

# **INTEGRATED COMPLIANCE INFORMATION SYSTEM**

## **ICIS Reports – Schedule Evaluation**



**November 19, 2009**

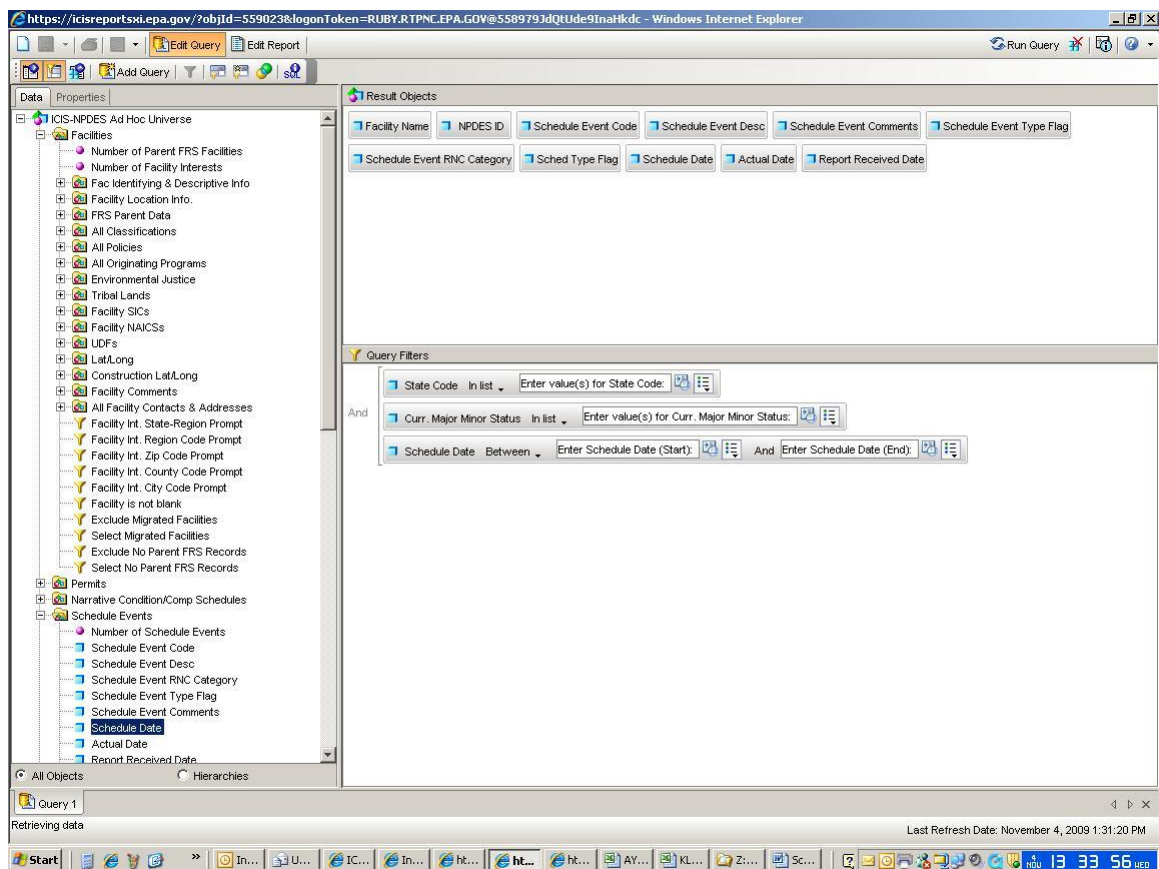
## Schedule Report Demo

The goal of this document is to step through the process of modifying a basic schedule list report to show the compliance history and status of schedules through the use of alerters, variables and measures.

The AYT Schedule Demo Base Report is a list of reports and schedules that have a *Scheduled Date* between a user supplied date range. This base report will be enhanced with *Alerters* to highlight non compliant conditions and provide derived data fields using *Formulas* that show why a schedule or report is non compliant. Finally, behavior of *Dimension* variables will be demonstrated and modified to eliminate data that is not relevant to the desired report goal.

The AYT Schedule Demo Base used for the demonstration is located in the ICIS Public Folders> Share Community folder.

