

Mocha Guide



TRAINING MATERIAL

PART 4

REPORT
BUILDER



Training Material
Part IV: *Report Builder*

Welcome to Mocha!

The new database system for San Francisco's early learning & care programs. Mocha can help you manage important information on families you serve. You can collect, organize and track data on enrollment, certification, parent fees, attendance, child level assessments, and many more.

In addition, there are easily customizable reports you can build, data visualization and task management features to assist in monitoring program status and effectiveness. Making it easier in decision making to target where program support is needed and in making policy that is backed with data.

And here is where we will start, following these user guides, designed for different workflows!

[Part I : Basic Mocha Functions](#)

[Part II : Enrollment & Certification](#)

[Part III : Attendance & Payment](#)

Part IV : Reports (Current document)

In partnership and collaboration,



San Francisco's Office of Early Care and Education (OECE)

<https://sfoece.org/>

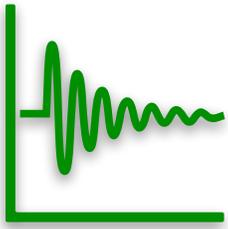
verticalchange

VerticalChange

<https://verticalchange.com/>

*“I’m always doing that which I cannot do,
In order that I may learn how to do it.”*

Pablo Picasso



Building Reports in mocha

verticalchange

1. *Signing in*

2. *VerticalChange Help Chat*

- Send us a message
- Find your answer now

3. *Landing page / Dashboard*

- *Agency Bulletin Board*

4. *Reports*

- Reports
- Report Builder

5. *Feedback Form*

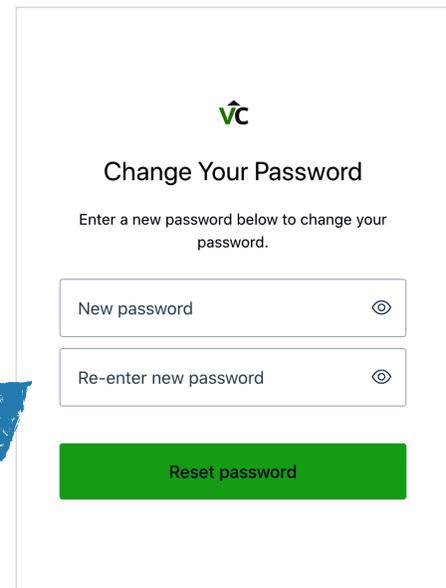
1

Signing in

Step 1 :

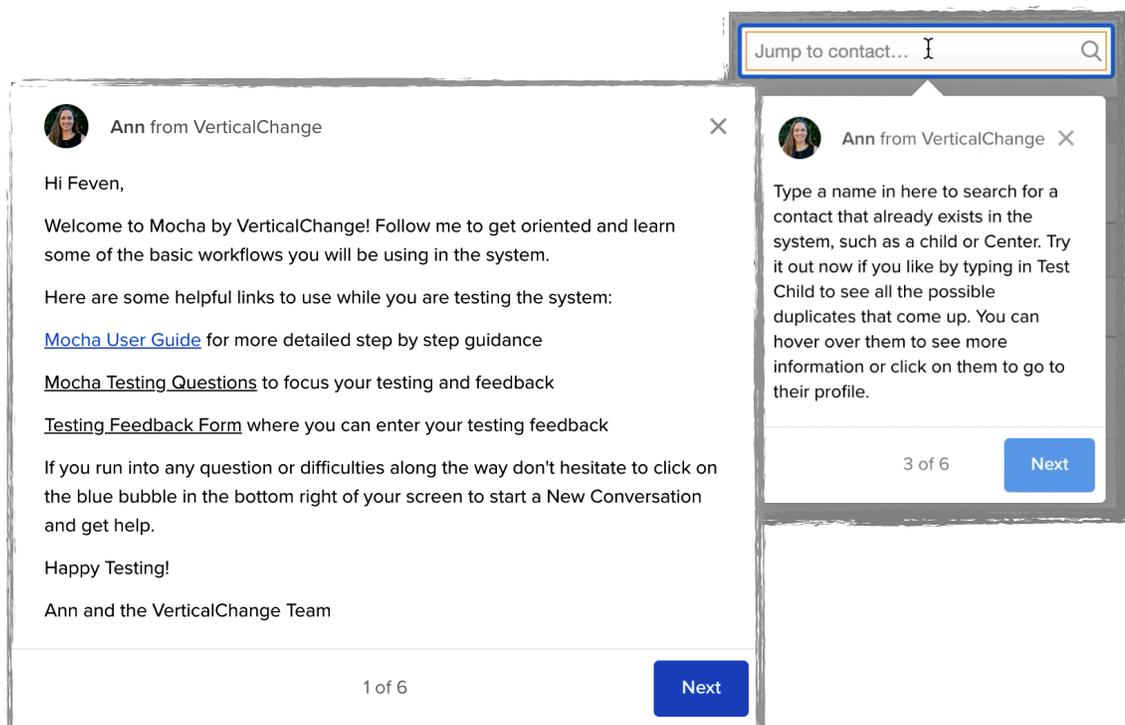
You were invited to VerticalChange! You should be getting an email with a link to activate your account. Follow that link and you will be asked to change your password.

