

TEXAS DEPARTMENT OF AGRICULTURE

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Texas Unified Nutrition Programs System (TX-UNPS)

# **Data Warehouse Report Training Guide**

**Texas Department of Agriculture  
Food and Nutrition Division**

*For External Users*

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## Document Revision History

Version	Status	Date	Change Description	Updated By
V1.0	FINAL	07/30/2012	Final Training Guide for Implementation	Linda Miller



# Introduction

*Welcome to the Texas Unified Nutrition Programs System (TX-UNPS) supplemental training guide for the Data Warehouse Report module. TX-UNPS is a web-based software solution that provides administrators, state users, and Contracting Entities with efficient and immediate access to applications, claims, and related nutrition program functions. This training guide will focus on the TX-UNPS data report function.*

## Training Guide

This training guide is intended for use by authorized Contracting Entity (CE) and Education Service Center (ESC) users that need to utilize the data report function within TX-UNPS. It is designed to provide a general understanding of how to use the report function in an effective and efficient manner.

# Getting Started

Before you can begin using TX-UNPS, you must be assigned a user ID and password by the TX-UNPS Help Desk that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the TX-UNPS web site.

## Accessing the TX-UNPS Web Site

You can access TX-UNPS from any computer connected to the Internet by opening your Internet browser and entering the following URL in the browser's address line:

<https://txunps1.texasagriculture.gov/>



**TIP:** You can add this URL to your browser's FAVORITES list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

Figure 1: TX-UNPS Home Page

# Logging On to TX-UNPS

1. Enter your assigned **User ID**.
2. Enter your **Password**.
3. Select **Log On**

**Note:** If you do not have a User ID and Password, contact the TX-UNPS Help Desk.



**TIP:** The Password is case-sensitive, so be sure to type upper and lower-case letters correctly.

The screenshot shows the TX-UNPS Home Page. At the top, there is a header with 'Nutrition Programs' and 'TX-UNPS'. Below the header, there is a 'Returning Users: Log On' box. This box contains fields for 'User ID:' and 'Password:', and a 'Log On' button. A red circle highlights the 'Log On' button. To the right of the login box, there is a welcome message: 'Welcome to the Texas Unified Nutrition Programs System! Last Updated: 7/12/2012'. Below the welcome message, there is a section for 'Avoiding/Resolving TX-UNPS Session Conflicts (Revised 07/12/2012)' and a 'System Maintenance' section. At the bottom of the page, there is a 'TDA Disclaimer' section. The CNF logo is visible in the bottom left corner.

Figure 2: TX-UNPS Log On box on Home Page

**Note:** If you change your TX-UNPS password, you will not be able to access the data warehouse until the next day.

# Accessing TX-UNPS Date Warehouse Reports

1. Select Reports in the top menu bar under the TX-UNPS tab

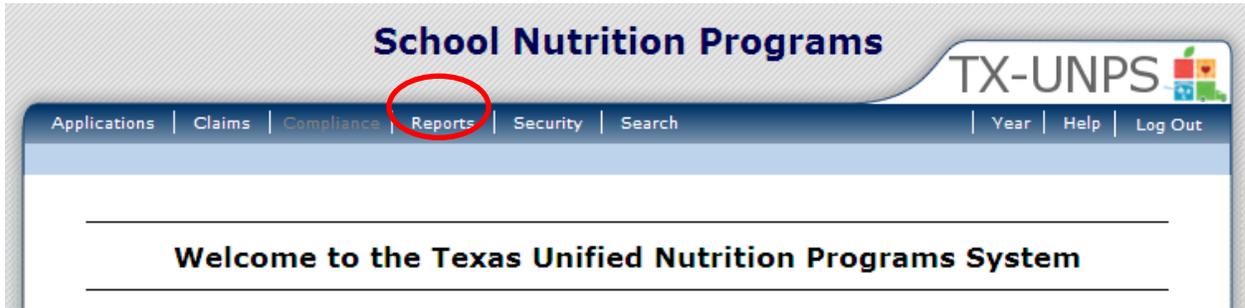


Figure 3: TX-UNPS Reports link on top menu bar

2. Select the **TX-UNPS Data Warehouse** link located under Report List. Since limited reports are available at this time, no filter needs to be selected from the pull-down menu.

