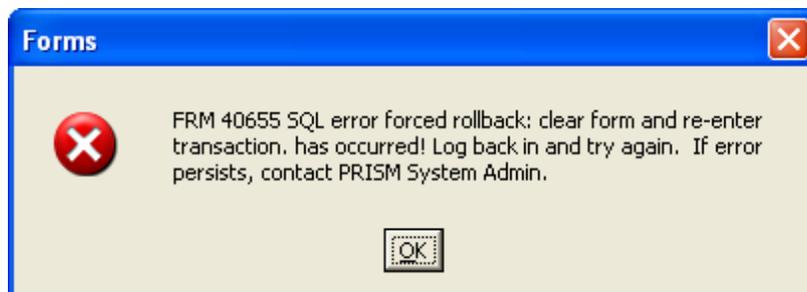


Figure 5



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## Connection Timed Out: (continued)

- One of the causes of the access is denied error, is an activity time-out. If you have been away from your desk for an extended period of time and try to access one of the PRISM Validation Tables, you may receive this access is denied error. (See Figure 6)
- Should this happen, click **OK** to close the window. You will need to reconnect to the Data Collection Subsystem Application. If the error persists, contact PRISM System Administration for resolution.

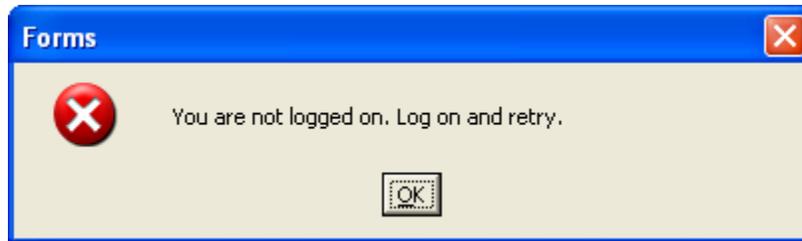


Figure 6

## Version Control Error:

- If the version of the Data Collection Subsystem Application located on the PC is old, an error message will appear. (See Figure 7)
- Click **OK** to close the window.
- Before trying again, download the most current version of the PRISM Data Collection Subsystem Application from [www.oregon.gov/prism/technicalinfo.shtml](http://www.oregon.gov/prism/technicalinfo.shtml) and place in your c:\prism\forms subdirectory.



Figure 7



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## Viewing and Editing Suspended Transaction Records

Once you have successfully logged on, the PRISM Main Selection Menu window appears. (See Figure 8)

There are two parts to this window:

- The Oracle Forms Application shell consists of:
  - Title Bar: reads Oracle Forms Runtime
  - Menu Bar: contains drop down menu options
  - Gray background area surrounding the PRISM Main Selection Menu
  - The status or message bar at the bottom of the windowWe will address some of these shell features later. The shell will remain consistent the entire time you are logged on. (See Figure 27)
- The PRISM Main Selection Menu window. (See Figure 9)

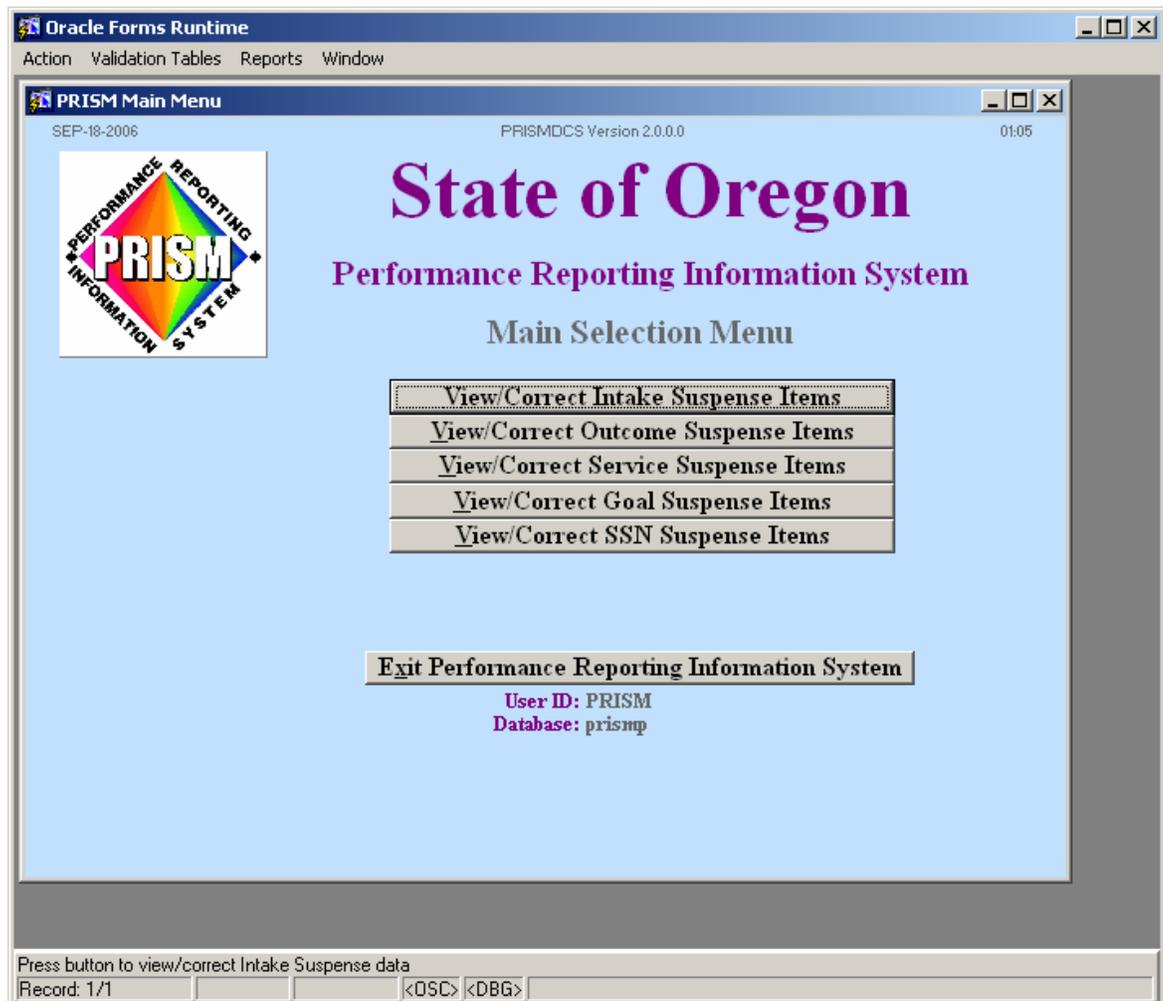


Figure 8



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## PRISM Main Selection Menu Window

Within in the shell, the blue background colored window of the PRISM Main Selection Menu is visible. This window is positioned in the upper left corner of the shell's gray area. (See Figure 9)

### Main Selection Menu

The Main Selection Menu has six buttons. The five buttons in the middle of the window all starting with the words "View/Correct" are your access points to suspended data. They give you the ability to drill down through the data to access to update or delete any suspended records. Tracking results of corrections made is the responsibility of the partner. Corrected records are available for viewing the following morning of the day changes were made. Individual customer data can only be viewed, updated or deleted by the submitting partner.

Use the "Exit Performance Reporting Information System" button to close the whole forms application program (both the Oracle Forms Application shell and the PRISM Main Selection Menu window).

*The following procedural flow is the same for each of the five buttons. Therefore, we will explain the screens for only one of the "View/Correct" button options.*

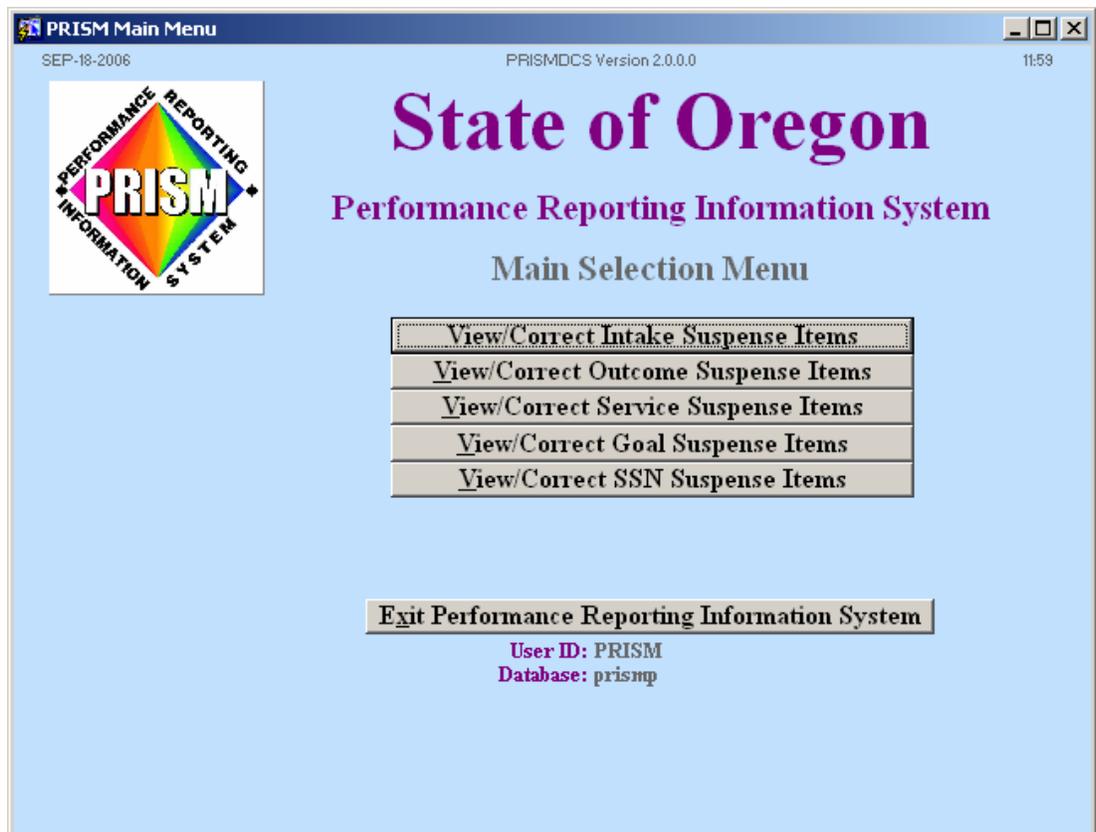


Figure 9



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## View/Correct Process

Click on one of the “View/Correct” buttons and a Transmittal Number window opens containing a list of your agency’s transmittal numbers. Only transmittal numbers that contain your agency’s suspended items appear on this list. (See Figure 10)

The transmittal numbers are listed in alphabetical order. There are three buttons across the bottom:

- **Find** – Find is a search feature that helps find the transaction number when the list of numbers is lengthy. This button works in conjunction with the “Find” field at the top of this window. If you type the first few characters of the beginning of a Transmittal Number in the Find field then click on the **Find** button, you will be taken to the first occurrence of that number in the list.
  - If your agency has only one suspended transmittal number and you use the Find feature, the Form will open the main window for the suspension type you selected.
- **OK** – OK takes you into the highlighted transmittal number’s suspension correction Main screen.
- **Cancel** – Cancel closes the Transmittal Numbers window and takes you back to the Main Selection Menu.

Highlight the desired transmittal number and click **OK** to access the main suspense error window. (See Figure 11)

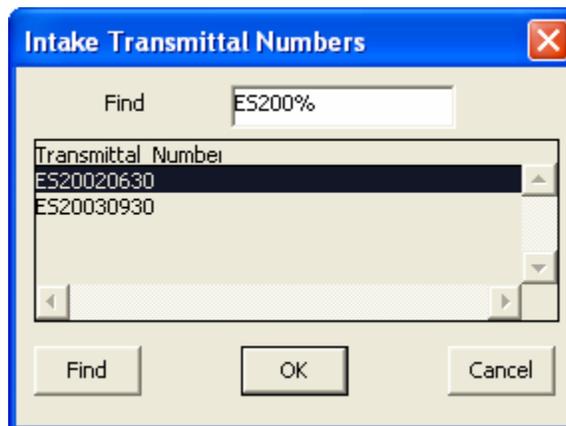


Figure 10



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## Suspense Errors

The title bar of the Suspense Errors window indicates which suspense table you are accessing. This window has four parts: (See Figure 11)

- Transmittal Number: each partner submission to PRISM arrives with a unique transmittal number. The number is composed of the two letter designation representing the partner agency, the year, month and date the submission was created
- Transmittal summary information: displays totals and percentages of errors that have occurred
- Edit Errors by Field: displays all the fields in the suspense table
- Selection buttons: opens access to correct suspended records, open new transmittal number or closes window and returns to Main Selection Menu

**INTAKE\_SUSPENSE\_ERRORS**

Intake Transmittal Report For Transmittal Number:

Intake records in this transmittal:	<input type="text" value="88871"/>		
Bad Intake records:	<input type="text" value="1"/>	<input type="text" value=".001"/>	% of total records
Total suspended for field validation errors:	<input type="text" value="1"/>	<input type="text" value=".001"/>	% of total records
Total suspended for database update failure:	<input type="text" value="0"/>	<input type="text" value=".000"/>	% of total records

\*\*\*\*\*EDIT ERRORS BY FIELD\*\*\*\*\*

Rec Type:	<input type="text" value="0"/>	Level Code:	<input type="text" value="0"/>	SSN:	<input type="text" value="0"/>	Release:	<input type="text" value="0"/>
Agency:	<input type="text" value="0"/>	sex:	<input type="text" value="0"/>	ethnic:	<input type="text" value="0"/>	Int Date:	<input type="text" value="0"/>
Birth Date:	<input type="text" value="0"/>	homeless:	<input type="text" value="0"/>	zip:	<input type="text" value="0"/>	Last Grd:	<input type="text" value="0"/>
Vet:	<input type="text" value="0"/>	DType1:	<input type="text" value="0"/>	DType2:	<input type="text" value="0"/>	County:	<input type="text" value="0"/>
Disab:	<input type="text" value="0"/>	Children:	<input type="text" value="0"/>	Adults:	<input type="text" value="0"/>	Marital:	<input type="text" value="0"/>
Dependents:	<input type="text" value="0"/>	YRIncome:	<input type="text" value="0"/>	OES:	<input type="text" value="0"/>	Seniors:	<input type="text" value="0"/>
Dep Care:	<input type="text" value="0"/>	Prime OES:	<input type="text" value="0"/>	Months:	<input type="text" value="0"/>	WeekHour:	<input type="text" value="0"/>
		System Code:	<input type="text" value="0"/>	FldOff:	<input type="text" value="1"/>	LastJob:	<input type="text" value="0"/>

<input type="button" value="Suspense"/>	<input type="button" value="Mass Update"/>	<input type="button" value="Reprocess Transmittal"/>
<input type="button" value="New Transmittal"/>	<input type="button" value="Mass Delete"/>	<input type="button" value="Close"/>

Figure 11



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## Breakout of Suspense Errors Window:

- Transmittal Number field displays the Transmittal Number of the submission being accessed. (See Figure 12)



Figure 12

- The transmittal summary information shows the total errors that have occurred. (See Figure 13)

On the left are four items:

- “Intake records in this transmittal:” total number of intake records
- “Bad Intake records:” total number of records suspended
- “Total suspended for field validation errors:” records that did not pass the syntax check
- “Total suspended for database update failure:” records that did not pass consistency editing

On the right are four items:

- A hidden message that displays in red if the total percent of suspended records exceeds 10%
- The “% of total records”: percent of suspensions for all the “Bad” intake records.
- The “% of total records”: percent of suspensions of the field validation errors
- The “% of total records”: percent of suspensions of the database update failures

<b>Intake records in this transmittal:</b>	<input type="text" value="88871"/>		
<b>Bad Intake records:</b>	<input type="text" value="1"/>	<input type="text" value=".001"/>	<b>% of total records</b>
<b>Total suspended for field validation errors:</b>	<input type="text" value="1"/>	<input type="text" value=".001"/>	<b>% of total records</b>
<b>Total suspended for database update failure:</b>	<input type="text" value="0"/>	<input type="text" value=".000"/>	<b>% of total records</b>

Figure 13



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- Edit Errors By Field displays the number of errors within each field that has occurred. The error count represents those records that did not pass the validation (syntax) checker. This area of the window displays the fields contained in the suspense table being accessed. (See Figure 14)

*This area of the window will appear different depending upon which "View/Correct" button selection was made from the Main Selection Menu earlier.*

\*\*\*\*\*EDIT ERRORS BY FIELD\*\*\*\*\*

Rec Type: <input type="text" value="0"/>	Level Code: <input type="text" value="0"/>	SSN: <input type="text" value="0"/>	Release: <input type="text" value="0"/>
Agency: <input type="text" value="0"/>	sex: <input type="text" value="0"/>	ethnic: <input type="text" value="0"/>	Int Date: <input type="text" value="0"/>
Birth Date: <input type="text" value="0"/>	homeless: <input type="text" value="0"/>	zip: <input type="text" value="0"/>	Last Grd: <input type="text" value="0"/>
Vet: <input type="text" value="0"/>	DType1: <input type="text" value="0"/>	DType2: <input type="text" value="0"/>	County: <input type="text" value="0"/>
Disab: <input type="text" value="0"/>	Children: <input type="text" value="0"/>	Adults: <input type="text" value="0"/>	Marital: <input type="text" value="0"/>
Dependents: <input type="text" value="0"/>	YRIncome: <input type="text" value="0"/>	OES: <input type="text" value="0"/>	Seniors: <input type="text" value="0"/>
DepCare: <input type="text" value="0"/>	Prime OES: <input type="text" value="0"/>	Months: <input type="text" value="0"/>	WeekHour: <input type="text" value="0"/>
	System Code: <input type="text" value="0"/>	FldOff: <input type="text" value="1"/>	LastJob: <input type="text" value="0"/>

Figure 14

- The buttons at the bottom of the window help with editing/fixing suspended records. (See Figure 15)
  - **Suspense:** access to correct individual suspended records (See Figure 16)
  - **Mass Update:** access to correct group of suspended records with the same suspension error (See Figure 18)
  - **Reprocess Transmittal:** sends transmittal data to be validated and updated (See Figure 21)
  - **New Transmittal:** opens transmittal number selection window (See Figure 23)
  - **Mass Delete:** access to delete group of suspended records with the same suspension error (See Figure 26)
  - **Close:** closes this current window and returns to Main Selection Menu

Click on the **Suspense** button.

<b>Suspense</b>	<b>Mass Update</b>	<b>Reprocess Transmittal</b>
<b>New Transmittal</b>	<b>Mass Delete</b>	<b>Close</b>

Figure 15



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## Suspense

The **Suspense** button allows opening of an individual suspended transaction record. (See Figure 16)

There are four parts to this window:

- The Transmittal Number and Transmittal Item Number at the top of the window contain the unique transmittal number and the number of customer records sent in this Transmittal Number.
- The Field Errors area contains the transaction data. The columns are spaced in such a way to allow two 20 character error description fields to appear at the right of each visible data field when needed. The error description fields describe why the record did not pass the syntax checker.
- The Episode Error field describes why the consistency edit failed. This field will be blank when there are one or more fields with syntax errors.
- The nine buttons at the bottom are used for editing and navigation.
  - **Update:** allows editing of data fields that contain errors. (See Figure 17)
  - **Cancel:** returns to the suspense window.
  - **Delete:** removes transaction record from suspense table.
  - **Top:** returns to the first record in this particular transmittal.
  - **Previous:** takes you back one record.
  - **Next:** takes you forward one record.
  - **Last:** takes you to the last record in this particular transmittal.
  - **TransRPT:** takes you to the main Suspense Errors window. (See Figure 11)
  - **Close:** closes the current suspense record window.

