

**California Department of Health Services
Women Infants Children Branch**



**WIC ExtraNet
Training Guide**

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1 Course Overview

1.1 Overview

The WIC ExtraNet Training Guide is designed to assist in accessing the WIC ExtraNet and navigating in the applications provided there. Guidance is included for the Autodialer appointment download, ISIS News, ISIS, Address Book, WIC Reports and Create Reports, the ad hoc reporting tool.

This guide has information about the new Glinda universes in the WIC ExtraNet and has instructions for more advanced query techniques. It replaces the WIC ExtraNet Orientation Guide and the Level 2 Training Guide.

1.2 Prerequisites for Training

You will receive the maximum benefit of this training if you have:

- Worked in ISIS for a minimum of 3 months, and/or
- Completed ISIS Part 1 and Part 2 training.

Another advantage, though not required, is prior experience with Microsoft Excel. As you become familiar with the WIC ExtraNet reporting capabilities, you may choose to download data into Excel for further manipulation and formatting.

1.3 Training Objectives

The objectives of the Training are:

- Learn the various functions available in the ExtraNet, including ISIS News, Autodialer, Address Book, ISIS and Reporting.
- Learn how the reporting area is organized into universes of data and what kind of information is in each Universe.
- Learn how to use the features of the reporting tool
- Complete sample queries using the reporting tool.
- Create queries to answer questions you have about your agency's ISIS data
- Download data into Excel on your local PC
- Create a simple pivot table in Excel from the data you downloaded.

2 Logon ID's, Passwords and Authorities

2.1 Who Needs ExtraNet Access?

To access the ExtraNet, an individual must have a User ID and password called the "ExtraNet ID". This ExtraNet ID is intended for individuals who have responsibility to perform tasks using one or more of the applications provided. WIC clinic employees who use just the ISIS application to perform their job will not generally require access to the WIC ExtraNet.

Local agency employees who need access to the WIC Reporting function also need a second User ID and password. This ID is called the Reporting ID (also called TSO or RACF User ID). The Reporting ID is used to access WIC Reports, the ad hoc reporting tool, and other reporting functions, including the Autodialer.

If you have staff members who need an Extranet ID and Reporting ID, send an ExtraNet ID request form by email to the ISIS Help Desk.

2.2 Logging On to the ExtraNet

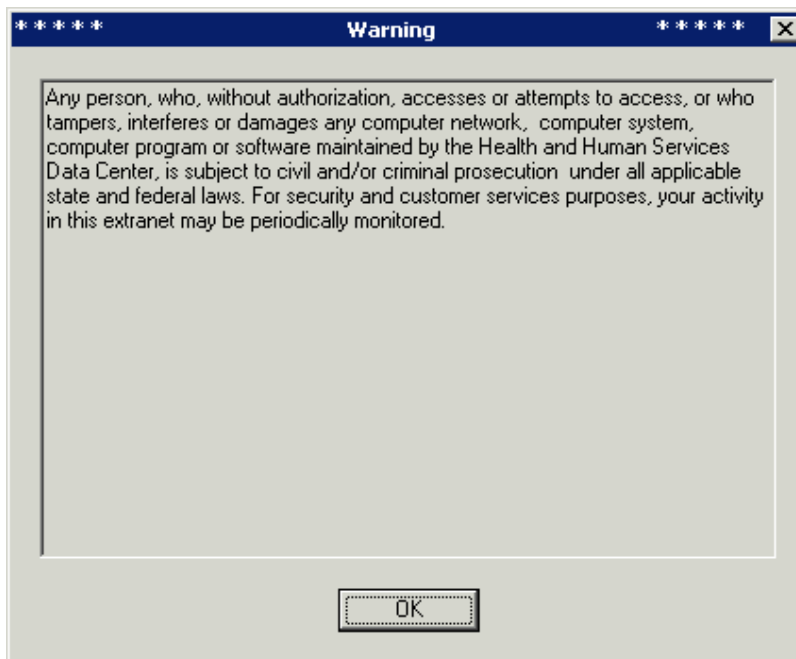


WIC Extranet.Ink

WIC ExtraNet Icon (On your Desk Top)

On your PC desk top, double click on the Icon for the WIC ExtraNet home page. The pop up below will be displayed. After reading the warning, press OK and continue.

Security Warning Pop Up





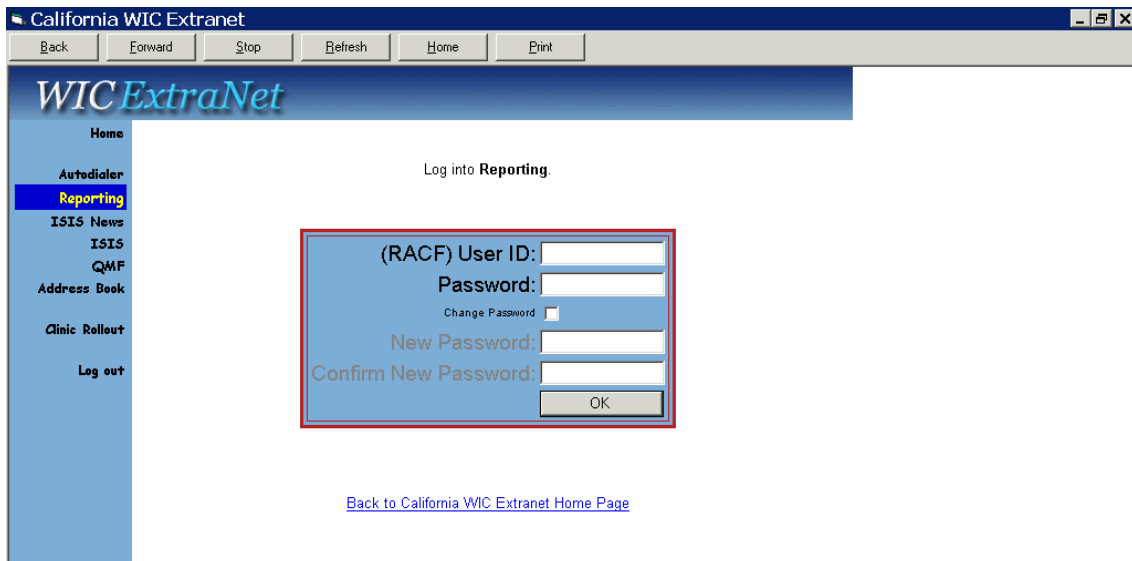
Log On Function:

The screen above will appear next. To log on to the ExtraNet type in your User name. This is usually the first letter of your first name and your full last name. For example: Jane Doe would be entered as jdoe. User Names are assigned by the ISIS help desk.

Type in your ExtraNet password. Passwords must be no more than eight characters and must include at least one capital letter and at least one number. Remember they are case sensitive. Click OK.

2.3 Logging into Reporting

Click on Reporting. This takes you to the Log into Reporting screen



WIC ExtraNet Training

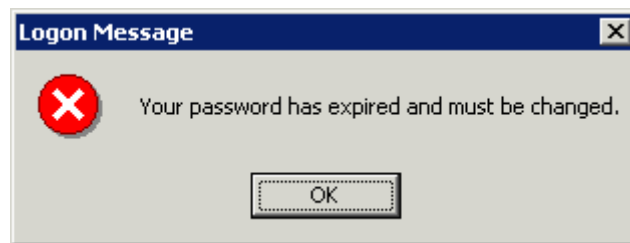
- Enter your Reporting ID. Reporting IDs begin with “hd” followed by the first letter of your first name and the first 4 letters of your last name, such as hdjdoe.
- Enter your Reporting password. This password is not case sensitive but must be between 6-8 characters with no special symbols such as * / +.
- Click on the OK button.
- The reporting options are listed in white on the WIC ExtraNet Home Page.



2.4 Expired Password—How to Create a New ExtraNet Password

ExtraNet and Reporting passwords expire after a set period of time. When your ExtraNet password expires you will see the pop-up message below when you try to log on.

Password Expired Popup



Click OK to go to the Change ExtraNet Password Screen.

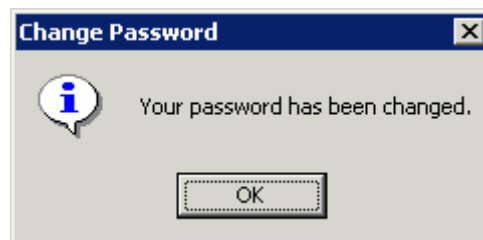
Change ExtraNet Password Screen



The screenshot shows the 'Change Password' dialog box in Windows 2000 Server. The title bar reads 'Change Password' and the Microsoft logo is visible. The dialog contains the following fields and controls:

- User name:** A text box containing 'jdoe'.
- Log on to:** A dropdown menu showing 'WICPROD'.
- Old Password:** A text box containing '*****'.
- New Password:** An empty text box.
- Confirm New Password:** An empty text box.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

- Enter your current password in the Old Password field.
- Enter a new password. It must be eight characters, contain at least one capital letter, and at least one number.
- Type in your new password again to confirm.
- Click OK and you will see the Change Password confirmation pop-up below.



2.5 Changing your Reporting Password for Autodialer Only Users

The screenshot shows a web browser window titled "California WIC Extranet". The browser's address bar contains navigation buttons: Back, Forward, Stop, Refresh, Home, and Print. The main content area features the "WIC ExtraNet" logo and a navigation menu on the left with options: Home, Autodialer, Reporting, ISIS News, ISIS, QMF, Address Book, TSO password (highlighted in blue), and Log out. The main content area displays the text "Change TSO password." followed by an "IMPORTANT" notice: "If you are a 'Reporting' user, you can only change your password after you 'Log into Reporting'". A form is centered on the page, enclosed in a red border, with the following fields: "User ID:" with the value "hdwflin" entered; "Password:"; "Change Password" with a checked checkbox; "New Password:"; "Confirm New Password:"; and an "OK" button. Below the form is a link: "Back to California WIC Extranet Home Page". The browser's status bar at the bottom shows "Done".

Purpose of Screen:

This is used only by those who use the ExtraNet just to download the Autodialer appointments. Since they do not have access to Reporting, they have a Reporting password option on the application menu.

To change your Reporting password:

- Type your Reporting User ID in the appropriate field.
- Enter your current password and check the Change Password box.
- Enter a new password. This password is not case sensitive but must be between 6-8 characters. There cannot be any special symbols like * / +.
- Click the OK button.
- Wait for a confirmation message that your password has been successfully changed.

For those with access to Reporting, the Reporting password option on the Navigation Bar will not appear. These individuals must select Reporting on the Navigation Bar and check the Change Password box on the log on pop up to initiate the change password process.

2.6 Expired Reporting Password—How to Create a New Reporting Password

California WIC Extranet

Back Forward Stop Refresh Home Print

WIC ExtraNet

Home

Autodialer

Reporting

ISIS News

ISIS

QMF

Address Book

Log out

Log into Reporting.

User ID:

Password:

Change Password

New Password:

Confirm New Password:

OK

[Back to California WIC Extranet Home Page](#)

Purpose of Screen:

When you are notified that your old password has expired, you must create a new password. To change your password:

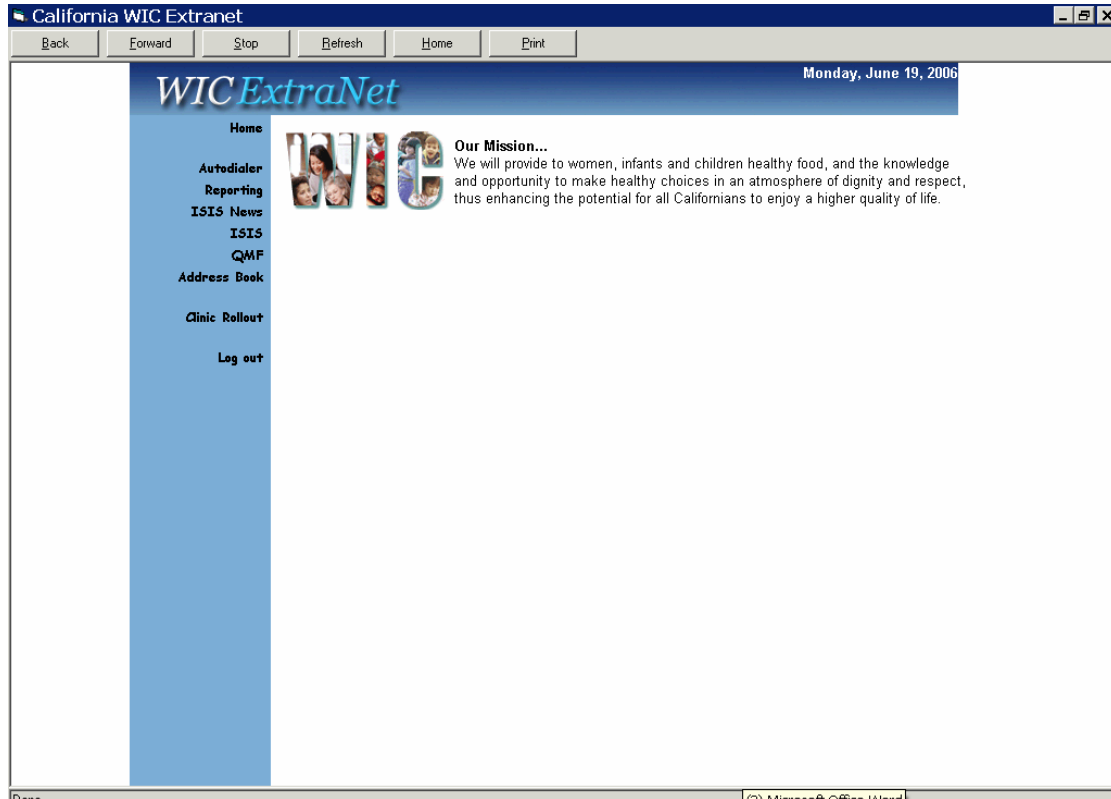
- Click on Reporting to bring up the Log into Reporting pop-up.
- Enter your Reporting ID. This logon ID begins with hd followed by the first letter of your first name and the first 4 letters of your last name, for example, Jane Doe is hdjdoe.
- Make sure the change password box is checked.
- Enter your new password. Passwords must be 6-8 characters and are not case sensitive. There cannot be any special symbols such as * / +.
- Re-enter your new password to confirm.
- Click OK.
- Check for the confirmation message that your new password has been changed.