- ❖ Note that you might get the option to set up a two step account verification. If you'd like that, go ahead and set it up.



Step 2 :

You will get a welcome note from Ann! Included a quick guided tour & helpful links for reference. Go ahead click 'Next' button and take the tour!



2

VerticalChange Help Chat

Have a question? Notice a bug? The quickest way to reach a member of the Customer Support team at VerticalChange is to chat with us!

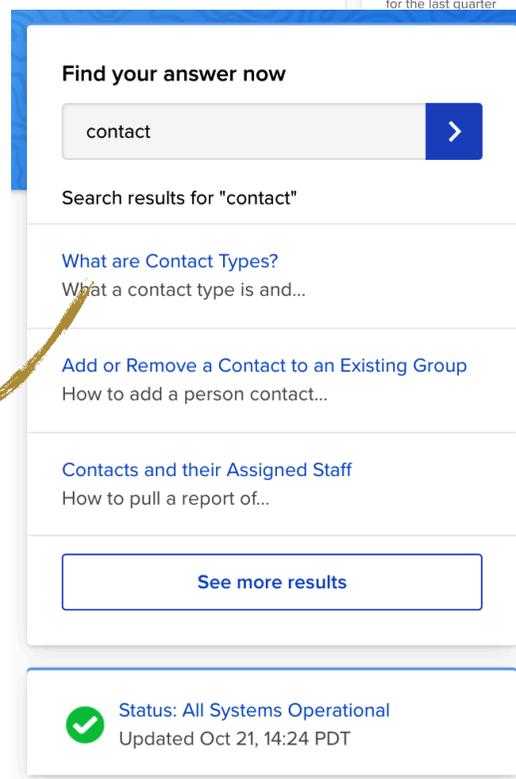
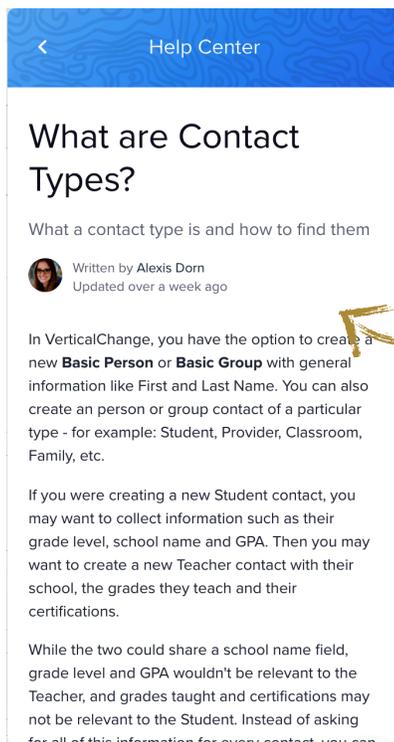
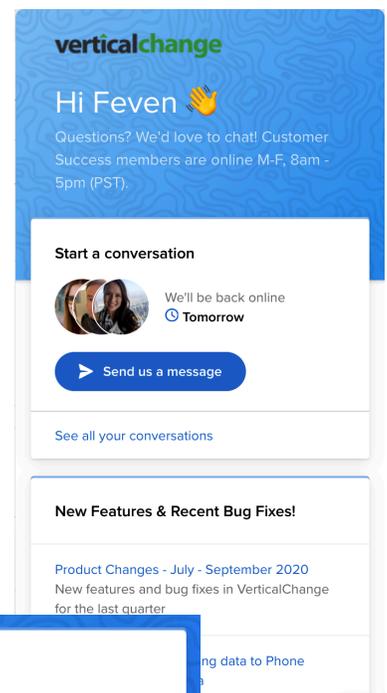
Customer Support team members are online Monday - Friday, 8:00 a.m. - 5:00 p.m. (PST). If you need assistance outside of those hours, please email us at support@verticalchange.com and we will respond to your email as soon as possible.

You can pull up the chat box in the bottom right corner of the screen

by clicking on the circular icon of a chat box.



Or you can scroll down and type in any keyword under 'Find your answer now' to search through our help documentation library.