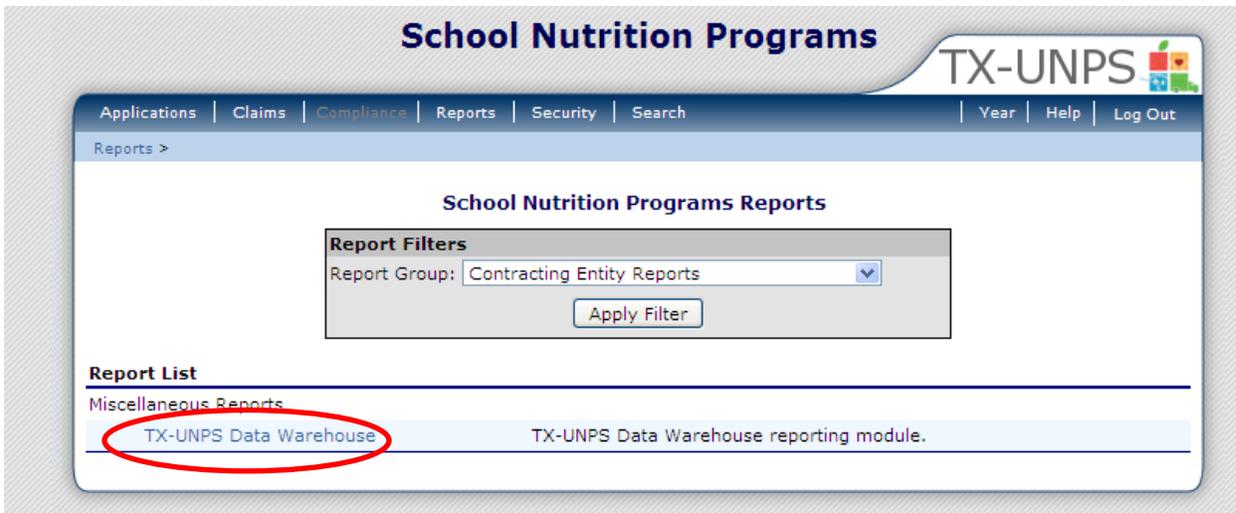


Figure 4: TX-UNPS Data Warehouse link

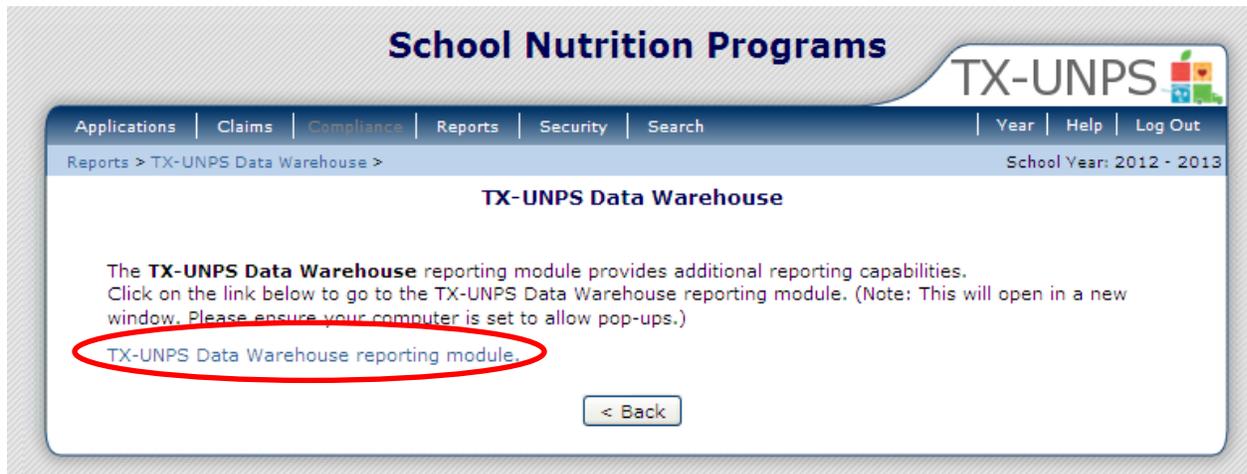
3. Select the **TX-UNPS Data Warehouse reporting module** link.



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**TIP:** Make sure your pop-up blocker is turned off before clicking the TX-UNPS Data Warehouse reporting module link. If the pop-up blocker is on, the linked window will not appear.

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**Figure 5: TX-UNPS Data Warehouse reporting module link**

A new window will open showing the Pentaho User Console. Pentaho is the database application that stores data and creates reports.

**Note:** Follow the steps above to access any of the nutrition program modules. The title displayed on the screen (see "School Nutrition Programs" above) will reflect the program-appropriate title of the reporting module link.



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**TIP:** If no Pentaho window opens, click the browser back arrow to return to the previous screen showing the Data Warehouse reporting module link, check that the pop-up blocker is off, then click the reporting module link again.

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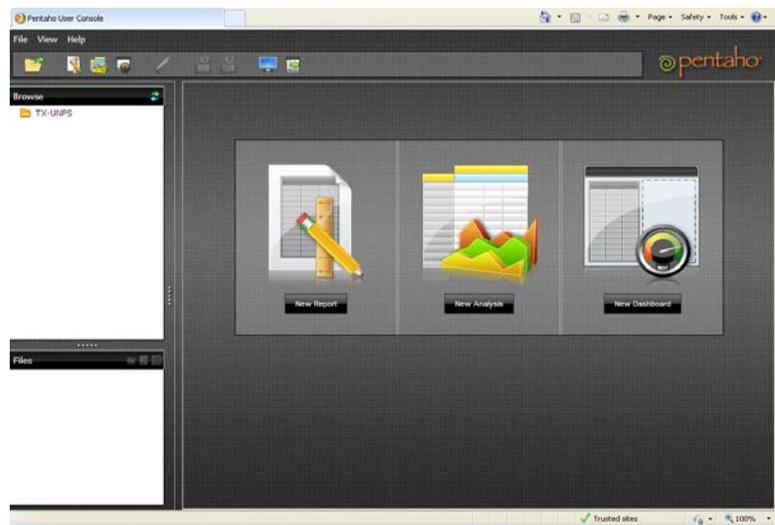


