JCATS Reports & Excel Tips

My Reports:

Save your favorite reports to all your MyJCATS pages by clicking on My Reports and checking the reports you use regularly

Report Parameters:

Date Fields:

"T" on the keyboard will bring you to today's date

"D" will move to the previous date (think "Down")

"U" will bring you to the following day (think "Up")

Case Appt is going to tell you when the office got the case.

Atty Appt goes by the dates the case was assigned to an attorney. If you pull by a specific attorney for a range of times, you may notice that another attorney's name is listed, this may be because the attorney was assigned in that time frame but is no longer.

Parameters Required: If not used, JCATS will tell you what is needed in a red box. Use parameters wisely, one filter can alter results.

Report Definitions: If you're unsure what some categories include (ex: case type groups) or what assumptions a report has (ex: excludes conflicts), check to see if it has a Display Report Definition link on the far left of the Reports page.

Dynamic Data: Cases are constantly being updated and so it's difficult to replicate report results. Any report you run will pull the most recent case status and information so save any reports that you may want to refer to later with dates.

Using Excel Filters:

Tip: To quickly be able to see data in the columns, you can first quickly expand each column by selecting the columns you wish to expand and then double clicking the end of the selected column.

- To add filters, go to the Data menu, Sort & Filter Section and select "Filter"
- You'll notice the drop-down arrows appear in the first row, from here you can select the drop-down arrow and select multiple options in one or more columns
  - To unselect all options, uncheck "(Select All)"
  - Then you can select only those options you wish to see and select ok to see just those.
  - Another option, especially if the menu is long and you're looking for something specific would be to type in what you want to filter in the search bar. Hit Enter or Ok to filter to just that option.
- You can also sort by date in various ways depending on how much data you have (Data: Sort & Filter A > Z or Z > A)

Creating a Pivot Table:

With pivot tables, you can get totals quickly. You can also break down data to individual reports.

1. Click anywhere within the data, go to the Insert menu and select PivotTable in the Tables section
    a. You will get a pop up and see where it selected all text and will place the pivot table in a New Worksheet. This is what we want.

       Note: If you want to distinguish values such as total clients, check the box "Add this data to the Data Model." If you do not see it, copy the data to a new excel sheet
    b. Select "OK" or Enter
2. In the new sheet, a menu will pop up on the right side. Select if you want to filter by any specific criteria only, select what rows and columns you want, and which values to return. To add them to the pivot table, select the field under PivotTable fields and drag them to the appropriate box.
    a. **Note:** To get total clients, attorneys, etc. where it will only count them as one, we need to use the Distinct Count feature using the Data Model. After moving the field to the Values column, click the down arrow where it says, "Count of X" select Value Field Settings and scroll in the menu until you get "Distinct Count" and select "OK"
3. The result should be a chart showing totals by whatever fields you selected (Ex: total clients and cases per attorney)
    a. From here, you can double click any of the numbered fields to reveal a specific table of data only for that selection.

Formatted JCATS Excel Reports:

To edit the excel to a version where you can filter or pivot:

1. **Select All Text:** Start by copying all the text. Click within the sheet and select Ctrl + A. You may need to do it twice to select all.
2. **Copy All Text:** Copy the selection via right click & Copy or Ctrl + C.
3. **Past to New Sheet:** Open a new worksheet or select "+" at the bottom to add a new sheet. In the new sheet, right click in the first cell to Paste, selecting the 123 option to paste text only
4. **Remove Unnecessary Rows:** Delete the top rows of the parameters of the report but leave the column titles. To select the rows, select the numbers before the rows (starting at the top row), click and drag to select all and then right click to delete.
5. **Delete Blank Columns:** Select the letter associated with the blank columns. To select multiple at once, hold Ctrl while you continue to select the column letters. Right click and delete those.
6. **Remove Blank Rows**: Easiest way to do this is to sort a column by A to Z, often I choose the first column but <u>note</u> that it could move the titles. Select the whole column by clicking the letter associated above and then go to the Data menu and select A>Z (Sort A to Z) from the Sort & Filter option. You'll get a Sort Warning. Keep it on Expand the Selection, and select "Sort"
7. **Fix the Date Columns:** To fix the date columns, you'll want to select any date columns (use Ctrl to select multiple) go to the Home menu, find the Number section in the middle and then filter the drop-down menu from General to Short Date.