The screenshot shows a window titled "INTAKE\_SUSPENSE\_ERRORS" with a blue title bar. The window contains a form with the following fields and values:

Transmittal Number:	AF20040209	Transmittal Item Number:	507
Field Errors			
TYPE	1	DTYP1	00
LEVEL	A	DTYP2	00
SSN	XXXXXXXXXX	MSTAT	0
REL	1	DEPS	99
AGY	AF	CHILD	99
IDTE	20010913	ADULT	99
B DTE	19710409	SEN	99
SEX	1	CARE	00
ETH	200	INC	999999
GRD	00	OES	00000
YET	0	HRS WK	000
HMLS	0	MOS	999
ZIP	974020000	LJOB	999
CNTY	20	PR OES	00000
DISAB	00	FLD OFF	1103
SCD	2		

Below the fields, there is an "EPISODE ERROR" section with the message: "New EPISODE falls within an existing episode".

At the bottom of the window, there are nine buttons: Update, Cancel, Delete, Top, Prev, Next, Last, Trans RPT, and Close.

Figure 16



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## Update

**Update** allows changes to be made in an individual suspended record.

There are two button options within the transaction Update process:

- **Update** button must be selected to make changes to a transaction record. (See Figure 16) When you click this button, the name changes from “Update” to “Save Changes”. Once the changes have been made to the field(s) with the error(s), Click **Save Changes**. Once this button has been clicked, it saves the changes to the table and locks the record to prevent accidental modification where you can move forward to the next suspended record or close and return to the main Suspense Errors window. (See Figure 11)
- **Cancel** terminates the update operation and locks the record to prevent accidental modification without making any changes. (See Figure 17)

To make a change, highlight (or delete) the incorrect information and type in the correct information. Then click on **Save Changes**. (See Figure 17)

The screenshot shows a window titled "INTAKE\_SUSPENSE\_ERRORS" with a teal background. At the top, there are two input fields: "Transmittal Number: AF20040209" and "Transmittal Item Number: 507". Below these are two columns of "Field Errors" with various data entry fields. The left column includes fields for TYPE, LEVEL, SSN, REL, AGY, IDTE, B DTE, SEX, ETH, GRD, VET, HMLS, ZIP, CNTY, DISAB, and SCD. The right column includes fields for DTYP1, DTYP2, MSTAT, DEPS, CHILD, ADULT, SEN, CARE, INC, OES, HRS WK, MOS, LJOB, PR OES, and FLD OFF. At the bottom, there is an "EPISODE ERROR" message: "New EPISODE falls within an existing episode". Below the error message is a row of buttons: "Save Changes", "Cancel", "Delete", "Top", "Prev", "Next", "Last", "Trans RPT", and "Close".

Figure 17



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## Mass Update

**Mass Update** allows global changes to all the suspended records with the same error within one transmittal number. (See Figure 18)

There are three parts to this screen:

- Transmittal Number
- All fields in the suspense table
- Mass Update and Cancel

To Mass Update, type in the criteria for the records that need to be updated and press **MASS UPDATE**. Say an invalid Field Office code is showing on several customer records. Find the FldOff edit field. Type the incorrect field office number in the left box (under the Before column). Then type the correct field office number in the right box (under the After column). Click on **MASS UPDATE**.

**CANCEL** closes the Mass Update screen and takes you back to the main Suspense Errors window. (See Figure 11)

**INTAKE\_SUSPENSE\_ERRORS**

**Mass Update Entry Screen**

For Transmittal Number:

Enter the value of the field you want changed into the "before" field.  
Enter the value that you want it changed into the "after" field.

	Before	After		Before	After		Before	After
Rec Type:	<input type="checkbox"/>	<input type="checkbox"/>	Level Code:	<input type="checkbox"/>	<input type="checkbox"/>	SSN:	<input type="text"/>	<input type="text"/>
Release:	<input type="checkbox"/>	<input type="checkbox"/>	Agency:	<input type="checkbox"/>	<input type="checkbox"/>	Birth Date:	<input type="text"/>	<input type="text"/>
sex:	<input type="checkbox"/>	<input type="checkbox"/>	Int Date:	<input type="text"/>	<input type="text"/>	Last Grd:	<input type="text"/>	<input type="text"/>
Vet:	<input type="checkbox"/>	<input type="checkbox"/>	ethnic:	<input type="text"/>	<input type="text"/>	zip:	<input type="text"/>	<input type="text"/>
County:	<input type="checkbox"/>	<input type="checkbox"/>	homeless:	<input type="checkbox"/>	<input type="checkbox"/>	DType1:	<input type="text"/>	<input type="text"/>
DType2:	<input type="checkbox"/>	<input type="checkbox"/>	Disab:	<input type="checkbox"/>	<input type="checkbox"/>	Dependents:	<input type="text"/>	<input type="text"/>
Children:	<input type="checkbox"/>	<input type="checkbox"/>	Marital:	<input type="checkbox"/>	<input type="checkbox"/>	Seniors:	<input type="text"/>	<input type="text"/>
Dep Care:	<input type="checkbox"/>	<input type="checkbox"/>	Adults:	<input type="checkbox"/>	<input type="checkbox"/>	OES:	<input type="text"/>	<input type="text"/>
WeekHour:	<input type="text"/>	<input type="text"/>	YRIncome:	<input type="text"/>	<input type="text"/>	Prime OES:	<input type="text"/>	<input type="text"/>
Months:	<input type="text"/>	<input type="text"/>	LastJob:	<input type="text"/>	<input type="text"/>	FldOff:	<input type="text"/>	<input type="text"/>
System Code:	<input type="checkbox"/>	<input type="checkbox"/>						

**MASS UPDATE**      **CANCEL**

Figure 18



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All the records containing the before value are updated with the after value and an informational window appears showing the results. Normally there will be 0 records re-written to the SUSPENSE file. If however there were multiple errors on any of the transactions modified and those additional errors were not corrected, those records will be re-written to the SUSPENSE file and will require further action. (See Figure 19)

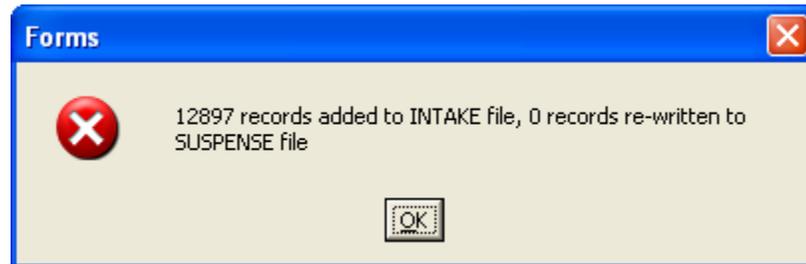


Figure 19

Click on **OK** and if a condition results where there are no records remaining in the suspense file for this transmittal, a second window will appear. (See Figure 20)

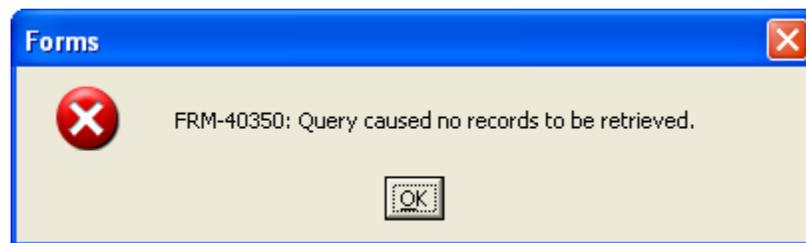


Figure 20

Click on **OK** once again and you return to the main Suspense Errors window. (See Figure 11)



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## Reprocess Transmittal

The **Reprocess Transmittal** button takes the set of suspended transaction records from the previously selected transmittal, re-validates (or syntax checks) them and places them in the Validation tables to wait for the next consistency check processing. Other errors will cause the records to go back into the suspense tables. (See Figure 21 or Figure 11)

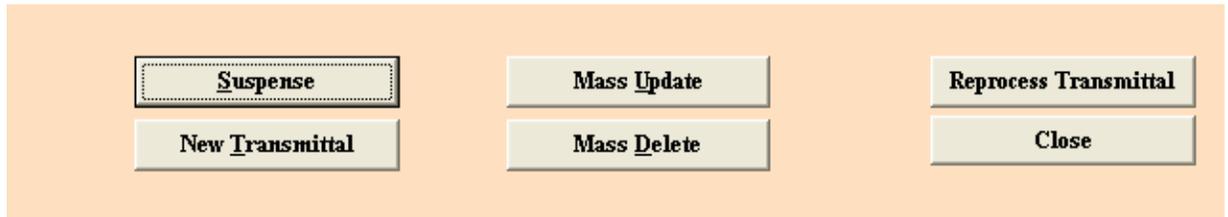


Figure 21

A window will appear indicating the reprocessing is complete and what action was taken with the records. (See Figure 22)

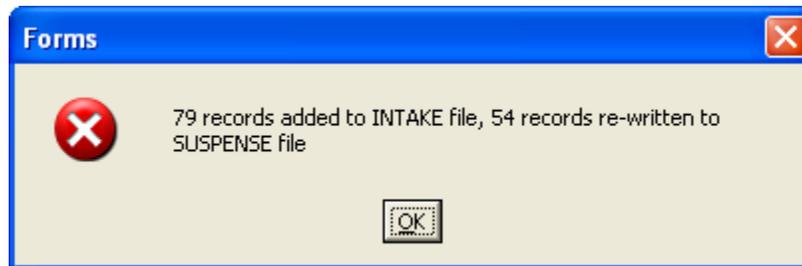


Figure 22

Updates made will be made available for viewing and possibly for further editing the next day. The nightly validation/update job syntax and consistency checks the records and either allows updates to the PRISM database or places them back in the suspension tables for further review.



# Performance Reporting Information System Desk Manual

## New Transmittal

The **New Transmittal** button opens the Transmittal Numbers window (See Figure 23) allowing a different transmittal number to be selected for review. Upon clicking **OK**, another suspense error window opens on top (covering) the previously open window. If you select **Window** from the tool bar and then select **Cascade** you will see the other windows are still open underneath. (See Figure 24)

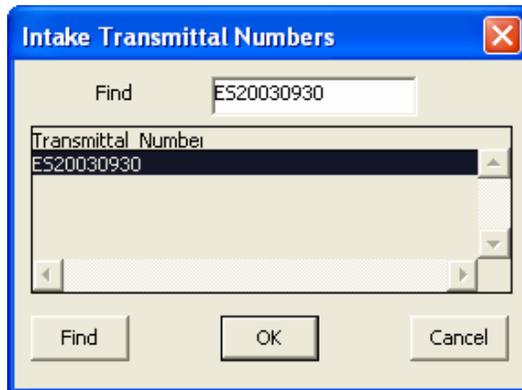


Figure 23

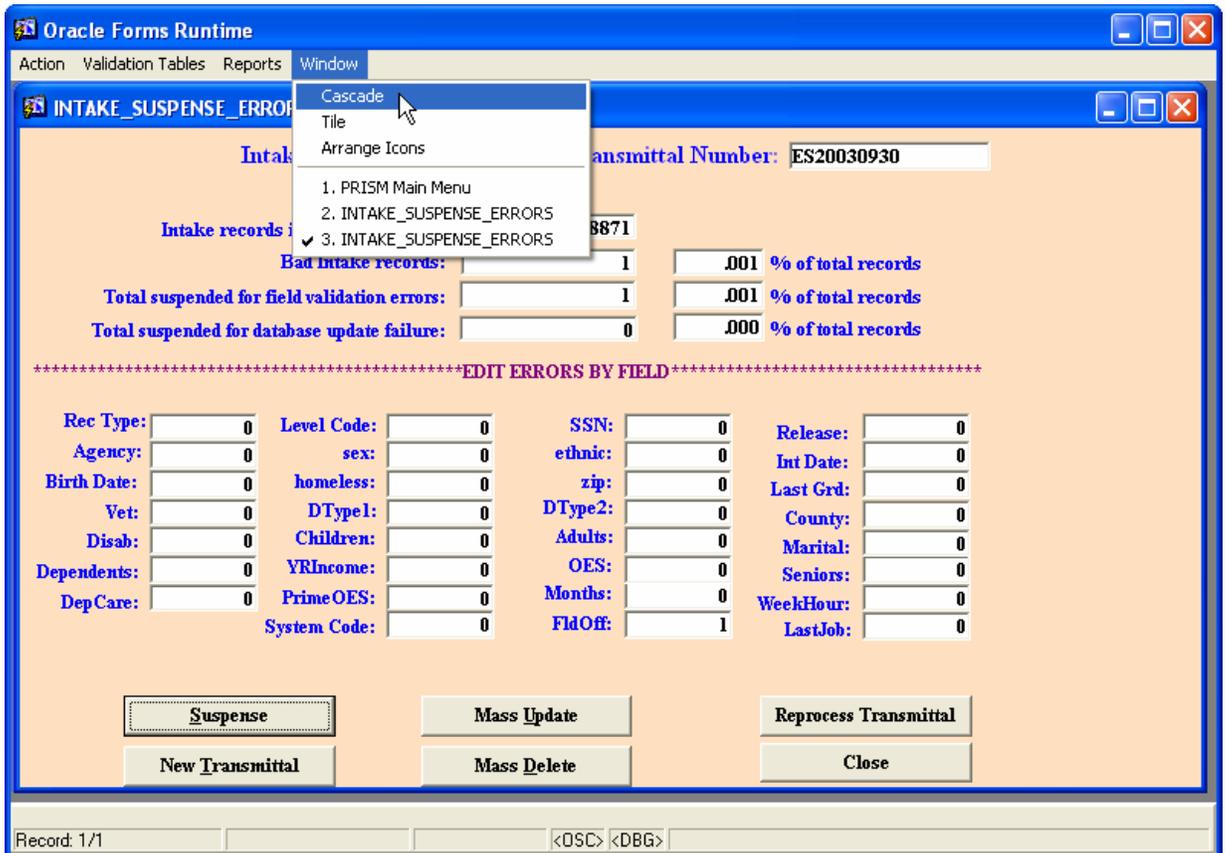


Figure 24



# Performance Reporting Information System Desk Manual

Too many open Transmittal windows could possibly create confusion.

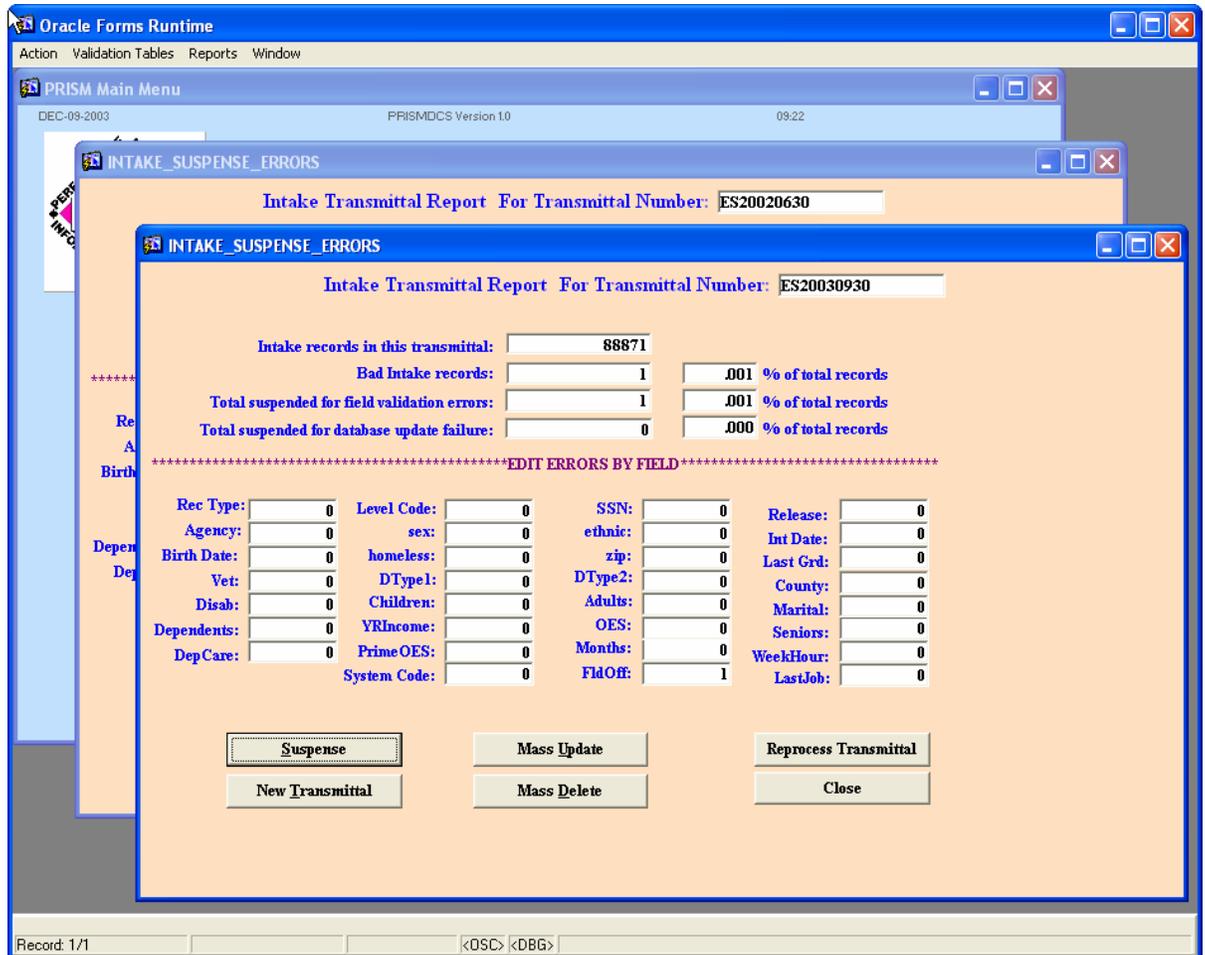


Figure 25



# Performance Reporting Information System Desk Manual

## Mass Delete

Mass Delete is used to delete all suspended records with the same error within one transmittal number.

**Mass Delete** is similar to Mass UPDATE. There are four parts to this screen: (See Figure 25)

- Transmittal Number
- Data fields contained in the suspense table
- Episode Error
- Mass DELETE and CANCEL buttons

To carry out a **Mass Delete**, type in the criteria for the records that need to be deleted. For example, all suspended Service Outcomes with record types of "O" are duplicates. Find the **Rec Type** field and type an "O" in the field to the right. Click on Mass DELETE.

If you wanted to delete all of the suspended transactions with a particular "Episode Error", move the cursor to the "Episode Error:" field and type in the exact character string error message for the records to be deleted. Then click **Mass DELETE**.

All mass deleted records will be removed from the suspense table. The Mass Delete window closes and you are returned to the main Suspense Errors window. (See Figure 10)

The **Mass Delete** records have been moved to a suspense deleted table. However, should a mistake be made, they can be retrieved. Please refer to the contact list located at this web link: [www.oregon.gov/prism/contact\\_us.shtml](http://www.oregon.gov/prism/contact_us.shtml)

**CANCEL** closes the **Mass Delete** screen and returns to the main Suspense Errors window without saving changes. (See Figure 11)

Figure 26



# Performance Reporting Information System Desk Manual

## Oracle Forms Runtime Shell

The Tool Bar contains four drop down menu options: (See Figure 27)

- **Action:** Print and Exit
- **Validation Tables:** all PRISM validation tables
- **Reports:** not available at this time
- **Window:** Cascade, Tile, Arrange and a list of other open suspense windows.