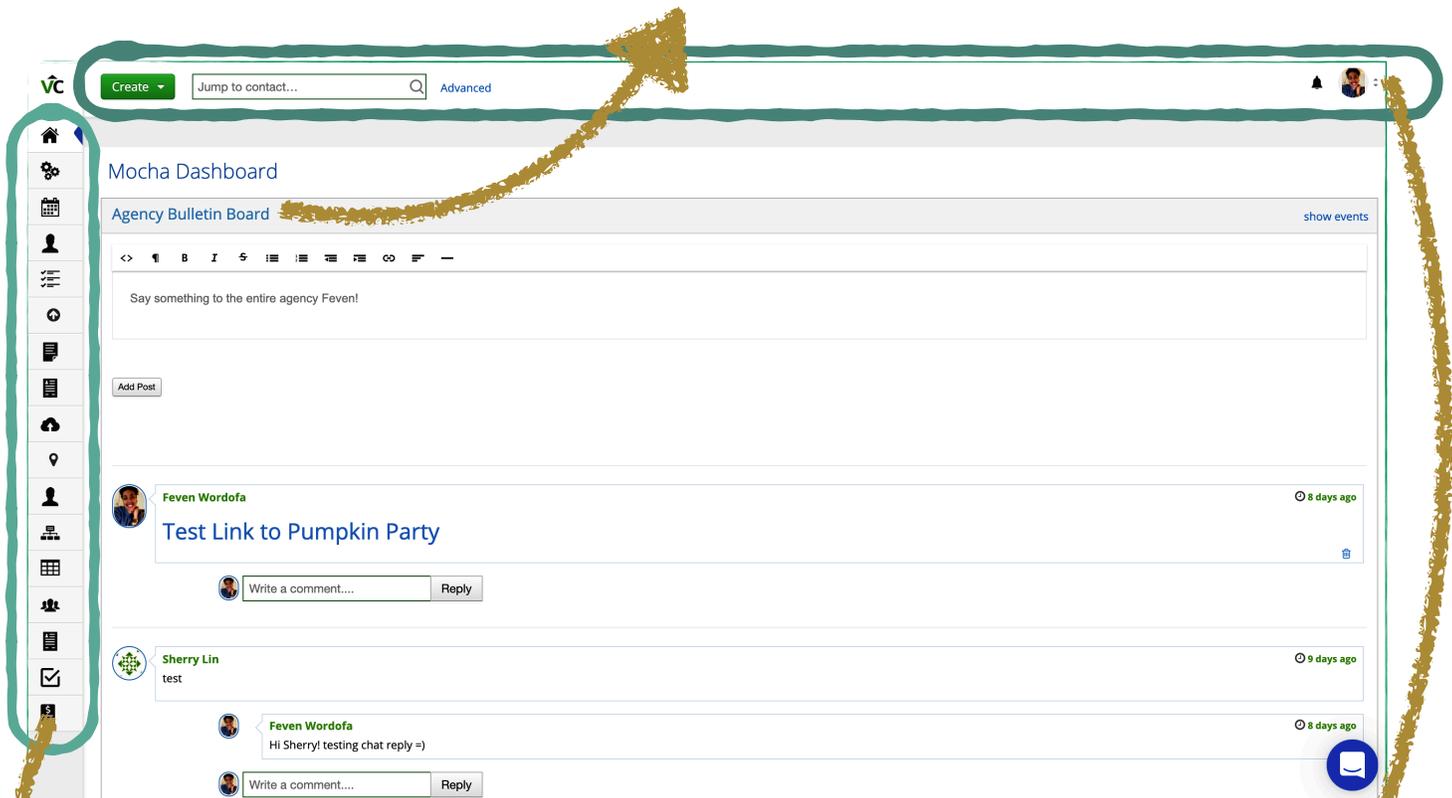


3

Landing Page / Home page

Your landing page is where you will find the Mocha Dashboard and all your navigation centers!

Step 1 : Say hello to your early care and education collaborators! This is a bulletin board where you can post public messages, share links and notes with the entire Mocha user community!



Side Navigation Bar:

You will find almost all of the things you need here; Account settings, contacts, forms, reports & domains to name the few.

Top Navigation Bar:

Here you will find 'My setting', 'Search bar' & the 'Create' feature.

4 Reports

There are three different levels of reporting in Mocha.

1. Report Builder
2. Standard Reports
3. Visual VerticalChange

Report Builder

Report builder in Mocha is the most flexible and accessible of the reporting options. You can control who has access to view the reports or edit/create new and save the reports for later.

Mocha is designed to capture data through a set of forms which are divided into 3 categories: *Contacts (individuals and groups), Activities, and Assessments*. The Report Builder is designed to pull data out of the system with the same categorical logic. It helps to know what these categories are, and what type of information typically lives in these forms, so that you can effectively gather the data you want to include in your reports.

Let's review the Reports feature in Mocha and dive deeper in the categories in report builder.

Step 1 : Click on 'Reports' link on the side navigation menu.

It will bring up a list of reports that you or someone else in your agency have saved. You can select the report you want from that list, or you can select to **+add new report**.

Name	Category
agency1	Agency Report
San Francisco Public Montessori	Attendance
Child Demographic Report	Test
Child Enrollment Report	
Test	

There are four tabs in the Reports page;

Report: You find all of your reports (made by you or others in your agency) listed as above

Report Builder: This is where you find all your data collected through the various forms in Mocha. From here you can select different data fields and build new reports.

Reports

Reports Report Builder Standard Reports Standard Exports

+ add new report

Standard Reports & Standard Exports: Are custom build SQL reports created by VerticalChange staff.