You will receive this message if you enter a new password that is not accepted.



3 ExtraNet Home Page Orientation

3.1 WIC ExtraNet Home Page



When you log into the ExtraNet you will see the home page. The menu across the top of WIC Extranet home page works much like a home page within a web browser.

- **Back:** Click this button for access to the last page you visited. If there is no previous page, the button is grayed and cannot be clicked.
- **Forward:** When you have used the back button, you can click "forward" to return to the pages you've seen already. If there is no next page, the button is grayed and cannot be clicked.
- **Stop:** Terminates the request to access another page.
- **Refresh:** Re-access the current page and populate it with the most recent information.
- **Home:** Return to the WIC ExtraNet home page.
- **Print:** Print the contents of the page or report.

WIC ExtraNet Training

The WIC ExtraNet home page displays the applications available through the WIC ExtraNet. The following applications are available from this page.

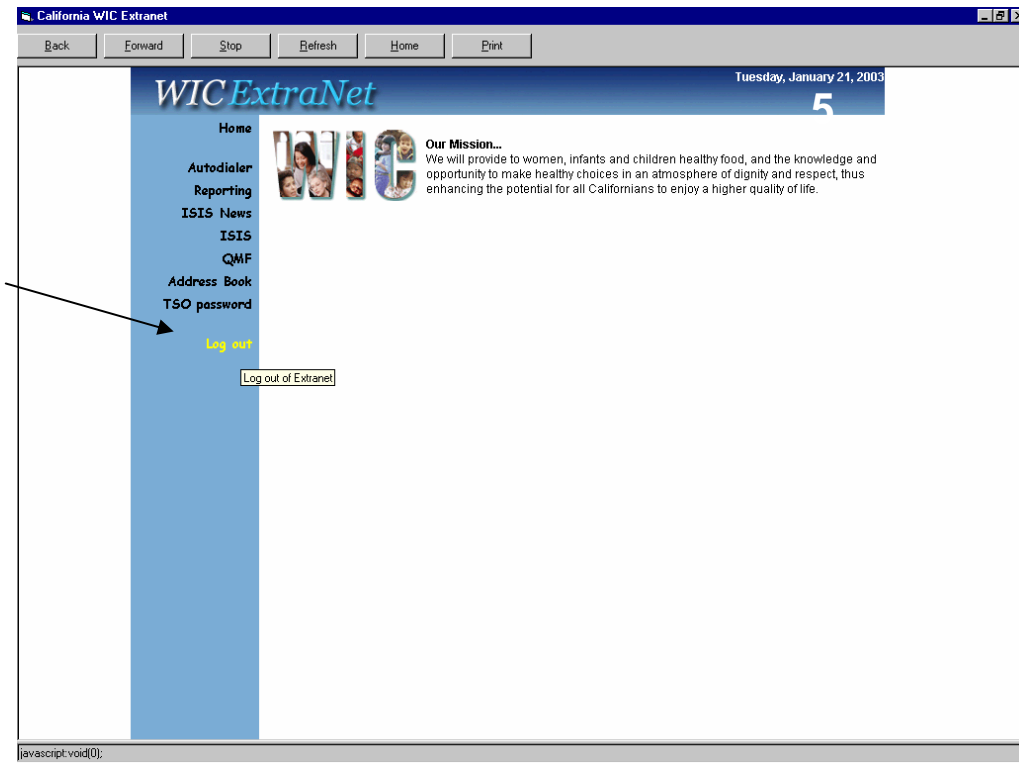
- **Autodialer** – Use to download appointments to transfer to the Autodialer.
- **Reporting** -- Provides access to the reporting application
- **ISIS News** – Use to send a message to your local agency or specific clinic staff that appears when they log on to ISIS.
- **ISIS** – Use to open HWDC green screen for ISIS
- **QMF** – No longer available
- **Address Book**—Directory of email addresses and phone numbers for State staff.
- **Log Out** – Use to log out of the ExtraNet.

The Options available and viewable depend on the access given to each individual through their User ID. Only those Options that the user has been given authorization to perform will be listed.

Click the mouse on key word to transfer to the selected application.

3.2 Log Out of the ExtraNet

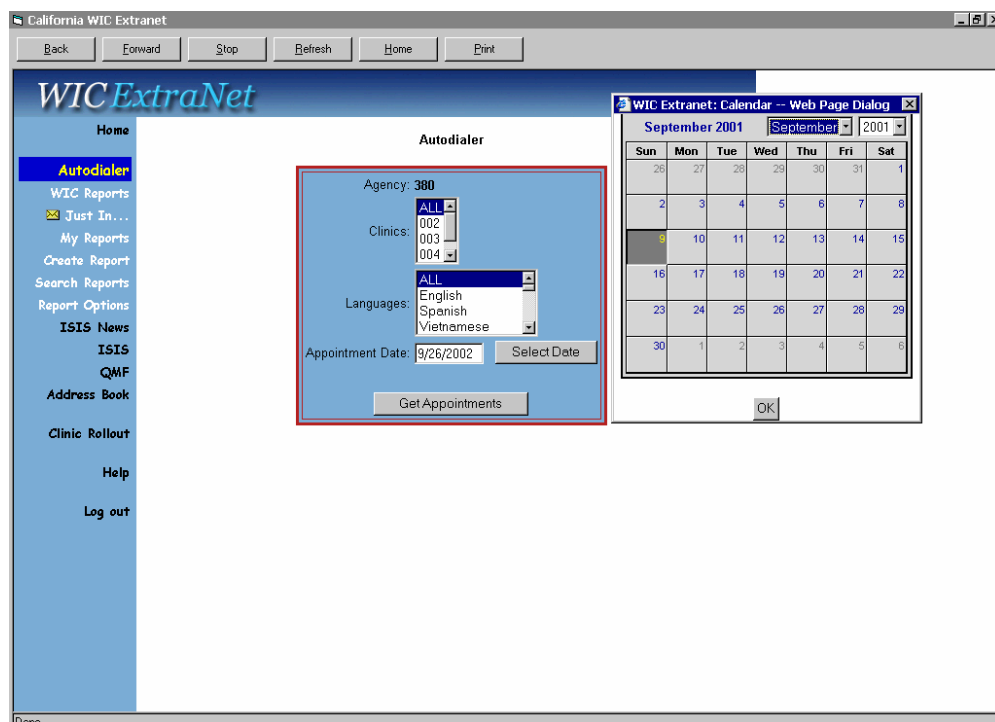
Click on Log out to close the ExtraNet. .



4 Application Options

4.1 Autodialer

The Autodialer application allows you to download participant appointments and information to be transferred to the Autodialer.



Click on Autodialer

- Your agency number will automatically be displayed
- Select one clinic or “All” for all clinics within your agency.
- You may select a specific language or select “All” languages. The list of languages is sorted from most used to least used language in ISIS.
- The default Appointment Date is initially blank. Click on the Select Date button and the system will display a calendar. Point and click to select the desired date and click OK. You may enter the date manually if you choose.
- Click on the Get Appointments button and the system will retrieve your appointments from the database.
- After clicking the Get Appointments button on the Autodialer screen, the File Download screen is displayed; click on OK button. Once you click the OK button, the system saves the Autodialer file to the Autodate file location on your PC.

4.2 ISIS News

ISIS News provides a way to place a brief message to some or all of the clinics at your agency. The message is displayed when staff log on to ISIS.

California WIC Extranet

Back Forward Stop Refresh Home Print

WICExtraNet

Home

Autodialer

WIC Reports

Just In...

My Reports

Create Report

Search Reports

Report Options

ISIS News

ISIS

QMF

Address Book

Clinic Rollout

Help

Log out

ISIS News

Add Message Delete Message

Agency: 380

High Priority:

Clinic: ALL
002
003
004

Message Expiration Date: 12/10/2003 Select Date

This is a test message:
ISIS News has been redesigned...it is now easier to Broadcast Text
Messages and specify the Expiration Date!

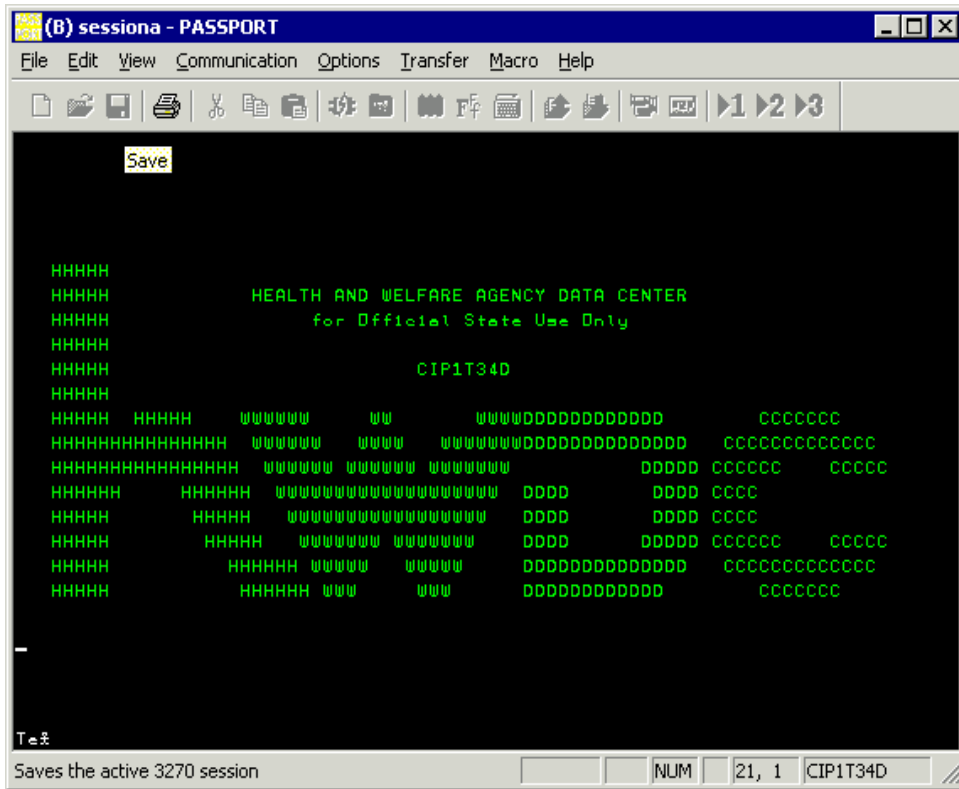
Send Message

Click on ISIS News.

- Your agency number will automatically be displayed.
- If the message is important, click High Priority and asterisks will be inserted around the message.
- Select one clinic or “All” clinics in your agency to receive the message.
- Click on the Select Date button to select a Message Expiration Date. The system will display a calendar – point and click to select the expiration date and click OK. You may manually enter an expiration date if you choose. The message expiration date defaults to the current date plus five days. The system will not allow you to choose an expiration date before the current date or more than 30 days after the current date.
- Enter the message text using upper and lower case characters. Note that ISIS News does not have a spell check function.
- Once you finished typing the message, click on the Send Message button.
- The system will confirm that the message was sent successfully by displaying a confirmation screen. Click the OK button.
- Click on the Delete Message button to see a list of active messages you have created.
- To delete one message at a time click on the Delete tag just above the message.
- To go back to the ISIS News screen, click Add Message button.