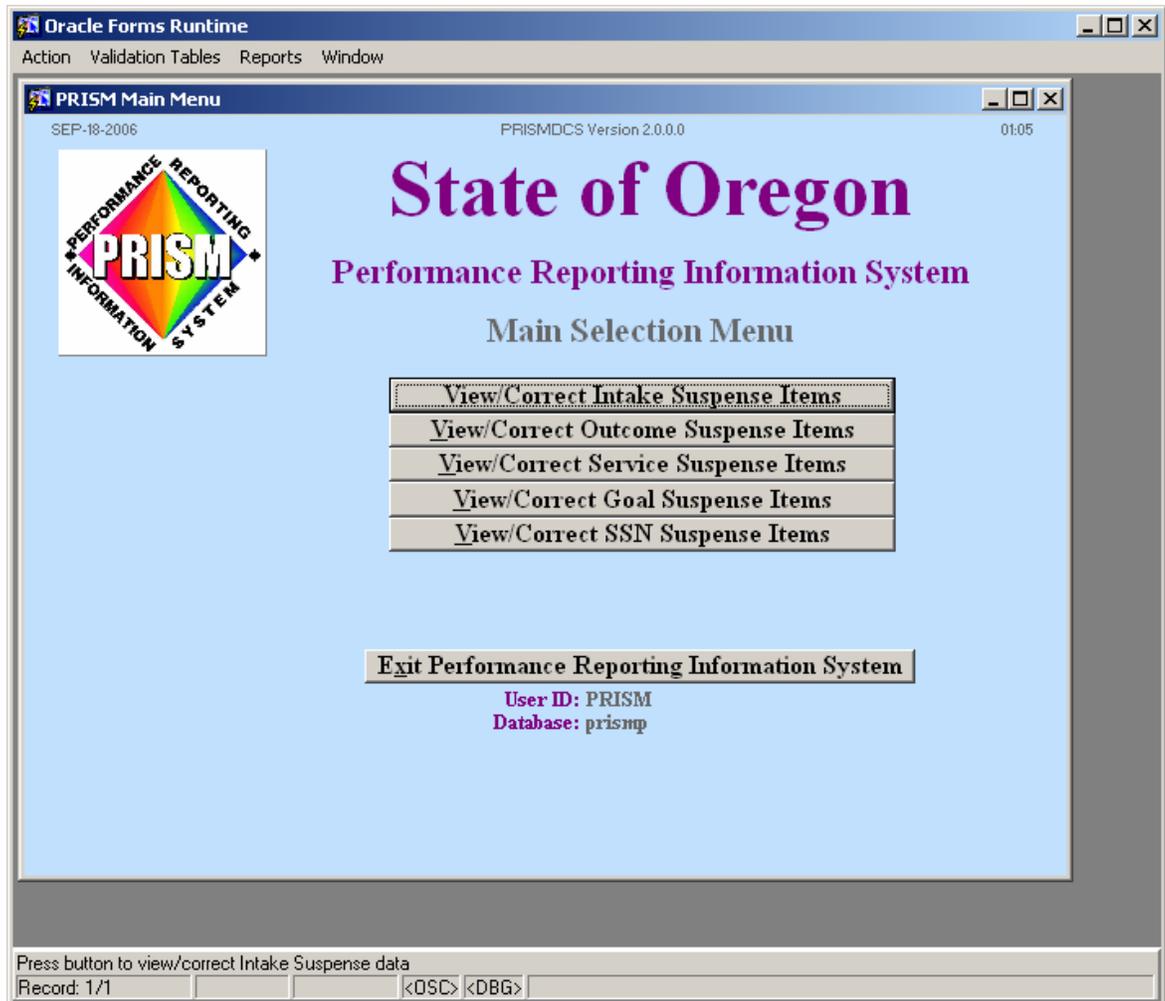


Figure 27



# Performance Reporting Information System Desk Manual

## Action

The **Action** drop down menu contains: (See Figure 28)

- Print – not available
- Exit – closes the Oracle Forms Runtime

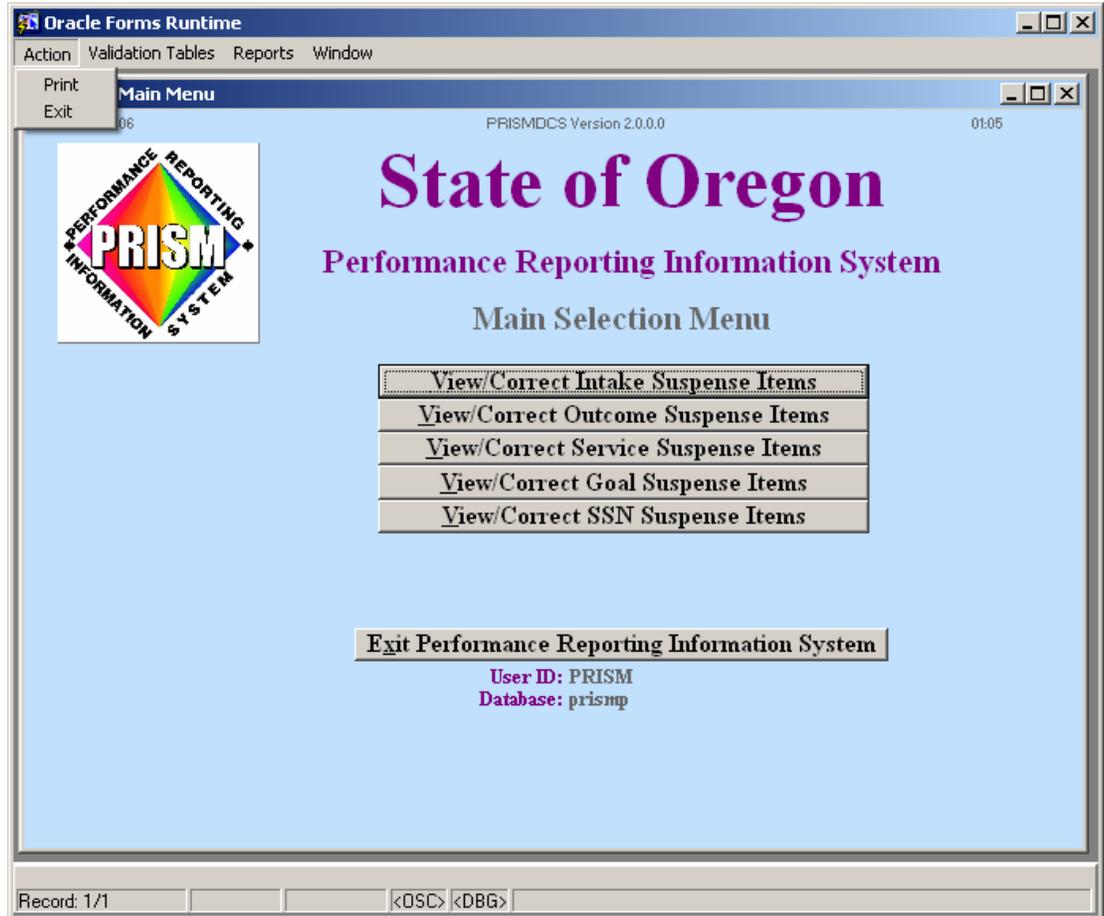


Figure 28

**Print** is not support at this time. When selected, the following error message appears. Click **OK** to return.

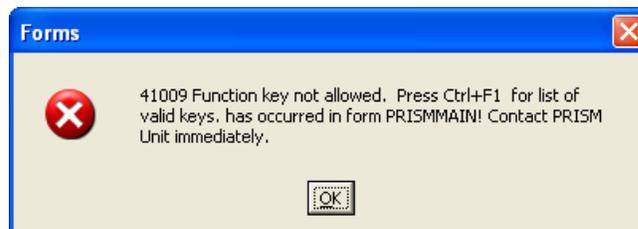


Figure 29

**Exit** closes the Oracle Forms Runtime application.



# Performance Reporting Information System Desk Manual

## Validation Tables

**Validation Tables** are available for changes, additions and/or deletions to the PRISM Validation Tables. There are only two tables that the partners can update: (See Figure 30)

- The Field Office Table
- The Program Code Table.

The remaining tables listed are view only.

*Since the process is the same for viewing and/or updating any of these tables, we are going to explain the process for only the Field Office Table.*

To access the Field Office Validation Table editor, place your cursor over Validation Tables on the Tool Bar and click once with your left mouse button. The list of Validation Tables opens.

Click on **Field Office Table** to open the Field Office Validation Table edit window.

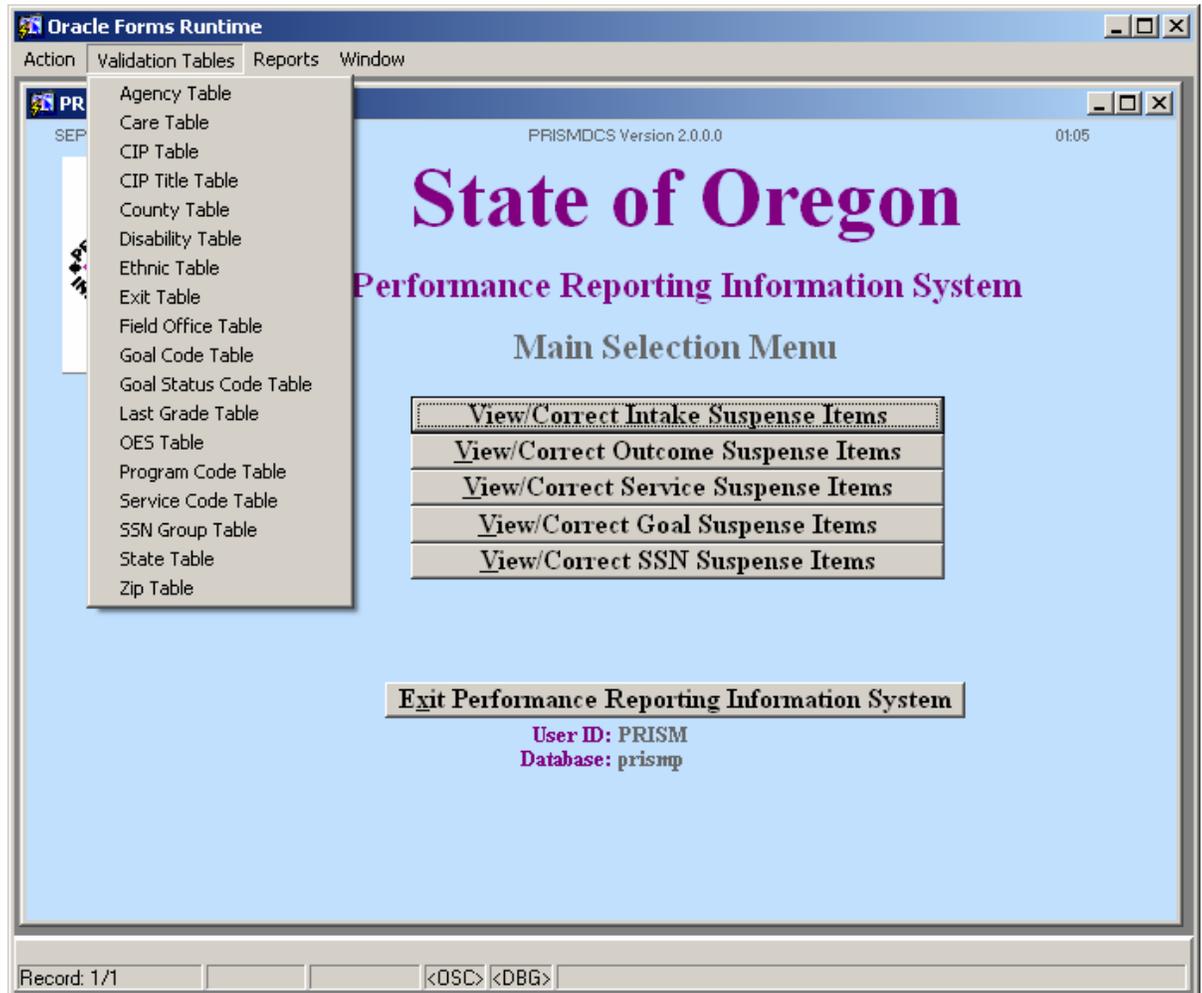


Figure 30



# Performance Reporting Information System Desk Manual

## Field Office Validation Table

The **Field Office Validation Table** contains a list of valid partner field offices. As partner agencies open new field offices, this table must be kept current or records referencing the field office are suspended. The field office validation table window has two parts: (See Figure 31)

- The top portion contains three field names:
  - Agency Code: two character representation of partner agency's name
  - Field Office Number: four character code
  - F.O.: field office description
- The bottom portion contains eleven navigation/editing buttons

Across the bottom, the first four buttons on the left are the "navigation" buttons:

- **Top** button positions on the first record in the table.
- **Prev** button positions on the record previous to the record currently being viewed.
- **Next** button positions on the next record in the table.
- **Bottom** button positions on the last record in the table.

Next five buttons allows the partner to search, delete, save, modify and add field office information.

- **Query:** search feature
- **Delete:** removes field office information
- **Save:** saves new or modified field office information
- **Modify:** allows changes to field office information
- **Add:** allows new field office information to be added

Last two buttons:

- **Back:** returns to the Main Selection Menu
- **Cancel:** cancels changes when in deleting, saving modifying or adding mode

**NOTE:** Agency Code must always be typed in caps.

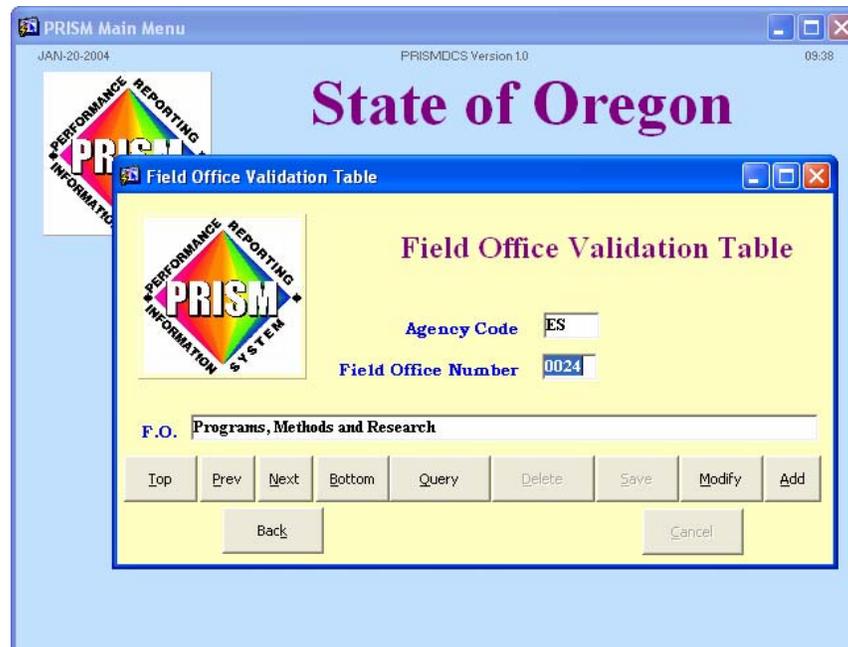


Figure 31



# Performance Reporting Information System Desk Manual

## Query

The “**Query**” button finds a specific record without moving through the list of records one at a time.

- Click on **Query** to access the query feature
- Type in desired query information in the fields
- Click on **Query** button to bring up selection
  - If you clicked on **Query** accidentally, you can click on **Query** again to cancel the query operation.
  - If you get stuck in a query attempt and want to get back to a full table list, delete the contents of the data fields and click **Query** to cancel the operation.



Figure 32



## Performance Reporting Information System Desk Manual

If there is no record matching the query, a “No records match select criteria.” message appears. (See Figure 33)

Click **OK** and type in valid search criteria.

**Warning:** If you click **OK** and then click on **Back**, you will get the error message. (See Figure 34)  
Clicking on **Cancel** is not an option and will not help.

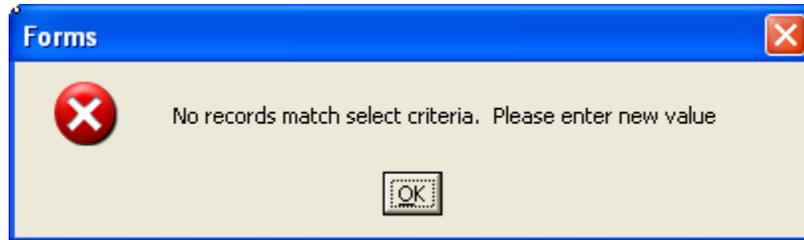


Figure 33

Clicking on **Back** during a Query that has received a “No records match select criteria” error message, will pop up an error message. (See Figure 34)

Type in different, valid information and click **Query** and then you can click **Back** to exit or move on.

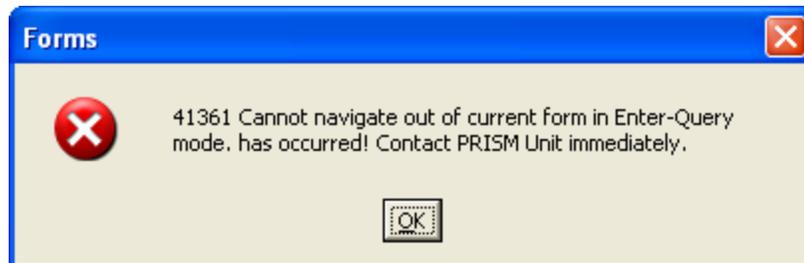


Figure 34



# Performance Reporting Information System Desk Manual

## Delete

The “Delete” button deletes the record showing in the table window. A delete warning message appears. (See Figure 35)

- Click **Yes** and the record is removed from the table.
  - If a mistake is made, the partner needs to add that record back into the table.