Reports will be organized by **Name** and **Category**. It's always helpful and very important to have a clear and systematic way of categorizing your reports so they will be easier to locate. The list here are composite of different level reporting from your whole Agency that might be created for various purposes from funding, to eligibility tracking, to reviewing assessment results.

Step 2 : Click the green *+add new report* to get started with your new report.

Here is where you decide at what level you want to pull data from;

People (*Child, Staff/teacher or Parent/Guardian*)

Group (*Agency, Site or Family*)

Domains (*ECE Programs*)

Name and Categorize your new report here; and save once you have all the fields you need.

filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Show group results

Require form result

Name *

Name of report (required)

Category

Category of report

Save report

Details Summary

INFO: Select columns on left to add to report.

Person

- Basic fields
- Child
- Common fields
- Parent/Guardian
- Staff/Teacher
- Locations
- Programs
- Activities
- Assessments
- Sessions

Person

- Basic fields
- Child
 - All Fields
 - ELSF ID (auto-populated)
 - Preferred Name / Nick Name
 - Date of Birth
 - Age (Years)
 - Age (Months)
 - Gender
 - Limited English Proficiency?
 - First Language
 - Second Language
 - Primary Home Language
 - Race/Ethnicity
 - Click to view target population requ
 - Target Populations (Select all that A
 - Special Needs (Select all that apply)
 - ADHD: Diagnosed or Suspected?
 - If Diagnosed, Date of Diagnosis (est

The left side of the report builder holds all the data you have entered at any point into Mocha. Eg: if you click the **+** next to **'Person'**..

It will drop down into further specific categories, like **Basic fields, Child, Parent/Guardian** or **Staff/Teacher**..

Click on Child...

Here you will find Child level data such as age, language, race/ethnicity...

The side menu of data fields is the most important part of the report builder. The better understanding you have of these categories, the better equipped you will be in pulling out the data you want to see in your report. So let's explore the data field menu.

filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Show group results

Require form result

'Person' or 'Group' forms tell us static information about the contact - information that typically doesn't change. This is usually data you enter when you create a new contact from the "Create" button.

filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Require form result

Activities: This will bring up all the form names that have been created as an "activity". These are the forms that show up when you go to the Activity tab in a contact's profile. Activity forms typically record data related to services you provide, but can capture any range of data you decide to categorize through a form.

filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Require form result

Similar to Activities, **Assessments** are a grouping of forms that give you data related to assessments you create in the system. These forms typically contain data that lets you measure progress people have made towards goals.

Sessions : contains list of classroom-sessions at all location/site within Mocha. (Best level to pull sessions data is under 'Groups')

Registration : This will bring up all the fields that is filled during session enrollment. (Best level to pull session enrollment data is under 'People')

Attendance : This will bring up the the fields from the attendance tab within contacts. The best way to gain insight in attendance is actually to go to an Agency or Site profile and retrieve monthly reports.

filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Require form result

Similar to activity forms, you can click on the assessment form you want data for, and then select the field you want to show up in the grid.

For now the only Domain that is in Mocha is the ECE programs. So the 'Domain' tab here will not give us that much variation. We will focus on 'Groups' and 'People'.

If you open each of the 'people' or 'group' categories and click on the **+** button next to either 'Person' or 'Group' sub-category, a list of data fields with more branch out options open up.

Q filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Show group results

Require form result

- Person
 - Basic fields
 - Child
 - Common fields
 - Parent/Guardian
 - Staff/Teacher
 - Locations
 - Programs
- Activities
- Assessments
- Sessions
- Registrations
- Attendances

Here you will see under 'Person' all the individual contacts, such as, 'Child', 'Parent/Guardian' and 'Staff/Teacher'. And accordingly, under 'Group' level, you can find the group contacts; 'Agency', 'Family' and 'Site'.

However, both levels of categories contain this following fields;

Basic fields: Basic Fields give you *meta-data*, information you probably didn't enter yourself - such as a client's "Unique ID" (the ID that the system creates when each new contact is created), "Date Created" (the date the contact was entered into the system), "Staff Assigned" (the staff member you assigned to this contact), and others.

Common fields: These are fields that were created to go with any contact type.

Locations: The location associated with any of the data fields + forms

Programs: These are fields that were created to go with any contact type. Which is ECE programs in Mocha.

Q filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Require form result

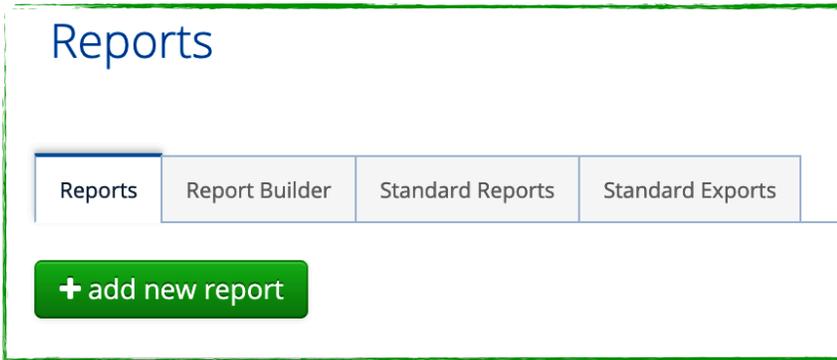
- Group
 - Basic fields
 - Agency
 - Common fields
 - Family
 - Site
 - Locations
 - Programs
- Activities
- Assessments
- Sessions
- Registrations
- Attendances

Now that we have a closer look at the categories, let's build some simple reports that will be useful to assess/review that data you've been collecting in Mocha.