4.3 ISIS Application Screen

Click on ISIS to access to the HWDC screen where you can log on to ISIS.



4.4 Address Book

The screenshot shows a web browser window titled "California WIC Extranet". The browser's address bar is empty, and the navigation buttons (Back, Forward, Stop, Refresh, Home, Print) are visible. The main content area features the "WIC ExtraNet" logo at the top left. A vertical navigation menu on the left includes links for Home, Autodialer, Reporting, ISIS News, ISIS, QMF, Address Book (highlighted in blue), TSO password, and Log out. The main content area is titled "Search the address book." and contains four search fields: Last Name, First Name, Department, and Office. A "Search" button is positioned to the right of the Department field. Below the search fields, a small instruction reads "Search by any combination of the fields above." The browser's status bar at the bottom shows "Done".

Address Book provides access to the State of California Global Address List, which includes the Department of Health Services, and other State departments. Telephone numbers are available for many DHS staff.

You can search by any combination of the fields listed. The more detail you provide, the more accurate your search will be.

- Last Name: Type the Last Name of the person you are looking for, such as Smith. You can complete the search with just the last name information.
- First Name: Type the First Name of the person you are looking for, such as Alice. You can complete the search with just the first name information.
- Department: Enter DHS. This is optional but helps to narrow your search results.
- Office: Enter WIC. This is optional but helps to narrow your search results.
- Click the Search Button to retrieve the requested information. A list of possibilities from the search will be displayed

4.5 Reporting

This option provides access to the WIC ExtraNet reporting tool. The reporting applications available are listed in white and include:

- WIC Reports
- Just In
- My Reports
- Create Report
- Search Reports
- Report Options
- Log Out



4.5.1 WIC Reports

WIC Reports provides access to the ready made or canned reports in the ExtraNet.

Click on WIC Reports. A list of the available WIC Reports will be displayed. You have the option to view the list of reports with a Compact list or expanded list. If you click Expand in the upper right of the screen, the alternate option Compact appears on the black bar. The Expanded view displays more detail about each report. The Compact view is shown below.

If you don't see all of the reports listed below, click on Refresh List. New reports will be added as the WIC ExtraNet is developed.

WIC Reports Screen

The screenshot shows the California WIC Extranet interface. At the top, there's a navigation bar with buttons for Back, Forward, Stop, Refresh, Home, and Print. Below that, the WIC ExtraNet logo is on the left, and a search bar is on the right. The main content area displays a list of reports under the heading 'WIC Reports'. The list has two columns: 'Report Name' and 'Report Description'. The reports listed are:

Report Name	Report Description
IB001-A	Percentage of Infants with Feeding Choice B (Exclusively Breastfeeding) By Race.
IB001-C	Percentage of Infants with Feeding Choice B (Exclusively Breastfeeding) By Clinic By Race
IC001-A	Average Number of Cans of Formula Issued to Combination Fed Infants By Race
IC001-C	Average Number of Cans of Formula Issued to Combination Fed Infants By Clinic By Race
IF001-A	Percentage of Infants with Feeding Choice F (Exclusively Formula Fed) By Race
IF001-C	Percentage of Infants with Feeding Choice F (Exclusively Formula Fed) By Clinic By Race
WI001	All Records by Category by Clinic
WI004	All Records by Enrollment in Other Services by Category (By Selected Clinic)
WI004A	All Records by Enrollment in Other Services by Category (All Clinics)
WI006	Infant Feeding Choice for Certified Participants Issued FI's by Ethnicity by Age
WI007	Staff Productivity - Activity by Date
WI008	Staff Productivity - Family Records Report by Date
WI031	Infant Feeding Choices for Certified Participants Issued FI by Specific Agency by Month
WI031S	Infant Feeding Choices for Certified Participants Issued FI for All Agencies by Month
WI032	Formula Source for Certified Participants Issued FI's, All Categories by Specific Agency by Month
WI032S	Formula Source for Certified Participants Issued FI's, All Categories for All Agencies by Month
WI040	Certified Participants Issued FI's and Priorities I and II by Specific Agency by Month
WI040S	Certified Participants Issued FI's and Priorities I and II for All Agencies by Month
WI052	WIC 5-Year-Old Graduates
WI083	Certified Participants (Receiving FI's), Caseload, and Unissued Food Instrument Ratios by Specific Agency by Month
WI083S	Certified Participants (Receiving FI's), Caseload, and Unissued Food Instrument Ratios for All Agencies by Month
WI084	Issuance by Prescription Month

To open a sample WIC report, Select WI004, All Records by Enrollment in Other Services by Category (by Selected Clinic). A popup box appears populated with your Agency ID.

WIC ExtraNet Training

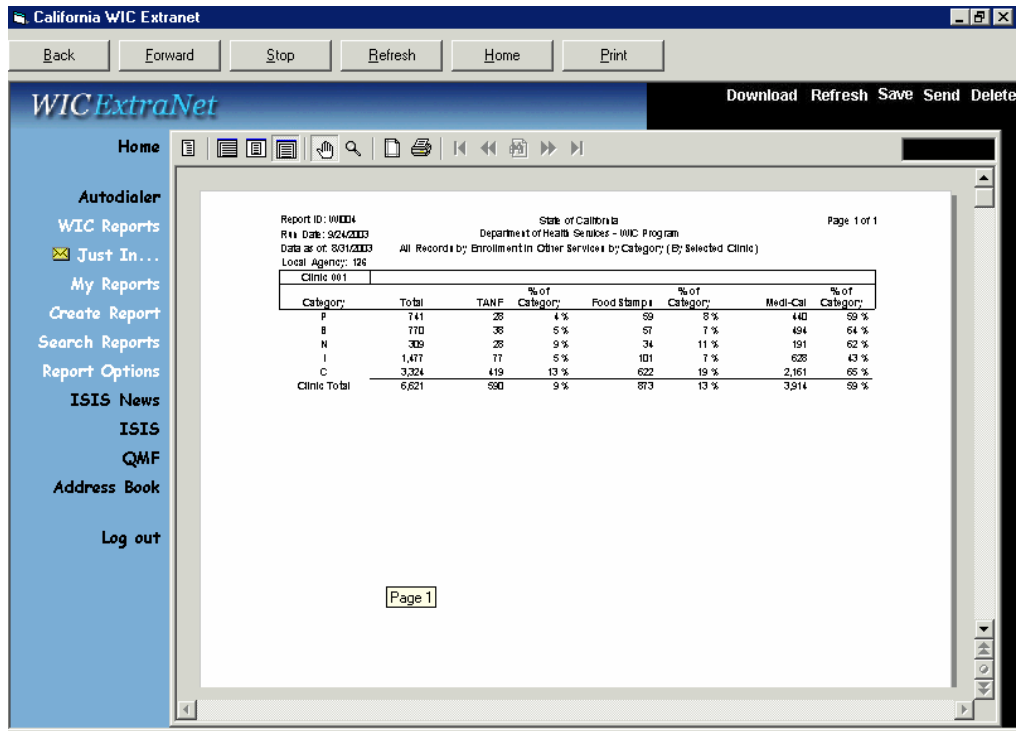
The pop-up allows you to select a specific clinic and extract date.

- Click on the arrow to open up drop down menu of Clinic ID's. Select the desired clinic. The first numeric clinic for your agency will automatically populate this field.
- Select an extract date.
- Click on Run Report.

The screenshot shows a web browser window titled "California WIC Extranet". The browser's address bar contains navigation buttons: Back, Forward, Stop, Refresh, Home, and Print. The main content area features the "WIC ExtraNet" logo and a left-hand navigation menu with the following items: Home, Autodialer, WIC Reports, Just In..., My Reports, Create Report, Search Reports, Report Options, ISIS News, ISIS, QMF, Address Book, and Log out. A red-bordered pop-up window is centered on the screen, titled "W1004 - All Records by Enrollment in Other Services by Category (By Selected Clinic)". This pop-up contains three dropdown menus: "Agency ID" with the value "126", "Clinic ID" with the value "001", and "Select a date for the report" with the value "8/31/2003". Below these fields are two buttons: "Run Report" and "Cancel". The browser's status bar at the bottom shows the word "Done".

Report Results

Your report will be displayed.



Use the small icons on the menu bar above the report to resize the view, pan, zoom, page setup, and print the report.

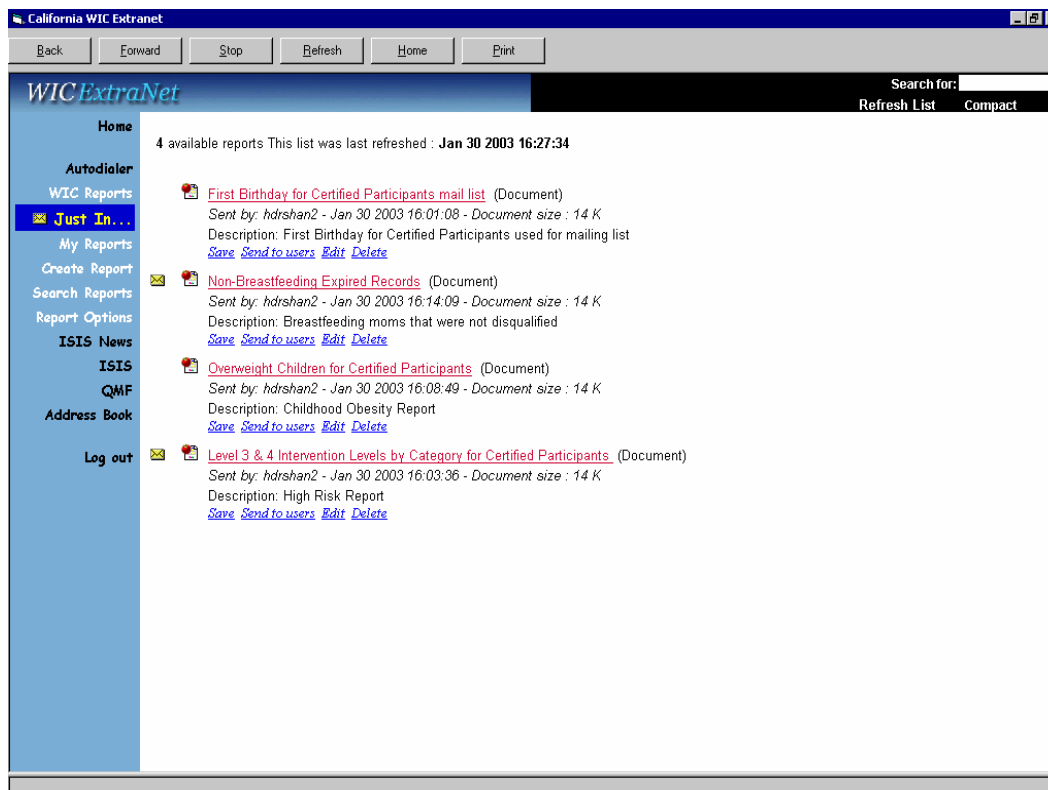
To print your report, first click on the Page Setup icon and click on Printer to select the printer. You can also use this area to change the page orientation from portrait to landscape.

Click on the printer icon to print the report. Do not use the Print button at the top of the screen to print from WIC Reports.

4.5.2 WIC Data Terminology and Description

You will notice terms such as All Records and Certified Participants in various WIC reports. In the Appendix, you will find a graphic display of WIC Data Terminology and Descriptions that provides the standard language used to define various types of data in the ExtraNet. There will be times when you want information on certified participants only, while other times you may want information on individuals whose certification period has expired. Understanding the terminology conventions will assist you in setting up your query within the WIC ExtraNet reporting environment.

4.5.3 Just In



Just In provides access to reports developed and distributed by others in your agency or at the WIC Branch. It is similar in concept to an email inbox. You can send and receive reports from others in your agency. The Branch also uses Just In to send ad hoc reports requested by agencies.

