

TVB Reporting & Advanced Search Webinar



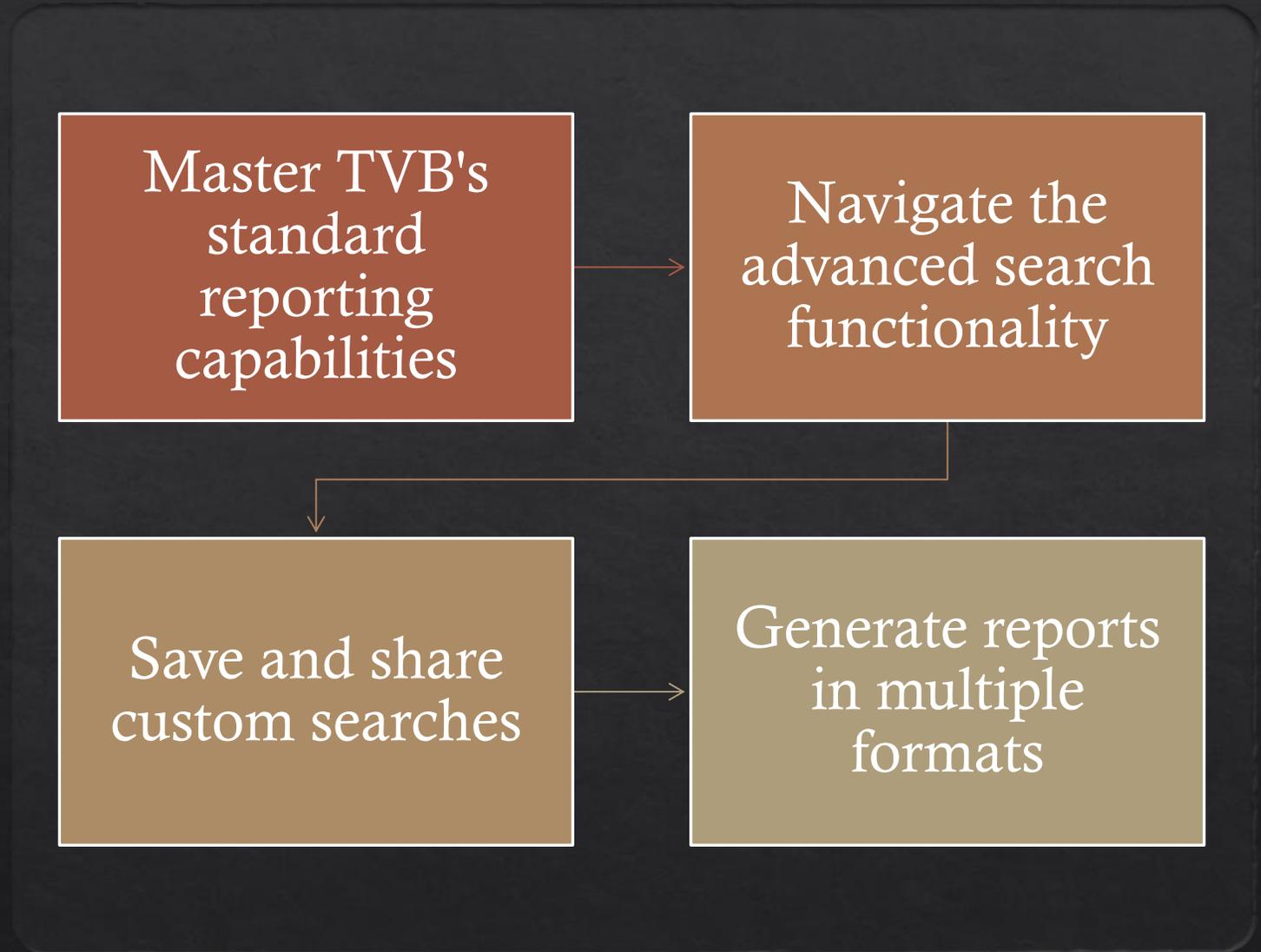
Today's Learning Objectives

Master TVB's
standard
reporting
capabilities

Navigate the
advanced search
functionality

Save and share
custom searches

Generate reports
in multiple
formats



TVB REPORTING BASICS

Standard Reports

- ◆ Claims Filed by Each VSO
- ◆ Claim Detail Report
- ◆ Communication Detail Report
- ◆ Veteran Detail Report
- ◆ Award Summary Report