### AYT Schedule Demo Base Query View:



## AYT Schedule Demo Base Report View:

https://icisreports.epa.gov/?objId=559023&loginToken=RUBY.RTPNC.EPA.GOV@558979JdQtUde9InaHkdc - Windows Internet Explorer

Refresh Data

Page 1

Data Templates Map Properties

AYT Schedules Demo Base

- Actual Date
- Facility Name
- NPDES ID
- Report Received Date
- Sched Type Flag
- Schedule Date
- Schedule Event Code
- Schedule Event Comments
- Schedule Event Desc
- Schedule Event RNC Category
- Schedule Event Type Flag

### Schedule Report 11/4/09

#### BLOUNT SEAFOOD CORPORATION

##### RI0001121

EventCode	EventDesc	EventComment	Event Type	EventCat	SchedType	SchDate	ActDate	RecDate
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 5 Annual Report	R	2	P	1/15/08	1/18/08	1/18/08
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 4 Annual Report	R	2	P	1/15/07	1/16/07	1/16/07
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 3 Annual Report	R	2	P	1/15/06	4/14/06	4/14/06
96199	Toxics Prescreening Monitoring	PPSCAN 2	S	2	P	1/15/05	1/12/05	1/19/05
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 2 Annual Report	R	2	P	1/15/05	3/31/05	3/31/05
CS011	Plan, Report, or Scope of Work	EVALUATE BOD, TSS, GREASE Draft Eng	R	2	J	4/25/04	4/23/04	4/23/04
96199	Toxics Prescreening Monitoring	PPSCAN 1	S	2	P	1/15/04	2/16/05	2/16/05
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 1 Annual Report	R	2	P	1/15/04	7/1/04	7/1/04
50008	Study Results	RESULTS OF DATA COLLECTED 12E	R	2	J	8/31/98	8/27/98	8/27/98
CS016	Complete Required Work or Construction	COMPLETE CONSTRUCTION (12C)	S	1	J	1/1/97	12/30/96	1/10/97
21599	Special Study	SUB DISSOLVED O2 STUDY-8	R	2	P	12/1/95	9/21/94	9/21/94
55099	Quality Assurance Report	SUBMIT LIST OF APPROVALS (10)	R	2	J	4/10/95	4/3/95	4/3/95
CS032	Other (See Comments)	PAY \$3000 ADMINIST. PENALTY	S	2	A	3/20/92	3/10/92	3/10/92

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##### RI0000043

EventCode	EventDesc	EventComment	Event Type	EventCat	SchedType	SchDate	ActDate	RecDate
02399	Annual Priority Pollutants Sampling		R	2	P	10/15/08	10/29/08	10/29/08
02610	Bioassay Report		R	2	P	10/15/08	10/27/08	10/27/08
02610	Bioassay Report		R	2	P	7/15/08	7/10/08	7/10/08
02610	Bioassay Report		R	2	P	4/15/08	3/28/08	3/28/08

Report 1

Arranged by: Alphabetic order

Last Refresh Date: November 4, 2009 1:55:12 PM

Start Info... Unk... ICIS... Info... https... https... AYT... Sche... Demo...

13:56:00

## Alerters

The following group of sub alerters will be added to the *Schedule Date* field to indicate compliance conditions through color:

Report/Schedule is late

Report/Schedule is not achieved



Report/Schedule has been received and achieved, but was late

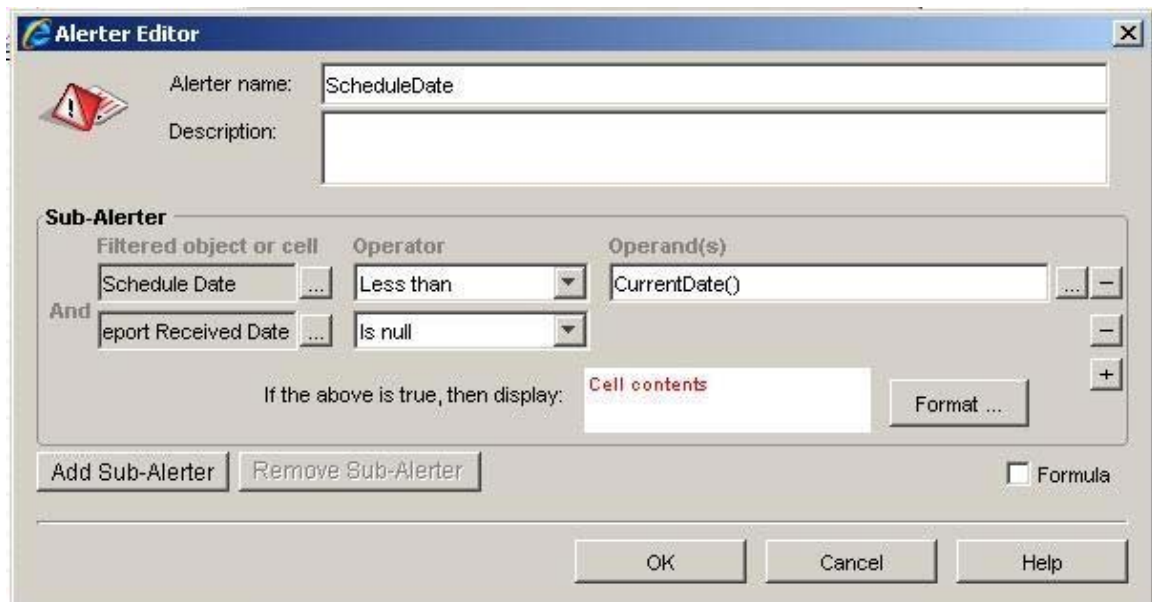
### Sub-Alerter1

1. Report or Schedule has not been received as of today.  
Scheduled Date < CurrentDate() and,  
Report Received Date is null and  
Show it as **Red!**