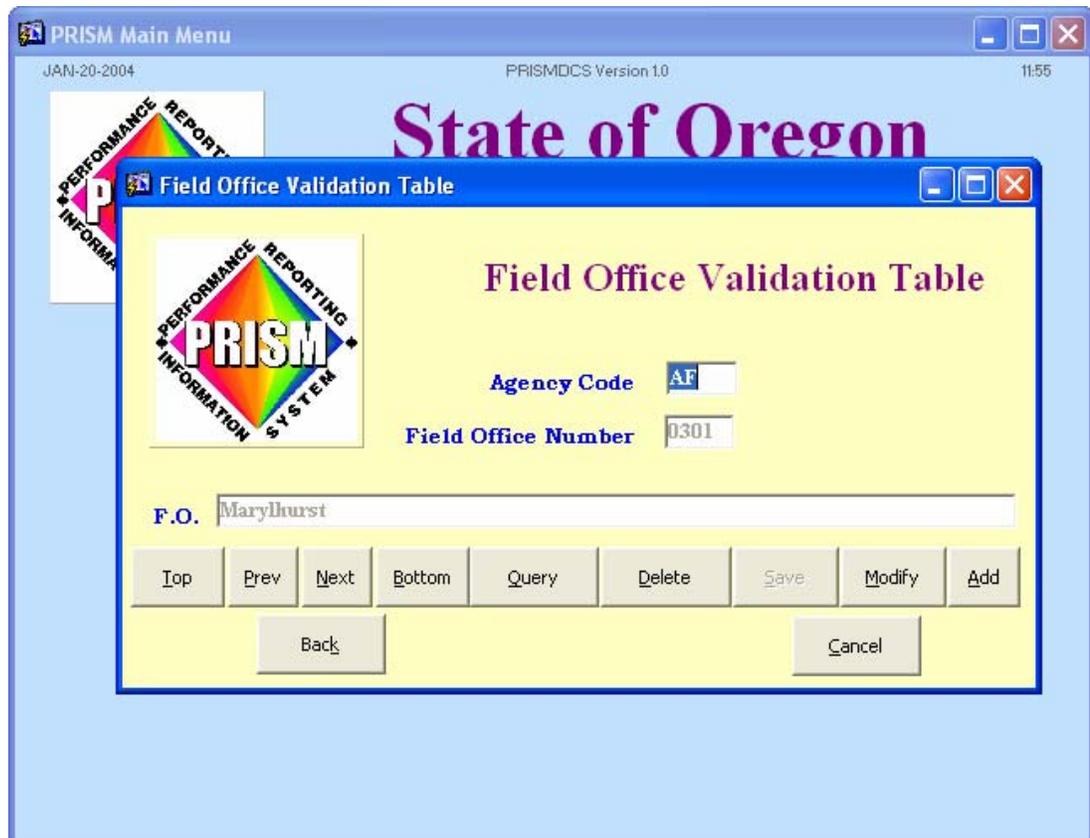


Figure 35

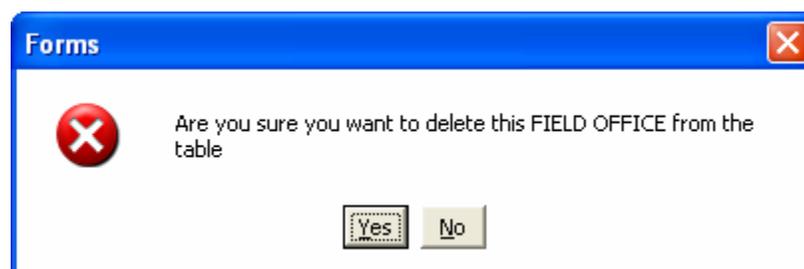


Figure 36



# Performance Reporting Information System Desk Manual

## Save

The “**Save**” button saves the record showing in the table window. This button is available only when a record is being added or modified. (See Figure 37)

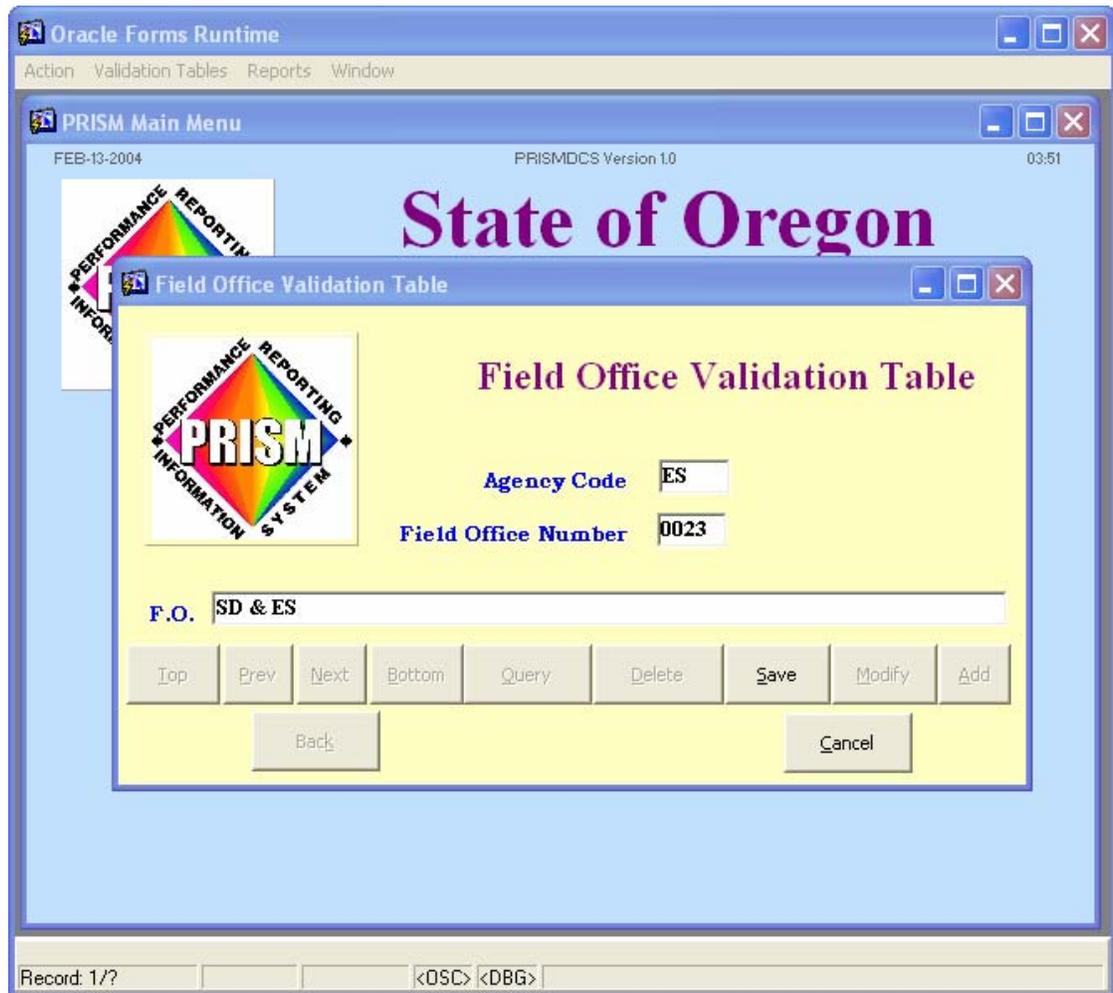


Figure 37



# Performance Reporting Information System Desk Manual

## Modify

The “**Modify**” button is used to edit data already in the table.

- To modify data, just click on the **Modify** button, edit the text to be changed and then click on the **Save** button.
- The “**Save**” button is used when a partner modifies or adds records to the table.
- The “**Cancel**” button, if pressed during modifying or adding a record, cancels the current action.

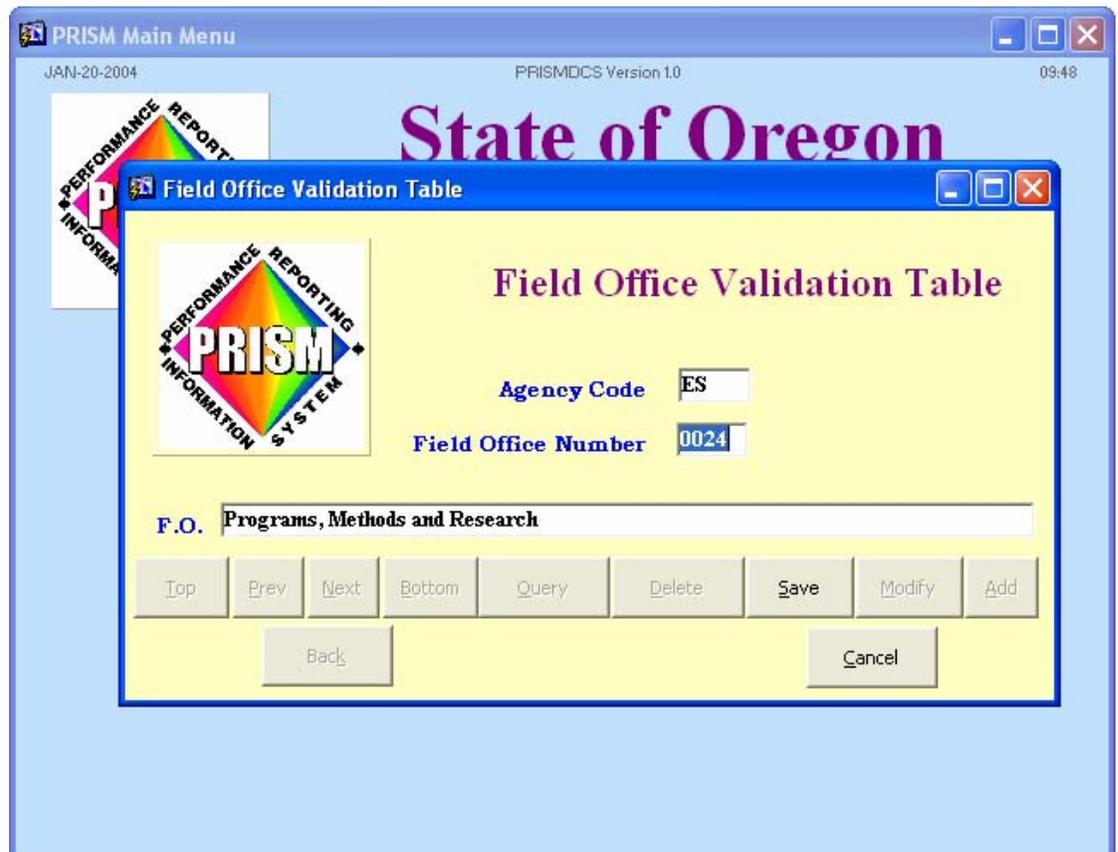


Figure 38

If no changes were made to the data, a message stating that appears. (See Figure 39)

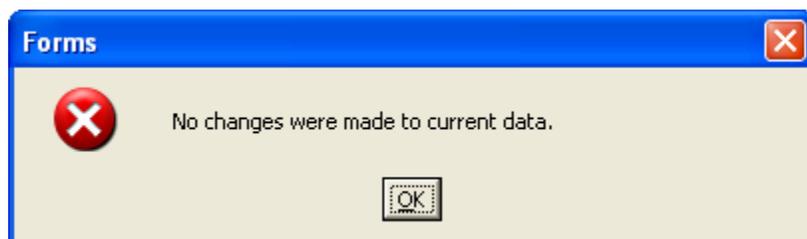


Figure 39



# Performance Reporting Information System Desk Manual

## Add

The “**Add**” button is used to add new partner information to the validation table.

- To add data, just click on the **Add** button, type in the information in the fields and click on the **Save** button. (See Figure 40)
- The “**Save**” button is used when a partner modifies or adds records to the table.
- The “**Cancel**” button, if pressed during modifying or adding a record, cancels the current action.

Field Office Validation Table

Field Office Validation Table

Agency Code

Field Office Number

F.O.

Top Prev Next Bottom Query Delete Save Modify Add

Back Cancel

Figure 40



# Performance Reporting Information System Desk Manual

## Back

Click the **Back** button to exit the validation table window. (See Figure 41)

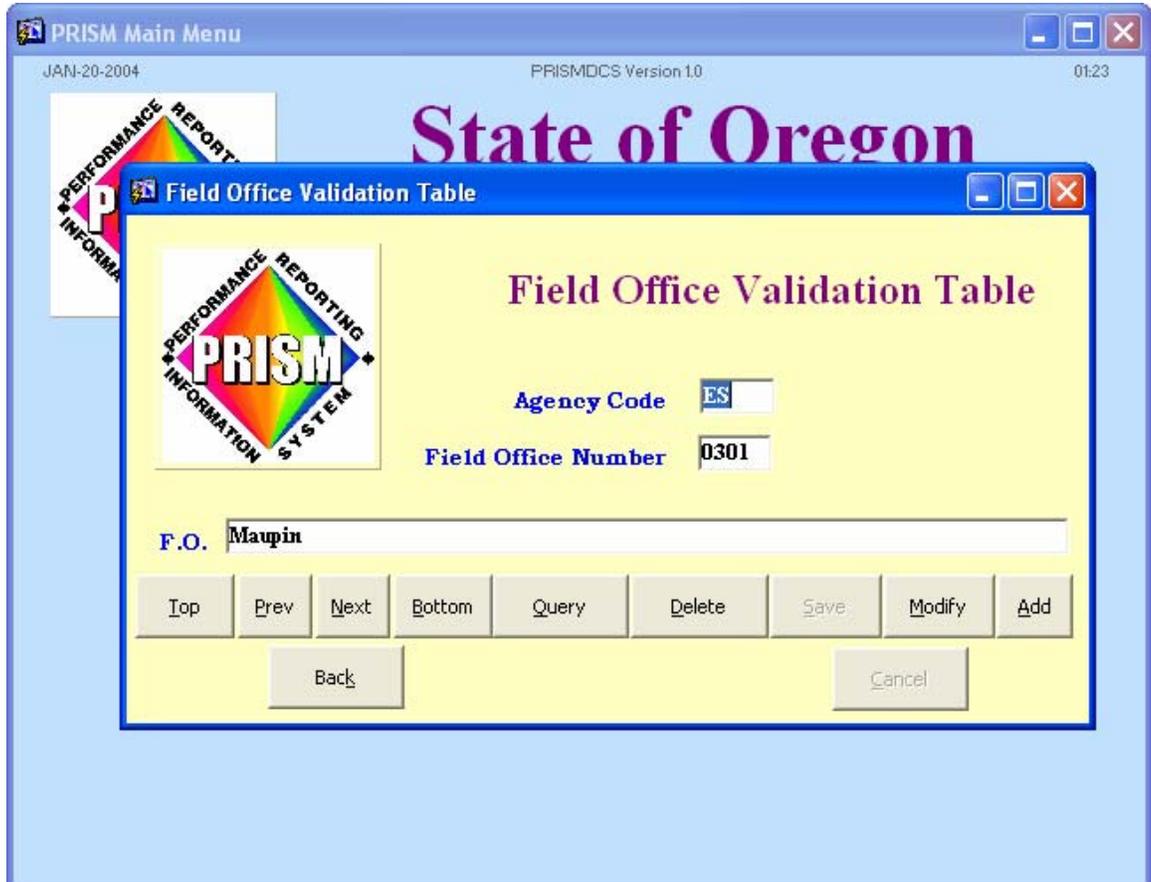


Figure 41

Clicking on the **Back** button when non-valid table information is entered in the Field Office Validation Table fields, will result in “Cannot navigate out of current form.. ” error. (See Figure 42)

Replace the non-valid information with valid information and click on the **Back** button. You are then allowed to return to the PRISM Main Selection Menu.



Figure 42



# Performance Reporting Information System Desk Manual

## Cancel

The “**Cancel**” button, if pressed during modifying or adding a record, cancels the current action.

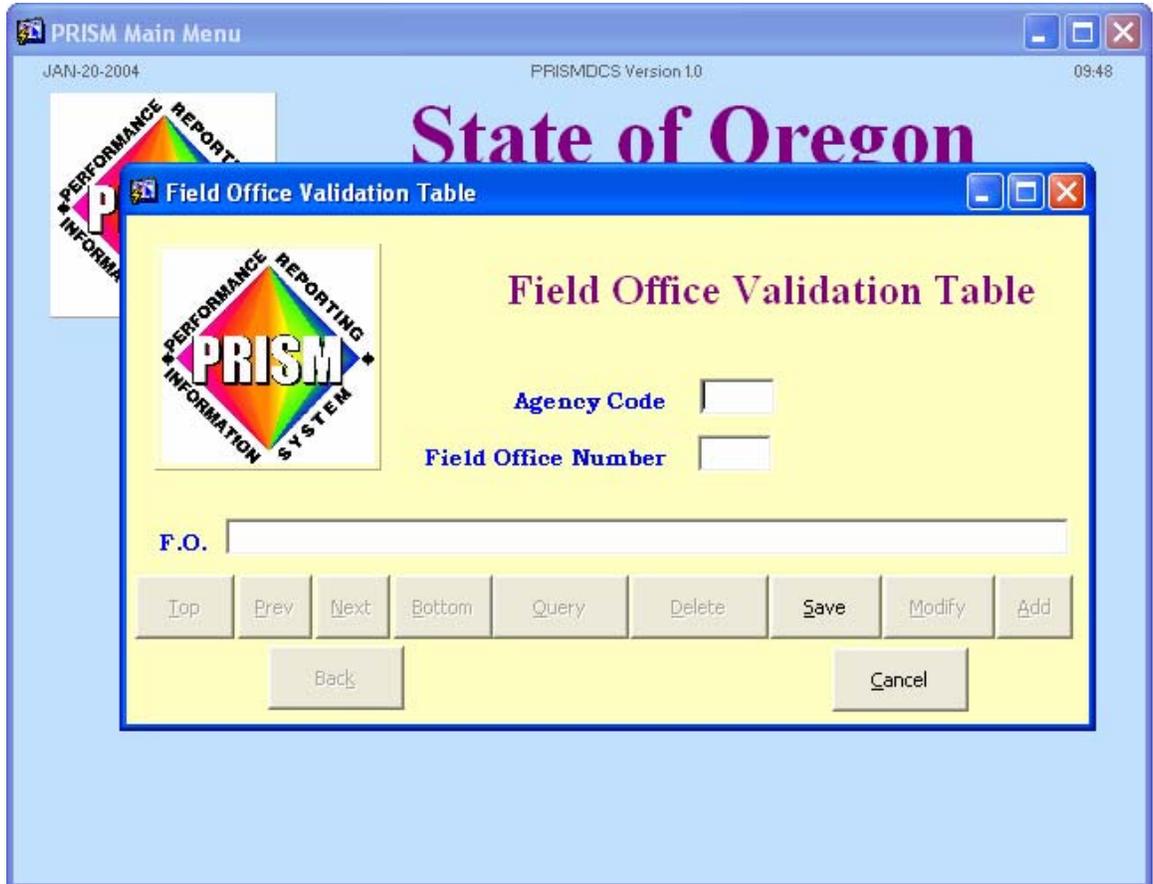


Figure 43



# Performance Reporting Information System Desk Manual

## User ID

At the bottom of the Main Selection Menu window, under the “Exit Performance Reporting Information System” button, is displayed “User ID:” and user logon name. The user logon name field is a hidden “hot” button. If you double click on the user logon name, a logon window will appear.

