

For: State and County Offices

State Office Reporting System (SORS) Enhanced with Ad Hoc Queries

Approved by: Acting Deputy Administrator, Farm Programs



1 Overview

A Background

SORS provides current and historical reports of MAL and LDP activities and historical reports (up to June 2016) on FSFL activities.

B Purpose

This notice provides general information on a new SORS reporting functionality that was released on November 1, 2016.

The new functionality is expected to be of particular interest to State and County “power users,” as it offers advanced query capabilities for creating personalized reports.

General public users, including CMA’s, LSA’s, and DMA’s, will not have access to this new reporting functionality. Only authorized FSA users will have access to this new reporting functionality.

In particular, this notice alerts State and County Offices of the new reporting functionality “Ad Hoc Queries,” which allows authorized FSA users to run personalized queries, based on the parameters of interest.

Disposal Date	Distribution
June 1, 2017	State Offices; State Offices relay to County Offices

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1 Overview (Continued)

C Contact

If there are any questions about this notice, State Offices shall contact the applicable individual according to the following table.

IF the question is about...	THEN State Offices shall contact...
peanut MAL and LDP policy	Kathy Sayers by either of the following: <ul style="list-style-type: none">• e-mail to kathy.sayers@wdc.usda.gov• telephone at 979-680-5155.
cotton MAL and LDP policy	Kelly Hereth-Dawson by either of the following: <ul style="list-style-type: none">• e-mail to kelly.hereth@wdc.usda.gov• telephone at 202-720-0448.
sugar commodity loan policy	Toni Williams by either of the following: <ul style="list-style-type: none">• e-mail to toni.williams@wdc.usda.gov• telephone at 202-720-2270.
policy for all other MAL and LDP eligible commodities	DeAnn Allen by either of the following: <ul style="list-style-type: none">• e-mail to deann.allen@wdc.usda.gov• telephone at 202-720-9889.
CMA, DMA, and LSA policy	Frankie Coln by either of the following: <ul style="list-style-type: none">• e-mail to frankie.coln@wdc.usda.gov• telephone at 202-720-9011.
all MAL and LDP Automation	Laura Schlote by either of the following: <ul style="list-style-type: none">• e-mail to laura.schlote@wdc.usda.gov• telephone at 202-720-7785.

In addition, State Offices may develop standard operating procedures for using these reports for specific tasks, such as MAL maturity date letters.

D Training

PSD will offer a demonstration of this new SORS functionality on a future CLPS call. Further details will be forthcoming.

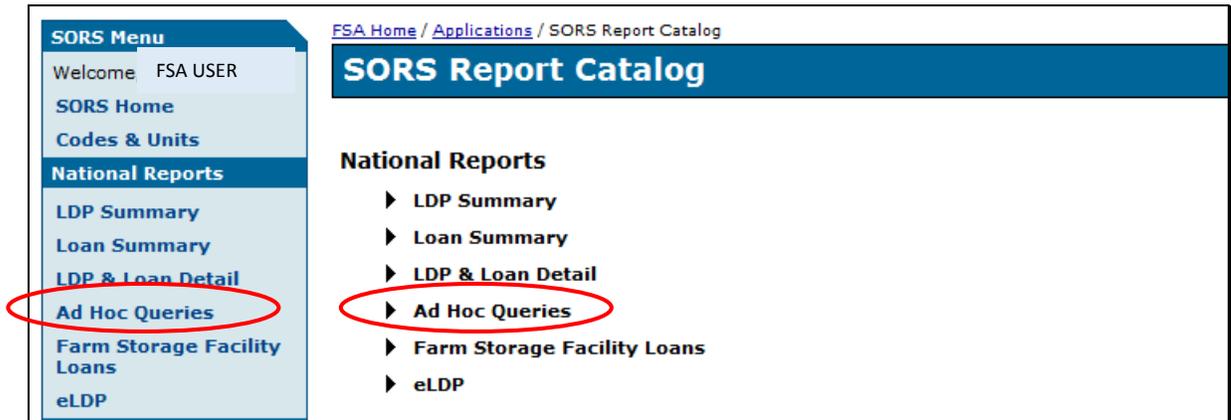
2 SORS Reporting

A SORS Access and the Addition of Ad Hoc Queries

There are two methods to access SORS reports:

- Authorized State and County Office employees are able to access all reports, navigating to the FSA Intranet Application page <http://fsaintranet.sc.gov.usda.gov/fsa/applications.asp> and, within the side Applications Directory for G-O, click on MAL SORS – State Office Reporting Systems. Employees can also go directly to the SORS Intranet page <https://intranet-apps.fsa.usda.gov/sors/>
- The general public is able to access select SORS reports from the FSA’s Price Support website, Price Support Reports at <http://www.fsa.usda.gov/programs-and-services/price-support/price-support-reports/index>

FSA has added to SORS a new reporting functionality, “Ad Hoc Queries.” The linked text for “Ad Hoc Queries” is located on the SORS application home page and left sidebar, both under the “National Reports” and “State Reports” headings.