Figure 6: Pentaho User Console window

4. Select the **TX\_UNPS** link in the Browse window. This will bring up a list of available reports.

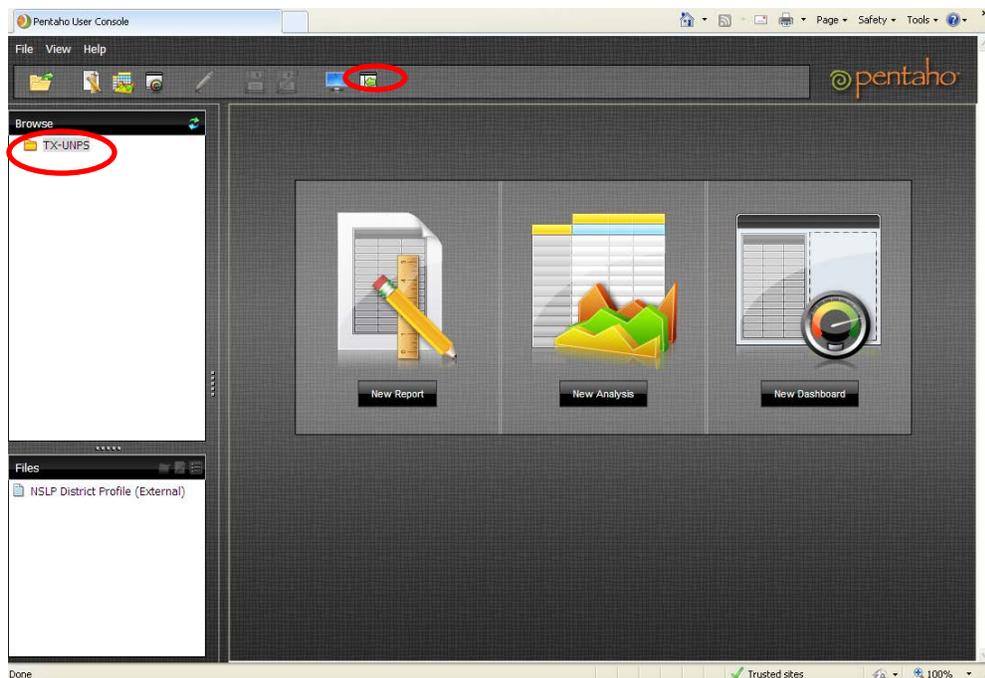


Figure 7: Pentaho User Console Browse window

5. Locate the **Files** section in the Pentaho User Console window.

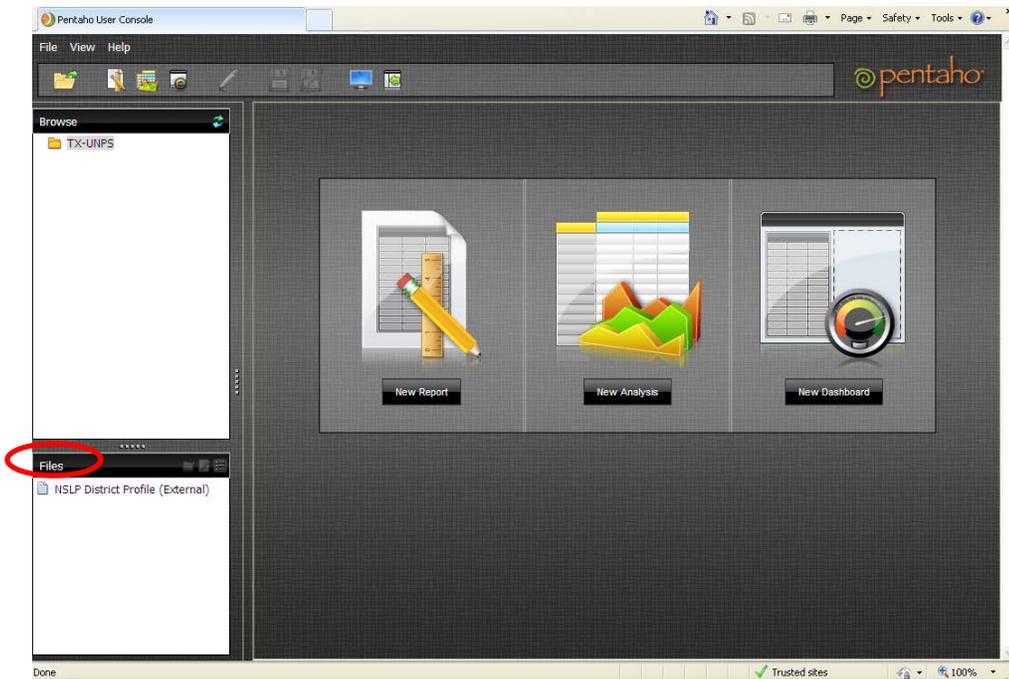


Figure 8: Pentaho User Console window Files link



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**TIP:** If the Browse and Files windows are not visible, select the green Toggle icon located on the far right end of the top navigation bar. 

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6. Open the report you wish to view. You can
- double-click the file name link for the report, or
  - click to select the file name link for the report, then select the Open File icon.

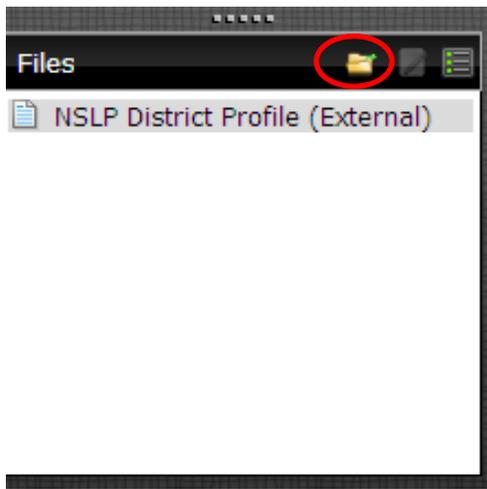


Figure 9: Pentaho User Console window Open File icon

7. Set the Report Parameters for the data warehouse report you want to access. See the appropriate appendix for your specific program report instructions.

**Note:** Data displayed in the reports is one day behind the actual calendar date. Data is refreshed each night. For example, data for a claim entered on Tuesday will not show up in a report until Wednesday.

8. To **view an online report**, select either of the HTML views from the Output Type pull-down menu and then click View Report. Alternately, you can also **download a data file report** or **print a report**. To download or print, proceed to Step 11 or Step 13, respectively.

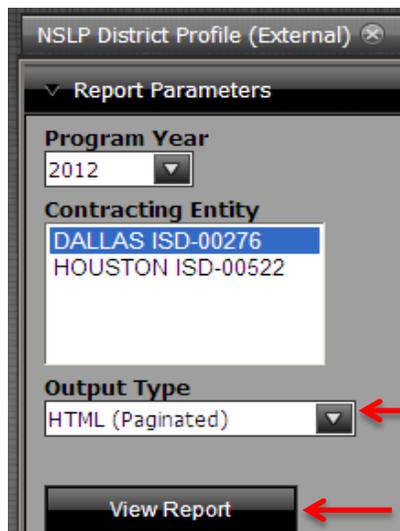


Figure 10: Report Parameters HTML Output Type selection

9. View the online report in the display window.



**TIP:** To understand what information is represented in each field of the reports, see the appropriate **“Field Definitions”** appendix beginning on page 16 of this document. Fields remain the same across all file output types, whether online, Excel data report, or printed PDF.

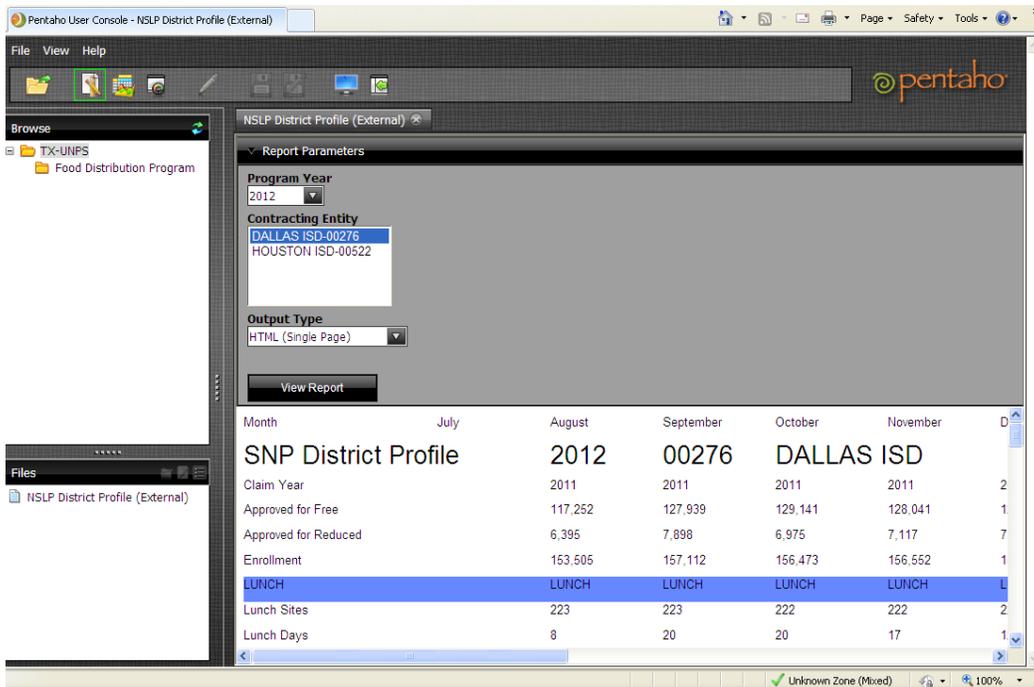


Figure 11: Pentaho User Console SNP District Profile Report



**TIP:** To see more of the online report in the display window, adjust the viewing percentage from 100% to 75%. The percentage adjustment is in the bottom right corner of the browser window.