Building a Site Directory

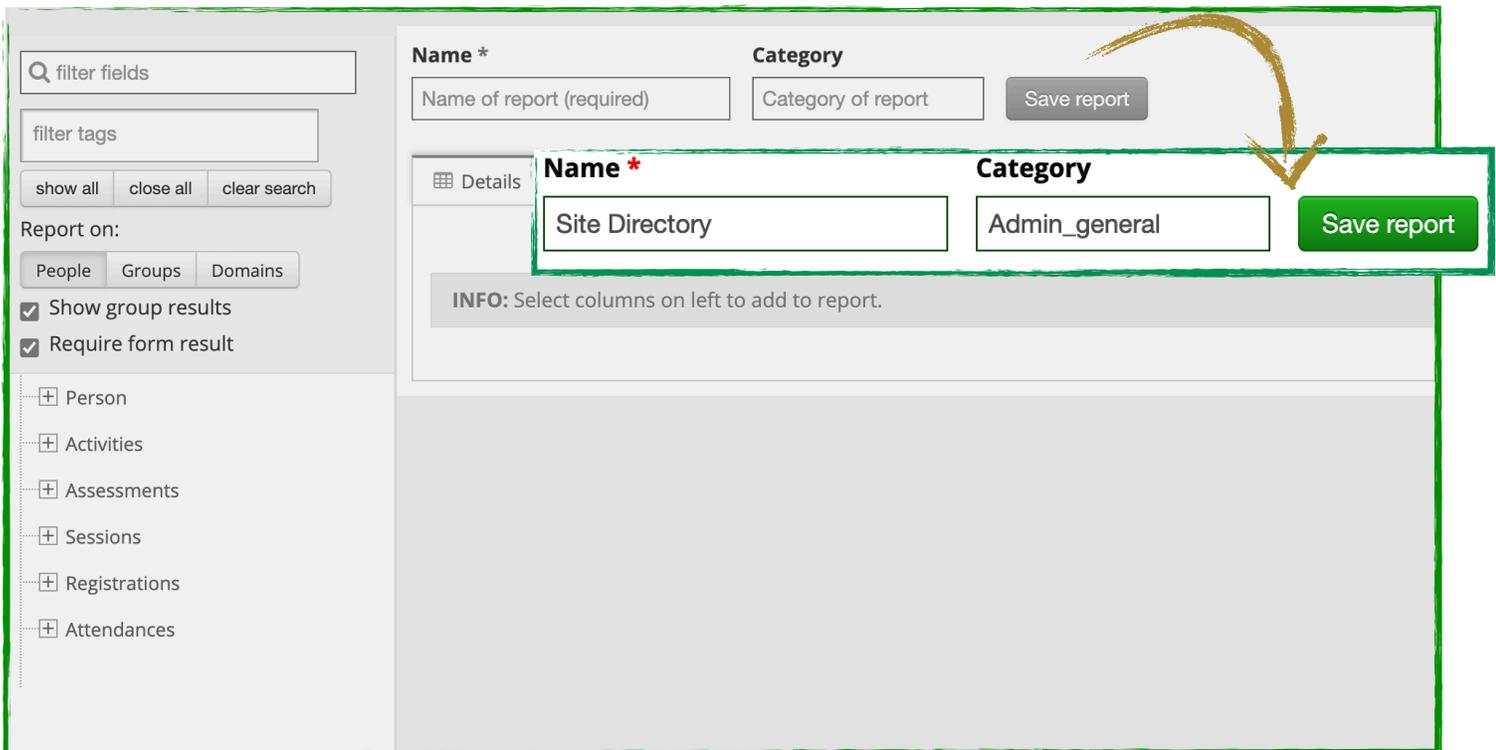
So you've been inputting lots of information in your Mocha, and now you want to find a place where you can just have a list of all the Sites in Mocha in one place and include other data points to gain insight.

Step 1: Go to the 'Report Builder'



Either Click on **+ add new report**
Or click on the 'Report Builder'
tab.

Step 2: Name your report clearly and create a category



To pull a Site level data we will have to use the 'Group' category in report builder.

Step 3: Click on 'Groups' to bring the data fields under 'Group' contacts.

Step 4: Under the Groups category, Click on 'Group' then 'Basic Fields'

Step 5: Select 'Unique ID', 'Name' and 'Contact Type'

On the top you see two title rows for each column, one is the 'Form' you are pulling data from, in this example, it's the 'Basic Fields'. The second row is the name of the data field, so far we have 'Unique ID', 'Name' and 'Contact Type'.