### Creating Sub-Alerter 1

Click the Alerters button from the Report toolbar 

1. The Alerters dialog box appears. Click New to define a new alerter.
2. From the Alerter Editor, shown below, enter name and a description for the alerter.
3. Under Filtered Object or cell, select the Schedule Date field from the object chooser button drop down 
4. Under Operator, click the down arrow and specify Less than.
5. In the Operand(s) box, type in the CurrentDate() function.
6. Click the Format ... button and click the Color down arrow to select red.
7. To add the second condition (Report Received Date isnull), click the  button and repeat steps 3 – 5.
8. Click OK to close the Alerter Editor



Filtered object or cell	Operator	Operand(s)
Schedule Date	Less than	CurrentDate()
And		
Report Received Date	Is null	

### Sub-Alerter 2

2. Report or Schedule has not been achieved as of today.

Schedule Date < CurrentDate() and,

Report Received Date is not null and,

Actual Date is null

Show it as **Green!**

### Creating Sub-Alerter 2

9. Select Add Sub-Alerter.

10. Repeat steps from Sub-Alerter 1.

The screenshot shows the 'Alerter Editor' dialog box. At the top, the 'Alert name' is 'ScheduleDate' and the 'Description' is empty. Below this, there are two 'Sub-Alerter' sections. The first sub-alterer has the following conditions: 'Schedule Date' is 'Less than' 'CurrentDate()', and 'Report Received Date' is 'Is null'. The display text is 'Cell contents' in red. The second sub-alterer has the following conditions: 'Schedule Date' is 'Less than' 'CurrentDate()', 'Report Received Date' is 'Is not null', and 'Actual Date' is 'Is null'. The display text is 'Cell contents' in green. Both sub-alerters have 'Add Sub-Alerter' and 'Remove Sub-Alerter' buttons. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.

**Alerter Editor**

Alert name: ScheduleDate

Description:

**Sub-Alerter**

Filtered object or cell	Operator	Operand(s)
Schedule Date	Less than	CurrentDate()
Report Received Date	Is null	

And

If the above is true, then display: Cell contents

Format ...

Add Sub-Alerter Remove Sub-Alerter ☐ Formula

**Sub-Alerter**

Filtered object or cell	Operator	Operand(s)
Schedule Date	Less than	CurrentDate()
Report Received Date	Is not null	
Actual Date	Is null	

And

If the above is true, then display: Cell contents

Format ...

Add Sub-Alerter Remove Sub-Alerter ☐ Formula

OK Cancel Help

Sub-Alerter 3 and 4

3. Report or Schedule was received or achieved late

Actual Date > Schedule Date **or**,

Report Received Date > Schedule Date

**Make it Blue!**

### Creating Sub-Alerter 3 and 4

11. Select Add Sub-Alerter.

12. Repeat steps from Sub-Alerter 1.

The screenshot shows the 'Alert Editor' dialog box. At the top, the 'Alerter name' is 'ScheduleDate' and the 'Description' is empty. Below this, there's a section for the main alert condition: 'If the above is true, then display:' followed by a text box containing 'Cell contents' and a 'Format ...' button. Below this are buttons for 'Add Sub-Alerter' and 'Remove Sub-Alerter', and a 'Formula' checkbox. The dialog then lists three sub-alerters, each with its own 'Add Sub-Alerter' and 'Remove Sub-Alerter' buttons and a 'Formula' checkbox.


Sub-Alerter	Filtered object or cell	Operator	Operand(s)	Display
1	Schedule Date	Less than	CurrentDate()	Cell contents
2	Report Received Date	Is not null		
3	Actual Date	Is null		
4	Actual Date	Greater than	Schedule Date	Cell contents
5	Report Received Date	Greater than	Schedule Date	Cell contents