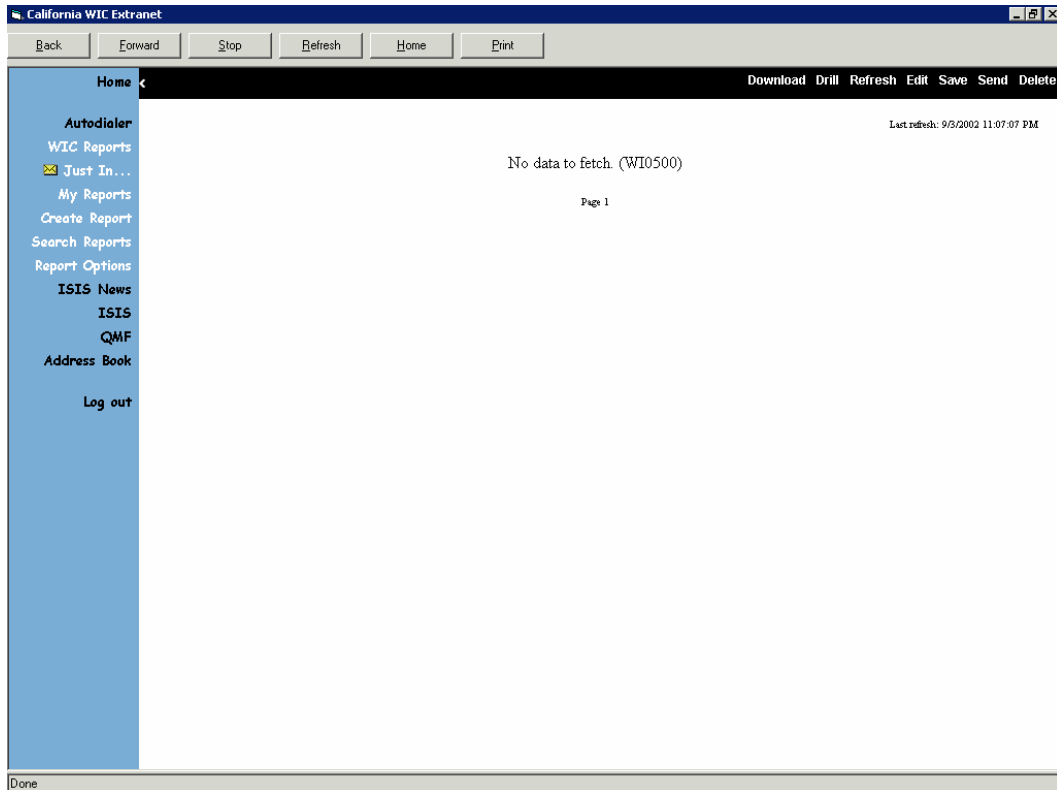
You have the option to view your Just In with a Compact list or expanded list. If you select Expand, as shown above, the alternate option Compact appears in the upper right of the screen. The Expanded view displays a description of the report and gives you options to save, send to users, edit or delete the report.

A closed envelope in front of Just In or to the left of the report name indicates a new report that has not been opened. You can manage your Just In as you would your email Inbox. The list of possible actions includes:

- Save – Save your reports to your personal folder called My Reports
- Send to Users – Send/share reports with others in your agency who have access to Reports
- Edit – Modify the report
- Delete – Delete a report you no longer want or have saved to My Reports

To Open and Display a Report within Just In

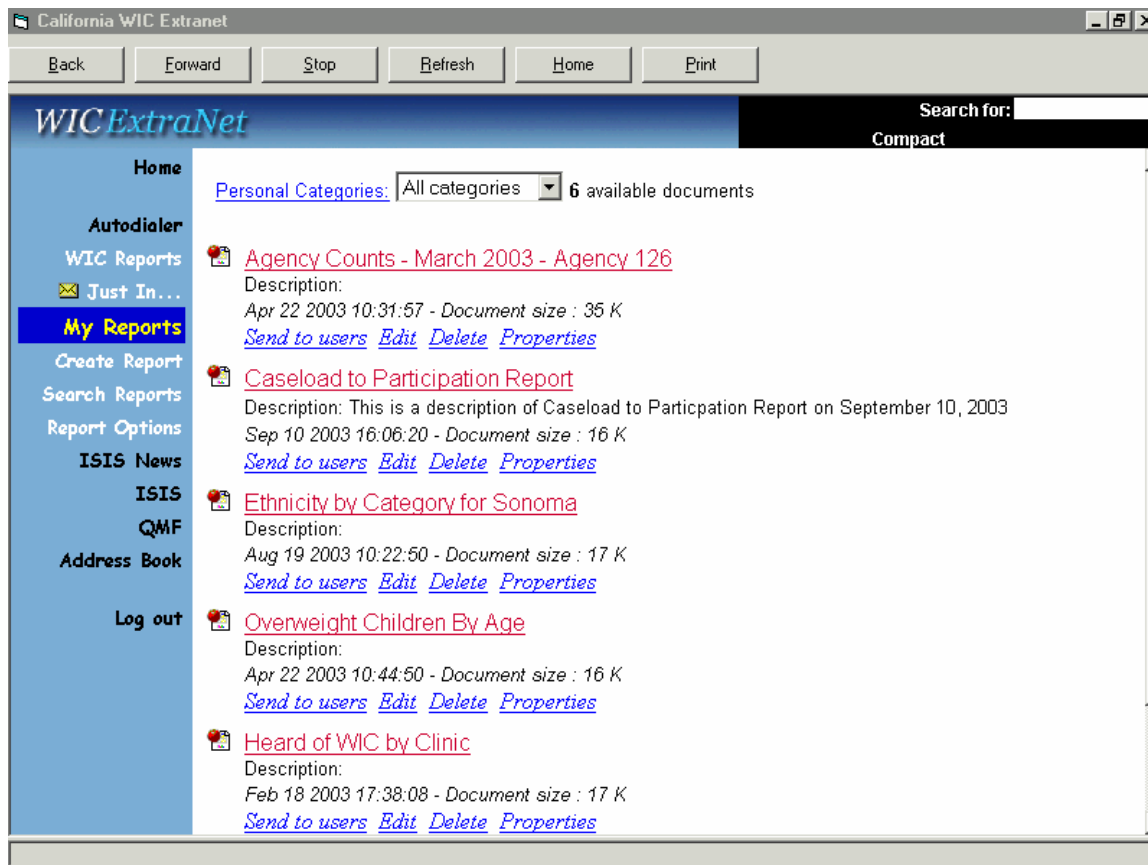
Click on the name of the report to open it. You can view the data that was sent to you, or you can click on Edit and then Run Query to retrieve updated information.



When you receive a report from the WIC Branch, you may see the 'No-data-to-fetch' screen above when you open it for the first time. To populate the report with data, click Edit on the black menu to the upper right of the screen and then click Run Query.

4.5.4 My Reports

My Reports is the place where you can save your own reports from Just In and Create Report.



My Reports is your personal file area. Within My Reports, you have the option to:

- Send to Users—Send the report to other users in your agency
- Edit—Open the report in Create Reports so you can make changes to the content or formatting.
- Delete—Delete the report from your list of saved reports.
- Click on the name of the report to open it.

4.5.4.1 Personal Categories for My Reports

California WIC Extranet

Back Forward Stop Refresh Home Print

WIC ExtraNet

Home
Autodialer
WIC Reports
Just In...
My Reports
Create Report
Search Reports
Report Options
ISIS News
ISIS
QMF
Address Book
Log out

Category Management

Select from the list or enter a new one.

Name	From	Date
Breastfeeding Reports	hddphil2	9/23/2003 9:37:39 AM

Category:

Create Delete Update Close

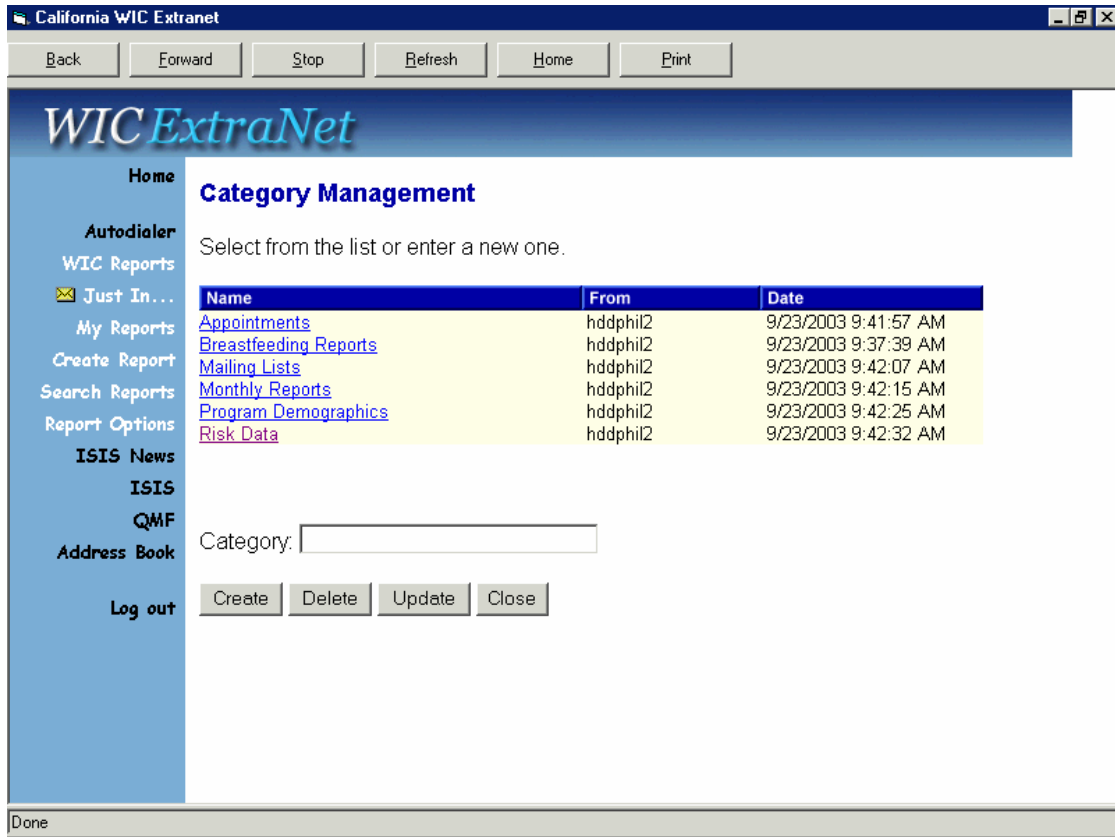
status: *New category successfully created.*

Done

Click on Personal Categories in the upper left of My Reports to open the Category Management screen. Here you can create Personal Categories, which are like folders to help you organize your reports. The saved reports are then stored in these various categories within My Reports for easy access.

Type in the name of the category and click Create. You can also delete or update categories here.

Update or Delete Categories



From the Category Management screen you can change titles or delete the personal categories within My Reports.

To update a category, click on the name of an existing category, type in a new name, and press Update to change the category name.

To delete a category, click on the name of an existing category and press Delete.

Click on Close to return to the Save in My Reports screen.

4.5.4.2 Saving a Report

There are two ways to save a report. The first is when you receive a new report in Just In and want to save it to My Reports. In the expanded view, you can save the report directly from Just In without opening it.

The second way is from an open report from either Just In or from Create Report when you want to save a report after you create it. Use the Save option at the upper right of the screen.

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Tip:

The Save and Close option next to Apply Format when a report is open in Edit does not save the report in My Reports. This option is used by the WIC Branch to create a query with no data that can be sent to local agencies so that they can run the query with their own agency information. It does not save the query.

To save a report directly from Just In to My Reports click on Expand in the upper right of the screen to display report options under the report description. Click on Save. This will take you to the Save in "My Reports" screen.

The screenshot shows the California WIC Extranet interface. The top navigation bar includes buttons for Back, Forward, Stop, Refresh, Home, and Print. The main content area displays a list of reports under the heading "4 available reports This list was last refreshed : Jan 30 2003 16:27:34". Two reports are listed: "First Birthday for Certified Participants mail list" and "Non-Breastfeeding Expired Records". The "Just In..." menu item is highlighted in the left sidebar, and an arrow points to the "Save" link under the first report's description. A second screenshot below shows the "Create Report" menu item highlighted, and an arrow points to the "Save" button in the top right corner of the report view. The report view displays a table titled "Participation: Current Month to Date" with columns for B, C, I, N, P, and Sum. The data is for the period 2004-06.

	B	C	I	N	P	Sum:	
2004-06	002	315	1,811	942	275	328	3,671
	003	364	2,146	1,046	261	362	4,179
	004	272	1,251	549	103	155	2,330
	005	401	2,788	1,290	352	382	5,213
Sum:		1,352	7,996	3,827	991	1,227	15,393

To save a report opened from Just In, click on Save on the menu at the upper right side of the screen. This will take you to the Save in "My Reports" screen.

To save a report opened from Create Report, click on Save at the upper right side of the screen. This will also take you to the Save in "My Reports" screen.