10. Page through the entire report by clicking the single forward or back arrow in the page menu bar. Select the barred forward or back arrows to jump to the first or last page of the report. To see an entire page of the report without adjusting the viewing percentage, use the bottom scroll bar to move the display window back and forth, and the side scroll bar to move the window up and down.

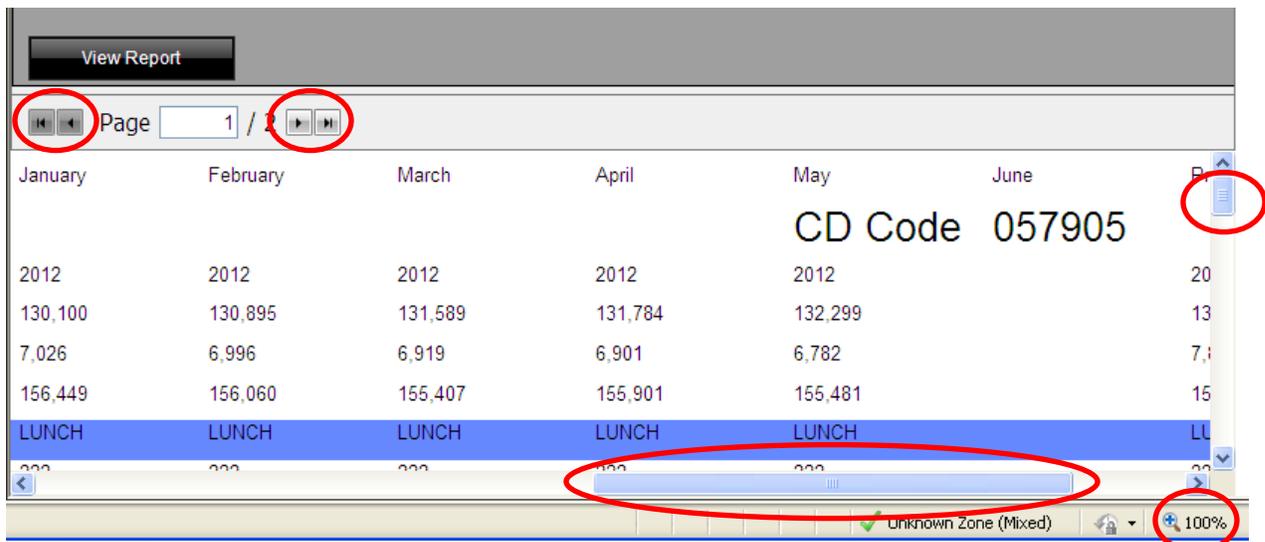


Figure 12: Pentaho User Console SNP District Profile Report (annotated)

11. To download a **data file report**, select either of the Excel views from the Output Type pull-down menu and then click View Report.

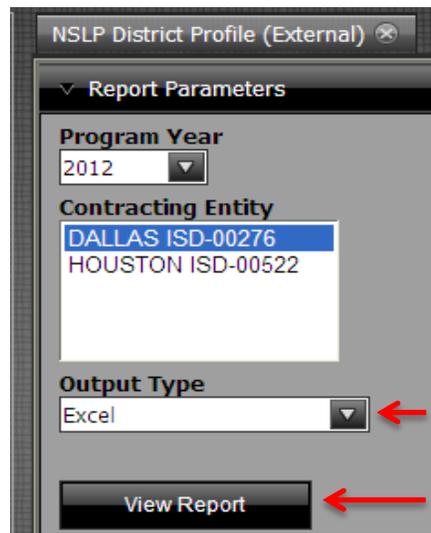


Figure 13: Pentaho User Console Excel Output Type selection

After clicking View Report, you will get a security message which will require that you click to download the file. Click the option area to bring up a pull-down menu with a “Download File...” option. Select that option.

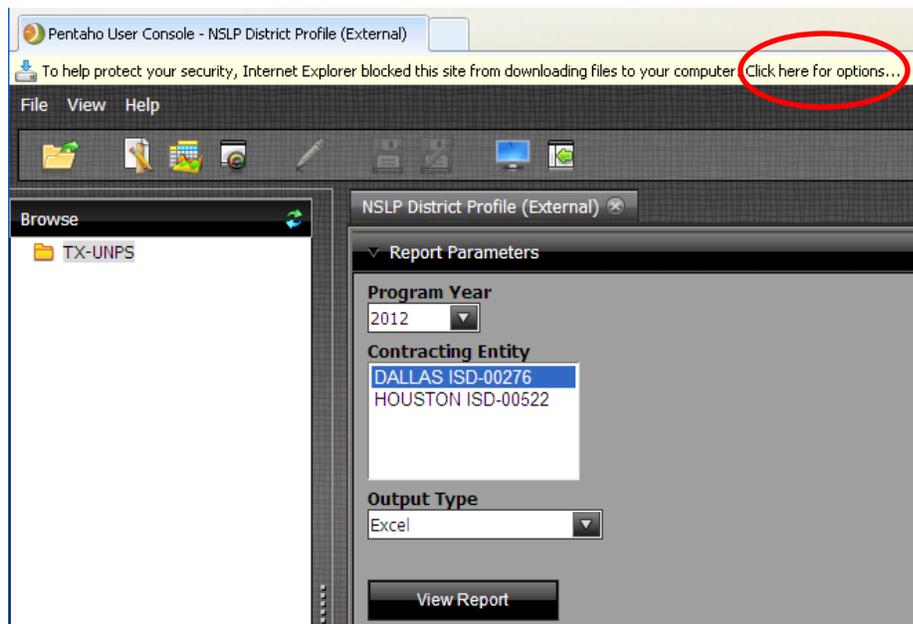


Figure 15: Pentaho User Control Security Message

After selecting the Download File option, you will be returned to the opening Pentaho User Console. (see Step 4, Figure 6) From this point, repeat Steps 4 through 7.