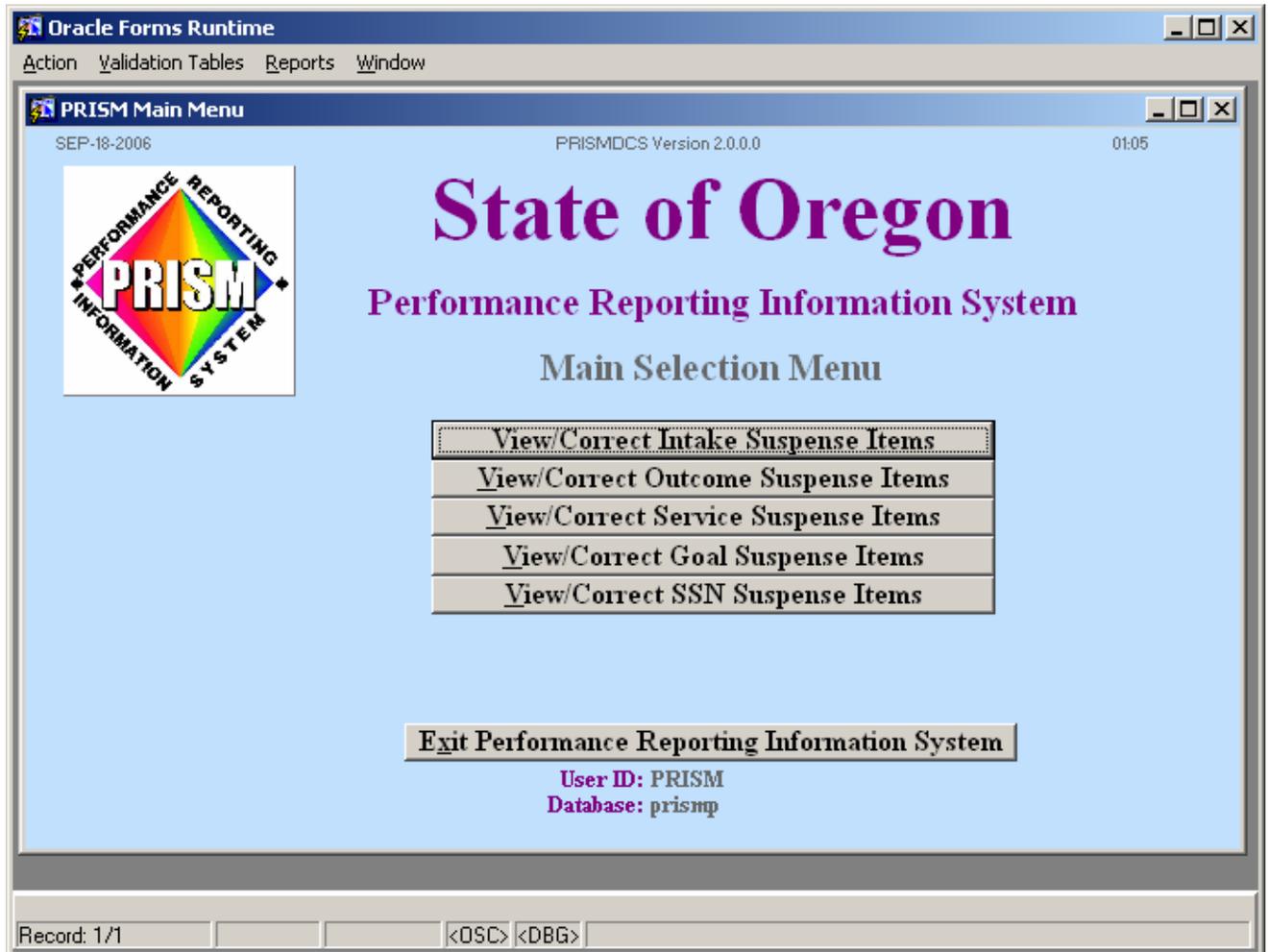


Figure 44

If you open this logon window, YOU NEED to re-enter your logon information and click on **Connect** to get back in to the Oracle Forms application. (See Figure 45)



## Performance Reporting Information System Desk Manual

Clicking the **Cancel** button will result in a refresh of the Logon window and a second chance to re-entering the user logon information. If you click **Cancel** a second time, an error message will appear. (See Figure 45)

A screenshot of a Windows-style dialog box titled "Logon". It has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains three text input fields labeled "Username:", "Password:", and "Database:". Below the fields are two buttons: "Connect" on the left and "Cancel" on the right.

Figure 45

Click the **OK** button and you return to the Main Selection Menu window. (See Figure 46)

A screenshot of a Windows-style dialog box titled "Forms". It has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains a red circular icon with a white "X" on the left. To the right of the icon is the text: "You are no longer logged into the system. You must log in or exit." Below the text is a single "OK" button.

Figure 46



# Performance Reporting Information System Desk Manual

The PRISM logo will be missing from the upper left corner of the window and the fields **User ID** and **Database** will be empty. (See Figure 47)

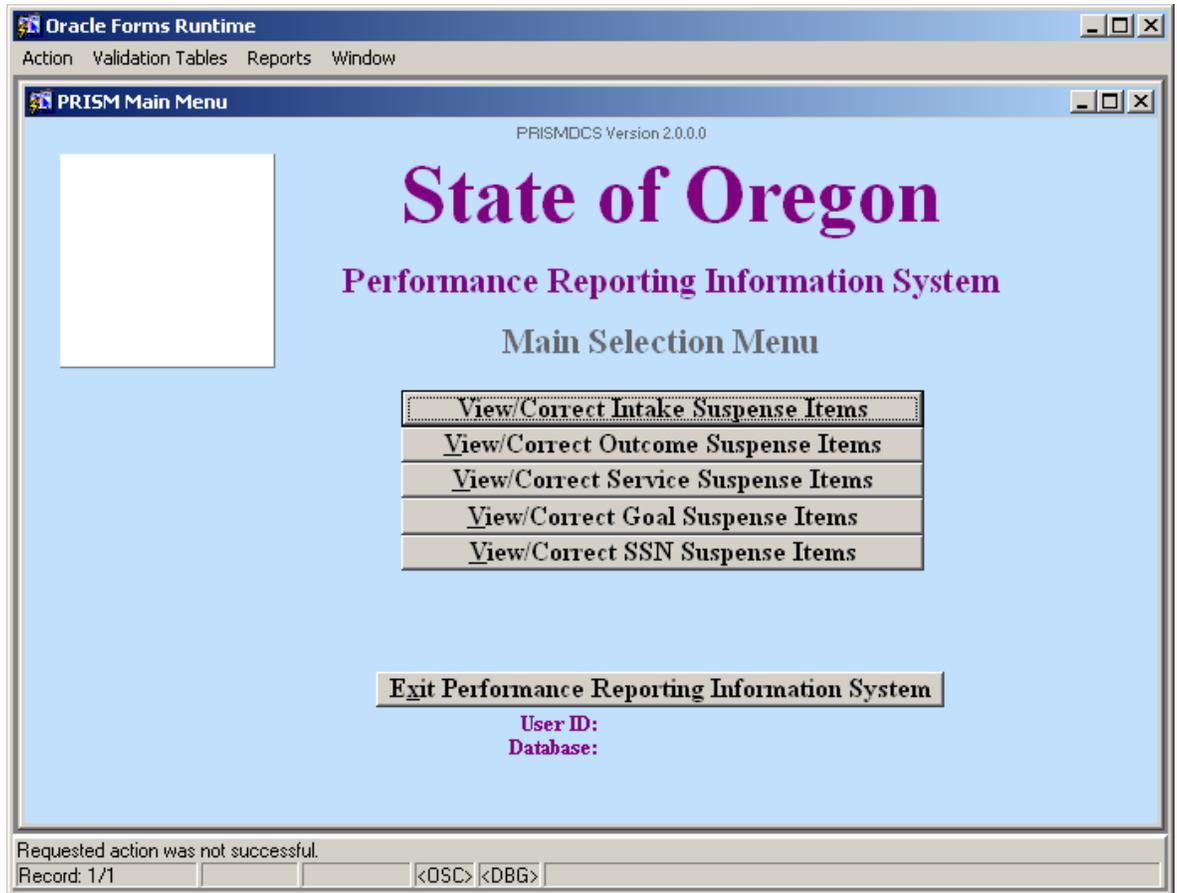


Figure 47



# Performance Reporting Information System Desk Manual

Double clicking on the empty area of the **User ID** field will access the logon screen. (See Figure 48)

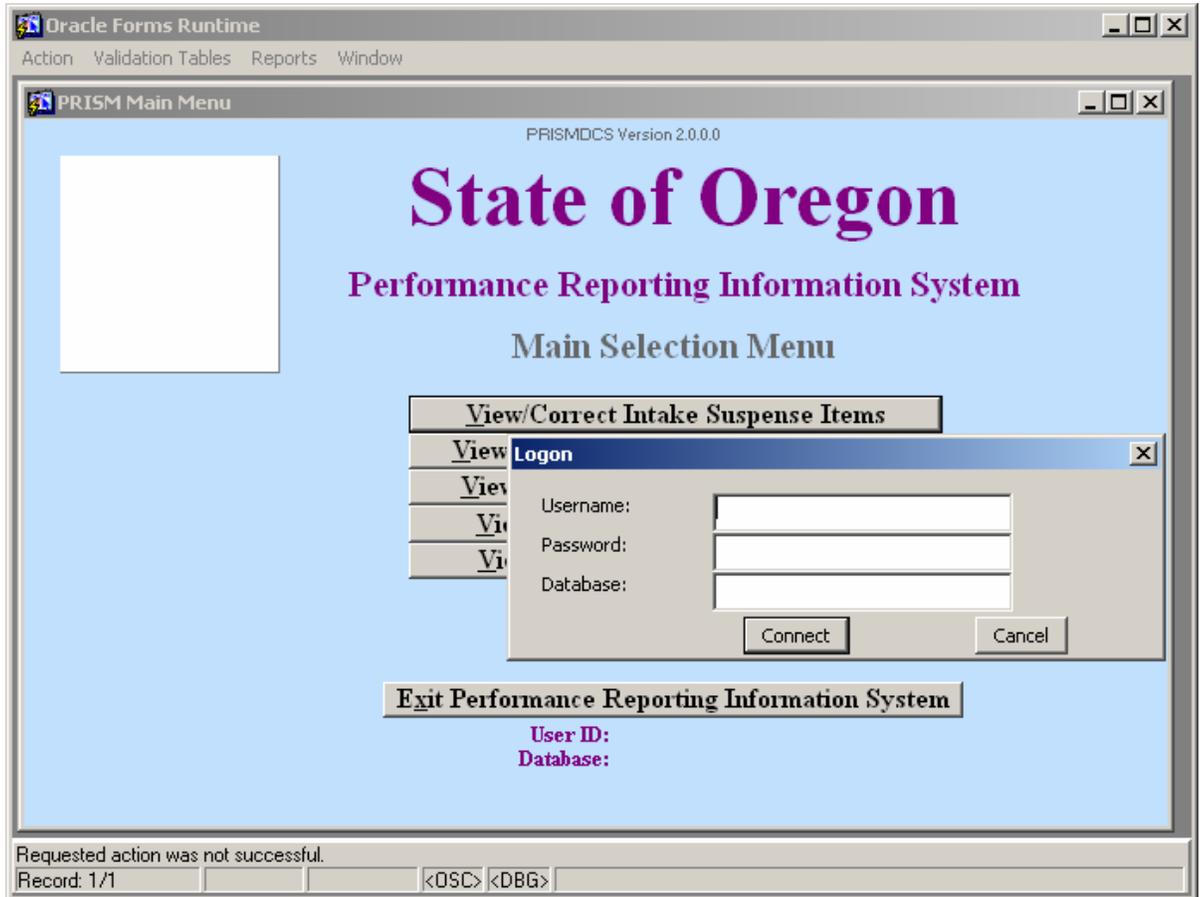


Figure 48

## Exiting the Main Selection Menu

Use the "Exit Performance Reporting Information System" button to close the whole forms application program (both the Oracle Forms Application shell and the PRISM Main Selection Menu window).



# Performance Reporting Information System Desk Manual

## Open Data Base Connectivity (ODBC)

### Introduction

*Open DataBase Connectivity* is a standard database access method developed by Microsoft Corporation. The goal of ODBC is to make it possible to access any data from any application, regardless of which database management system (DBMS) is handling the data. ODBC manages this by inserting a middle layer, called a database *driver*, between an application and the DBMS. The purpose of this layer is to translate the application's data queries into commands that the DBMS understands. *For this to work, both the application and the DBMS must be ODBC-compliant -- that is, the application must be capable of issuing ODBC commands and the DBMS must be capable of responding to them.* Oracle is a fully ODBC compliant DBMS. Since version 2.0, the standard supports SAG SQL.

The PRISM database installation is configured to allow ODBC connections. If you utilize ODBC compliant database software such as MS Access, SPSS, SYBASE, FOXPRO, SQL Server or any of a number of others, you should be able to connect to PRISM using that software and the ODBC connection driver provided with it. To date, MS Access and SPSS have been fully tested and are known to work.

### Installation and Setup

- The necessary software will be brought to your place of work and will be installed and setup for you.  
**OR** The necessary software is available from the following web link:
- The ODBC drivers must be installed manually on your PC
- Should something happen and help is needed with installation or setup, please refer to the contact list located at this web link: [www.oregon.gov/prism/contact\\_us.shtml](http://www.oregon.gov/prism/contact_us.shtml)

### Using ODBC

Presentation methods will vary with different software packages but in general the process and the data you must provide to the driver are the same. First you must create a data source within your software that points to the PRISM database. At a minimum you will have to provide a data source name, a service name or destination that is the name of the tnsnames entry within your Oracle client that points to the database. Optionally you may provide a user\_id that will restrict the data source to a single user or group of users of your workstation.

When you activate a link to the PRISM database either to select a table to link to an application within your software package or to use a table already linked to your application, you will be presented with a login window in which to put your user\_id and password for the database. It will look much like the one you see when you attempt to use any of the software provided you by PRISM such as the SQL\*Plus software except that it will not ask you for a service name or SID of the database you want to connect to. ***By PRISM security policy, you are not to tell your ODBC connection to "remember" the user id and password required.***

When you make a request from your software to link to one or more of the PRISM tables, Oracle will present a list of tables available for you to choose from that will include all tables for which you have direct or indirect granted access to. This will include tables from the PRISM, PUBLIC, SYSTEM and other schemas in the database. You are interested in only those tables and views identified in the PRISM, PUBLIC or your own schemas.

When you make a request from your software to use one of the tables you have linked to for the first time in the current session, you will be prompted for a login and after having done so the table will be available



## Performance Reporting Information System Desk Manual

to you for the remainder of the session as though it were a local table. It will be identified in your software as a linked table by an icon that is different from your locally acquired tables.

Your connection to the PRISM database will remain “persistent” as long as you do not break the link to the table in your software. However, you should be aware that your connection will “time out” after a period of inactivity. Different software packages react differently to this condition and if it occurs, it may require that you restart your software before you can reconnect. You will not be disconnected due to inactivity if you are running a query that uses the linked table or if you are manipulating data retrieved from the link.



# Performance Reporting Information System Desk Manual

## SQL\*Plus

### Introduction

SQL\*Plus is a command line application that allows you to retrieve and manipulate data in PRISM.

### Using SQL\*Plus

You will find the shortcut icon to run SQL\*Plus in the Prism DB Queries folder placed on your desktop during installation.

To access SQL\*Plus from your Windows desktop, find the Oracle group and click on **SQL\*Plus**. You will see the Log On screen. (See Figure 49) Type your User Name and Password. Type "primp" for the Host String and click **OK**.

If successful, you will see the SQL> prompt. (See Figure 50)



Figure 49

Upon successful login, the Oracle SQL\*Plus window opens.

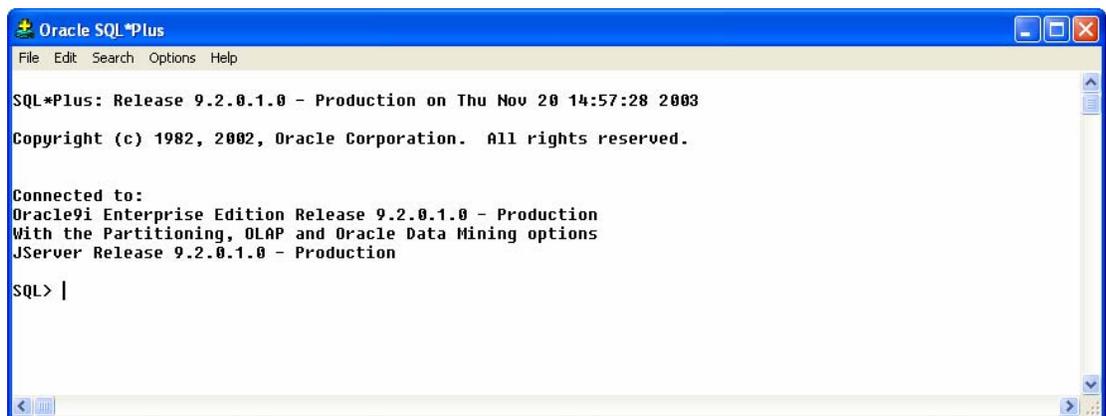


Figure 50



# Performance Reporting Information System Desk Manual

## SQL \*Plus (continued)

1. SQL Commands (a.k.a. select statements)
  - i. allow you to communicate with the server
  - ii. allow you to define, retrieve and manipulate data in the tables
2. Running anonymous PL-SQL blocks – this allows the data manipulation and query statements of SQL to be included in block-structured and procedural units of code.
  - i. the command line starts with START
  - ii. Or @
3. Executing stored database procedures -
4. Data Definition Language (DDL) – these statements are a subset of SQL statements used to create, modify or remove Oracle database structures. These statements have an immediate effect on the database.
  - i. Partners will be limited to the use of the ALTER USER command

At the SQL prompt, you can begin typing any SQL command. Upon hitting **ENTER**, the SQL prompt will change to line number prompts. When you are finished typing a command, type / or **RUN** to execute the SQL command. A semicolon placed at the end of the SQL command will also execute the command immediately after hitting **ENTER**.

The **SELECT** statement is the most common command used to query data from PRISM tables.

A sample SELECT statement would be:

```
select * from prism.agency; (enter)
```

This would bring up a list of all the partner agencies in PRISM.

A few other simple commands available at the SQL prompt are:

- **DESCRIBE** tablename - lists the attributes and their specifications of table name
- **EDIT** - Places you in an editor (Notepad) containing the buffer contents. The buffer consists of the most recent SQL\*Plus command executed.
- **GET** filename - Retrieves a file and places it into the buffer
- **SAVE** filename - Saves the buffer to the file name of your choice
- **CLEAR BUFFER** - Clears the buffer



# Performance Reporting Information System Desk Manual

## Oracle Discoverer

### Introduction

The Oracle Discoverer application allows partners to produce ad-hoc reports from their views of the PRISM data. This is a customizable GUI tool that allows queries of the data that product customized reports that can be run, filed and later retrieved fro re-run from workbooks created by the user.

Reports produced using this application can be converted into permanent Oracle Reports that can be added to the available standard reports arsenal. Thus, if you develop an ad-hoc report and realize that it is a consistently run report, we can port it to Oracle Reports and set it up to run as a production report without requiring you to run it from your desk.

### Using Oracle Discoverer

You will find the shortcut icon to run the Oracle Discoverer End User Application in the Prism DB Queries folder placed on your desktop during installation.

- When Oracle Discoverer opens, select the **Start** using Discoverer now button. (See Figure 51)

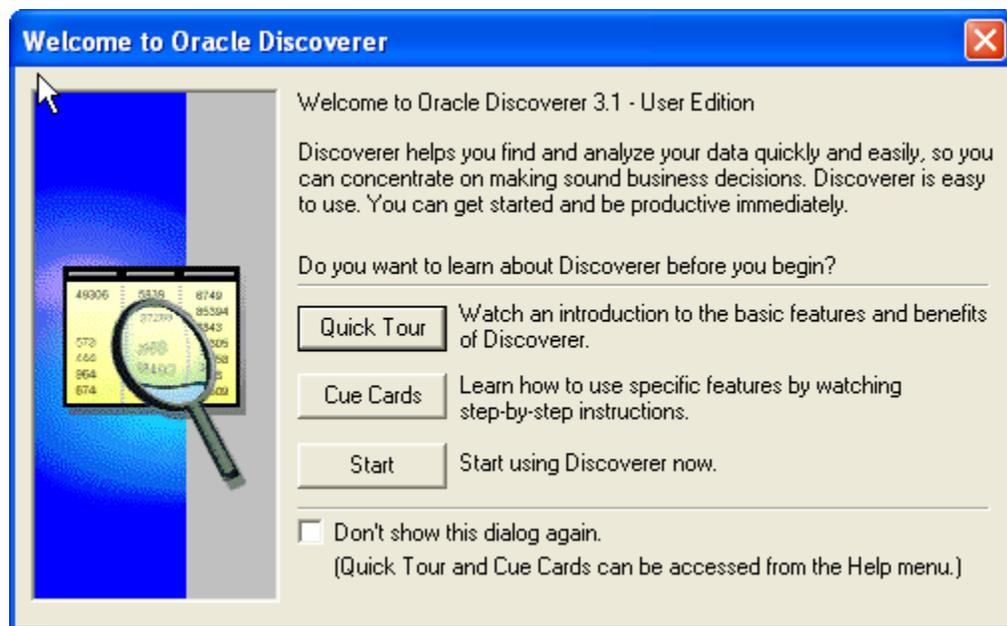


Figure 51



## Performance Reporting Information System Desk Manual

A window appears requesting your Username, Password and Connect (or Database) information. (See Figure 52) Type the logon information provided to you by the PRISM System Administration staff and click the **Connect** button.