Save in My Reports

The screenshot shows a web browser window titled "California WIC Extranet". The browser's address bar contains navigation buttons: Back, Forward, Stop, Refresh, Home, and Print. The main content area features the "WIC ExtraNet" logo and a navigation menu on the left with items like Home, Autodiater, WIC Reports, Just In..., My Reports, Create Report, Search Reports, Report Options, ISIS News, ISIS, QMF, Address Book, and Log out. The main form area is titled "Save in 'My Reports'" and includes the following fields and options:

- Enter the report **name**:
- Enter the report **description**:
- Select **Personal Categories**:
- Enter the report **keyword(s)**:
- Refresh options**:
 - Refreshed manually
 - Refreshed when opened
- Overwrite if report exists**: Yes No

At the bottom of the form are two buttons: "Save" and "Back to Report".

When you save a report it will automatically be saved in My Reports.

- If you need to create a new personal category for the report, do this first. See the My Reports section for instruction on category management.
- Enter a title for your report. Enter a brief description if you wish to describe the content of the report or instructions for running the report again. The description will appear in the expanded view of My Reports.
- Select the desired Personal Category from the list.
- You can enter a keyword that can assist you in finding the report using the Search Reports function on the Navigation Bar. You do not need to use this function.
- Refresh Options. There are two refresh options: If you select Refreshed Manually the report will open showing data from the last time you saved the report. You will have to go into edit and click Run Query to get updated information. If you select Refreshed when opened, the report returns current data every time it is opened.
- Overwrite if report exists. Check Yes if you have made changes to a report and want to keep the same name. Check No if you do not want to overwrite a report with the same name.
- Click Save and the report will be saved to My Reports. Be sure to check the confirmation at the bottom of the main window to be sure the report was saved. It will read, "Status: Report successfully saved."

WIC ExtraNet Training

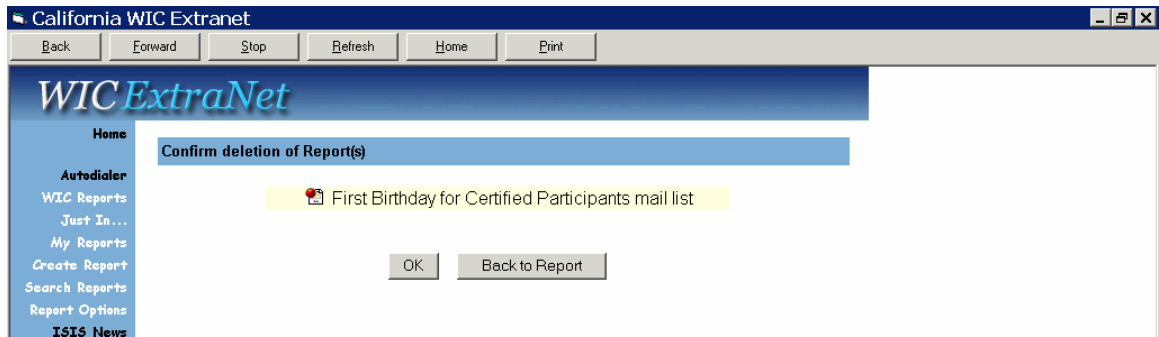
4.5.4.3 Deleting a Report from Just In or My Reports

To delete a report from either Just In or My Reports open the expanded view of the report list. Click on Delete.



Delete Confirmation Screen

The Confirm deletion of Report(s) screen appears. Click OK to delete the report.

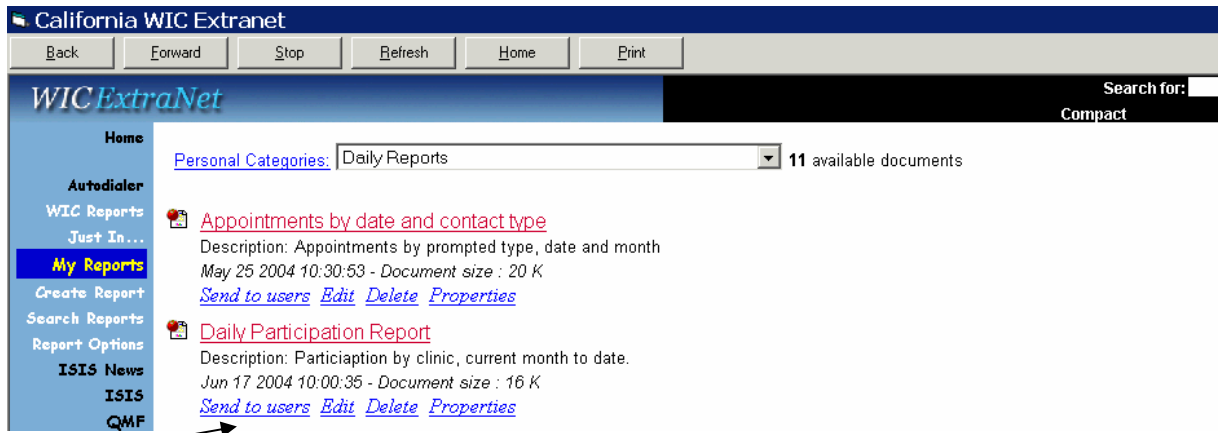


Check for the confirmation message at the bottom of the screen. It will read "status: Report(s) successfully deleted."

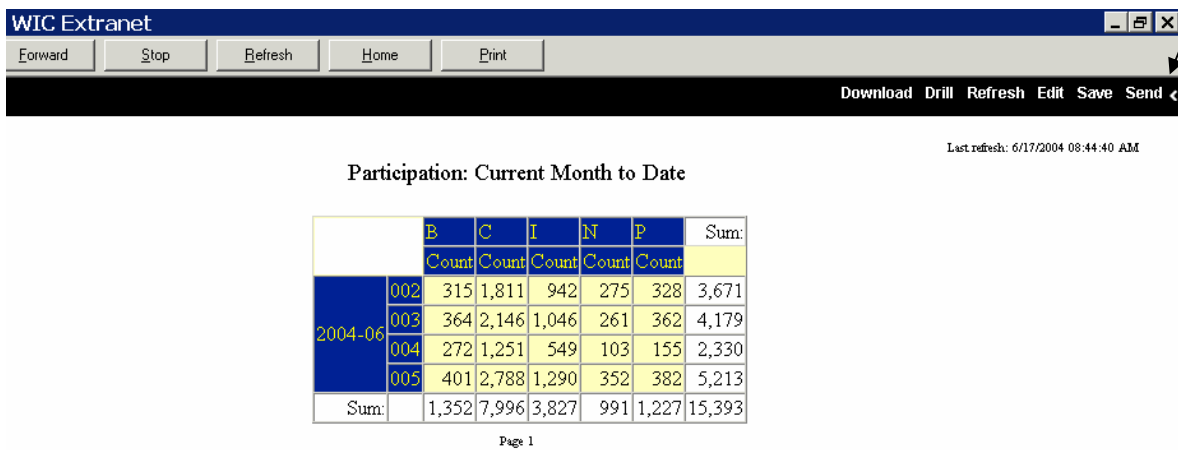
4.5.4.4 Sending a Report to Other Users

There are two ways you can send a report to other reporting users in your agency. You can send a report directly without opening it from the report list in either Just In or My Reports. You can also open a report from Just In, My Reports or Create Report and use the Send command at the upper right of the screen.

From either My Reports or Just In, with the report list in the expanded view, click on Send to Users.



From an open report click on the Send command at the upper right of the screen.



Send Report Screen

California WIC Extranet

Back Forward Stop Refresh Home Print

WIC ExtraNet

Home

Autodialer

WIC Reports

Just In...

My Reports

Create Report

Search Reports

Report Options

ISIS News

ISIS

QMF

Address Book

Log out

Send report to the following user(s)

Enter the report **name**: Example Report Title

Enter the report **description**:

Enter the report **keyword(s)**:

Select the destination **users**: [380]
hdaodr1
hdbrobe
hdccant1
hddgear1

Refresh options:

Refreshed manually

Refreshed when opened

Send Back to Report

Done

To send a report, fill in the report name and add a description of the report. Select the destination user by clicking on the reporting ID of the person to whom you wish to send the report.

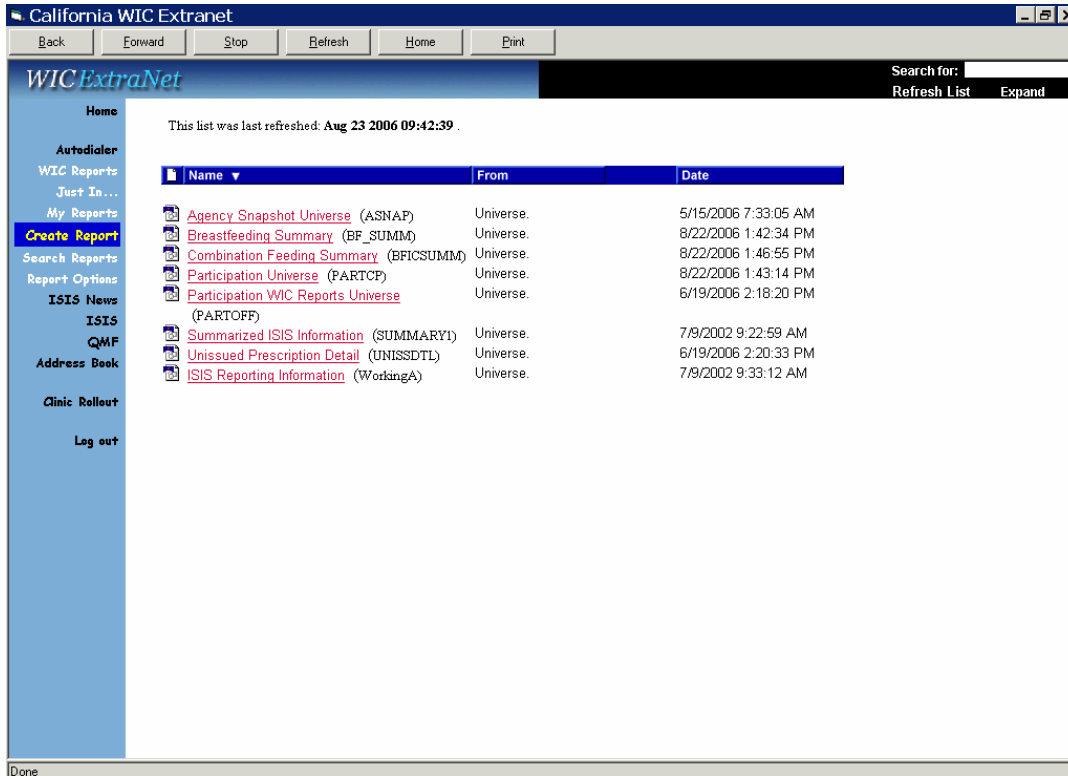
To select more than one user, hold down the 'Ctrl' key and click on the other reporting ID's.

Click on Send and check for the confirmation message. It will read,"status: The report was successfully delivered."

5 Create Reports—Data Universes

The Create Report function allows you to put together an ad hoc report quite easily. This reporting tool provides a user-friendly access to the vast amounts of available ISIS data.

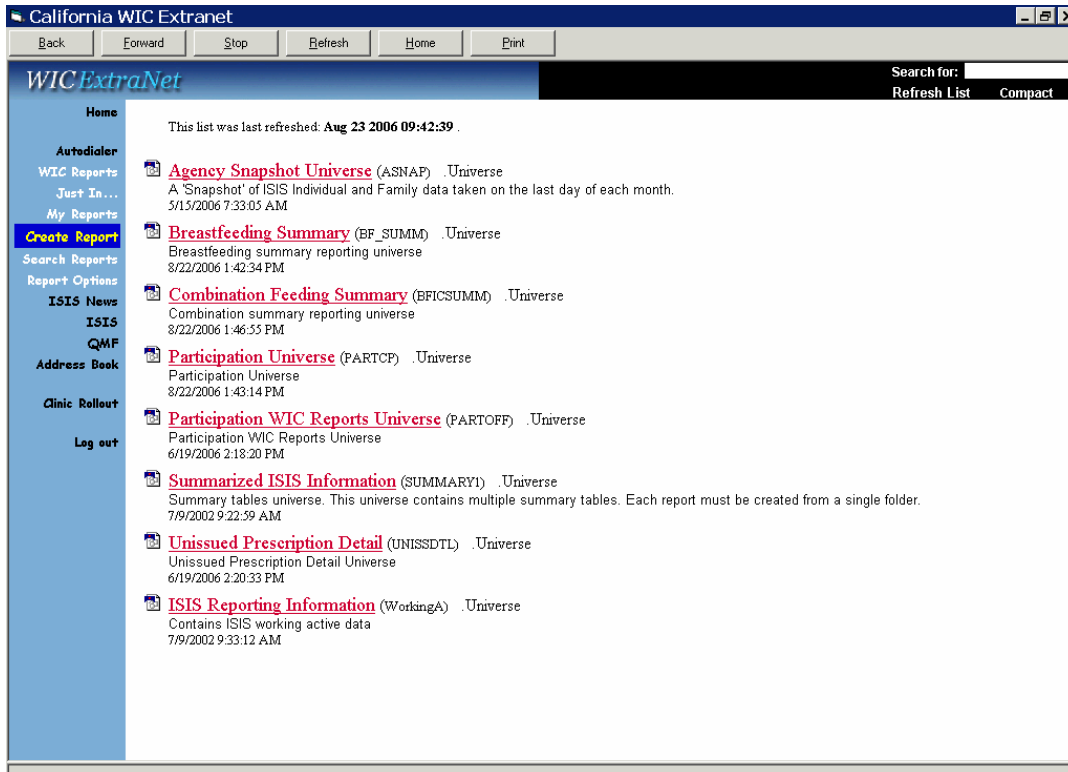
The reporting data has been organized into groups called universes. The names of the universes available are listed on the screen below. More universes of data will be added and others will be deleted as the WIC ExtraNet is developed.



