Data Warehouse Report Title: **Organizational Hierarchy Report**

Report Purpose: The Organizational Hierarchy Report allows users to view the organizational hierarchy for their agency in a pre-defined report as described below. The report can be printed as needed.

Data Item	Data Definition	Sample Values
Agency Code	The Agency Code from Connections.	A41, U02, P33
Agency Name	The Name of the Agency.	Saratoga County, Children's Aid Society, Berkshire Farms
Parent Unit	The Site Code, Unit Code and Unit Specialization from Connections for a unit with no units above it in the organizational hierarchy.	(X01) AA1 – Administration
Level One and Subsequent Levels	The Site Code, Unit Code and Unit Specialization from Connections for the Level One Unit in the hierarchy. Level one is the unit just below the Parent unit, Level 2 is the next level below level one and this continues to the lowest level of unit in the organizational hierarchy.	(X01) AB1– Program Management
Data As Of	The date of the last refresh of the data in the report	9/8/2004
Date of the Report	The date this report was run.	9/15/2004

Report authored by Cheryl Stanford-Smith, 2004

Purpose of the Report

A district or agency is able to drag and drop units to create an organizational hierarchy in Connections. In the Data Warehouse, this report allows users to view all of the units in their District/Agency Organizational Hierarchy. This report may be printed or exported to Excel.

Report Description

Prompt for the Agency code. This prompt defaults to your agency code. If a user is in the State Worker user class more than one agency will be presented by the prompt and all may be selected.

You may select all of the agencies by left clicking on the first one, scrolling to the bottom of the list, holding the **shift** key down and left clicking the last agency on the prompt. Then click OK.

To select one and only one of the agencies in the prompt: scroll down to the agency and left click on it once. Then click OK.

To select several, but not all, of the agencies in the prompt: hold the **control** key down and left click on the agencies for the report (scroll down to view all the possible agencies) Then click OK
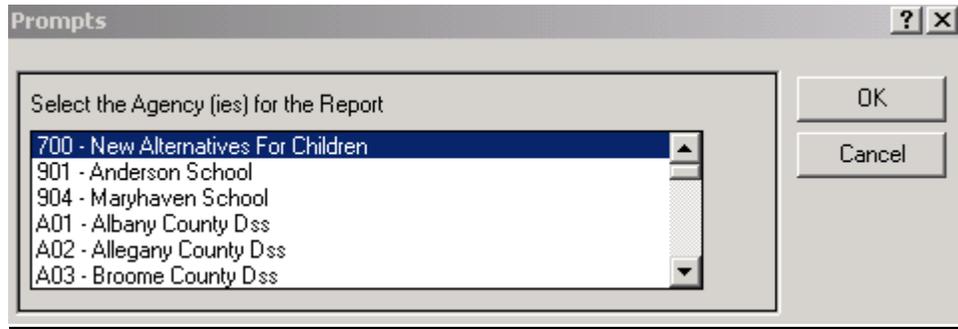
The report is sorted alphabetically by the Parent Unit, then by Levels.

(X01) AA1 - Administration			
(X01) AA1 - Administration	(X01) AB1 Program Management	(X01) AC1 Management Services	(X01) B01 Budget
			(X01) B02 Fiscal
			(X01) B03 Rate Setting
		(Y01) P01 Program Management	(Y01) F01 Adoption (Y01) F02 Aftercare
			(Y01) F02 Foster Care
			(A01) F01 Foster Care

The report has dynamic columns that will expand as more levels of the Hierarchy are entered into Connections. If you have 7 or more levels in your agencies hierarchy the report will expand to the right onto page 1b. You will need to scroll to the right in order to view levels above 7. There is a text message to remind the user.

If you have not entered an Organizational Hierarchy the report will only contain a list of Parent Units. A text message appears to remind the user.

The data supporting this report is refreshed weekly.

For More Information

Contact the Data Warehouse, Joe Delucia, 518-473-8209.