Drag and drop to reorder fields

- Group - Basic fields - Unique ID
- Group - Basic fields - Name
- Group - Basic fields - Contact Types

Click here to re-order your columns.

Basic fields	Basic fields	Basic fields
Unique ID	Name	Contact Types
f0b7d8b8-fb03-41d5-b256-dff60b5f9fc5	Test Child Care Center	Common fields, Site
daea067f-9b90-4b40-b905-dcc51bbebfae	Test Family Child Care Site	Common fields, Site
5e2906d5-2874-4176-8ee4-7c688f7372de	Test Organization	Agency/Business, Common fields
4f63c109-652c-4a72-b097-2187d10d6977	New Test	Common fields, Family, Workshop/Training
2328c196-6b7a-4e3d-99c7-35c3012083d1	Banana	Common fields, Family
4b667eb8-d7ae-4089-845c-8fed92800f66	Site1	Common fields, Site
5bf89261-c435-4a8a-8d2c-7742520babe8	Agency1	Agency/Business, Common fields, Site
f149d294-c1b6-47c3-8e9d-8a5c59c9de2a	Jones	Common fields, Family
2934b2f5-86d9-4250-b9e2-54e8379b791d	Subsidy	Common fields, Family

You can identify your selection here. Data fields in the grid will have an orange check mark next to them.

The filter icon here can be used for grouping, filtering and cleaning/organizing data within a field.

- Filter is off/not being used.
- Filter is on

Contact Types filters

- Group by this field
- Is not empty
- Is empty

Search

done

Step 6: Look at the column 'Contact Type'. There are multiple types of contact types under group contact, but we only want to see Sites.

Search for only Site information by using the filter feature. Click on 'Done'.

Basic fields
Common fields, Site
Common fields, Site
Agency/Business, Common fields
Common fields, Family, Workshop/Training
Common fields, Family
Common fields, Site

Step 7: After applying the filter, double check your column. You should only see ‘Contact Types’ that only contain ‘Site’. You will also notice, there is a new tab named ‘Filter’ now.

The screenshot shows a list of 'Contact Types' with a 'Filter' tab selected. The 'Filter' tab displays the following table:

Field	Filter
Contact Types	• { "search": "Site" } - remove

You can see all the list of filters used in your report here in this tab.

Step 8: Now that we set up the basic fields, which are the most important info such as ‘Unique ID’ , ‘Names’ and ‘Contact type’, we can build on this by adding more fields.

The screenshot shows a list of 'Groups' with 'Site' selected. The 'Site' group is highlighted with a blue box.

Staying under the ‘Group’ category, lets move on to the Site forms by clicking on ‘Site’ under the list;

The screenshot shows a list of 'Site' forms with the following six fields selected (indicated by orange checkmarks):

- ELS Qualified
- Active Licenses
- Site License Number - Infant/Toddler
- Site License Number - Preschool
- Address
- Site Phone Number

From here, select the following six fields ;

- *Active Licenses*
- *Site License Number Infant & Preschool*
- *Address*
- *Site Phone number*
- *ELS Qualified*

Step 9: Inset filter. For this example, we just want to see all the complete information so we can remove sites that have missing information by using the filter.

Below you can see all the filters applied. We filtered for ‘Sites’ under Contact types and we also filtered not to show empty fields for *Address*, *Phone number* and *License numbers*.

Name * Site Directory **Category** Admin_general **Save report**

Details (248) Summary **Filters (5)**

Current filters

Field	Filter
Contact Types	• {"search": "Site"} - remove
Address	• {"not_empty": true} - remove
Site Phone Number	• {"not_empty": true} - remove
Site License Number - Preschool	• {"not_empty": true} - remove
Site License Number - Infant/Toddler	• {"not_empty": true} - remove

Below is how your Site Directory will look like.