Over recent years, FSA has produced reporting functionalities for the distinct reporting needs of the national and field offices. These reports are helpful for discrete queries when looking for information on MAL’s or LDP’s in a given commodity year.

The new reporting functionality “Ad Hoc Queries” enables FSA users to run personalized queries for accessing a wide range of ad hoc data on MAL’s. Because of the extensive data available in “Ad Hoc Queries,” the csv file, viewed in Excel, will most likely be more helpful than the web report, viewed in the web browser (i.e. IE Explorer, Google Chrome, etc.). The web report is intended only for small queries, or for preview of large queries before exporting to CSV, and so has very strict row limits.

Note: “Ad Hoc Queries” only provide reporting functionalities on MAL’s and not on LDP’s.

2 SORS Reporting (Continued)

B Types of Ad Hoc Queries

In selecting “Ad Hoc Queries” either under National Reports or State Reports, the user can select one of two types of “Ad Hoc Queries”:

- **Loan Explorer**

The loan explorer provides flexible, multi-level listing of loan details. This report can be tailored for many different filtering and display options. Most of the information available on the Loan and LDP Detail (PK8) report is available in this report, but with the ability to view multiple loans within a single report. In addition, details can either be displayed in full, or rolled up to a number of different summary levels.

Notes: This report is optimized for CSV output. Extra columns can be removed from the CSV worksheet as needed.

ACRE was applicable only for crop years 2009 through 2013.

Web output is limited to 100 rows; PDF 100 rows; CSV 5,000 rows.

- **Loan Explorer with Producer**

Flexible, multi-level listing of loan details along with contact producer info. This report can be tailored for many different filtering and display options. Most of the information available on the Loan and LDP Detail (PK8) report is available in this report, but with the ability to view multiple loans within a single report. In addition, details can either be displayed in full, or rolled up to a number of different summary levels.

Notes: This report is optimized for CSV output. Extra columns can be removed from the CSV worksheet as needed.

ACRE was applicable only for crop years 2009 through 2013.

Web output is limited to 100 rows; PDF 100 rows; CSV 500 rows.

2 SORS Reporting (Continued)

C Parameters for Building Ad Hoc Queries

For running “Ad Hoc Queries,” FSA users are able to refine data according to their needs with the following parameters:

Parameter	Acceptable Options
Crop Year	any year from 2006 to 2016; “ALL” or Multiple* is an option
Commodity	any commodity eligible for an MAL; “ALL” or Multiple* is an option
State	any state; “ALL” is an option
County	any county; “ALL” or Multiple* is an option
Storage Type	All, Farm Stored, Warehouse Stored
Loan Status	Outstanding, Fully Liquidated, Canceled
Office Type	County Office, Cooperative (CMA, DMA, LSA)
Recourse Status	Nonrecourse, Recourse
Activity Date Range	Maturity Date, Approval Date, Application Date, Date Last Changed in System of Record, Date Last Loaded in SORS

* Some parameters allow multiple selection – more than one but less than ALL – accessed via the Multiple Selection icon (📄) to the right of the parameter.

[FSA Home](#) / [Applications](#) / [SORS](#) / [National](#) / [Loan Explorer](#)

Loan Explorer

Search Parameters ⓘ

Crop Year: 📄

Commodity: 📄

State:

County:

Storage Type: All
 Farm Stored
 Warehouse Stored

Loan Status: Outstanding
 Fully Liquidated
 Canceled

Office Type: County Office
 Cooperative (CMA, DMA, LSA)

Recourse Status: Nonrecourse
 Recourse

Filter by Activity Date:

From (mm/dd/yyyy): 📄

To (mm/dd/yyyy): 📄

2 **SORS Reporting (Continued)**

C Parameters for Building Ad Hoc Queries (Continued)

In addition to selecting from the parameters, users are able to define the level of detail of the query. If the user selects the level of detail “Group and Total”, the user can then choose parameters according to which information will be grouped. Check any of the “Group by” column names to break out separate line items for each different value (e.g., Commodity). Uncheck to ignore different values and roll them together into a single subtotal. An asterisk “*” in a report column means it was not selected in “Group by” – if a breakout is desired, CLICK “**Search Again**”, scroll down to “Group by”, and check the desired column. The “Group and Total” option provides quick data summaries. If the user selects the level of detail “Show Full Detail”, the user then will have access to the data set at the loan number level.