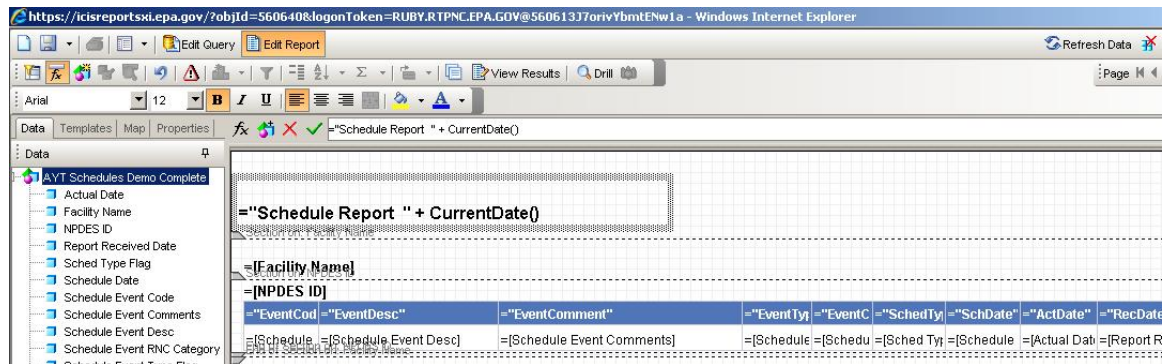
Alerter Behavior: (from Business Objects XI, The Complete Reference, McGraw Hill)

Alerters are evaluated from top to bottom: if the first condition is met, then the formatting specified in that condition applies; if the first condition is not met then Web Intelligence proceeds to evaluate the second condition. If none of the conditions are met, then the cell content and format remain unaffected.

## Formulas

### View a Formula

1. Click the  button to open the formula toolbar.
2. Click on the Report Title cell and view the formula. This formula has the text "Schedule Report" concatenated(+) with the CurrentDate() function. Notice that the text is surrounded by quotations and the CurrentDate() function is not. Functions, variables and data fields do not need to be surrounded by quotations.
3. Click on Properties tab to access the Format properties of the cell.





The screenshot shows the iCIS Reports web application in Internet Explorer. The browser address bar displays the URL: <https://icisreports.ehpa.gov/?objId=560640&loginToken=RUBY.RTPNC.EPA.GOV@560613J7orivYbmtENw1a>. The application interface includes a toolbar with buttons for 'Edit Query', 'Edit Report', 'Refresh Data', 'View Results', and 'Drill'. Below the toolbar is a navigation pane with tabs for 'Data', 'Templates', 'Map', and 'Properties'. The 'Data' tab is active, showing a tree view of data fields under 'AVT Schedules Demo Complete'. The main area displays the formula editor for the Report Title cell, showing the formula: `="Schedule Report " + CurrentDate()`. Below the formula editor, there is a table with columns for various data fields, including Event Code, Event Description, Event Comment, Event Type, Event Category, Schedule Type, Schedule Date, Actual Date, and Report Date.

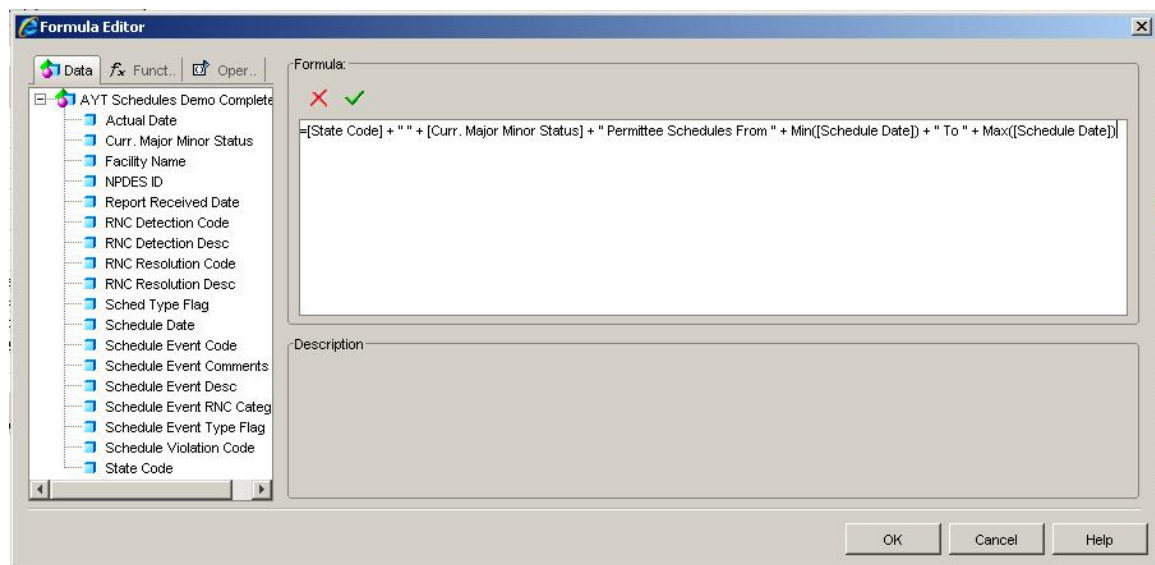
Event Code	Event Description	Event Comment	Event Type	Event Category	Schedule Type	Schedule Date	Actual Date	Report Date
[Schedule]	[Schedule Event Desc]	[Schedule Event Comments]	[Schedule]	[Schedule]	[Schedule Type]	[Schedule Date]	[Actual Date]	[Report Date]



## Create a Formula

Use a Formula to create a custom report heading.