If you wish to avoid rerunning the report by repeating Steps 4 through 7, you may adjust your Internet security options to add this site to your “trusted sites” list. However, steps in the procedure below may vary according to network settings or protocols established by technology departments.

In your browser navigation bar, select Tools and then select Internet Options.

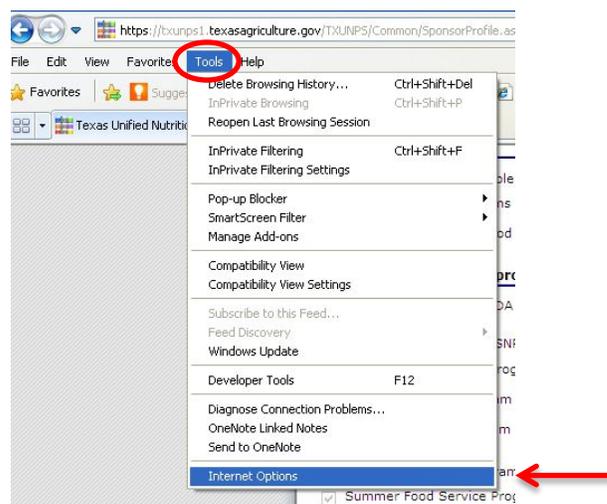


Figure 15: Internet Tools > Internet Options

Click the Internet Options Security tab and then click the Trusted sites icon.

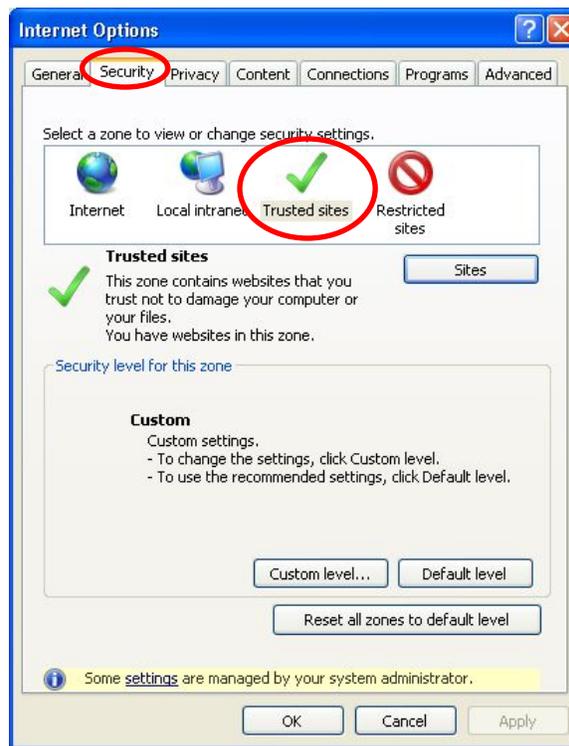


Figure 16: Internet Options > Security Tab

If your security settings allow you to manually add sites to the trusted list, the TX-UNPS website address will appear in the “Add this website to the zone” box. Click the Add button. (The Add button will not be greyed out as it appears in Figure 18 below.)

If your security settings do not allow you to manually add sites to the trusted list, the Add button will be greyed out, as it appears in Figure 18 below. You will need to consult with your technology department about getting the TX-UNPS site added to the trusted list.

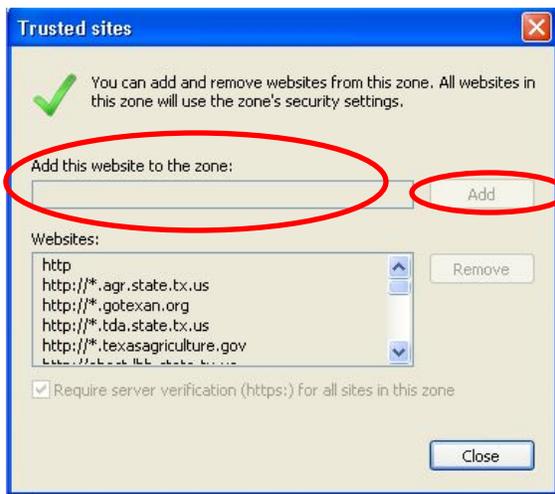


Figure 17: Trusted sites window

12. Repeat the Report Parameter process and select Excel as the Output Type. Then select how and where you wish to view and/or save the data report file.

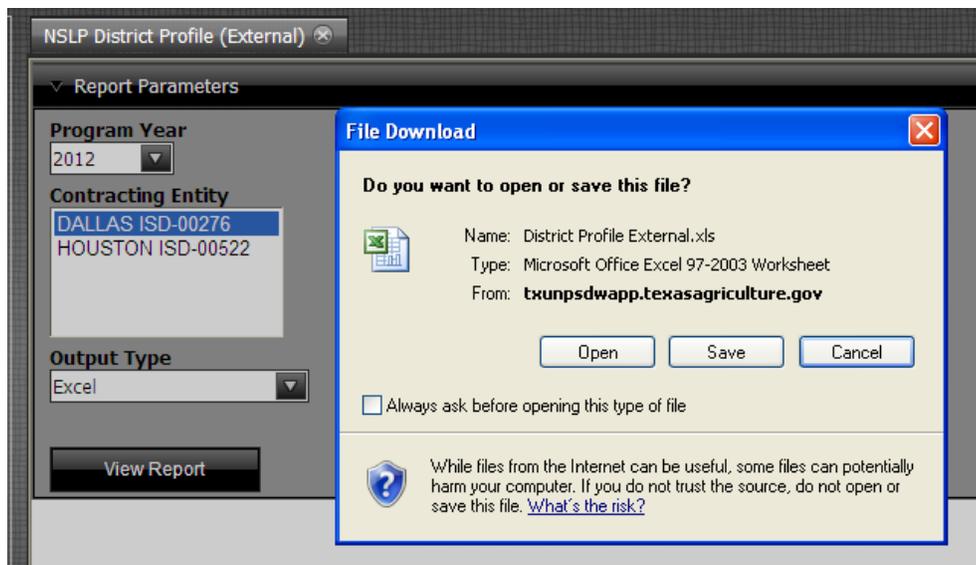


Figure 18: Excel Output Type selection

13. To download and **print a report**, select the PDF view from the Output Type pull-down menu and then click View Report.