The screenshot shows a web-based interface for configuring report parameters. It features two main sections: 'Level of Detail' and 'Group by'. Under 'Level of Detail', there are two radio button options: 'Group and Total, using 'Group by'' (which is selected) and 'Show Full Detail'. The 'Group by' section contains a list of 14 checkboxes, each corresponding to a different data field: State, County, Crop Year, Commodity, Commodity Class, Farm-stored vs. Warehouse-stored, Loan Type, Loan Status, Recourse Status, Warehouse, Gin Code, Application Date (YYYYMM), Approval Date (YYYYMM), and Maturity Date (YYYYMM). At the bottom of the interface, there are three buttons: 'Web Report', 'PDF Report', and 'CSV Report'.

3 **Filtering and Saving Ad Hoc Queries in Microsoft Excel**

A CSV Data and Preparation for Analysis

Since the functionality of “Ad Hoc Queries” is of particular use in Excel, users are advised to select the “CSV Report” option and open the csv file in Microsoft Excel in order to filter the data relevant to their analysis. All reports produced as “Ad Hoc Queries” may be filtered in Excel to provide meaningful statistics.

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3 Filtering and Saving Ad Hoc Queries in Microsoft Excel (Continued)

A CSV Data and Preparation for Analysis (Continued)

Once the file is open in Excel, users can prepare the data for quick and easy analysis per the following steps:

Step	Action
1	Delete the first four rows. In SORS reports, the first three rows are blank and the fourth row contains a description of the report. The first row should now contain the column headers.
2	Freeze the top row. Go to the “View Tab” in the Microsoft Office Ribbon. Within the Window Panel, select “Freeze Panes/Freeze Top Row”. This will enable the user to scroll through the records and still view the header row.
3	Delete or Hide all columns that are not relevant to the user query needs. Unless refined in the parameters, an “Ad Hoc Query” will produce a report with 39 columns. Most users will require a small fraction of these columns.
4	Select the Filter option. Go to the “Data Tab” in the Microsoft Office Ribbon. Within the Sort and Filter Panel, select Filter. This will enable the user to further filter the report while viewing it in Excel. To filter, click on the dropdown arrow in a column header, then use the checkboxes to select specific values.

B Saving the Report

Step	Action
1	To save the report, select “ Save As ”, either from the File Tab in the Microsoft Office Ribbon or by pushing the keyboard button F12.
2	Select the appropriate file location. Since the default location will be the user’s Downloads file, the user should select a different file location that is appropriate for the report.
3	For the File name, remember to include a description of the report in the file name. For example, if a user created a report of all outstanding CY2015 MAL’s across the country as of November 15, 2016, the file name should include such data: CY2015.outstanding.MALs.2016.11.15.
4	For the “Save As” type, select Excel Workbook if you have added any formatting, filters or graphs. Saving the file as a csv will remove these features.

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4 Example of A SORS Ad Hoc Query for Maturing Loans

A A SORS Ad Hoc Query for Maturing Loans

State and County Offices can use SORS “Ad Hoc Queries” to identify maturing loans. Such a report can be helpful for the preparation of demand letters for maturing MAL’s.

FSA Home / Applications / SORS / National / Loan Explorer with Producer

Loan Explorer with Producer

Search Parameters 

Crop Year: 

Commodity: 

State:

County: 

Storage Type: All
 Farm Stored
 Warehouse Stored

Loan Status: Outstanding
 Fully Liquidated
 Canceled

Office Type: County Office
 Cooperative (CMA, DMA, LSA)

Recourse Status: Nonrecourse
 Recourse

Filter by Activity Date:

From (mm/dd/yyyy): 

To (mm/dd/yyyy): 

Level of Detail: Group and Total, using 'Group by'
 Show Full Detail

Group by: State
 County
 Crop Year
 Commodity
 Commodity Class
 Farm-stored vs. Warehouse-stored
 Loan Type
 Loan Status
 Recourse Status
 Warehouse
 Gin Code
 Application Date (YYYYMM)
 Approval Date (YYYYMM)
 Maturity Date (YYYYMM)