1. Click the  button and select Data/Properties.
2. Click Templates tab and find the Report Elements>Free-Standing Cells>Formula and Text Cell> Blank Cell. Drag the Blank Cell to the report below the Report Title.
3. Click the  to open the Formula Editor window.
4. Click the Data tab and drag the State Code field to the formula box.
5. Type + " " + to add a space to the formula.
6. Drag the Curr. Major Minor Status field to the formula bar.
7. Type + " Permittee Schedules From " +
8. Click on the fx Functions tab. Make sure cursor is blinking at the end of the formula text
9. Drag the Min() function to the blinking cursor.
10. Click on the Data tab and drag the Schedule Date field and drop between the parenthesis.
11. Type + " To " +
12. Click the fx Function tab and drag the Max() function.
13. Click the Data tab and drag the Schedule date and drop between the parenthesis.
14. Click OK button.
15. View report and adjust format of the cell as needed.




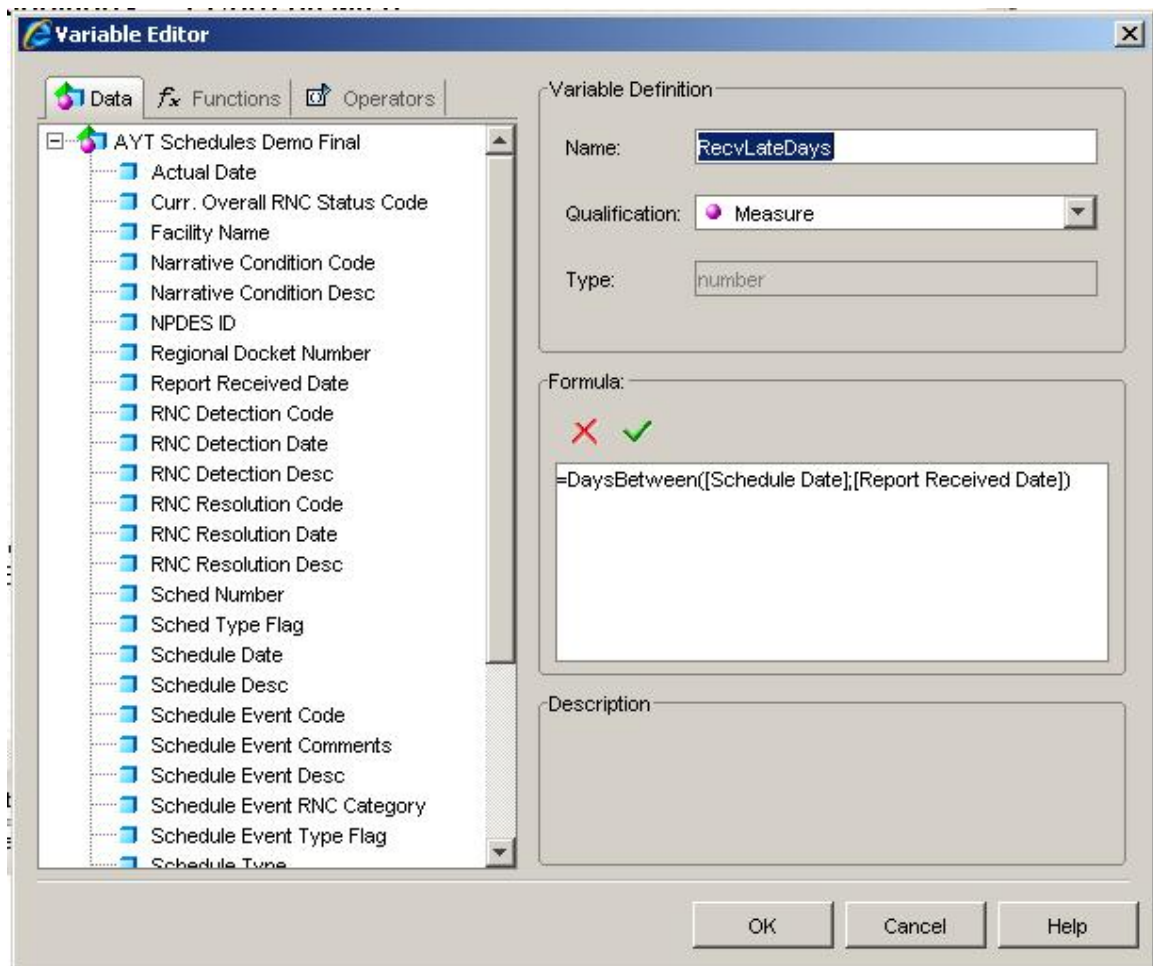


## Variables

A variable is used to store a formula to calculate the number of days late a report has been received and achieved.