Figure 52

The Workbook Wizard window appears. Selecting: (See Figure 53)

- **Create a new workbook** allows selection of tables and fields to place in the workbook
- **Open an existing workbook** opens a previously created workbook
- Clicking on **Cancel** give you access to the Discoverer shell

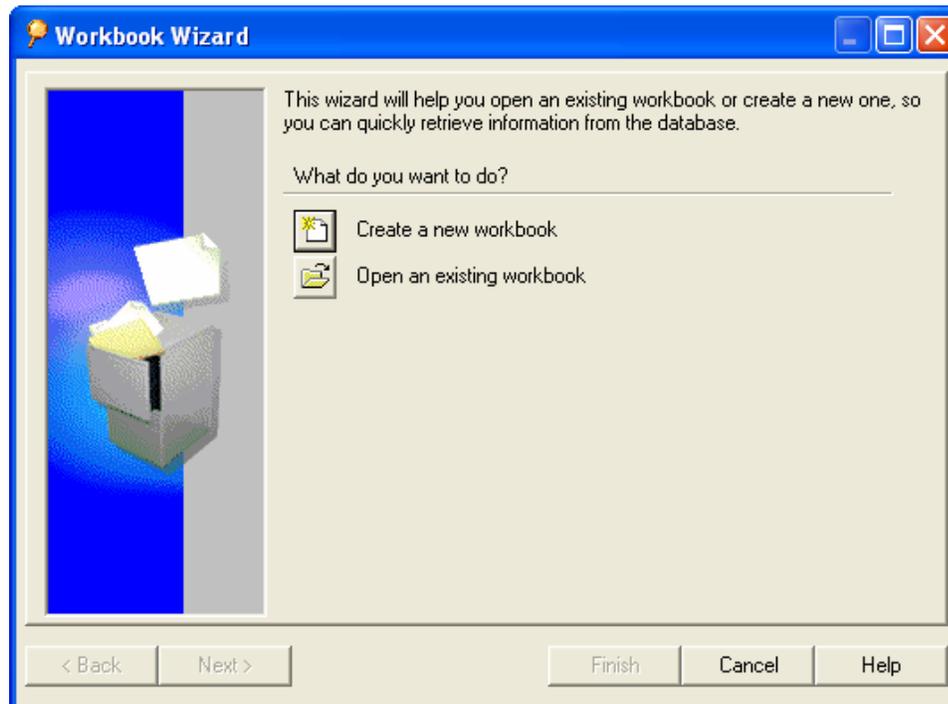


Figure 53



# Performance Reporting Information System Desk Manual

## Finding Help

Discoverer has included several options to help you become familiar with this application.

- Help Topics (See Figure 55)
- Using Help (See Figure 56)
- Quick Tour (See Figure 57)
- Cue Cards (See Figure 58)
- Manuals (See Figure 59)

They can be found in the drop down box under Help from the tool bar. (See Figure 54)

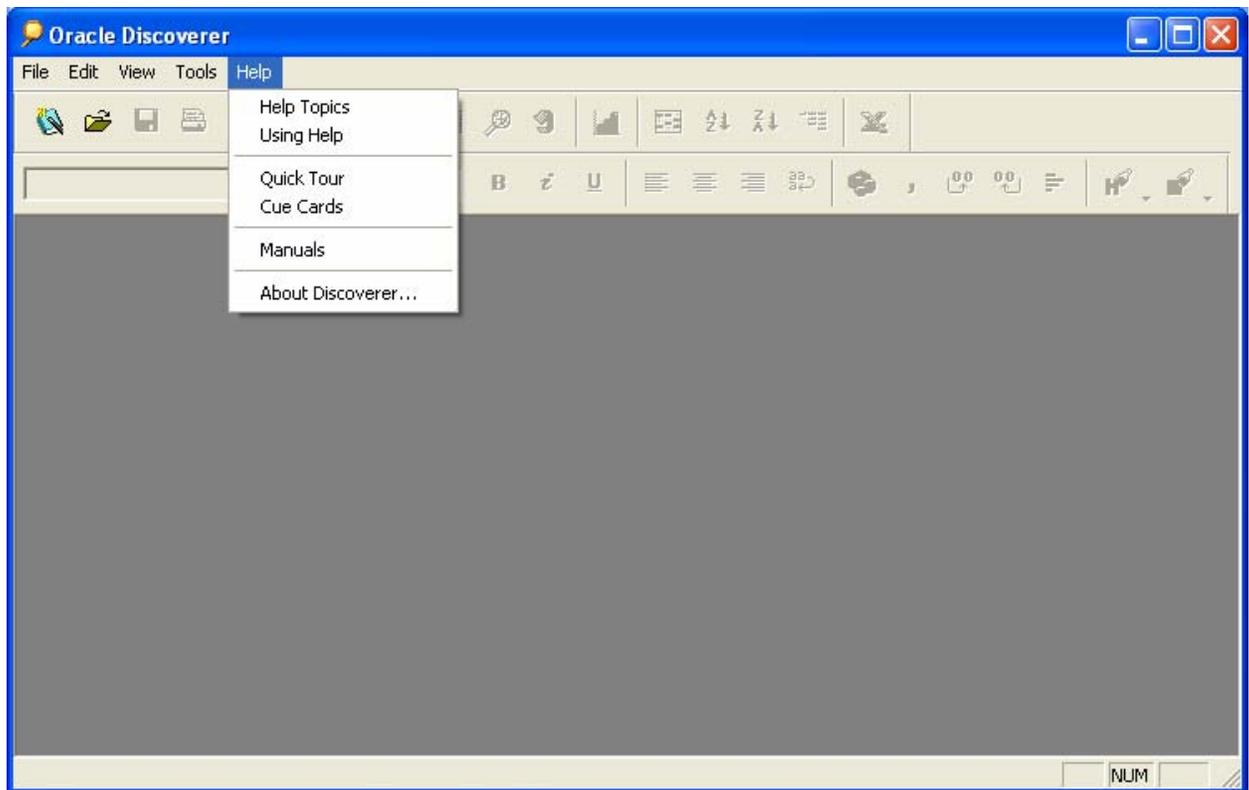


Figure 54



# Performance Reporting Information System Desk Manual

## Help Topics



Figure 55



# Performance Reporting Information System Desk Manual

## Using Help

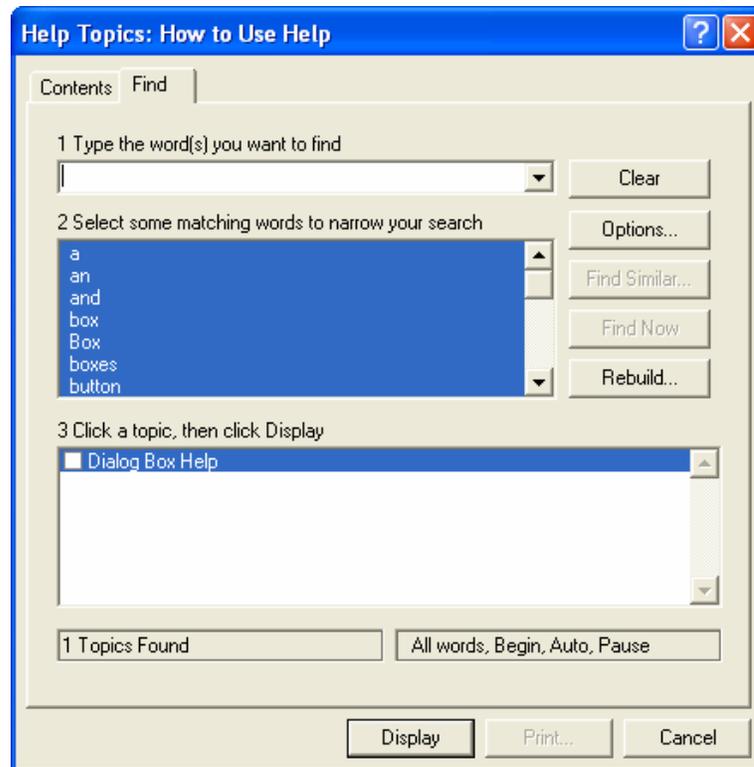


Figure 56



# Performance Reporting Information System Desk Manual

## Quick Tour

To access from the Tool Bar, click on Help/ Cue Cards

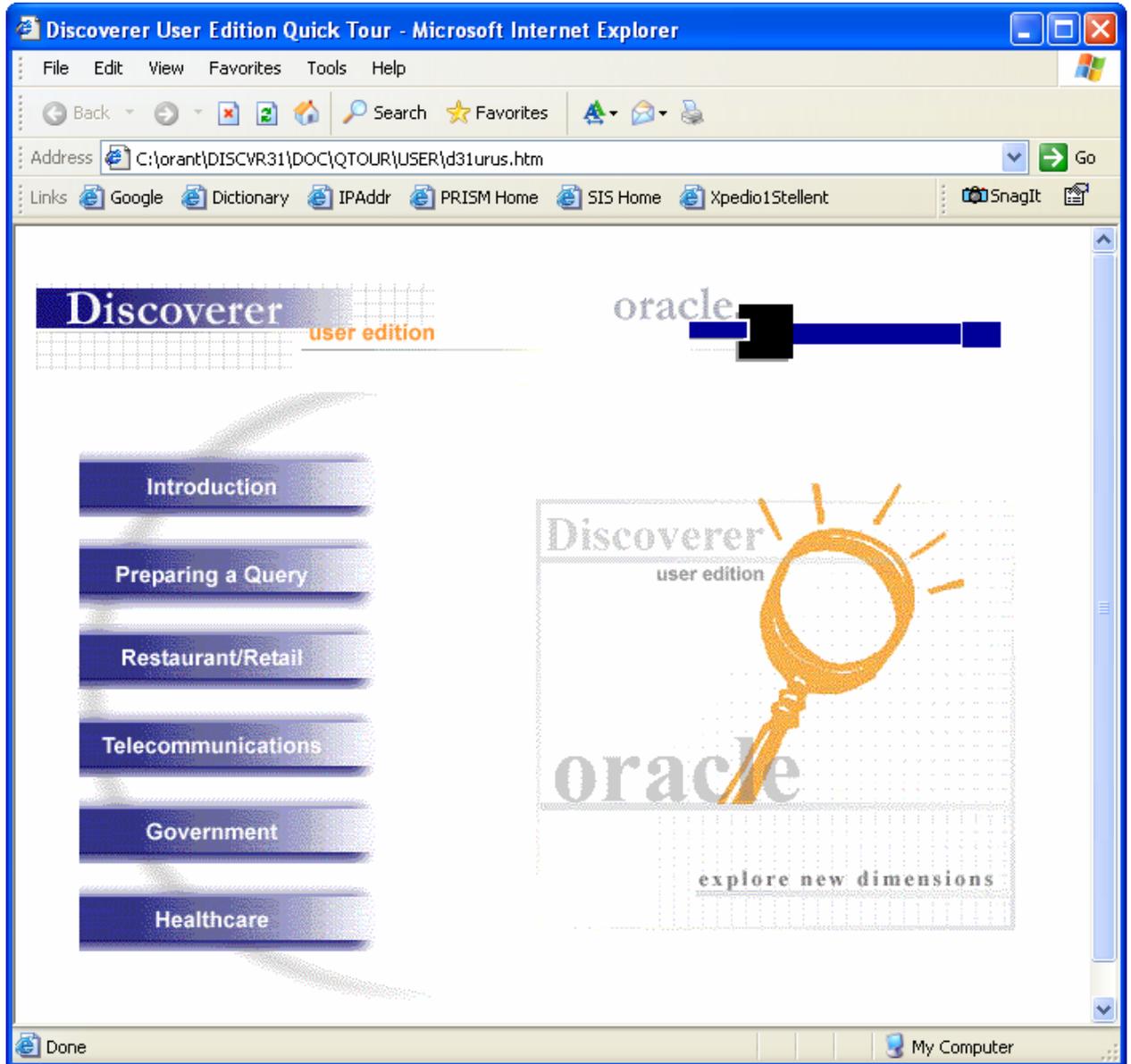


Figure 57



# Performance Reporting Information System Desk Manual

## Oracle Discoverer Cue Cards

Handy quick reference available to look up quick How To questions.

To access from the Tool Bar, click on Help/ Cue Cards

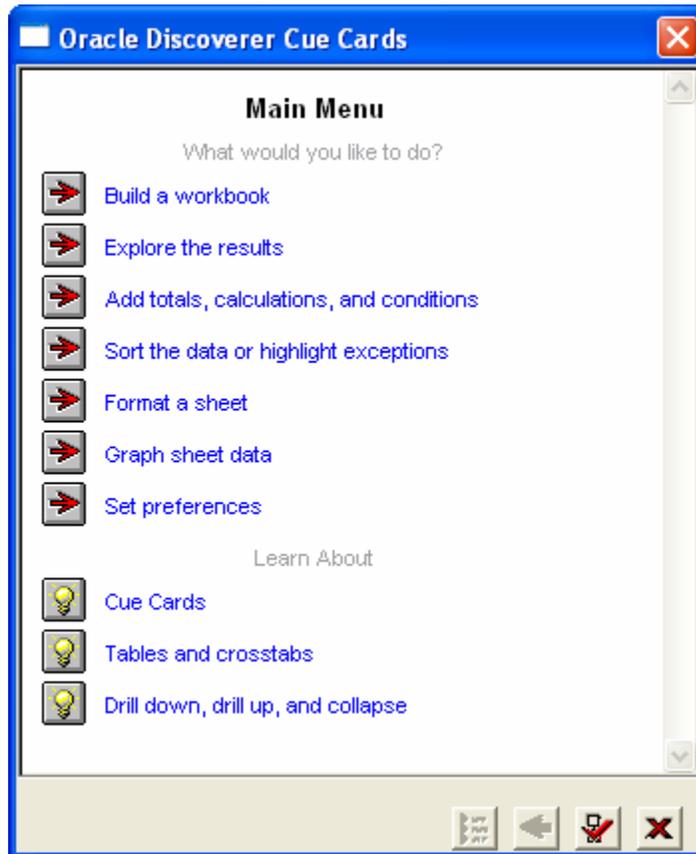


Figure 58



# Performance Reporting Information System Desk Manual

## Discoverer Manual

An in-depth resource for the Oracle Discoverer tool.

To access from the Tool Bar, click on Help/Manuals. Search for the topic needed.

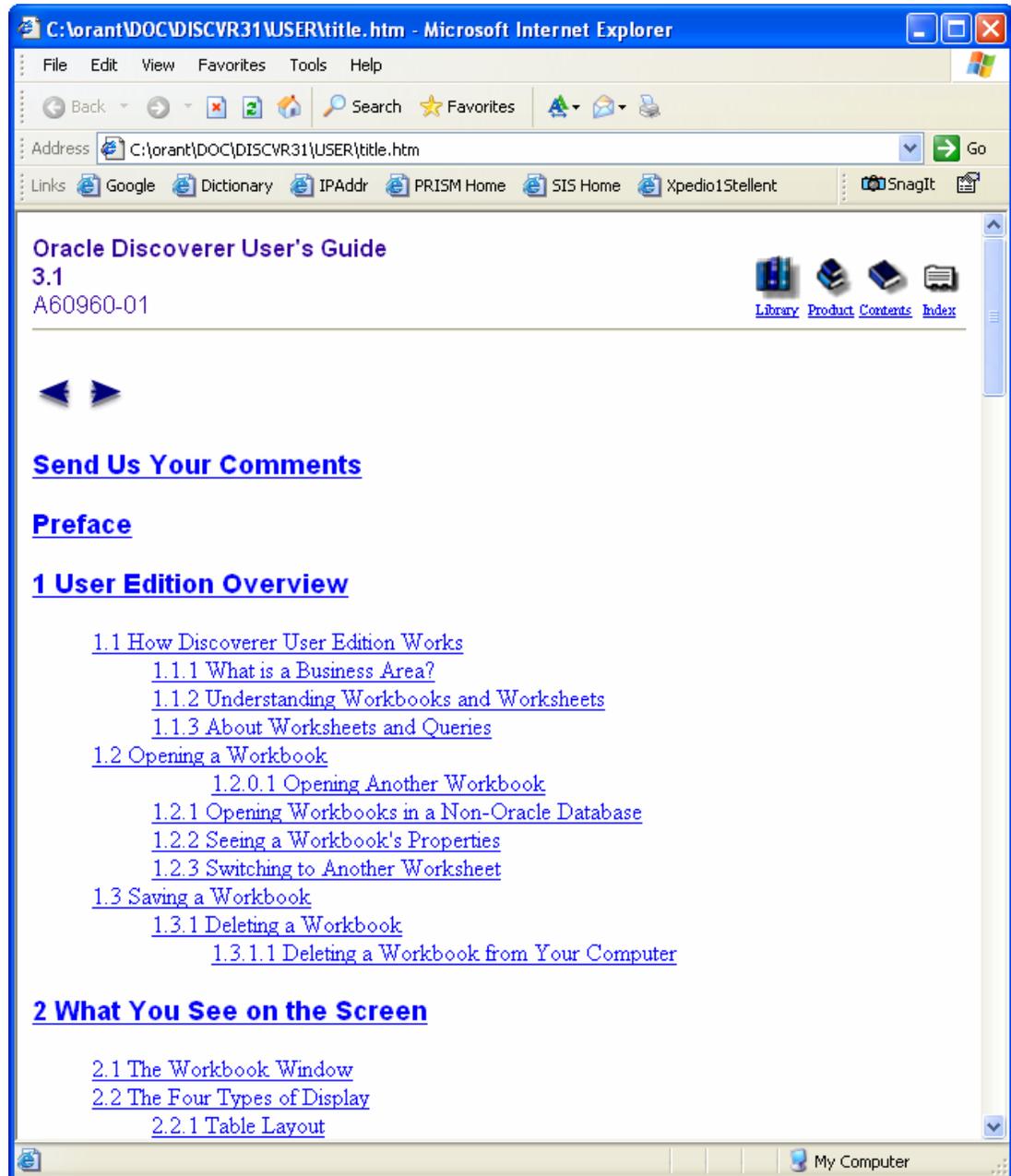


Figure 59



# Performance Reporting Information System Desk Manual

## Secure File Transfer Protocol (FTP)

### Introduction

Secure FTP is a version of the File Transfer Protocol that sends and receives data over a secure and encrypted connection between a client and the FTP server. This enables partners to send PRISM transaction files to PRISM without having to encrypt the files and then have them unencrypted by PRISM staff before they can be accessed. With it and the inclusion of an FTP server partition resident on the PRISM production servers, the data can be protected from point to point and user\_id/passwords are kept confidential and secure.

### Using Secure FTP

When the PRISM software was installed on your workstation a directory prism/Secure FTP was created (most likely on your C: drive). In that directory there is a program called psftp.exe. This program is a public domain FTP program that uses the ssh protocol in the UNIX FTP environment to get and put files. You can create a shortcut to this executable and place it on your desktop or in your startup menu or you can move this program to a location of your choosing and access it in any way that suits your environment.

