VERMONT
AGENCY OF EDUCATION
CHILD NUTRITION PROGRAMS

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Accessing Business Intelligence Reports in the Harvest Child Nutrition System

Purpose

This guidance document will show you how to access the Business Intelligence (BI) Reports available in the Harvest Child Nutrition System. The BI Reports currently available are the Claim Meals and Reimbursements Report, the User Roles Report, and the Site Application Reports.

Claim Meals and Reimbursements Report

Provides an overview of the meal counts and reimbursement the School Food Authority (SFA) has received for the program and date range selected. This report fills the need for printing claims.

User Roles Report

Provides an overview of which users are assigned to your SFA and their level of access.

Site Application Reports

Provides an export of all responses to the site-level applications. An Organization Application Report is forthcoming.

Accessing the BI Reports

From the Harvest Dashboard, click on the "hamburger menu" in the top right corner of the screen.
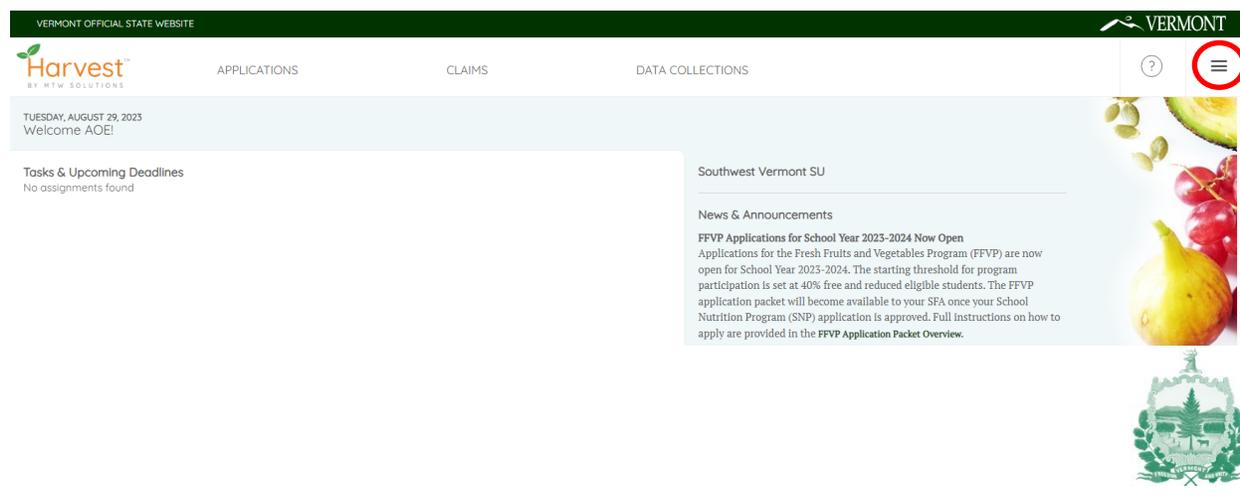
From the dropdown menu, choose the Business Intelligence Reports option.

In the Business Intelligence Reports menu, you will see an overview of the reports available to you, a brief description of the report, and the option "View Report". In this guidance document, we will select the Claim Meals and Reimbursements Report by clicking "View Report" in the Claim Meals and Reimbursements Report box. When selected, a new tab will open with the report.
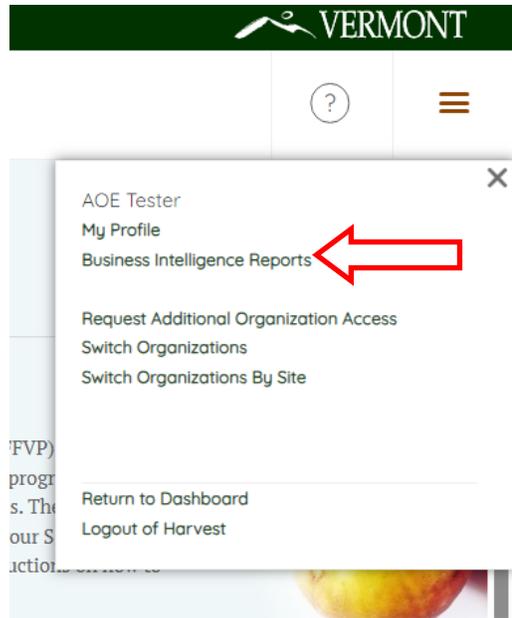
Next, you need to choose the parameters of the report:

1. **Organization**: For most users, there will only be one option here. If you have access to multiple SFAs, you will be able to select which SFAs are included in the report.
2. **Grant**: This is where you select which program you would like to run the report for: School Nutrition Programs, Summer Food Service Program, Child and Adult Food Care Program, Fresh Fruit and Vegetable Program, etc. You may only choose one.
3. **Claim Status**: This allows you to select which claims you'd like included in the report. For example, if you'd only like to include claims that have been paid by the State, only check that box.
4. **Begin and End Claim Period**: The date range you would like included in the report. In the example below, we are looking at SY2022-2023.
5. **Site Level Report and Totals**: These are formatting options. It does not change the what data is reported, but changes the formatting. This is a personal preference of what you find most useful.

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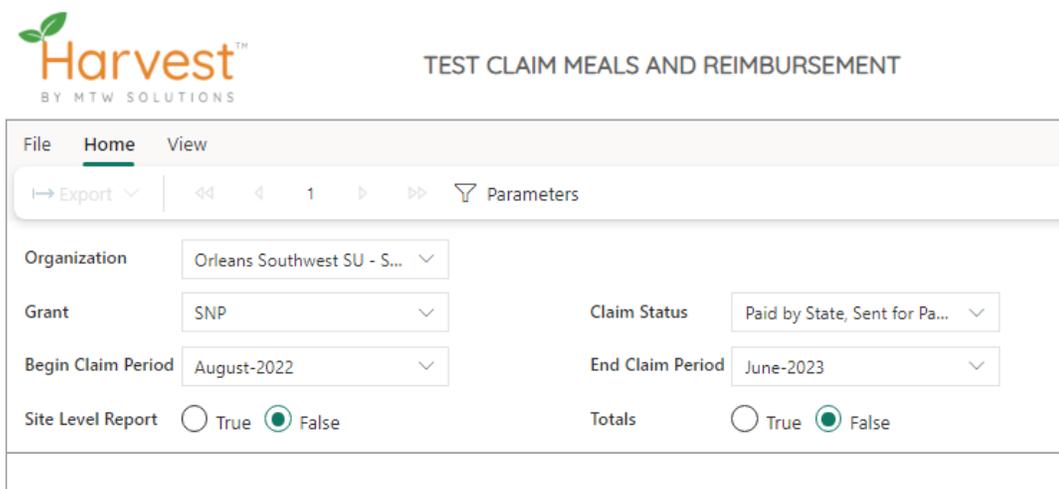
Once you have chosen your report parameters, click "View Report" on the right-hand side of the screen to generate the report.

Now that you have run the report, you will likely want to export that data. To do this, click the "Export" dropdown and select your preferred format, we recommend Microsoft Excel.

Note: If viewing the report in Harvest, remember that you may need to navigate through multiple pages to see all the data. For this reason, exporting to Excel is usually the easier option.

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