### Create a Variable

1. Click the  Variable Editor button.
2. Enter vRecvLateDays into Name box. Variable naming convention uses “v” preceding the variable name.
3. Click the down arrow of the Qualification box and select Measure.
4. Drag or double click the DaysBetween() function to the Formula box. Notice the format in the Description box.
5. Drag or double click the Scheduled Date and Report Received Date separated by a ; to the Formula box.
6. Click the OK button.



The Variable Editor dialog box is shown with the following fields and options:

- Variable Definition:**
  - Name:
  - Qualification:
  - Type:
- Formula:**
  -
- Description:**
  -

The left pane shows a tree view of data sources under "AYT Schedules Demo Final", including fields like Actual Date, RNC Detection Code, and Schedule Date.

7. Repeat steps 2 – 5 to create the vAchvLateDays variable using the Actual Date field.
8. Drag the variables onto the report.

**Variable Editor**

Variable Definition

Name: vAchvLateDays

Qualification: Measure

Type: unknown

Formula:

=DaysBetween([Schedule Date],[Actual Date])

Description:

**Actual Date**

OK Cancel Help

sz://icisreports.eia.gov/7objId=559023&loginToken=RUBY.RTPNC.EPA.GOV@572640Jk7Q1mbwrczans1 - Windows Internet Explorer

Refresh Data

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Templates Map Properties

AYT Schedules Demo Base

Actual Date

Report " + CurrentDate()

" + [Curr. Major Minor Status] + " Permittee Schedules From " + Min([Schedule Date]) + " To " + Max([Schedule Date])

Event Desc	Event Comment	Schedule Event	Event Code	Schedule	Schedule Date	Actual Date	Name of [vAchvLateDays]	Report Received Date
[Schedule Event Desc]	[Schedule Event Comments]	[Schedule Event]	[Schedule Event Code]	[Schedule Type Flag]	[Schedule Date]	[Actual Date]	[vAchvLateDays]	[Report Received Date]

vAchvLateDays

vRecvLateDays

## Report View:

https://icisreports.epl.epa.gov/?objId=5606408&loginToken=RUBY.RTPNC.EPA.GOV@561354JevifCXqBCjcFMh - Windows Internet Explorer

Refresh Data

View Structure Drill

Arial 9 B I U

[AchvLateDays]

**Schedule Report 11/5/09**

RI Major Permittee Schedules From 1/1/90 To 12/31/08

**BLOUNT SEAFOOD CORPORATION**


**RI0001121**

EventCode	EventDesc	EventComment	EventType	EventCat	SchedType	SchDate	ActDate	AchvLateDa	RecDate	RecvLateDa
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 5 Annual Repor	R	2	P	1/15/08	1/18/08	3	1/18/08	3
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 4 Annual Repor	R	2	P	1/15/07	1/16/07	1	1/16/07	1
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 3 Annual Repor	R	2	P	1/15/06	4/14/06	89	4/14/06	89
96199	Toxics Prescreening Monitorir	PPSCAN 2	S	2	P	1/15/05	1/12/05	-3	1/19/05	4
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 2 Annual Repor	R	2	P	1/15/05	3/31/05	75	3/31/05	75
CS011	Plan, Report, or Scope of Work	EVALUATE BOD, TSS, GREASE Draft En	R	2	J	4/25/04	4/23/04	-2	4/23/04	-2
96199	Toxics Prescreening Monitorir	PPSCAN 1	S	2	P	1/15/04	2/16/05	398	2/16/05	398
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 1 Annual Repor	R	2	P	1/15/04	7/1/04	168	7/1/04	168
50008	Study Results	RESULTS OF DATA COLLECTED 12E	R	2	J	8/31/98	8/27/98	-4	8/27/98	-4

Note: The number of days late is negative(-) when a report has been received or achieved before the due date.

## Use Alerter and the color “white” to make data invisible

Reports that are not late result in a negative number being displayed. This information can be suppressed by using an Alerter to change the text font color to white.

1. Click on AchvLateDays column and click on the  Alerter Button.
2. Click New button and enter ActualLate in the Alerter name box.
3. Keep the AchvLateDays in the Filtered object or cell box.
4. Select Less than or Equal to from Operator drop down.
5. Set Operand to 0.
6. Click Format button and select white from the drop down.
7. Click OK button.
8. Repeat for RecvLateDays column.