Additional Reports

- | | |
|-------------------------------------|------------------------------------|
| Claims by Type Report | Financial Assistance Report |
| Conflict Summary Report | Forms Report |
| Counts By POA Report | Grant Rate Report |
| Current Ratings by Type Report | Issues Report |
| Death and Burial Report | Recovery Report |
| Demographic Report | Total Awards Report |
| Diagnostic Code by Condition Report | Veteran Details by Conflict Report |
| Field Office Summary Report | Veterans By POA Report |

ADVANCED REPORTING

Show

- Parameter selection

Explain

- Output format choices

Generate

- Sample report

Display

- How report appears in new window/download

SEARCH FUNCTIONALITY

Standard Search

- ✓ Quick access
- ✓ Pre-defined fields
- ✓ Role-based

Advanced Search

- ✓ Complex queries
- ✓ Custom criteria
- ✓ Save & share

Veteran Standard Search

1

Navigate:
Search →
Veteran
checkbox

2

Show: Search
criteria panel

3

Enter: Sample
search (name,
SSN)

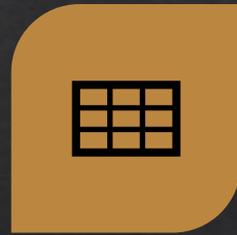
4

Display:
Results format

The 5 Tabs of Advanced Search



SEARCH CRITERIA -
BUILD YOUR
QUERY



COLUMNS -
CHOOSE DISPLAY
FIELDS



ORGANIZATIONAL
UNIT - FILTER BY
OFFICE



DISPLAY OPTIONS -
OUTPUT FORMAT



PROPERTIES - SAVE
& NAME SEARCHES

Building Your First Advanced Search

Tab 1 - Search Criteria:

- ◇ Select: Data Object (Veteran)
- ◇ Choose: Data Element (Assigned To)
- ◇ Pick: Operator (EQUAL TO)
- ◇ Enter: Value (Your Username)
- ◇ Click: Add button

Think of Data Objects as the main category
you're searching within

Operator Reference Guide

Operator

EQUAL TO

NOT EQUAL TO

CONTAINS ANY

DOES NOT CONTAIN

IS BLANK

IS NOT BLANK

Use When You Want To

Find exact matches

Exclude specific values

Find partial text matches

Exclude partial matches

Find empty fields

Find populated fields

Customizing Your Results Display

- ◆ Column Selector section (left)
- ◆ Column Editor section (right)
- ◆ Up/down arrows

The screenshot displays the 'Advanced Search' interface for 'Veteran' data. The interface is divided into two main sections: the 'Column Selector' on the left and the 'Column Editor' on the right.

Column Selector (Left): This section allows users to select which data elements to display. It features a dropdown menu with 'Veteran' selected. Below the dropdown, a list of data elements is shown with checkboxes: Application Date, Claim Name, Claim Number, Claim Received Date, Claim Status, and Claim Status Date. The 'Application Date', 'Claim Name', 'Claim Number', 'Claim Status', and 'Claim Status Date' options are currently checked.

Column Editor (Right): This section displays a table of the selected data elements. Each row represents a data element with columns for 'Data Object', 'Data Element', 'Label', and 'Action' (Up, Down, and a delete icon).

