

Transcript (SCIP Training – ADHOC Reports Demonstration):

Welcome to this DSCU SCIP training video. My name is John O'Connor. I'll be the DSCU instructor for this training. This is going to be relatively short because we're going to focus just on how to develop, and the purpose of a case information ad hoc report with a focus on financial,

So within SCIP case information community, there is a feature called ad hoc which to me, is one of the more powerful capabilities and reports on SCIP and there are actually multiple types of ad hoc reports. First just kind of the definition of what we're talking about with an ad hoc report. An ad hoc provides the capability to data-mine if you will. Out of all the data your SCIP account has access to you're able to develop a customized ADHOC report that will give you answers to your specific questions when there's no other standard SCIP report that's available that would answer the questions. So if there's already a report that gives you the answers that you are looking for, there's no requirement to develop an ad hoc, but if there isn't, you may want to consider developing your own customized report. Your own ADHOC report. Like I said, I personally believe this is one of the more powerful features on SCIP. By the way, there are other types of customized reports that are available on SCIP. Unfortunately they have different names, so if you're familiar with the Navy community on SCIP, they do have a feature called Information Warehouse. If you're in the U.S, government only Security Cooperation Management Suite (SCMS) community, there is a feature called Custom Reports. So these customized reports do have different names, but we're going to focus in this training video on the SCIP Case Information ADHOC report.

So we're looking at our case information community and specifically like every community it has a navigation bar to navigate within that community and as we as we said, this training is going to focus on the ad hoc type report, so we'll click ad hoc. Within the case information community, it then brings up a new screen. We now see we're looking at case information ad hoc and specifically it gives us filter options. Now I mentioned there are multiple different types of reports that you can do, and in fact if we click this drop down arrow where it says Case Level ADHOC we would see, that not only do we have a case ad hoc option, but we also have a line level, a requisition, a supply discrepancy report, a payment schedule, a document timeline delivery set, term of sale, national stock number, foreign military financing recipient, Unit delivery requisition, and a closure detail ad hoc. So actually, this is the first step when you're going to develop an ad hoc is decide at what level my question am I looking for answers on. So if you're looking for example at a very high level for a case, a case level ad hoc as the default is probably appropriate. If, on the other hand, you're looking for supply discrepancy reports, or requisition, or a line level, or Delivery schedule or requisition, then pick that level of the ad hoc.

So that is the first step in developing an ad hoc report is where are your questions focused on and pick an ad hoc type report that matches the questions that you have so that you can develop it. And this is key because depending on the choice you make, the choices that are going to be available subsequent to clicking continue is going to be tailored to the level of the ad hoc you pick. So since we're going to pick Case Level ad hoc, we'll see the kind of choices they give us.

So we pick case level ad hoc. Step 2. Design your report. So if we want a report, we need to figure out what that report should look like, and so you have to do little thought on that, and my personal experience with ad hoc. It's a bit of an iterative process. You may end up designing a report and find out that you got to go back and redesign it because you didn't quite think through it. So the more you think upfront, the less rework. If you will, as you might have.

So what we're going to do here is pick the typical out of all the available fields and you see, you have some pretty extensive choices. So let's first think about what kind of question that we have. So in our training we are going to say that we're looking for cases that have a lot of unprogrammed value that is currently available because potentially, maybe we want to draw down that case. Maybe we want to move money around, so we're our questions are financially related. So we need to develop a report that will look for cases that have a lot of unprogrammed value, so I need to develop a report for that purpose and I'm going to first start out with case ID. Then I'm going to click case description. Since I'm looking at financial value, I am going to look at the total case value. Now you notice as I picked each of the available data fields, it's highlighted and then to move it from available to selected by just clicking the right arrow. If I pick the wrong field, say for example, I inadvertently picked State Department approval date and I really don't want that, I can just go over to my selected fields and instead of the right arrow to move it from available to selected, I now pick the left arrow to move it from selected to available. The way I kind of distinguish it between and, you notice now that I I highlighted the State Department and moved the left arrow, it has now been moved back over to available fields. The way I kind of distinguish I'm a sports fan, so the available fields essentially is your playing roster if you will. These are all your valuable options and the selected fields is who the coaches picked to move onto the field and essentially.