**Alerter Editor**

Alerter name: ActualLate

Description:

**Sub-Alerter**

Filtered object or cell: AchvLateDays

Operator: Less than or Equal to

Operand(s): 0

If the above is true, then display:

Format ...

Add Sub-Alerter Remove Sub-Alerter

Formula

OK Cancel Help

## Report View:

https://icisreports.eis.epa.gov/?objId=560640&loginToken=RUBY.RTPNC.EPA.GOV@561354JevfCXqBCjcfMh - Windows Internet Explorer

Refresh Data

View Structure Drill

**Schedule Report 11/5/09**

RI Major Permittee Schedules From 1/1/90 To 12/31/08

**BLOUNT SEAFOOD CORPORATION**  
RI0001121

EventCode	EventDesc	EventComment	Event Type	EventCat	SchedType	SchDate	ActDate	AchvLateDa	RecDate	RecvLateDa
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 5 Annual Report	R	2	P	1/15/08	1/18/08	3	1/18/08	3
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 4 Annual Report	R	2	P	1/15/07	1/16/07	1	1/16/07	1
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 3 Annual Report	R	2	P	1/15/06	4/14/06	89	4/14/06	89
96199	Toxics Prescreening Monitoring	PPSCAN 2	S	2	P	1/15/05	1/12/05		1/19/05	4
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 2 Annual Report	R	2	P	1/15/05	3/31/05	75	3/31/05	75
CS011	Plan, Report, or Scope of Work	EVALUATE BOD, TSS, GREASE Draft Eng	R	2	J	4/25/04	4/23/04		4/23/04	
96199	Toxics Prescreening Monitoring	PPSCAN 1	S	2	P	1/15/04	2/16/05	398	2/16/05	398
CS011	Plan, Report, or Scope of Work	PRODUCTION REPORT 1 Annual Report	R	2	P	1/15/04	7/1/04	168	7/1/04	168
50008	Study Results	RESULTS OF DATA COLLECTED 12E	R	2	J	8/31/98	8/27/98		8/27/98	



## Changing a Dimension to a Measure to Eliminate Duplicate Records

The RNC Detection Code is a “dimension” variable. When this field is added as a column to the report duplicate records will occur.

1. Drag the RNC Detection Code Field to the report.
2. Notice 2 rows for one report where RNC Detection Code has 2 different values. There are 2 “dimensions” of RNC represented by the “N” and the null.

View Report:

/icisreportsxsl.epa.gov/?objId=560640&loginToken=RUBY.RTPNC.EPA.GOV@562265JWXkcgH67q5E1el - Windows Internet Explorer

Refresh Data


Page 1

**Schedule Report 11/6/09**  
Major Permittee Schedules From 1/1/90 To 12/31/08

**OUNT SEAFOOD CORPORATION**  
**001121**

EventCode	EventDesc	EventComment	EventType	EventCat	SchedType	SchDate	ActDate	AchvLateDays	RecDate	RecvLateDays	RNC Detect
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 5 Annual Report	R	2	P	1/15/08	1/18/08	3	1/18/08	3	
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 4 Annual Report	R	2	P	1/15/07	1/16/07	1	1/16/07	1	
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 3 Annual Report	R	2	P	1/15/06	4/14/06	89	4/14/06	89	N
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 3 Annual Report	R	2	P	1/15/06	4/14/06	89	4/14/06	89	
199	Toxics Prescreening Monitorir	PPSCAN 2	S	2	P	1/15/05	1/12/05		1/19/05	4	
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 2 Annual Report	R	2	P	1/15/05	3/31/05	75	3/31/05	75	N
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 2 Annual Report	R	2	P	1/15/05	3/31/05	75	3/31/05	75	

The not null value of the dimension field can be captured by creating a variable and saving RNC Detection Code as a “measure” variable.

1. Click  and enter RNC Detect Code into Name box.
2. Select Measure from Qualification drop down box.
3. Drag RNC Detection Code data field into Formula box.
4. Click OK button.

View Report:

/icisreportsxsl.epa.gov/?objId=560640&loginToken=RUBY.RTPNC.EPA.GOV@561354JevlCXqBcjcfMh - Windows Internet Explorer

Refresh Data

Page 1

**Schedule Report 11/6/09**  
Major Permittee Schedules From 1/1/90 To 12/31/08

**OUNT SEAFOOD CORPORATION**  
**001121**

EventCode	EventDesc	EventComment	EventType	EventCat	SchedType	SchDate	ActDate	AchvLateDays	RecDate	RecvLateDays	RNC Detect
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 5 Annual Report	R	2	P	1/15/08	1/18/08	3	1/18/08	3	
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 4 Annual Report	R	2	P	1/15/07	1/16/07	1	1/16/07	1	
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 3 Annual Report	R	2	P	1/15/06	4/14/06	89	4/14/06	89	N
199	Toxics Prescreening Monitorir	PPSCAN 2	S	2	P	1/15/05	1/12/05		1/19/05	4	
011	Plan, Report, or Scope of Work	PRODUCTION REPORT 2 Annual Report	R	2	P	1/15/05	3/31/05	75	3/31/05	75	N