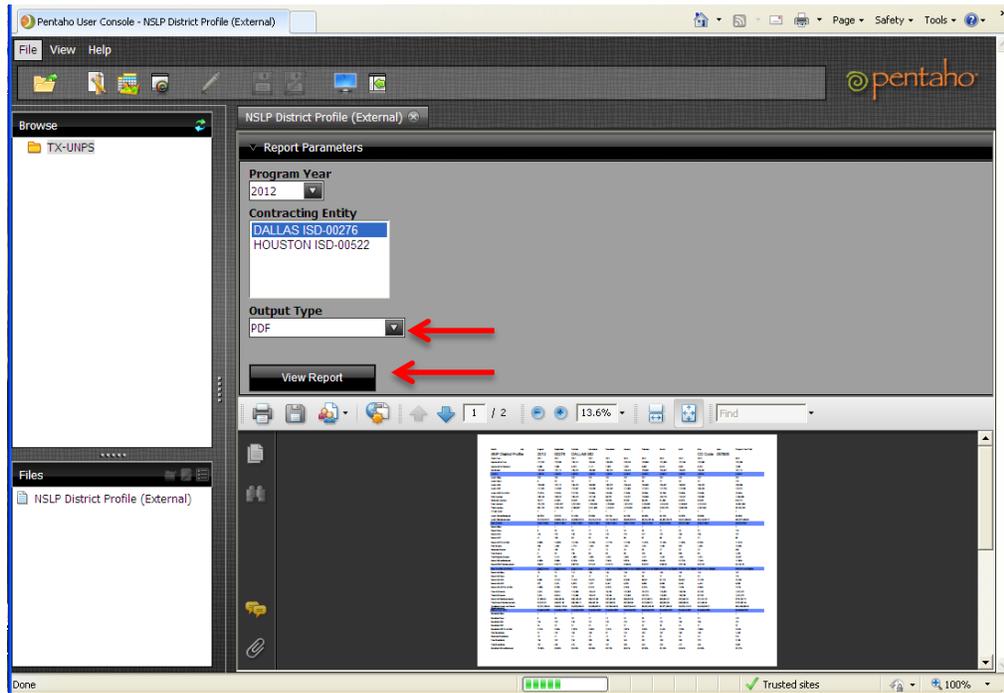


Figure 19: Pentaho User Console PDF Output Type selection

14. Select how you wish to view and/or share the report by selecting the appropriate icon. Going from left to right, the icon selections allow you to click to print the PDF pages, save the file to a computer, share documents, or create a PDF.

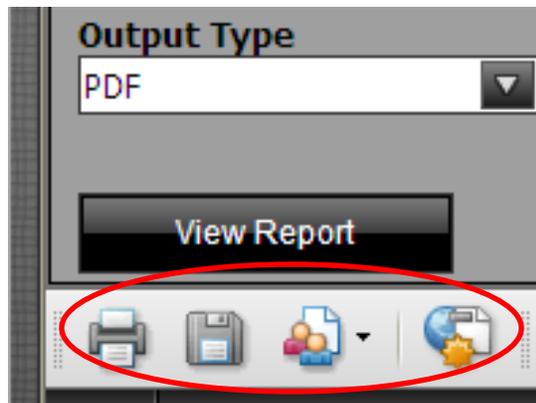


Figure 20: PDF View/Print/Share Options

15. To close an open report and select a new report to view, select the X button in the District Profile tab. This will close the current report and reset the page to the File view. Repeat the profile selection process for a new report by starting at Step 4 of this procedure.

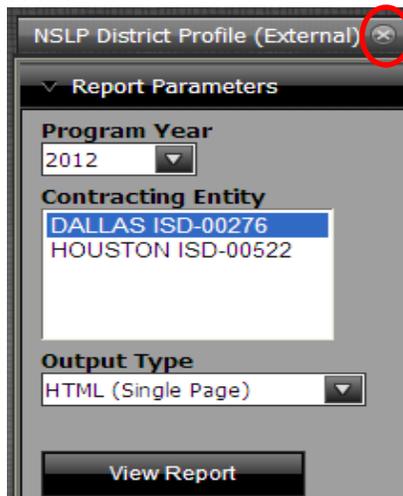


Figure 21: Pentaho User Console District Profile close button



**TIP:** If you leave the Pentaho application, you may see this Pentaho User Console screen (below) the next time you log in. Do not log in on this page. If this screen appears, close browser window and open the TX-UNPS web site in a new window. The Nutrition Programs TX-UNPS Home Screen (see Figure 1) will appear and you will be able to log in to the data warehouse reports section of Pentaho.



Figure 22: Pentaho User Console Login Screen

## Appendix 1: Field Definitions for NSLP District Profile Report

Field Name	Description for Claim Month Detail	Description for Program Year Totals Detail
<b>Month</b>	Claim Month	
<b>Claim Year</b>	Year of the claim month	
<b>Approved for Free</b>	Sum of G1, "number approved for free meals," from the site claim(s)	Highest value of "Approved for Free" for the program year
<b>Approved for Reduced</b>	Sum of G2, "number approved for reduced meals," from the site claim(s)	Highest value of "Approved for Reduced" for the program year
<b>Enrollment</b>	Sum of G3, "number of enrolled children," from the site claim(s)	Highest value of "Enrollment" for the program year
<b>LUNCH</b>		
<b>Lunch Sites</b>	Sum of L1, "Authorized Sites Participating," from lunch section of site claim(s)	Highest value of "Lunch Sites" for the program year
<b>Lunch Days</b>	Highest of L3, "Number of Operating Days," from lunch section of site claim(s)	Sum of "Lunch Days" for the program year
<b>Lunch ADA</b>	Sum of Total Monthly Attendance from the lunch section of the site claims divided by the highest number of days claimed from the site applications and rounded.	Sum of Total Monthly Attendance from the site claims for the program year divided by the sum of "lunch days" for the program year and rounded.
<b>Lunch ADP</b>	Sum of all lunches claimed for the month divided by the highest number of days claimed from the site applications and rounded.	Sum of all lunches claimed for the program year divided by the sum of "Lunch Days" claimed for the program year and rounded.
<b>Lunch ADP % of ADA</b>	ADP divided by the ADA and rounded to the second decimal point.	ADP divided by the ADA and rounded to the second decimal point.
<b>Paid Lunches</b>	Sum of L4.c., "Paid Lunches Served," from lunch section of site claim(s)	Sum of "Paid Lunches" for the program year
<b>Reduced Lunches</b>	Sum of L4.b., "Reduced Lunches Served," from lunch section of site claim(s)	Sum of "Reduced Lunches" for the program year
<b>Free Lunches</b>	Sum of L4.a., "Free Lunches Served," from lunch section of site claim(s)	Sum of "Free Lunches" for the program year
<b>Total Lunches</b>	Sum of L4.d., "Sum Lunches Served," from lunch section of site claim(s)	Sum of "Total Lunches" for the program year
<b>2 Cent Lunch</b>	Indicates whether the Contracting Entity qualified for the 2 cent Severe Need Lunch. This is from the application and is based on lunches served two years prior.	Indicates whether the Contracting Entity qualified for the 2 cent Severe Need Lunch. This is from the application and is based on lunches served two years prior.
<b>Lunch %Free/Reduced</b>	Sum of Free and Reduced Lunches divided by Total Lunches	Sum of Free and Reduced Lunches divided by Total Lunches
<b>Lunch Reimbursement</b>	Amount of federal reimbursement for lunch	Amount of federal reimbursement for lunch
<b>SNACK-REG</b>		
<b>Snack Sites</b>	Sum of A4, "Authorized Sites Participating," from Afterschool Care Program (Non-Area Eligible) section of site claim(s)	Highest number of "Snack Sites" for the program year.