Remember, we're designing a customized report, so out of all the available fields, all the available players, if you will on your team, those available fields as we said depend on the type of ad hoc. So since we picked a case label ad hoc, our available fields are typically case related and then the selected fields are those that we want to appear on our design reports. So we now have case ID, Case subscription, and total case value. Remember I said we wanted to identify those cases that have a lot of unprogrammed value, so that would be a natural one that I want to move over to my selected field. So now I have case ID, case description, total case value, and unprogrammed case value. It would also probably would be good to know what my document status is so I'm going to go ahead and look for document status Code and move that over. So now I have a report that would have in order case ID, case description, total case value, unprogrammed value, and document status.

So pick your available field, move those desired fields that you want in your report using the right arrow to your selected fields to your playing field if you will. And if you make a mistake, just move them back now. Also, you notice there's up and down arrows over here, so these are the order on your report that they're going to appear left to right. So if I wanted to move document status code to the very top. I could do that by just moving the up down arrow if I wanted to move it to the very bottom, I could just highlight it and then use the down arrow to move it. But remember, the fields that appear in the selected field or it would be the ones that

appear on your report. The order they will show up will depend on where you have them in sequence from top to bottom, because those fields will appear left to right on your report. The last thing is that once you've picked your selected fields to include on the report, the default is implemented, but you'll also notice there's other options here, including in progress, and cancelled. Now we're going to do implement only, so we'll click and then continue.

So the first step was pick the type of ad hoc. The second step was designing your report, so we've now designed a report. We've said we only want to look at implemented, so we click continue, which then brings us to the third step, which is out of all the data that you have available, you're going to have to filter for things that match your questions of interest, so it's the data that's populated in the report that you just built matches that.

So now we have to add filter criteria so we have to figure out what do we want to do. So let's go back to our original scenario. I said we want to look for those cases that our country has that has a lot of cases with a lot of unprogrammed values. So for our scenario in this demonstration, let's just say we only want to look at cases that are \$5 million or more, that have at least \$500,000 of unprogrammed value, and specifically since our particular SCIP account has multiple countries, we're all going to look at Bandaria type of funds. So we're going to add filter criteria and we're going to say country code is Bandaria. Now if you only have one country on your SCIP account then you don't need to filter by country, but since we have multiple countries on ours, we're going to do that. The other thing, remember, we said we only want to look for implemented, so we're going to go and look for Document status is implemented, and then we're going to put our financial criteria here to say and total case value. And we have options here. Contains a value, and does not contain, is, is not as great.

And this is one of the other challenges that involve developing and designing an ad hoc. Very powerful, but you have to think a little bit like a programmer. Remember we said you have to figure out the first step of what type of ad hoc. Second step was figuring out what your report wants to look at. Now you have to figure out how you want to filter for data, so I said in our scenario we want is greater than or equals to \$5 million for total case value. So you need to enter in and unfortunately they don't have decimal places or commas, so you have to count the zeros so we want \$5 million. So now we have...we have if we count it up, we've got 6 zeros followed preceded by a 5. So we want total case value is greater than or equal to \$5 million. Remember I said we also want those cases that have unprogrammed greater than 500,000, so we're going to add one additional filter, and we're going to say and unprogrammed case value is greater than or equals \$500,000. So now we have \$500,000, so we've now set our filter criteria, which is our third step, looking for Bandaria cases that are implemented with a total case value equal to or greater than \$5 million, and unprogrammed case value is greater than or equal to \$500,000.

So once our third step here, our filter choices are done, we could continue to Step #4. When SCIP finds data that matches your filter criteria and populates them on the report, you can also sort the resulting data. So since our scenarios to look for cases that have a lot of unprogrammed case value, you can sort and we'll go descending. So essentially the most unprogrammed value will be at the very top of the report, and the least will be on the bottom, and you notice it gives you the option of sorting by any of your report columns. You don't have to sort at all, or you can

sort as we're doing just on a single column. Or you could do multiple sorts, a complex sort, and then the last option is the sort option. If you do pick one or more of your columns to sort on, do you want it ascending or descending?