This screen shows you the universes of ISIS Information. When you create an ad hoc report, you will be creating it from within one of these universes.

By clicking Expand on the upper right of the screen a brief description of the universes will be displayed, as on the next page. Clicking on Compact will return to the display shown above.

Expanded View



5.1 Agency Snapshot Universe

The Agency Snapshot Universe contains snapshots of ISIS Individual and Family data taken on the last day of each month. These data snapshots go back thirteen months. None of the fields are updated after the snapshot is taken. This universe contains many useful data fields not found in the other universes.

5.2 Breastfeeding Summary

The Breastfeeding Summary universe contains information on the infant feeding choice for only the infants who were 2, 4, 6 and 11 months old during the prescription month. Data goes back to April 2004 and a new prescription month is added on the 2nd of each month. Feeding choice is based on the packet type issued. Because many breastfed infants receive the IT packet just before their first birthday the breastfeeding data for the 11 month-olds is not reliable.

5.3 Combination Feeding Summary

This universe contains information only on the combination fed infants who were 2, 4, 6, and 11 months old during the prescription month. Data goes back to April 2004 and a new prescription month is added on the 2nd of each month. Feeding choice is based on the packet type issued. Because many infants receive the IT packet just before their first birthday, the infant feeding data for the 11 month-olds is not reliable.

5.4 Participation Universe

This universe replaces Participation Summary I, the first folder, in the Summarized ISIS Information universe. It has the most of the same data elements, except that it uses the new racial ethnic categories. It does not have the predefined conditions for current month and last month, or the sort number for category. The data in this universe goes back in time to January 2003. The participation count is updated nightly through close of business the previous day.

5.5 Participation WIC Reports Universe

This universe contains many of the data fields in Participation Summary II, the second folder, in the Summarized ISIS Information universe. It contains the official total counts of participation, counts of infant feeding and formula payment sources, and priorities 1 and 2. Data goes back to May 1997. A new prescription month is added on the 3rd of each month or the 3rd working weekday of the month, whichever is later. Note that the count Total Infants includes those receiving an IT packet while these are not included in the counts of exclusively breastfeeding Infants, combo fed Infants, and formula only infants.

5.6 Summarized ISIS Information Universe

Summarized ISIS information contains folders with snapshots of counts of various parameters, for example, participation counts or counts of exclusively breastfeeding women for any given month. Data about specific individuals or risk codes is not available in this universe. This universe will eventually be deleted from the ExtraNet. It is updated on the second of each month.

5.7 Unissued Prescription Detail Universe

This universe contains the fields needed to identify individuals and families who have not received food instruments for a given prescription month. It can be used to prepare a list, with the family name, phone number and address so that WIC staff can contact the families for follow up. Because it is based on the food prescription, this universe has only certified individuals. It will not identify missed appointments for enrollments or those past their cert end date. Appointment date and the unissued counts are updated nightly.

5.8 ISIS Reporting Information Universe

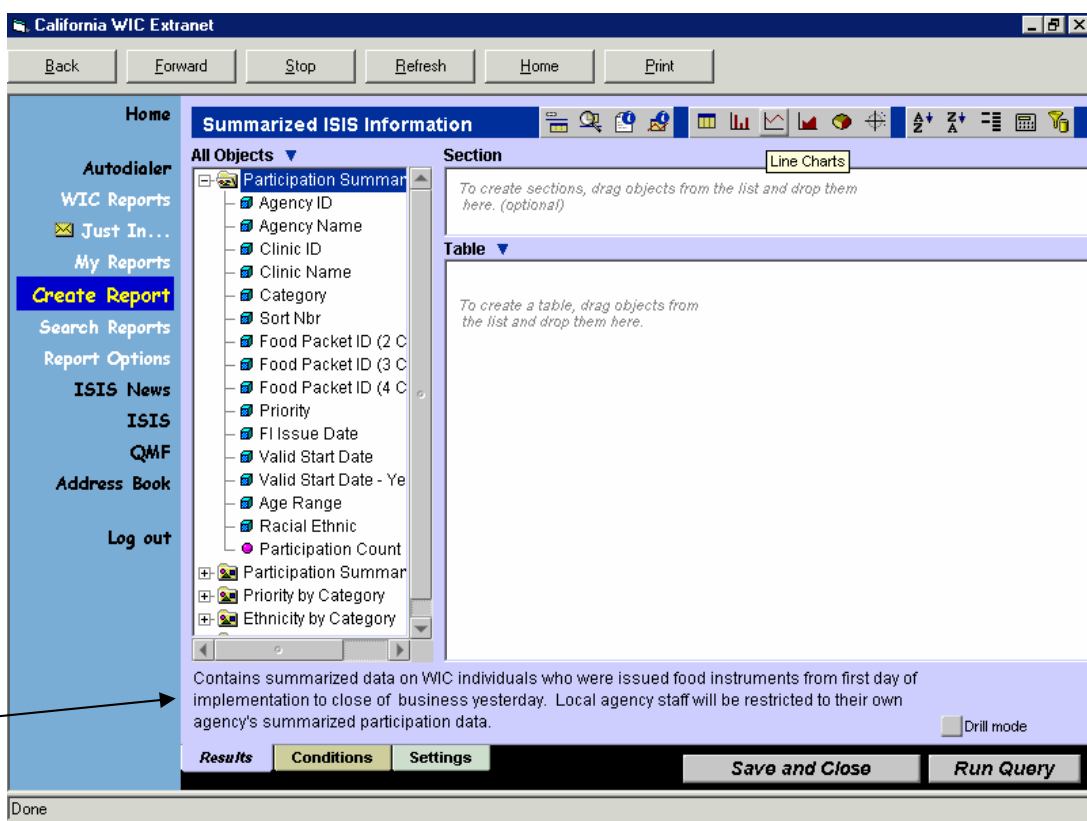
This universe contains specific detail on individuals and families collected by ISIS. Individual data is captured in monthly snapshots from the current active record. Family information is updated several times an hour. The ISIS Reporting Information universe gives you the option of the two most recent monthly snapshots to report against. If you want a list of participants with up to date name, address, phone number, and/or appointment date, use the ISIS Reporting Information universe.

6 Create Reports – Features, Functions and Navigation

Before we launch into showing you how to create an actual report, let's take a look at some basic components and navigation standards of this reporting tool.

Select the Create Report application and then select the Summarized ISIS Information universe. The following screen is displayed. The default display shows the first folder open, with the data objects listed as shown below.

The Summarized ISIS Information universe consists of five folders. When you highlight the title of any of the folders, a description of the contents of the folder will appear in the area near the bottom of the Results tab.



Highlight Participation Summary I and read the description. Then highlight Participation Summary II to see the difference. You will note that Participation Summary I is updated daily based upon issued Food Instruments and goes all the way back to the beginning of ISIS. Participation Summary II is updated monthly.

Tip:


Click on the plus sign next to the folder to open it. Click on the minus sign next to an open folder to close it.

6.1 Results Tab

To create a report, begin on the Results tab. This screen is divided into three parts: All Objects, Table and Section.

- All Objects lists the folders that contain the data objects available to drag and drop into the Table section.
- The Table section is where you drop the objects to create the foundation for the report.
- The Section area enables you to organize the report into groups or to change the way the data is displayed.

There is an icon in front of each folder or object that tells you what it is, a folder, attribute or a measure. The icons with their associated description are shown below.

 Folders: Folders contain related data objects or subfolders.

Within each folder, there are two object types:



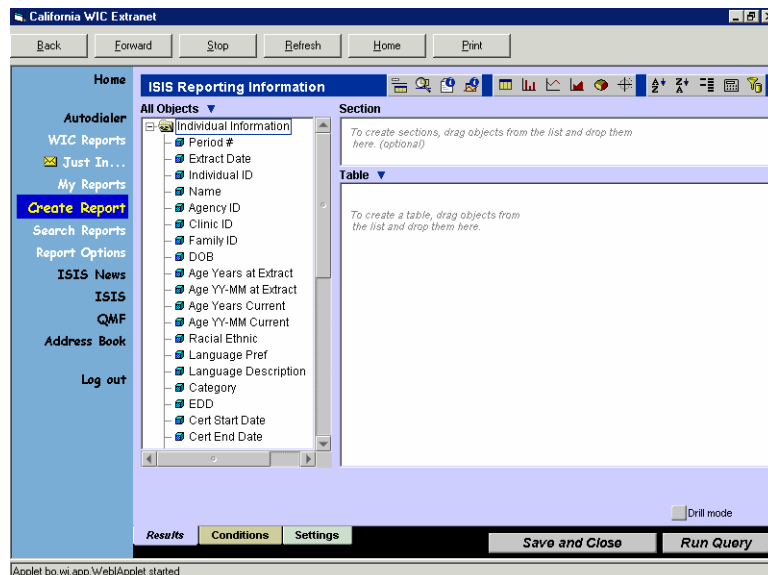
Attributes or labels



Measures of data (counts)

In the Summarized ISIS Information universe, you can use data objects from only one folder at a time to create a report. If you select data objects from two or more folders, the system will give you an error message and the report will not run. Don't be afraid to try it and see what happens. In the other universes with more than one folder, such as Agency Snapshot and ISIS Reporting, you can combine information from different folders into the same report.

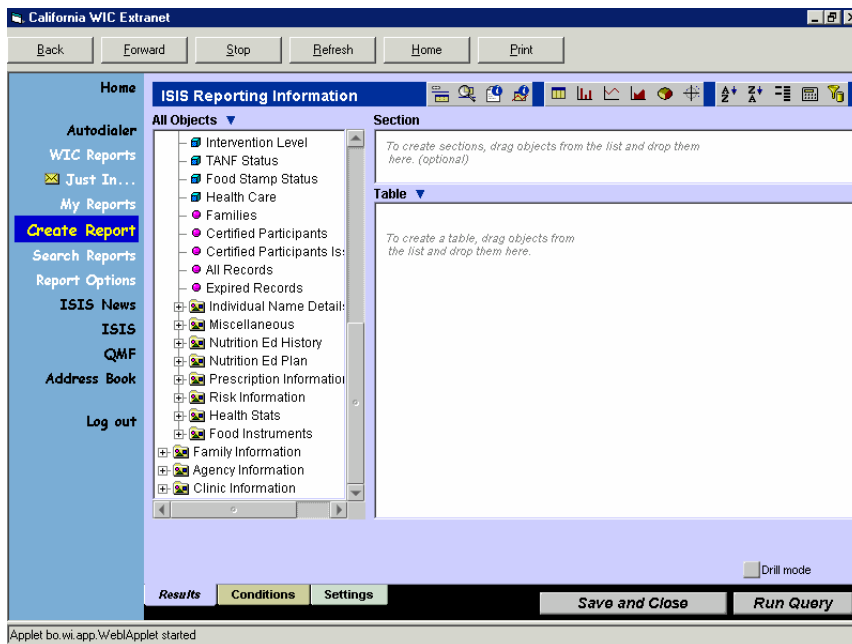
From Create Report select the ISIS Reporting Information universe. The following screen is displayed with the first folder, Individual Information, open.