<b>Snack Days</b>	Highest of A6, "Number Operating Days," from Afterschool Care Program (Non-Area Eligible) section of site claim(s)	Sum of "Snack Days" for the program year.
<b>Snack ADA</b>	Sum of Total Monthly Attendance from the regular snack section of the site claims divided by the highest number of days claimed from the site applications and rounded.	Sum of Total Monthly Attendance from the regular snack section of the site claims for the program year divided by the sum of "Snack Days" for the program year and rounded.
<b>Snack ADP</b>	Sum of all regular snacks claimed for the month divided by the highest number of days claimed from the site applications and rounded.	Sum of all regular snacks claimed for the program year divided by the sum of "Snack Days" claimed for the program year and rounded.
<b>Snack ADP % of ADA</b>	ADP divided by the ADA and rounded to the second decimal point.	ADP divided by the ADA and rounded to the second decimal point.
<b>Paid Snacks</b>	Sum of A7.c., "Paid Snacks Served," Afterschool Care Program (Non-Area Eligible) section of site claim(s)	Sum of "Paid Snacks" for the program year
<b>Reduced Snacks</b>	Sum of A7.b., "Reduced Snacks Served," Afterschool Care Program (Non-Area Eligible) section of site claim(s)	Sum of "Reduced Snacks" for the program year
<b>Free Snacks</b>	Sum of A7.a., "Free Snacks Served," Afterschool Care Program (Non-Area Eligible) section of site claim(s)	Sum of "Free Snacks" for the program year
<b>Total Regular Snacks</b>	Sum of A7.d., "Sum d Snacks Served," Afterschool Care Program (Non-Area Eligible) section of site claim(s)	Sum of "Total Regular Snacks" for the program year
<b>Snack %Free/Reduced</b>	um of Free and Reduced Snacks divided by Total Regular Snacks	Sum of Free and Reduced Snacks divided by Total Regular Snacks
<b>Snack-REG Reimbursement</b>	Amount of federal reimbursement for Regular Snacks	Amount of federal reimbursement for Regular Snacks
<b>SNACK-AREA ELIGIBLE (AE)</b>		
<b>Snack AE Sites</b>	Sum of A3, "Authorized Sites Participating," from Afterschool Care Program (Area Eligible) section of site claim(s)	Highest number of "Snack AE Sites" for the program year.
<b>Snack AE Days</b>	Highest of A5, "Number Operating Days," from Afterschool Care Program (Area Eligible) section of site claim(s)	Sum of "Snack AE Days" for the program year.
<b>Snack AE ADA</b>	Sum of Total Monthly Attendance from the area eligible snack section of the site claims divided by the highest number of days claimed from the site applications and rounded.	Sum of Total Monthly Attendance from the AE snack section of the site claims for the program year divided by the sum of "Snack AE Days" for the program year and rounded.
<b>Snack AE ADP</b>	Sum of all area eligible snacks claimed for the month divided by the highest number of days claimed from the site applications and rounded.	Sum of all regular snacks claimed for the program year divided by the sum of "Snack Days" claimed for the program year and rounded.
<b>Snack AE ADP % of ADA</b>	ADP divided by the ADA and rounded to the second decimal point.	ADP divided by the ADA and rounded to the second decimal point.
<b>Free AE Snacks</b>	Sum of A6.a., "Free Snacks Served," Afterschool Care Program (Area Eligible) section of site claim(s)	Sum of "Free AE Snacks" for the indicated program year

<b>Total AE Snacks</b>	Sum of all Area Eligible Snacks. All Area Eligible Snacks are free so this should match the figure from "Free AE Snacks"	Sum of "Total AE Snacks" for the program year
<b>Snack AE Reimbursement</b>	Sum of federal reimbursement for Area Eligible Snacks	Sum of federal reimbursement for Area Eligible Snacks for the program year
<b>Total Snack Reimbursement</b>	Sum of federal reimbursement for Regular and Area Eligible Snacks	Sum of federal reimbursement for Regular and Area Eligible Snacks for the program year
<b>Combined Lunch and Snack Reimbursement</b>	Sum of all lunch and Snack (regular and area eligible) Reimbursements	Sum of all lunch and Snack (regular and area eligible) Reimbursements for the program year
<b>BREAKFAST-REG</b>		
<b>Breakfast Sites</b>	Sum of N1, "Authorized Sites Participating," from Regular Breakfast Section of site claim(s)	Highest number of "Breakfast Sites" for the program year.
<b>Breakfast Days</b>	Highest of N3, "Number of Operating Days," from Regular Breakfast Section of site claim(s)	Sum of "Breakfast Days" for the program year.
<b>Breakfast ADA</b>	Sum of Total Monthly Attendance from the breakfast section of the site claims divided by the highest number of days claimed from the site applications.	Sum of Total Monthly Attendance from the Breakfast section of the site claims for the program year divided by the sum of "Breakfast Days" for the program year and rounded.
<b>Breakfast ADP</b>	Sum of all breakfasts claimed for the month divided by the highest number of days claimed from the site applications.	Sum of all breakfasts claimed for the program year divided by the sum of "Breakfast Days" claimed for the program year and rounded.
<b>Breakfast ADP % of ADA</b>	ADP divided by the ADA and rounded to the second decimal point.	ADP divided by the ADA and rounded to the second decimal point.
<b>Paid Breakfasts</b>	Sum of N4.c., "Paid Breakfasts Served," from Regular Breakfast Section of site claim(s)	Sum of "Paid Breakfasts" for the program year.
<b>Reduced Breakfasts</b>	Sum of N4.b., "Reduced Breakfasts Served," from Regular Breakfast Section of site claim(s)	Sum of "Reduced Breakfasts" for the program year.
<b>Free Breakfasts</b>	Sum of N4.a., "Free Breakfasts Served," from Regular Breakfast Section of site claim(s)	Sum of "Free Breakfasts" for the program year.
<b>Total Breakfasts</b>	Sum of N4.d., "Sum Breakfasts Served," from Regular Breakfast Section of site claim(s)	Sum of "Total Breakfasts" for the program year.
<b>Breakfast %Free/Reduced</b>	Sum of Free and Reduced Regular Breakfasts divided by Total Regular Breakfasts	Sum of Free and Reduced Regular Breakfasts for the program year divided by Total Regular Breakfasts for the program year
<b>Breakfast-REG Reimbursement</b>	Sum of federal reimbursement for Regular Breakfast	Sum of federal reimbursement for Regular Breakfast for the program year
<b>BREAKFAST-SN</b>	<b>Severe Need (SN) Breakfast Data</b>	<b>Severe Need (SN) Breakfast Data</b>
<b>Breakfast SN Sites</b>	Sum of N1, "Authorized Sites Participating," from Severe Need Breakfast Section of site claim(s)	Highest number of "Breakfast SN Sites" for the program year.
<b>Breakfast SN Days</b>	Highest of N3, "Number of Operating Days," from Severe Need Breakfast Section of site claim(s)	Sum of "Breakfast SN Days" for the program year.
<b>Breakfast SN ADA</b>	Sum of Total Monthly Attendance from the SN breakfast section of the site claims divided by the highest number of days	Sum of Total Monthly Attendance from the SN Breakfast section of the site claims for the program year divided by the sum of