So we're just going to sort by one column unprogrammed case value, because we're looking for those cases that have a lot of unprogrammed. So the most important ones will be at the top. So we'll continue. This next screens are a sanity check. Do you want to, sum the total case value and then program case value. Do you want to count the results and we'll say, yes, that's the default, so we'll move on to the next step, which is essentially, this is a check to you of whether this is this what you really want us to do.

So this is all the options we picked. We said total case value is greater than or equal to \$5 million, unprogrammed value greater than or equal to \$500,000, we're looking for implementing cases, we're sorting descending on unprogrammed case value, and then here's our filter criteria. If all of that is satisfactory, you can then view the report.

If for whatever reason you made a mistake, as I mentioned, it is a bit of an iterative process, so if you did make a mistake, you can correct it now by clicking the back button. But if it is satisfactory, we'll click view report. At that point we cross our fingers if you will and then wait for the report.

And as you see, that was relatively quick, and so these are two the powers of the ad hoc, which we hopefully demonstrated to you is they provide you the capability to develop a customized report that gives you answers to questions that you have that aren't answered by any other SCIP report, and the other thing is, SCIP is doing the work for you. So the computer which you just programmed, developed a customized report as you see and I'm going to switch to it to allow you to take a look at the ultimate results. And just so you know, as I'm switching to it, even though I've been talking and you've been looking at the filter options, it actually developed the report that I'm going to show you here in a matter of seconds, so that was that was pretty fast. So I'm going to actually show you the report. Now. This is just another window that you would see almost instantaneously on SCIP.

And so now here is our report, and since we asked for those cases that have a total case value of over \$5 million, you see, that's exactly what we're seeing here, but I asked to sort by unprogrammed case value. So here this case at the top has the most amount of unprogrammed case value, and the case at the bottom of the list has the least amount.

OK, so this is now a report that can be analyzed. So for Bandaria and the international customer, you can then look at this report and decide what you want to do. Do you want to use that unprogrammed value for future execution on the case that's currently allocated to, do you want to draw down that case in coordination with U.S. government, potentially. You can even move money in coordination with the U.S. government from one case to another. But this customized report this ad hoc report gives you capability and information to potentially to do that.

You'll also, as you notice, like many places on SCIP, you have the ability to export this report by clicking the Excel icon you see in the upper right hand corner. Additionally, let's say this is a

recurring question that you're going to have. So rather than having to develop this report every time, I can click the save ad hoc query, it will then give me the option as you see and so I'm going to just say training. You create a name, and then click OK. And you can see it's been saved. I'll close this window. So let's say for example, I log on to. This account that you have on SCIP perhaps a week later, a month later, etc. And you want to run that same report that you did before, but you want it with the latest data, which maybe a month or maybe even a year later, etc. Rather than having developed that ad hoc report from scratch, you now can go to your case information community, click ad hoc, and instead of picking that report and developing your report from scratch you now see that you have a saved ad hoc. So if you click continue, it will then say OK, I have a report. This is what you told me to do before. Do you want to change your parameters or you just want to run it as you did a year ago or a month ago or whenever the last time you developed this report, so you could continue. It will then once again bring the information of what you're planning on doing, and if you're satisfied, you click view report and I'm going to switch to that report and there you have it.

So you can see the ability to develop an ad hoc is very powerful and then to export it or save it is also very powerful because the saved ad hoc reports can be rerun at future times with updated data. And then once again, export option is available. So ad hoc report is a very very powerful capability. And it's definitely something that you want to get familiar with, because it does give you the ability to develop a customized report.

Remember, it's essentially if you don't have an existing report, you're going to have a five step process. First, determine what type of report that you want. Second step, design your report. Step #3 filter for the data that you want. Step #4, go ahead and decide how you want to sort your results on that report. And then step #5, analyze the report and decide whether you want to save that report for future use. So very powerful customized report encourage you to get familiar with it.

Remember, always start with asking for my questions are there is an existing report? If not, you're probably going to find your ad hoc. It provides you a capability to develop that customers report to give you the answers you want to give. The insights that you need to be able to better manage your funds and cases. So with that good luck in your training and remember to use the other SCIP resources. The other resources also includes DSCU instructors for additional questions or insights you want to have on this topic. So long for now and good luck on your training.