Basic fields	Site	Site	Site	Site	Site
Name	All - Active Licenses	All - Address	Site Phone Number	Site License Number - Preschool	All - ELS Qualified
CCFC - Turk	Infant/Toddler, Preschool	259 Turk Street, 94102, San Francisco, CA	415-928-5178	380506340	Yes
China Basin Preschool	Preschool	1234 Barry Street, 94107, San Francisco, California	(415) 101-2140	012345678	Yes
CCFC - Cleo Wallace	Infant/Toddler, Preschool	71 Turner Terrace, 94107, San Francisco, CA	415-282-6300	384002732	Yes
CCFC - Marcus Garvey	Infant/Toddler, Preschool	1672 Eddy Street, 94115, San Francisco, CA	415-567-9126	38050472	Yes
CCFC - Oscaryne Williams	Infant/Toddler, Preschool	85 Turner Terrace, 94107, San Francisco, CA	415-647-6970	384002731	Yes
CCFC - Turk School Age	Infant/Toddler, Preschool	259 Turk Street, San Francisco, 94102, San Francisco, CA	415-928-5178	380506341	Yes
CCFC-Mary Lane	Infant/Toddler, Preschool	1 Webster Street, 94117, San Francisco, CA	415-861-0144	38401117	Yes
CCFC-Richmond I	Infant/Toddler, Preschool	750 31st Avenue, 94121, San Francisco, CA	415-668-7863	380504386	Yes
CCFC-Richmond II	Infant/Toddler, Preschool	741 30th Avenue, 94121, San Francisco, CA	415-668-6539	380505039	Yes
CCFC-Tenderloin Infant Center	Infant/Toddler, Preschool	333 Taylor Street, San Francisco, 94102, San Francisco, CA	415-674-6114	384002192	Yes
Family Connections Centers	Infant/Toddler, Preschool	2565 San Bruno Avenue, 94134, San Francisco, CA	415-715-6746	384000274	Yes
50 Raymond - School Age	Infant/Toddler, Preschool	50 Raymond Avenue, 94115, San Francisco, CA	415-656-1508	384002449	Yes
Heritage Home Child/Family Development Center	Infant/Toddler, Preschool	245 REY STREET, 94134, San Francisco, CA	415-586-8700	384000918	Yes
John King Child/Family Development Center	Infant/Toddler, Preschool	500 RAYMOND AVENUE, 94134, San Francisco, CA	415-333-1375	384001049	Yes
Leland Center	Infant/Toddler, Preschool	325 LELAND AVENUE, 94134, San Francisco, CA	415-585-9320	380506234	Yes
Tucker Child/Family Development Center	Infant/Toddler, Preschool	103 TUCKER AVENUE, 94134, San Francisco, CA	415-467-5565	384000865	Yes
LCOS Preschool	Infant/Toddler, Preschool	1011 Garfield St, 94132, San Francisco, CA	(415) 333-9622	384002434	Yes
Stonestown Family YMCA Preschool	Infant/Toddler, Preschool	399 San Fernando Way, 94127, San Francisco, CA	415-452-9622	384000293	Yes
Argonne	Infant/Toddler, Preschool	750 16th Avenue, 94118, San Francisco, CA	415.750.8617	384000981	Yes
Bessie Carmichael	Infant/Toddler, Preschool	45 Cleveland Street, 94103, San Francisco, CA	415.615.8450	384001456	Yes

Step 10: You can also use the filter to search for missing data. So instead of putting ‘not empty’ as a filter for the data fields, try using ‘is empty’ as a filter so you can get a list of site names that have missing information like address, license type etc.

Building a Certification Report

Ok now you have the directory of Sites you are working with in Mocha, you want to view list of children that are certified for an enrollment, their sites, and their certification status etc.

Step 1: Open 'Report Builder' and name your new report clearly and create a category

Name *	Category	
Child Certification Report	Admin_Certification	Save report

To pull a Child level data we will have to use the 'People' category in report builder.

Step 2: Click on 'People' to bring the data fields under 'Person' contacts.

Q filter fields

filter tags

show all close all clear search

Report on:

People Groups Domains

Show group results

Require form result

+ Person

+ Activities

+ Assessments

+ Sessions

+ Registrations

+ Attendances

Step 3: Click on 'Person' then 'Basic Fields'

Step 4: Select 'Unique ID', 'First & Last Name' and 'Contact Type'

- Person

- Basic fields

All Fields

Unique ID

External ID

First name

Middle name

Last name

Name suffix

Date created

Date deleted

Assigned to

Status

Contact Types

+ Related Agency

+ Related Common fields

+ Related Family

+ Related Site

Step 5: Under the 'Contact Types', search for only 'Child' information by using the filter feature. Click on 'Done'.

Contact Types filters

Group by this field

Is not empty

Is empty

Child Search

done

Basic fields	Basic fields	Basic fields	Basic fields
Unique ID	First name	Last name	Contact Types
ecc3f666-ab0d-4bad-8ec2-35ddb86f501f	Doris	Pierce	Child, Common fields
4d6468ee-0e8a-4c43-ab72-619f123e2254	Josh	Jones	Child, Common fields
8ed8411b-6c0f-4c33-8f28-b1cbbdfbdab1	Jane	Jones	Child, Common fields
d36bb5a4-ec7b-4215-935d-c2eac8189184	Jason		Child, Common fields
c52b016e-0ea8-4967-a574-03f8d50a2753	Danny	Torres	Child, Common fields
4296fcbd-9a84-4d87-b72b-d315564045ce	Cesar	Paredes	Child, Common fields
50fc4acf-5b24-4d98-ad49-f75008c034e0	Child	2	Child, Common fields

Step 6: Now that we set up the basic fields, we can build on this by adding more fields. Go to 'Child Forms' and add 'Date of Birth' and 'Gender'.

Person

- Basic fields
- Child
 - All Fields
 - ELSF ID (auto-populated)
 - Preferred Name / Nick Name
 - Date of Birth
 - Age (Years)
 - Age (Months)
 - Gender
 - Limited English Proficiency?
 - First Language (Title 5 Native Language)
 - Additional options:
 - Second Language
 - Primary Home Language
 - Race/Ethnicity
 - Click to view target population requirements
 - Target Populations (Select all that apply)
 - Special Needs (Select all that apply)
 - ADHD: Diagnosed or Suspected?
 - If Diagnosed, Date of Diagnosis (estimated)

Step 7: Go to 'Locations' and add 'Locations enrolled in'. This will pull the associated sites the child is enrolled in.