This is a command line program much like the standard FTP programs shipped with just about every operating system on the planet. When you start the program, a command line window will be opened up and you will be presented with an FTP prompt of "psftp>". At the prompt you will enter the following command:

```
psftp>>open prismftp.emp.state.or.us
```

The system will respond with "login as:". At the prompt you will enter your FTP user\_id as follows:

Login as: ***(type your PRISM assigned user id)***

The very first time you do this the system will respond with a message informing you that the hash key has not been installed on your workstation and telling you that if you trust this host, reply "y". It is safe to do so. What this is for is so the host (prismftp) can create the proper public/private key for the data transmission. On every other occasion and on this one after you enter the "y", the system will respond with "Using username "user id"" and then respond with "userid@prismftp.emp.state.or.us's password:". At this prompt enter your password:

user id@prismftp.emp.state.or.us's password: ***(type your PRISM assigned password)***

The system will respond with a message that indicates your working directory and will then return to the standard FTP prompt of "psftp>".

From this point on the program works pretty much like every other command line FTP program. The only notable exception is that there are not "bin" or "ascii" commands. This program always gets and puts files as "bin". The only caveat to this is that if you "get" a text file from the FTP server with this program and open it with notepad it will not display correctly. You will need to use WordPad or some other editor that understands carriage return without a line feed following.



# Performance Reporting Information System Desk Manual

## Oracle Reports

### Introduction

The Oracle Reports Runtime is a report generation tool that will allow creation of standard and individual partner agency PRISM reports. With the installed reports runtime module and the compiled report programs, partners can run such reports from their own workstations.

You will be able to use this Runtime application to generate:

- Post Outcome Performance Reports that are created each quarter,
- Custom PRISM partner agency reports and
- Each of the quarterly reports have a comparable county report available for use as well

The reports you run might differ from the reports posted on the PRISM web link. This is due to agencies requesting their data be dropped and resubmitting of their data to the PRISM system.

### Using Oracle Reports Runtime

You will find the shortcut icon to run the Oracle Reports Runtime Application in the Prism DB Queries folder placed on your desktop during installation. This icon was setup so when it is opened it accesses the subdirectory where the reports are located.

Upon opening the Oracle Reports Runtime Application, you will need to connect to the PRISM database. To do this, click **File\Connect**. A login window appears. (See Figure 60)

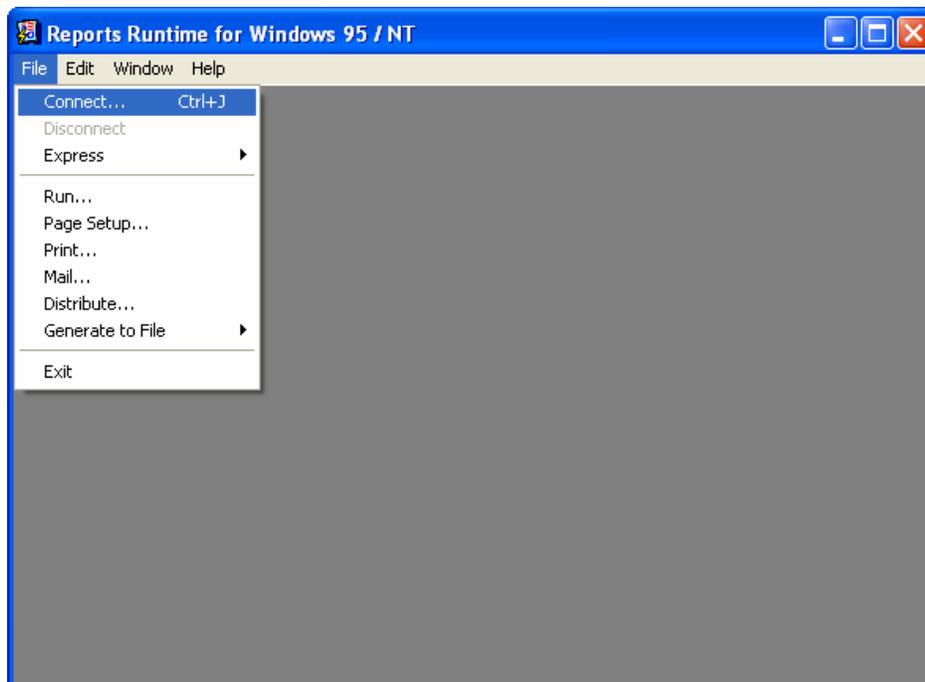


Figure 60



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Type in User Name, Password and the Database (which would be prism). Click the **Connect** button to finish logging in.

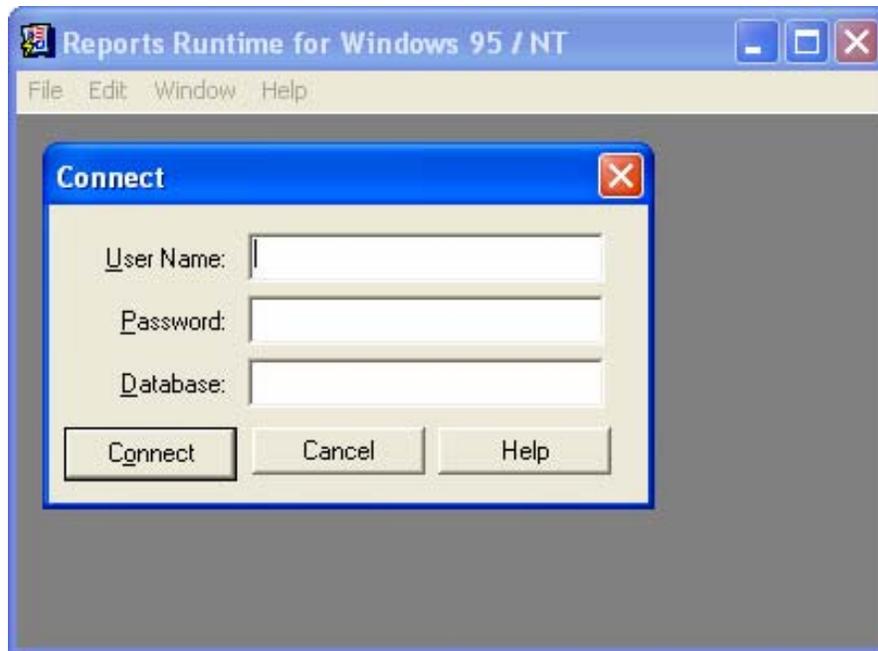


Figure 61

Once connected to the database, you can then select a report to run. (See Figure 62) To select a report, click on **File\Run**. A report selection window appears. (See Figure 63)

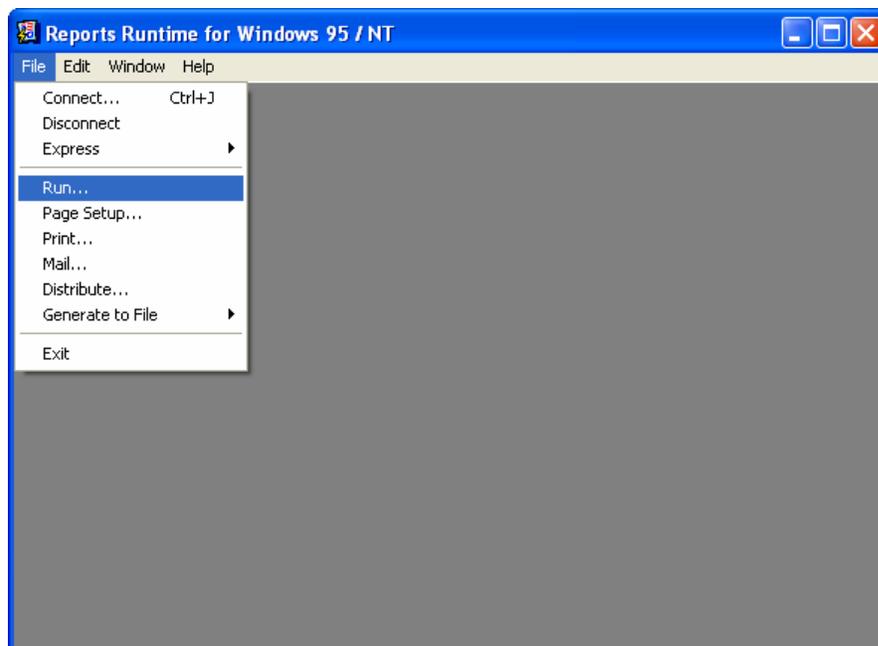


Figure 62



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The PRISM reports have a file name extension of \*.rdf. The selection criteria next to “Files of type” needs to be changed in order to be able to view these files from the Open window. Click on the arrow to the right of Report Runtime (\*.REP) and a drop down window appears. (See Figure 64)

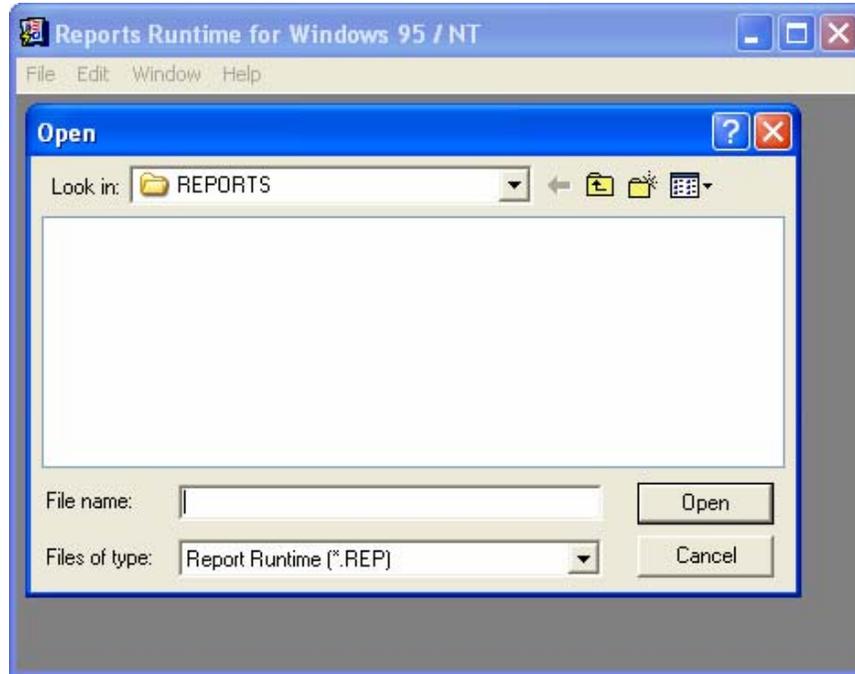


Figure 63

Select Report Definition (\*.RDF) and the list of PRISM reports becomes available. (See Figure 65)

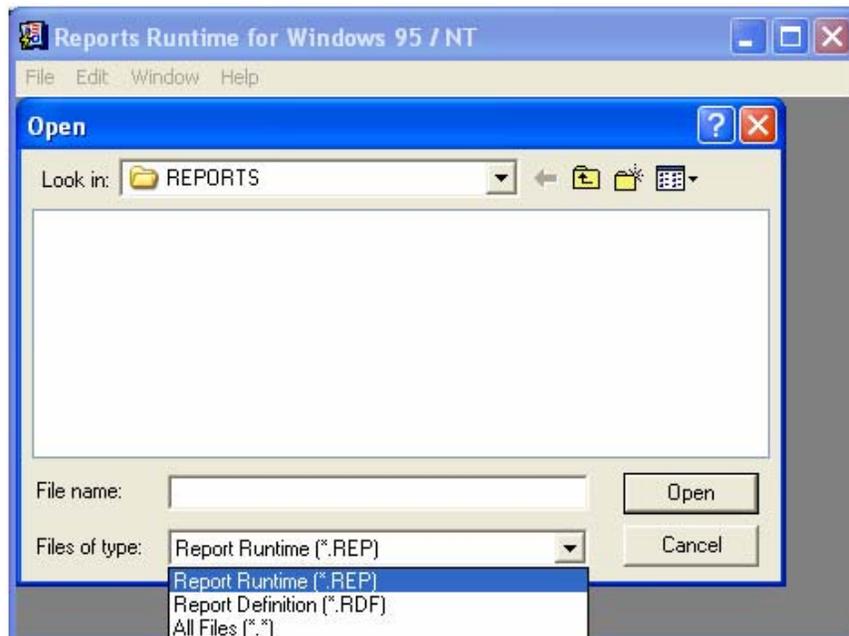


Figure 64



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Highlight the report you wish to run and click Open. (See Figure 65)

For purposes of explanation, we will run the Placement report.

*The following procedural flow is the same for each of the four buttons.  
Therefore, we will explain the screens for only one of the PRISM reports.*

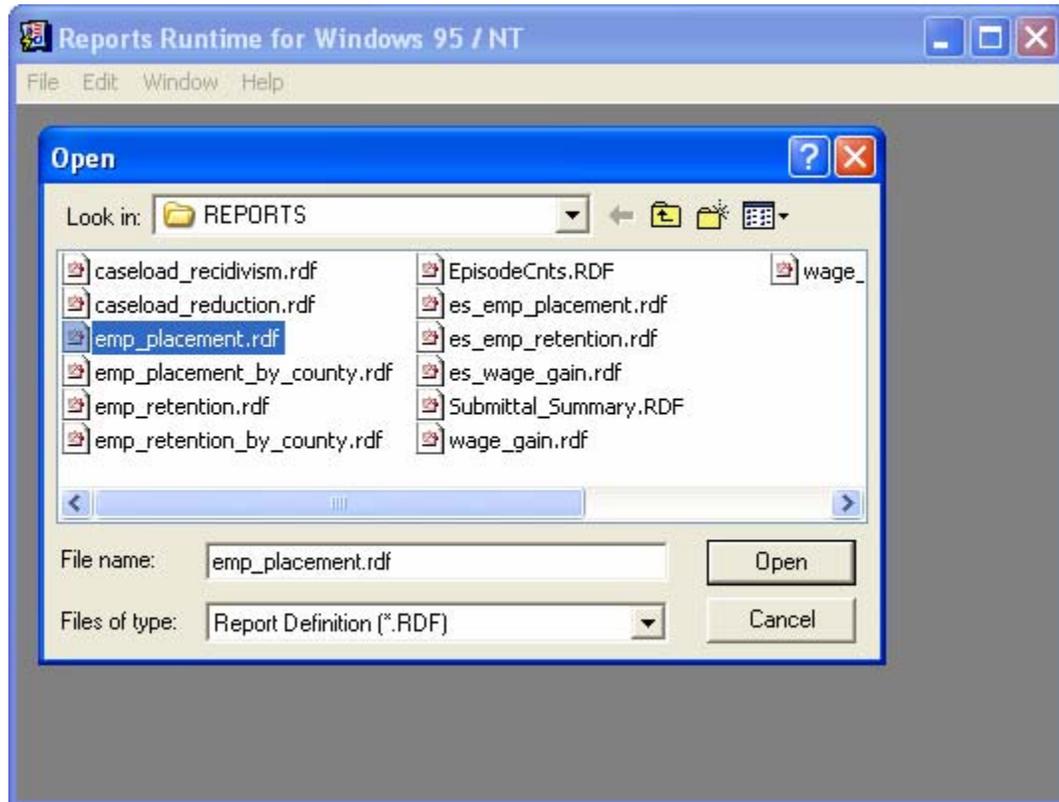


Figure 65

At this point if you have an older version of this application, an error message will appear. (See Figure 66) Click **OK** to close the window. Before trying again, download the most current version of the PRISM Standard Reports from [www.oregon.gov/prism/technicalinfo.shtml](http://www.oregon.gov/prism/technicalinfo.shtml) and place in your c:\prism\reports subdirectory.

Figure 66



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The Placement Report Control Form opens. (See Figure 67) The Control Form was built with a variety of selection options available. Reports can be created for just one quarter within a year or to cover multiple quarters over several years. This would be accomplished by using the Start Period and End Period fields. The content of these two fields need to be the four digit year followed by a single quarter digit (YYYYQ). No spaces between the year and quarter digits are allowed.

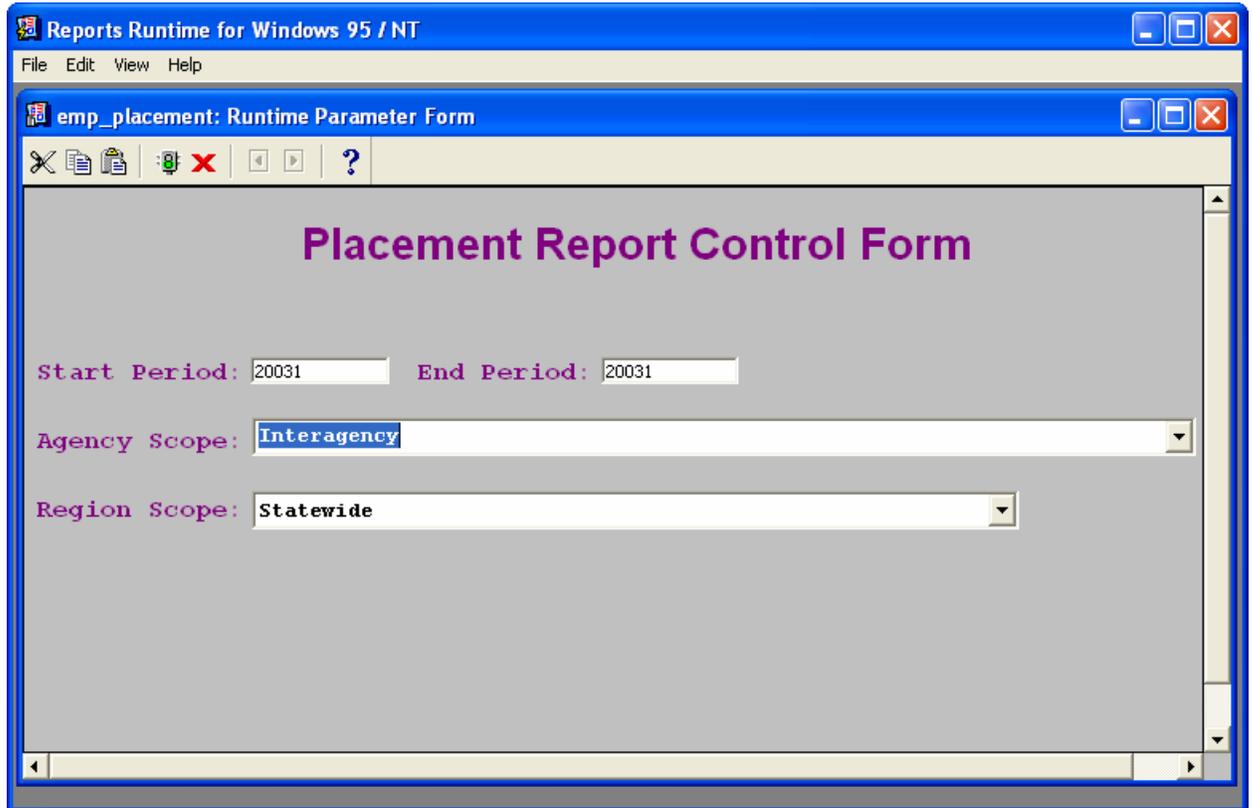


Figure 67



# Performance Reporting Information System Desk Manual

The Agency Scope selection allows the choices of Interagency (all partner agency data) or a single partner agency's data. (See Figure 68)

Remember, only the partner agency signed into the PRISM system can see their partner's agency data.