Data Object	Data Element	Label	Action	
<input checked="" type="checkbox"/>	Veteran	Assigned To	Assigned To	Up Down
<input checked="" type="checkbox"/>	Claim	Application Date	Application Date	Up Down
<input checked="" type="checkbox"/>	Claim	Claim Name	Claim Name	Up Down
<input checked="" type="checkbox"/>	Claim	Claim Number	Claim Number	Up Down
<input checked="" type="checkbox"/>	Claim	Claim Status	Claim Status	Up Down
<input checked="" type="checkbox"/>	Claim	Claim Status Date	Claim Status Date	Up Down
<input checked="" type="checkbox"/>	Claim	Claim Type	Claim Type	Up Down
<input checked="" type="checkbox"/>	Claim	Is Veteran the Claimant	Is Veteran the Claimant	Up Down
<input checked="" type="checkbox"/>	Claim	Rating Decision Date	Rating Decision Date	Up Down

The interface also includes a navigation sidebar on the far left with options like Home, Tracking Inbox, Search, Queues, Quick Links, Quick Access, Action, Reassignment, Reports, My Account, and notifications. The top right corner shows the user's role as 'Paul Overholser (Veteran Service Officer)' and a 'Change Role' button. The bottom right corner features the 'Powered by tyler technologies' logo.

Save Time with Saved Searches

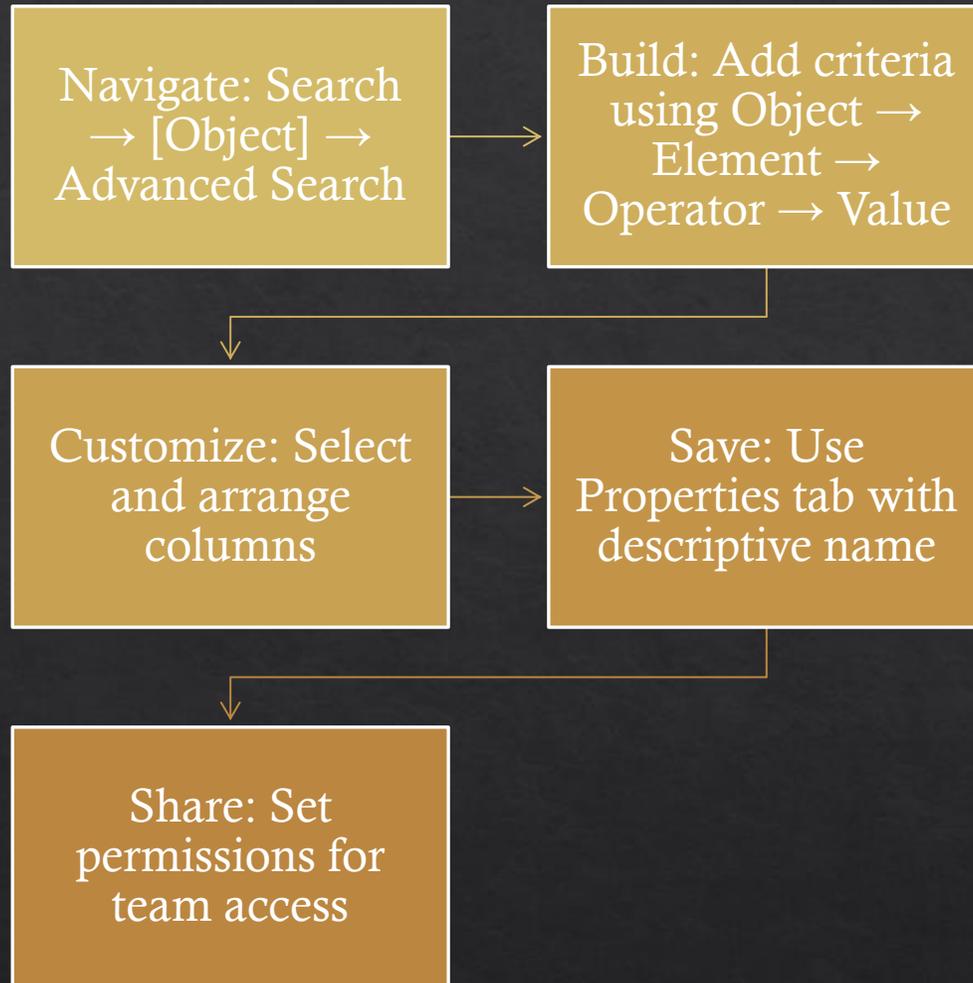
✓ Use descriptive names

✓ Include date/period in name

✓ Add purpose in description

✗ Avoid generic names like "Test" or "Search1"

Advanced Search Quick Reference





Questions

Thank you