Person

- Basic fields
- Child
- Common fields
- Parent/Guardian
- Staff/Teacher
- Locations
 - All Fields
 - Locations enrolled in
- Programs
- Activities
- Assessments
- Sessions
- Registrations
- Attendances

Step 8: Finally we'll go to 'Assessments' and select 'Child Subsidy Certification' and pull few data fields from there.

Person

- Activities
- Assessments
 - ASQ-3 Assessment
 - ASQ:SE-2 Assessment
 - ASQ:SE Assessment
 - Assessment of CLASS
 - Assessment of ERS
 - Child Subsidy Certification
 - Consent and Media Release Form
 - Director - Education Qualification
 - DRDP-2015 Infant/Toddler Rating Record
 - DRDP-2015 Preschool Rating Record
 - DRDP-2015 Preschool Rating Record

Fields pulled as an example here are shown below; however feel free to add/remove and adjust in different ways.

Child Subsidy Certification

- All Fields
- Created time
- Last updated time
- Last updated by
- Date of Activity
- Administered by
- Program that this form was filled out
- Enrollment Category that this form
- Agency that filled out this form
- Unique ID for this form result
- Status for this form result
- Location UID that this form was filled
- Case Status
- Denied Date
- Reason for being denied (these are
- Termination Date
- Reason for Termination
- Preschool for All (PFA)
- PFA only - Select Specific PFA Type
- ELS and City Funding

Here you can filter by date range in some cases like 'Certification Date' or 'Recertification Date' if you want to only view case files that you would need to rectify this month.

- Family Need
- Family Size
- Would you like to automatically calc
- Family Monthly Income (auto-calcul
- Family Adjusted Monthly Income
- Family Income Sources (check all th
- Total Family Adjusted Monthly Inco
- Family Income Greater Than 85 Per
- Parent(s) currently on active duty (i.
- Parent(s) a current member of a Na
- Certification Type
- Number of certifiable hours per we
- Number of Certified Hours Per Wee
- Certification Date
- Re-Certification Date

Step 9: Once you complete your selection. You should have a report that looks similar to the one below.

Locations	Basic fields	Basic fields	Child	Child	Child Subsidy Certification	Child Subsidy Certification	Child Subsidy Certification	Child Subsidy Certificati
Locations enrolled in	First name	Last name	Date of Birth	All - Gender	Family Need	Certification Date	Re-Certification Date	All - Certification Type
Test Location (123456)	Reid	Douglas	02/16/2019	Male	Parent A Employment	08/25/2020		Initial Certification
Test Location (123456)	Amanda	New Test			Parent A Employment	11/10/2020		
North Beach Center	Mindy	TestTest	07/31/2016	Female	Parent A Employment	10/08/2020		Initial Certification
Presidio	Bob	Simson	01/15/2020	Male	Parent A Employment	10/01/2020		Initial Certification
Frandelja Enrichment Center-Gilman	Lavell	Boyland	12/22/2015	Male	Parent A Employment	10/02/2020		Initial Certification
Test Location (123456), Bayview	Baby Panda	Bear	01/01/2016	Another Gender Identity: Non-binary	Parent A Employment, Parent A Seeking Permanent Housing, Parent A Seeking Permanent Housing	11/06/2020		Initial Certification
Test Location (123456)	Baby	Sibling	01/01/2019	Female	Parent A Employment, Parent A Seeking Permanent Housing, Parent A Seeking Permanent Housing	11/05/2020		Initial Certification
Test Location (123456)	Mocha	1	01/01/2017	Male	Parent A Employment, Parent A Education or Training	11/10/2020		
Test Location (123456)	Toddler Panda	Bear	11/15/2018	Another Gender Identity	Parent A Employment, Parent A Seeking Permanent Housing, Parent A Seeking Permanent Housing	10/01/2020		Initial Certification
Test Location 2	Farris	Child	04/01/2020	Male	Parent A Employment, Parent A Seeking Permanent Housing, Parent A Seeking Permanent Housing	10/01/2020		Initial Certification
Test Location (123456)	Alina	Gray	01/17/2019	Female	Parent A Employment	11/17/2020		

Here you will have a report that displays information on list of children, sites they are enrolled in, date of their certification and upcoming recertification, person who administered their certification and family income and eligibility information.

5 Feedback



VerticalChange team members would love to get your feedback on this document; the *Mocha Guide - Part I: Basic Function*.

Please submit comments, ideas, suggestions, frustrations, jokes and corrections by clicking here [SUBMIT FEEDBACK](#) to Feven Wordofa, Customer Success Manager at VerticalChange.

Thank you so much for your undivided attention!

In collaboration & partnership,
Customer Success Team

verticalchange