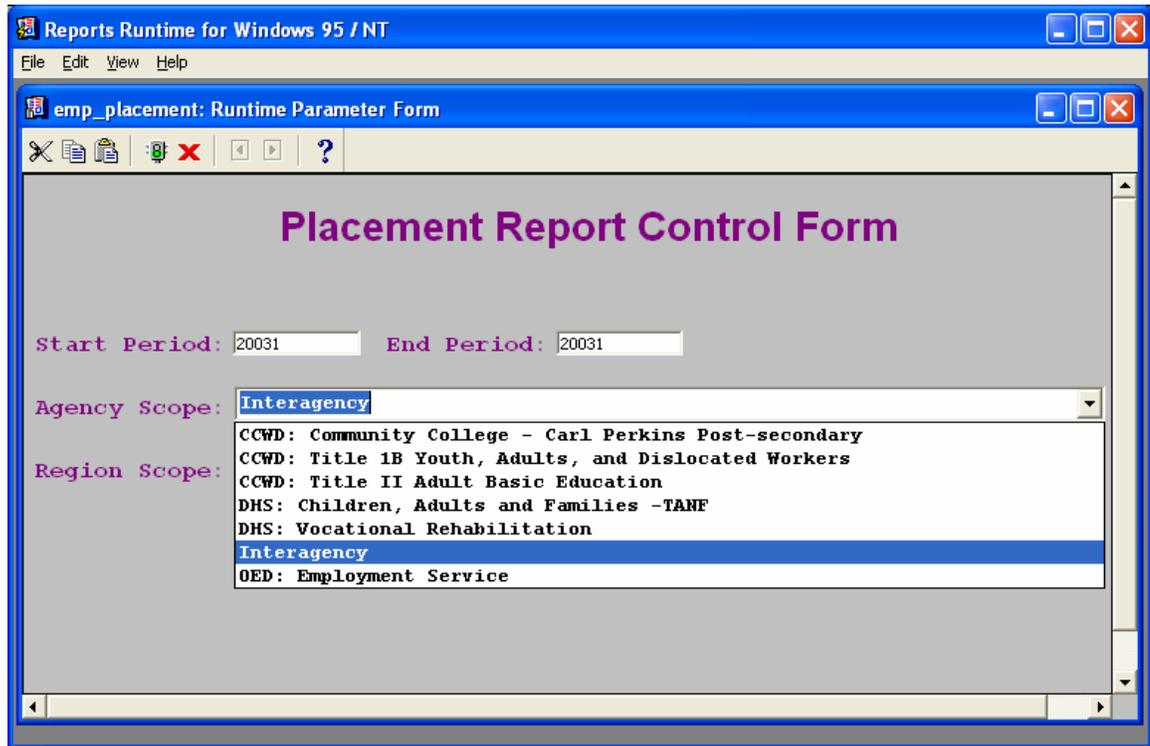


Figure 68



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The Region Scope selection allows the choice of collective Statewide data or one of the fifteen Region's data. Note scroll bar to the left of the Region Scope drop down list. This allows partner selection of all the Oregon Regions. (See Figure 69)

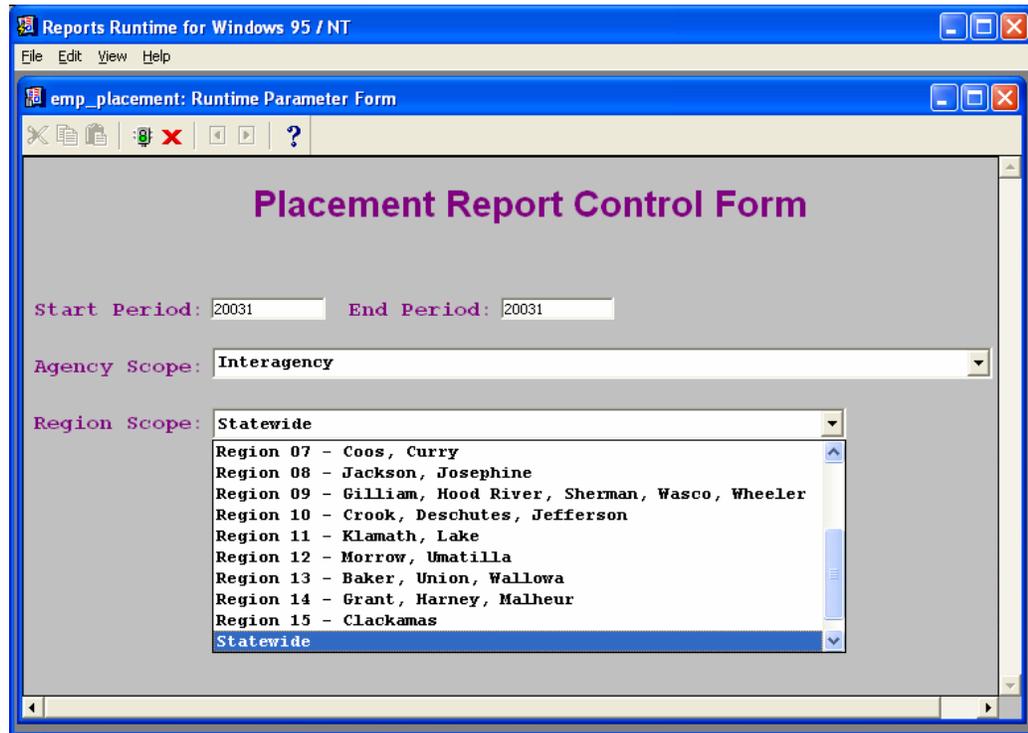


Figure 69

Once the desired selections have been made, press **ENTER** or click on the green signal light icon located in the tool bar. A Report Progress window appears allowing cancellation of the report. (See Figure 70)



Figure 70



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The report will run and appear in the Reports Runtime window. (See Figure 71)

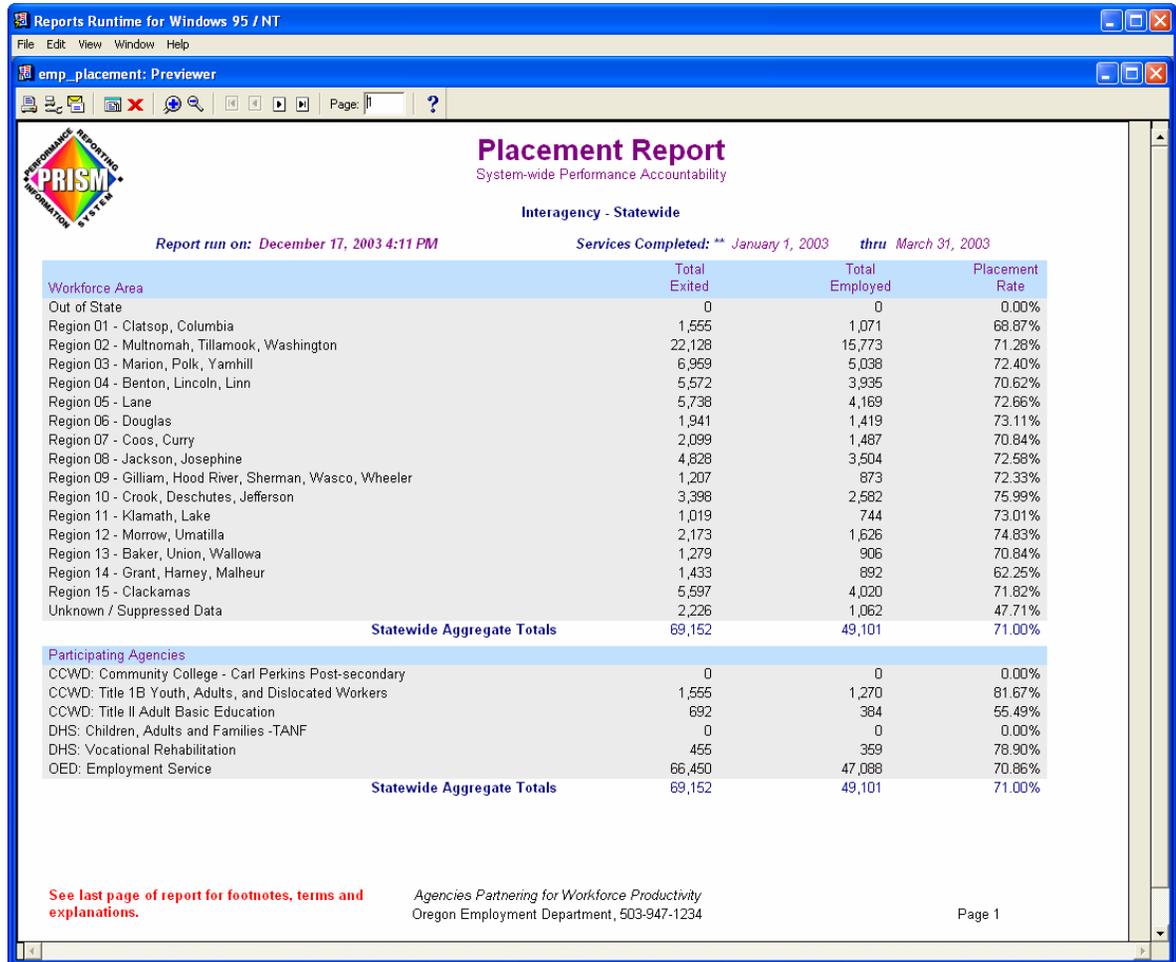


Figure 71



# Performance Reporting Information System Desk Manual

## Creating a PDF of a PRISM Report

To create a PDF of the report, click **File/Generate PDF**. (See Figure 72)

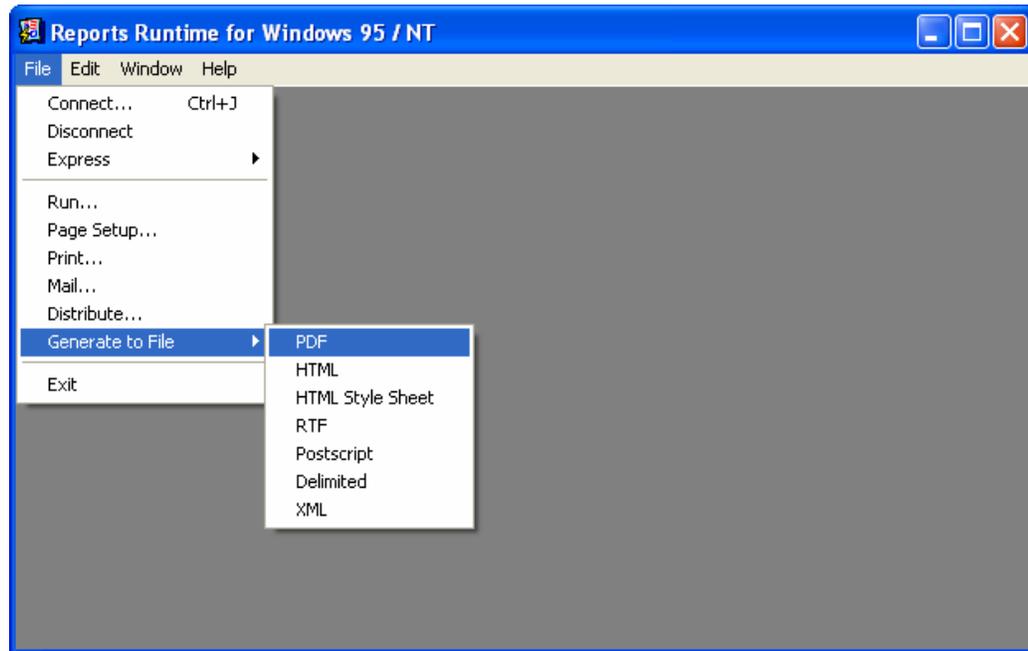


Figure 72

Open the report you would like the PDF created of. (See Figure 73)



# Performance Reporting Information System Desk Manual

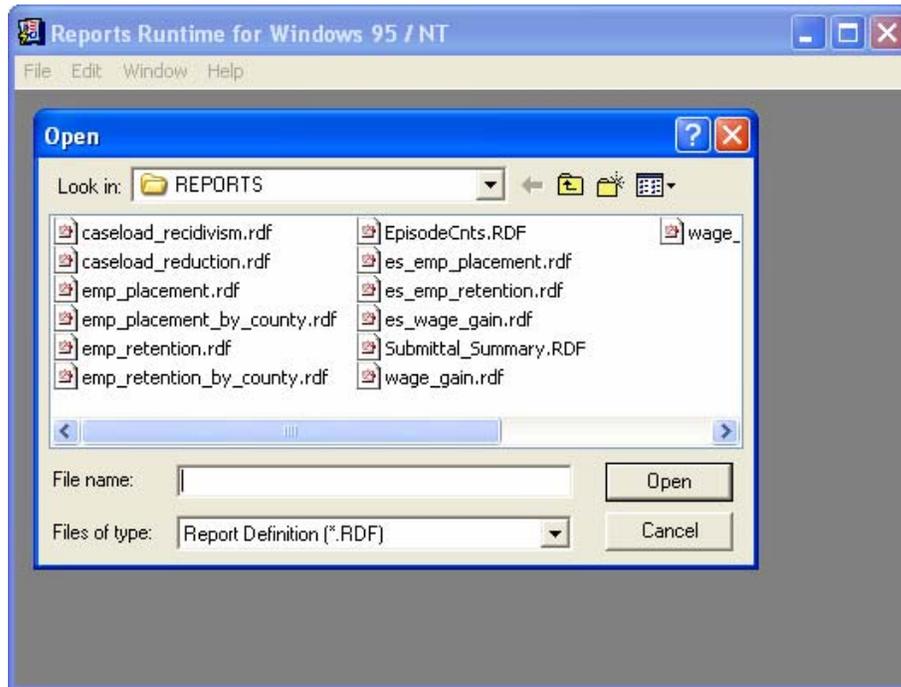


Figure 73

Select c:\prism\reports as the location of where the new report PDF will be saved. Type a name for the new \*.PDF report and click the **Save** button. (See Figure 74)

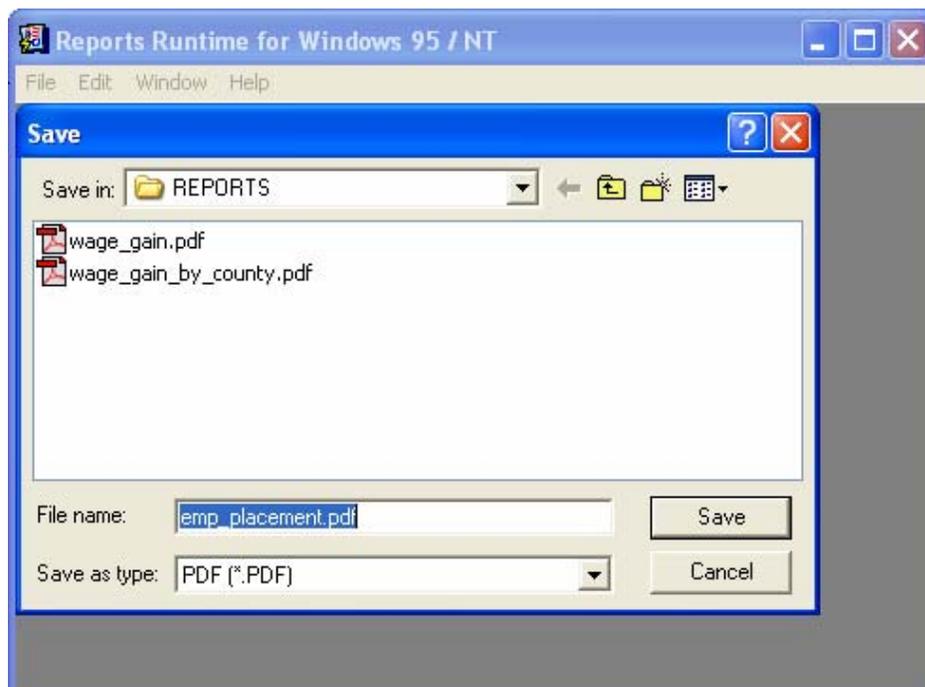


Figure 74



# Performance Reporting Information System Desk Manual

Make the desired selections just as if running the report to view and press **ENTER**, or click on green signal light icon. (See Figure 75)

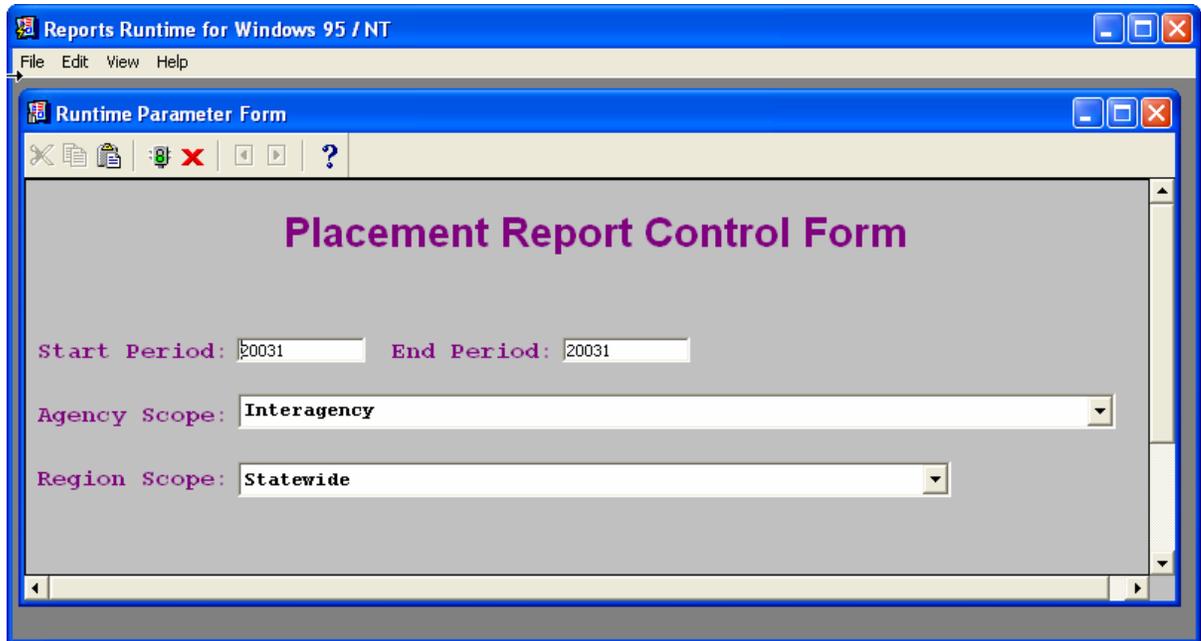


Figure 75

The Report Progress window appears. (See Figure 76)

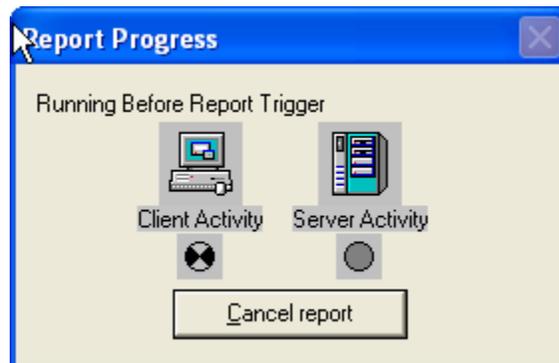


Figure 76

When the Report Progress window disappears, the PDF has been created and deposited in the previously chosen location. The report is now ready to view and/or print.



# Performance Reporting Information System Desk Manual

## Glossary

DBMS - Data Base Management System

Data Collection Subsystem Application

FTP - File Transfer Protocol

ODBC - Open Data Base Connectivity

SAG - System Administrators Guide

SQL - Structured Query Language

SQL\*Plus - an Oracle product

Oracle Discoverer - an Oracle product

SFTP - Secure File Transfer Protocol

Oracle Reports - an Oracle product

PRISM - Performance Reporting Information System

PRISM System Administration contact located at this web link: [www.oregon.org/prism/contact\\_us.shtml](http://www.oregon.org/prism/contact_us.shtml)