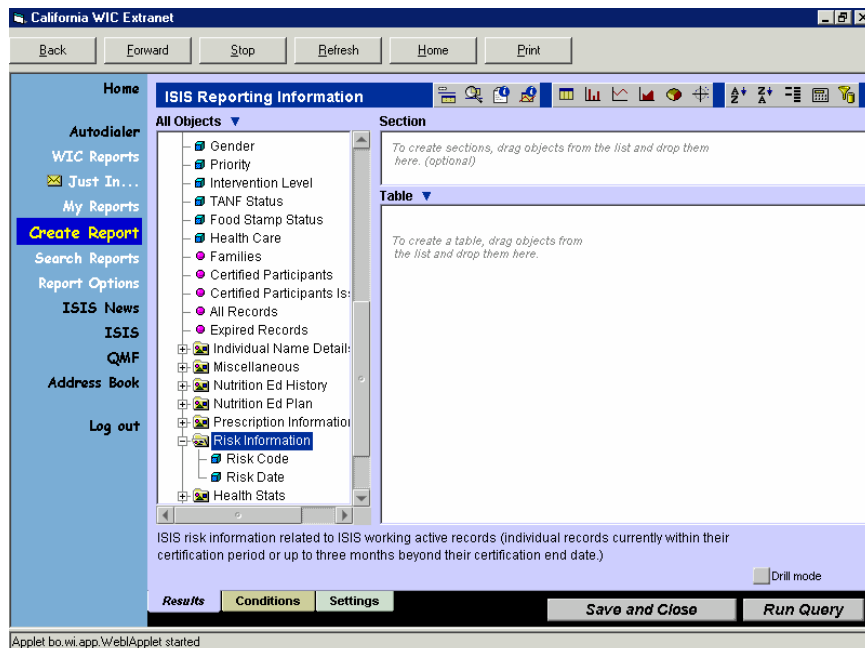
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The ISIS Reporting Information universe consists of four folders. In this Universe it is perfectly okay to select and mix objects from different folders in the same query. In fact, you will often want to do this.

The first two folders in this universe contain subfolders to help organize the large number of objects within this universe. Scroll down to the bottom of the objects listing in the first folder and you will see the view below.



Open the Risk Information subfolder and a list of the data objects within this subfolder is displayed.



Similar to the data objects listed elsewhere, you can drag and drop data objects in subfolders, such as Risk Code and/or Risk Date, into the Table area if you need these when building your report.

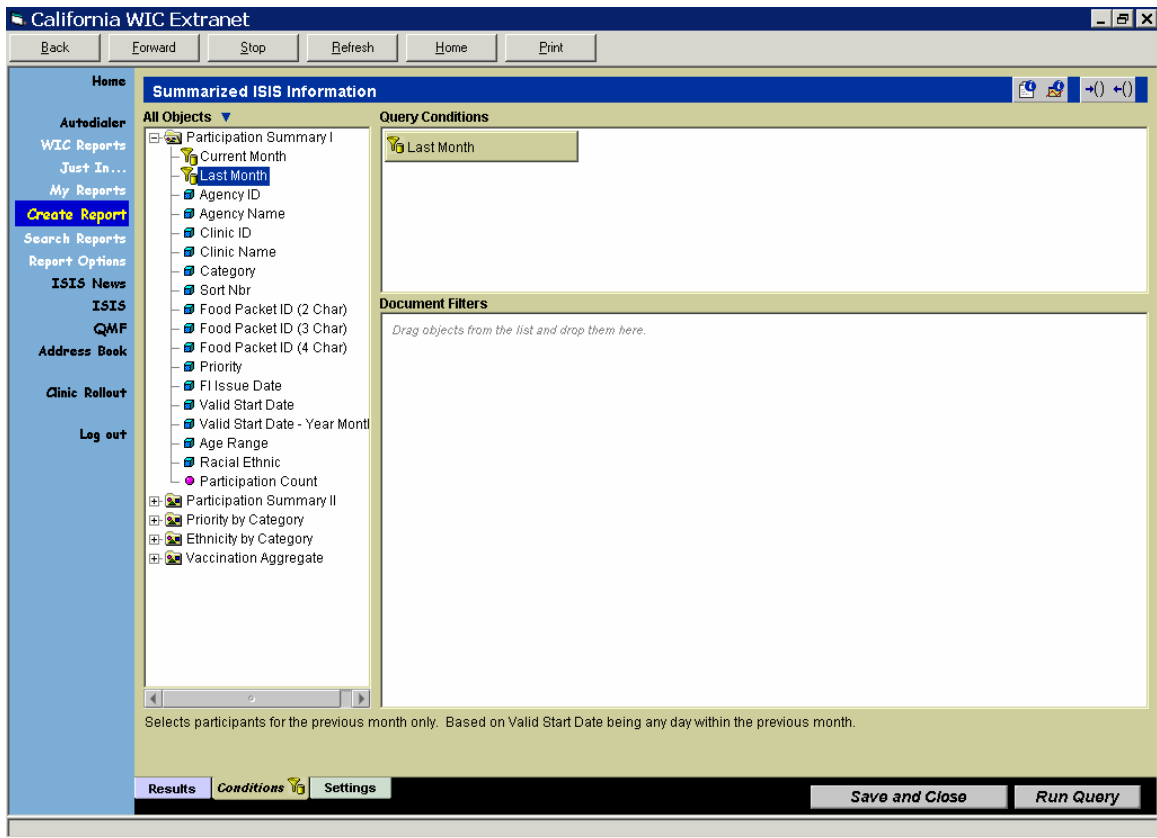
6.2 Conditions Tab

The Conditions tab allows you to place limits on data objects in the report. The Conditions tab is divided into three parts, All Objects, Query Conditions and Document Filters. The All Objects area of the conditions tab, like on the Results tab, lists the folders that contain all of the data objects available. The Query Conditions section is where you place the data objects you wish to limit. The Document Filters section is used after the report has been run and allows you to place limits or conditions on the results.

Under query conditions you will note a new icon.

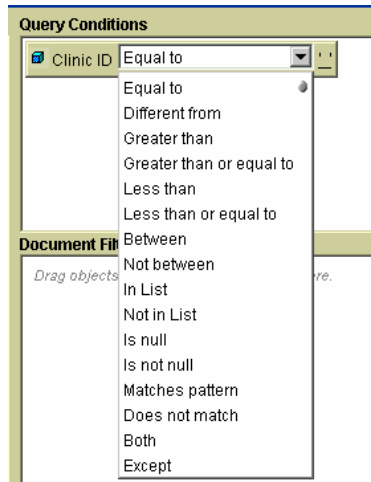
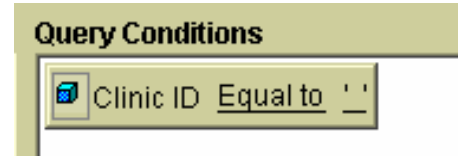


For example, if you want a participation count only for last month, drag the predefined condition for “Last Month” to the Query Conditions area. In this example, this is a predefined condition on Valid State Date – Year Month. The report will always retrieve data for the previous month, so in future months you will not have to edit the query and change the date on the conditions tab.



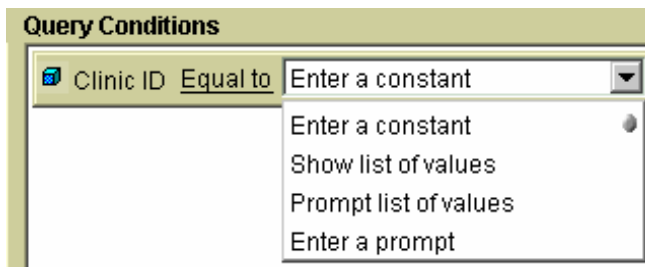
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When you move an object to the Query Conditions area two new fields appear. For example, drag the object for Clinic ID into the Query Conditions area. You will see the words “Equal to” and a blank space in single quotes.



Click on the Equal to and you will see a drop down list of options for the conditions you can set. Choose the option you want by clicking on the list.

- Equal to is used when there is only one thing you want, such as one specific clinic.
- In List is used when there are two or more things you want, such as clinic 001 and 002.
- Different from is used when there is only one thing you don't want, such as all clinics except 001.
- Greater than, Greater than or equal to, Less than, Less than or equal to, between and Not between are used for numbers and dates.
- Is null and Is not null are used for date fields, for example use Is not null if you want only participants with a date in the Exam Date field.
- Matches pattern and Does not match pattern are used with a “wild card” symbol, %. For example if you wanted to count attendance at all of your group classes without listing them all, you can write the condition as Matches pattern G%.
- Both is used when you want to query for participants who have two possible options for an object, such as Risk code. For example, you can query for a list of participants that have both anemia, B12, and under weight, A10. Just like In List, put a comma between the two objects.
- Except is like Different from, but it takes longer to run. For this reason, using Except is not recommended.



Once you have made a selection from the Equal to drop down list, click on the blank space between the single quotes. Four options are presented.

- Use Enter a constant to specify the definition when you create the query, such as 001 for a report that will always be for clinic 001.
- Use Show a list of values when you are not sure of the choices and want to see a list of options to select from. For Clinic ID, this will bring up a list of all your clinic numbers.
- Use Prompt list of values if you want to see the list of choices every time you run the query. This will let you run the same report for different clinics.
- Use Enter a prompt when you want to run the same query for different options. You will be prompted to type in your choice every time the query runs. This is useful for reports that you will run over again every day or every month. You can enter the condition when the report runs without having to go in and edit on the conditions tab. You can use the same report for different dates, risk codes, clinics, etc.

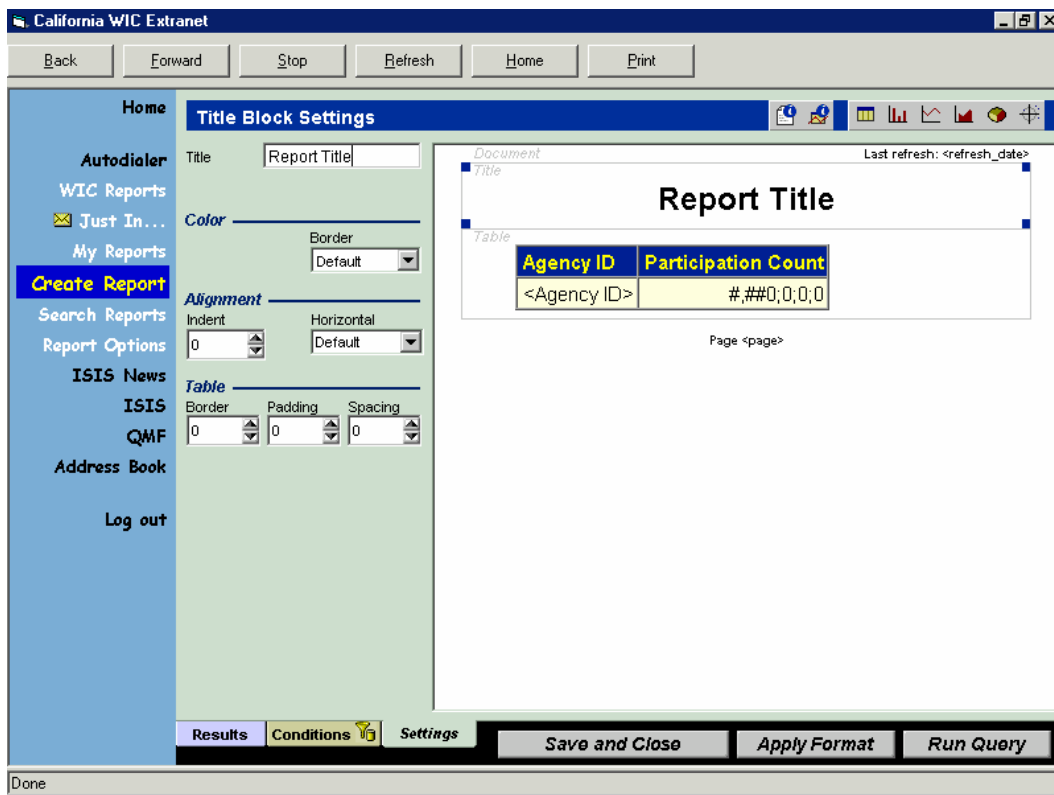
Open the Agency Snapshot universe and explore the different data objects available on the Results tab and the Conditions tab. This universe has a long list of folders. Objects from different folders can be used in the same report.

Explore the other universes. The Breastfeeding Summary, Combination Feeding Summary, Participation Universe, Participation WIC Reports Universe and the Unissued Prescription Detail universe each contain only one folder of information.

6.3 Settings Tab

Use the Settings tab to format your report. You can change font or colors, add a title, add, edit and delete headers and footers, center the report or column headings, or change the margins.

Click your mouse on the area you wish to change in the white portion of the screen. A tailored group of editing options will appear in the green panel based upon where you click the mouse in the white section. For example, when you click in the Title section, editing options for the Title appear. Make your changes on left side green panel on the Settings tab. After making your changes, click on Apply Format to see the changes displayed on your report.



Tip:

If you plan to download your report as data to Excel so that you can manipulate the data, there is no need to format the report on the Settings Tab. None of the formatting will be retained when you download the report. If you wish you can format the data within Excel for your final report.

If you plan to download your report as HTML, all of your fancy formatting will be retained, but you will not be able to change it once it is downloaded.

7 How to Design and Create Reports

7.1 Using the Participation Universe to Create a Report

All reports that you generate begin with a question. Identifying the question is the first step to creating a successful query.