	claimed from the site applications.	"Breakfast SN Days" for the program year and rounded.
<b>Breakfast SN ADP</b>	Sum of all SN breakfasts claimed for the month divided by the highest number of days claimed from the site applications.	Sum of all SN Breakfasts claimed for the program year divided by the sum of "Breakfast SN Days" claimed for the program year and rounded.
<b>Breakfast SN ADP % of ADA</b>	ADP divided by the ADA and rounded to the second decimal point.	ADP divided by the ADA and rounded to the second decimal point.
<b>Paid SN Breakfasts</b>	Sum of N4.c., "Paid Breakfasts Served," from Severe Need Breakfast Section of site claim(s)	Sum of "Paid SN Breakfasts" for the program year.
<b>Reduced SN Breakfasts</b>	Sum of N4.b., "Reduced Breakfasts Served," from Severe Need Breakfast Section of site claim(s)	Sum of "Reduced SN Breakfasts" for the program year.
<b>Free SN Breakfasts</b>	Sum of N4.a., "Free Breakfasts Served," from Severe Need Breakfast Section of site claim(s)	Sum of "Free SN Breakfasts" for the program year.
<b>Total SN Breakfasts</b>	Sum of N4.d., "Sum Breakfasts Served," from Severe Need Breakfast Section of site claim(s)	Sum of "Total SN Breakfasts" for the program year.
<b>Breakfast-SN Reimbursement</b>	Sum of federal reimbursement for Severe Need Breakfast	Sum of federal reimbursement for Severe Need Breakfast for the program year.
<b>Total Breakfast Reimbursement</b>	Sum of federal reimbursement for Severe Need and Regular Breakfast	Sum of federal reimbursement for Severe Need and Regular Breakfast for the program year.
<b>SEAMLESS SUMMER-SSO</b>		
<b>SSO Sites</b>	Total of Seamless Sites claiming for the month.	Highest number of "SSO Sites" for the program year.
<b>SSO Days</b>	Sum of the highest number of operating days across the meal types for each site.	Sum of "SSO Days" for the program year.
<b>SSO ADP</b>	Sum of all summer meals claimed for the month divided by the highest number of days claimed from the site applications.	Sum of "Total SSO Meals" for the program year divided by the sum of "SSO Days" for the program year and rounded.
<b>SSO Lunches</b>	Sum of "Free Lunches Served" from National School Lunch/Suppers section of the site claim.	Sum of "SSO Lunches" for the program year.
<b>SSO Breakfasts</b>	Sum of "Free Breakfast Served" from School Breakfast Program (Regular Reimbursement) section of the site claim.	Sum of "SSO Breakfasts" for the program year.
<b>SSO Snacks</b>	Sum of "Total Snacks Served" from After School Care Program section of the site claim	Sum of "SSO Snacks" for the program year.
<b>SSO Suppers</b>	Sum of "Free Suppers Served" from National School Lunch/Suppers section of the site claim.	Sum of "SSO Suppers" for the program year.
<b>SSO SN Breakfasts</b>	Sum of "Total Severe Need Breakfast Served" from School Breakfast Program (Severe Need Reimbursement) section of the site claim.	Sum of "SSO SN Breakfasts" for the program year.
<b>Total SSO Meals</b>	Sum of all of the seamless summer meals served for the month	Sum of all of the seamless summer meals served for the Program Year.
<b>Total SSO Reimbursement</b>	Sum of Federal reimbursement for Seamless Summer Program	Sum of Federal reimbursement for Seamless Summer Program for the program year
<b>Total Federal Reimbursement</b>	Sum of all federal reimbursement for the Contracting Entity for the month	Sum of all federal reimbursement for the Contracting Entity for the program year

<b>State Reimbursement</b>	Sum of all state matching funds for the Contracting Entity for the month <u>Note:</u> This applies only to public/charter schools.	Sum of all state matching funds for the Contracting Entity for the program year
<b>Total Reimbursement</b>	Sum of federal and state reimbursement for the month.	Sum of federal and state reimbursement for the program year.

## Appendix 2: Setting Report Parameters for NSLP District Profile Report

To set the report parameters for an NSLP District Profile Report,

- choose the program year from the pull-down menu,
- select the Contracting Entity by clicking a listing to highlight it,
- select the Output Type (see Steps 8 through 13), and
- select View Report.

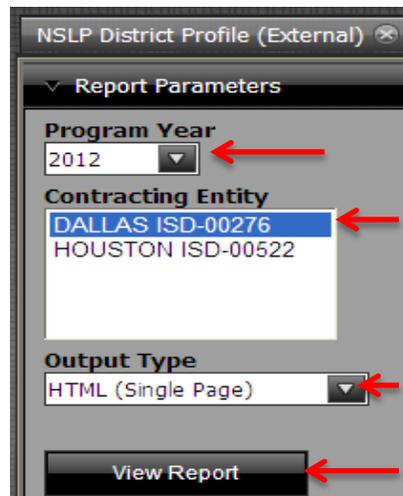


Figure 23: Pentaho User Console Profile NSLP Report Parameters selection