	Report	Report Uses	Assumptions or Options
Attorney Related	**Case Close Summary**	Quick way to view closed cases in a period	Can filter: attorney, disposition, case type, investigator, county, etc.
	Caseload Open Summary by PD	Quick way to view **open** cases per PD (will not count inactive cases)	Bold letter indicates Charging/Origination Document: **I**ndictment, **W**arrant, etc.
	Caseload Summary Report	Pull basic case data based on specific criteria selected	Can filter: case status, date, file name, file type, uploaded by, attorney
Clerical Related	**Attached File Query**	Assists in locating uploaded files	Can filter: case status, attorney, disposition, judge, county, case or court type, etc.
	Application Fee	Total of fee statuses and lists per county. **Paid Waived:** Totals and lists waived or paid fees **Not Paid:** Closed cases where fee is not paid	If fee was marked paid and then checked in case closure, it overwrites initial paid status and shows payment outstanding
	Court Calendar - Daily	Expanded version of Calendar Management	Can filter: attorney, department, hearing type, result, result reason, pending hearings only
	Hearing Summary	**NEW** Provides way to search past and upcoming hearings as well as result & reasons	Can filter: attorney, hearing court type, circuit and region. Excel version to easily filter & sort any columns
	Phone Tree	Lists upcoming hearing types and client's phone #	Shows open hearings only - no result selected
Investigation	**Investigation Summary**	Shows Investigator Workload from Action Requests	Only shows if investigator is active on the case (no end date for Investigator role)
Quality Assurance	**Case Creation Log Expanded**	Provides details of attorney assignments and days to assignment per case	Show dates for first 3 attorneys assigned. Does not filter out closed cases.
Inquiry	**Caseload Management**	View individual attorney caseloads. Export unassigned cases and next hearings to excel.	Can filter: role types, attorney, investigator, charges, case status, hearings
	Search for Case - Advanced	Provides ability to search for cases by other role types and multiple specific criteria. Provides basic case data that can be exported to excel.	Can filter: role types, attorney, investigator, charges, case status, hearings

	Report	Report Uses	Assumptions or Options
Management New	**Case Disposition Listing**	Provides basic case details with first 100 characters of case close note	Can filter: attorney, disposition, case type, jury trial, county, etc.
	Case Disposition Statistics	Summary of case dispositions by circuit and attorneys	See "Display Report Definition" to see how it groups dispositions into general categories.
	Case Status by Attorney Type	Provides a breakdown of cases assigned, open, closed and inactive by attorney name and type	If the attorney type is not selected, the attorney will also be listed as unidentified
	Caseload Summary Reports	**Version II:** client DOB, custody status, dispo. **Version III:** client demographics, custody status, and case disposition info **NEW Excel Version** **Version IV:** basic case details (no date required)	Can filter: attorney, disposition, case type, court type, investigator, county, etc.
	Conflict Notices within a Date Range	Provides Conflict Notice case statuses	Can filter: Conflict Status. Will show Pending notices
	Contact Case Listing	Client demographic data and detailed case data (72-hour types, file dates, hearings, etc.)	Uses the 72-Hour Date (If 72-hour date is not entered, goes by appointment date)
	Inactive Case Listing	**NEW** Excel report on inactive cases, case status reasons, days in inactive status & relevant fields	Can filter: inactive reason, attorney, case & court type, custody, inactive duration period (Excel)
Management Related	**72 Hour Initial Contact Summary**	Summarizes clients contacted within 72 hours	Excludes cases where the outcome results in no services. See Display Report Definition for more info
	Confinement/ Jail Status	Clients listed as in custody, totaling days	Can filter: attorney, days in custody, charging document type
	Case Summary by Case Type	Breakdown of cases by case status and case type	Conflict cases are only counted at the last level (Ex: not counted in New or CP new if in C3 new) Case type groupings listed in Display Report Definition.
	In Custody Percentage by Atty	Shows total clients in custody and percentage per attorney	If the clients' cases are not linked, the client's custody status may be counted multiple times
	Conflict Case Listing	Can search for specific case or for totals and list of conflict cases with the CP or C3 PD/CPD#	Reason does not display the outcome. Only counts last conflict level (so won't show CP if conflicted to C3)
Social Worker	**Social Worker Services Report**	Provides a total of assigned and opened cases, requests and completed Action Requests	Counts Social Worker assigned & closed by end dates. Assigned = no end date. Closed = end date

For access to a report, request via ITsupport@gapubdef.org. For questions about a report, email performance@gapubdef.org.