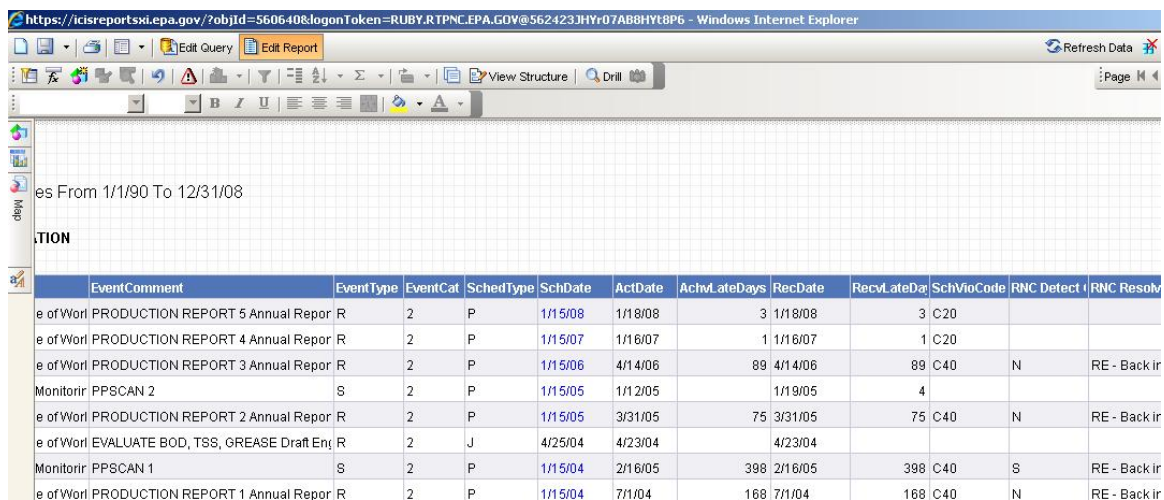
5. Create Measure variable for RNC Resolution Code, RNC Resolution Description, and RNC Detection Description and add to report.

## Use Max() function to show the worst violation

Schedule violation data field is a dimension. A single schedule or report can have more than one schedule violation condition.



1. Drag Schedule Violation Code to report.
2. View report and notice that schedules with more than one violation code have more than one row.
3. Create a measure variable called Sch Vio Code. Enter Max(Schedule Violation Code) into the Formula box.
4. Drag the Sch Vio Code variable over the Schedule Violation Code to replace.
5. View report and notice that only the worst violation for each schedule is listed.

View Report:



EventComment	Event Type	EventCat	SchedType	SchDate	ActDate	AchvLateDays	RecDate	RecvLateDays	SchVioCode	RNC Detect	RNC Resolv
e of Worl PRODUCTION REPORT 5 Annual Repor	R	2	P	1/1 5/08	1/18/08	3	1/18/08	3	C20		
e of Worl PRODUCTION REPORT 4 Annual Repor	R	2	P	1/1 5/07	1/16/07	1	1/16/07	1	C20		
e of Worl PRODUCTION REPORT 3 Annual Repor	R	2	P	1/1 5/06	4/14/06	89	4/14/06	89	C40	N	RE - Back ir
Monitorir PPSCAN 2	S	2	P	1/1 5/05	1/12/05		1/19/05	4			
e of Worl PRODUCTION REPORT 2 Annual Repor	R	2	P	1/1 5/05	3/31/05	75	3/31/05	75	C40	N	RE - Back ir
e of Worl EVALUATE BOD, TSS, GREASE Draft Eng	R	2	J	4/25/04	4/23/04		4/23/04				
Monitorir PPSCAN 1	S	2	P	1/1 5/04	2/16/05	398	2/16/05	398	C40	S	RE - Back ir
e of Worl PRODUCTION REPORT 1 Annual Repor	R	2	P	1/1 5/04	7/1/04	168	7/1/04	168	C40	N	RE - Back ir

## Highlight Actual and Report Received date that may have caused RNC detect code.

1. Click on ActDate Column, then click on  Alerter button.
2. Click on New and enter RNC Detect in the Name box.
3. Choose RNC Detect from the filtered object or cell box.
4. Select is not null form the Operator drop down box.
5. Format cell contents to be red.
6. Click Ok button.
7. Apply RNC Detect Alerter to RecDate column by clicking on the  Alerter button and select RNC Detect checkbox.

## Show the Final Current RNC status for the permittees.

1. Drag the Curr. Overall RNC Status Code to the report.