7.1.1 Step 1: What is the Question?

You want to know, for last month, how many infants, by age in months were exclusively breastfeeding, combo-feeding or formula feeding.

Where will you start? What universe will you use? Which folder will you use?

Remember, you are looking for counts and not individual detailed information about the infants.

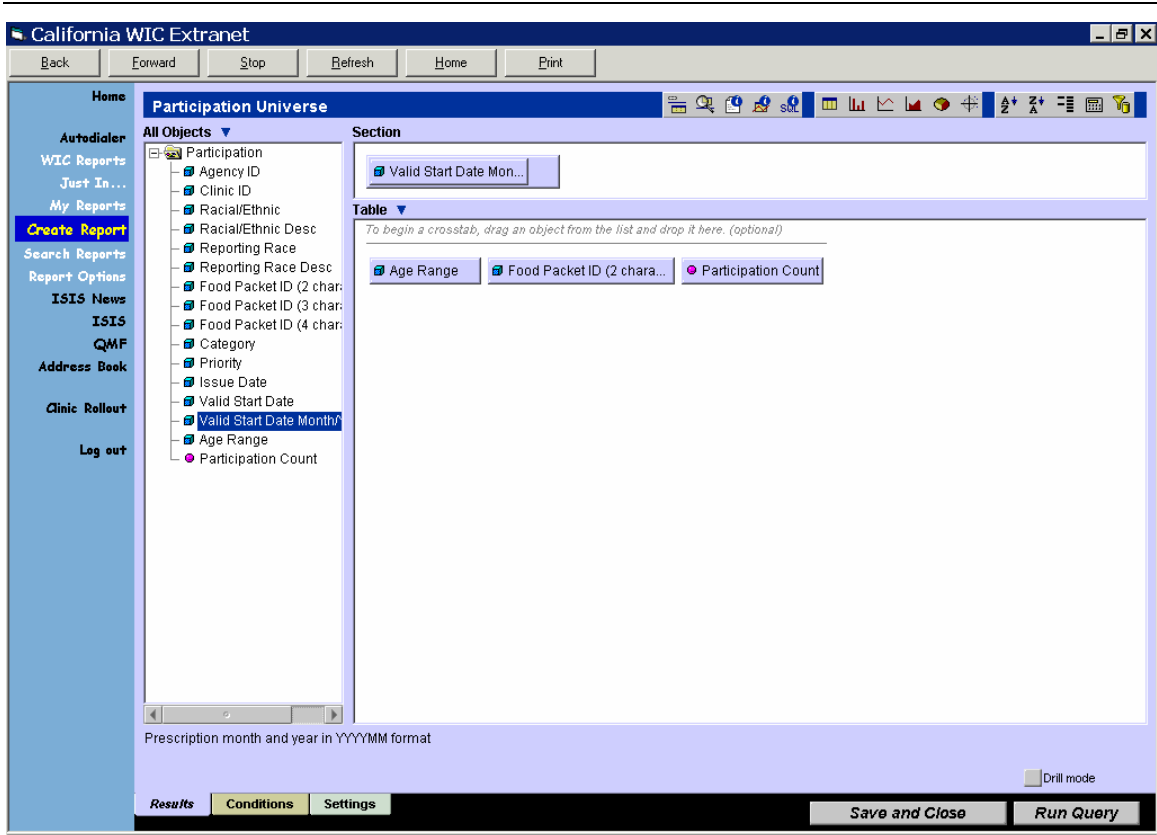
You have probably guessed that you want to select the Participation Universe. After selecting the universe, the default will be on the Results tab, with the folder open. This is the starting point for the query.

You are ready to drag and drop data elements into the Table area and/or Section area of the Results tab to create the foundation of your report.

7.1.2 Step 2: Selecting Objects to Begin the Report

To answer the question above, there are four objects that you need in your report. As you analyze the question, figure out which objects to select.

- You want to know something about infants by age and months, therefore, you want to drag and drop the Age Range object to the Table area.
- You want to know the type of food packet issued to infants, but just the first two characters that tell you the feeding method. Therefore, you want to drag and drop the Food Packet ID (2 Char), which for infants will return IB, IC, IF, and IT.
- You want to know how many infants received the various food packets, so you must select a measure or count (pink dot). Drag and drop Participation Count into the Table area.
- You want the information for last month, so select Valid Start Date-Month Year and drag this object to the Section area.

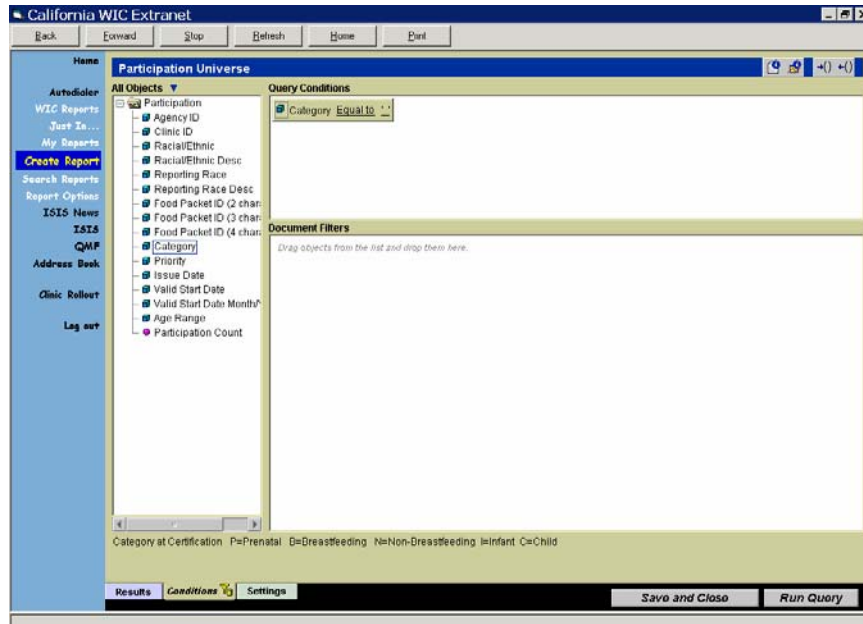


7.1.3 Step 3: Applying Conditions to the Report

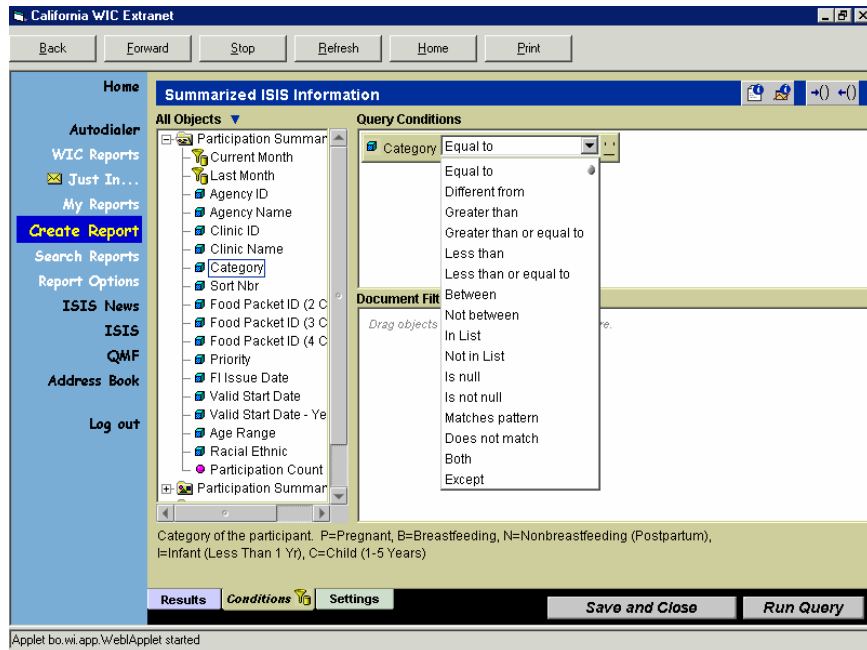
You apply conditions to a query in order to limit the results to the information you want. For example, in this case you want information only on infant food packets and you want information only for last month.

In this example, there are two Conditions to apply to the query.

You are interested in the information for the infant category. You must tell the query to look only for participants in the category called Infant. Drag and drop the Category object into Query Conditions, as shown in the example on the next page, for the first condition.



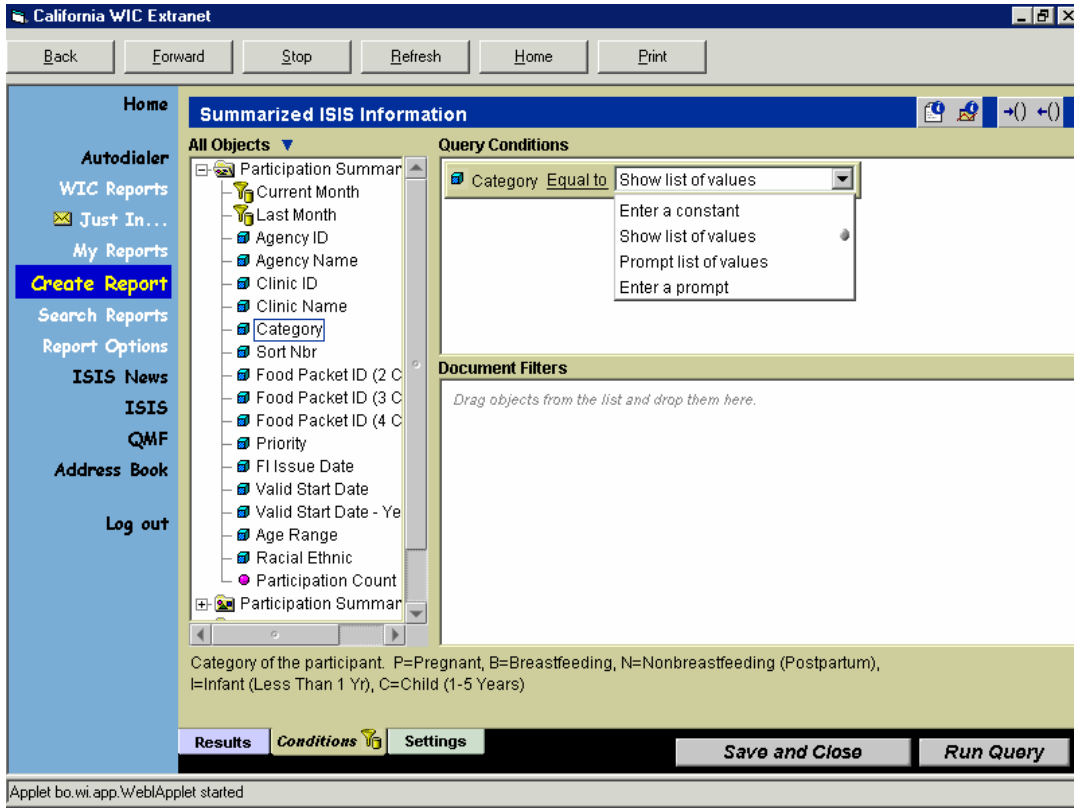
Once you drag the Category object over, the default Equal to ' ' appears. When you click on Equal to, a list of options appears, as shown below.



In this example, you want to select Equal to, since you want to make the Category equal to Infants.

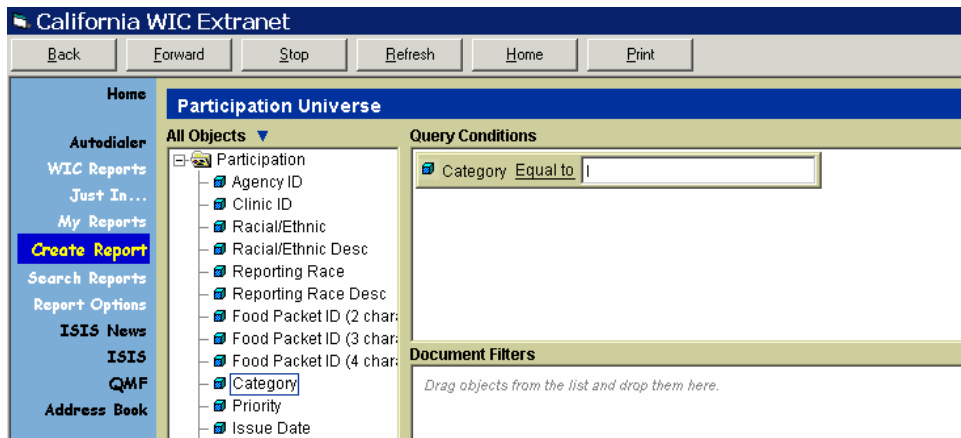
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When you click on the ‘_’, another drop down list of prompt values appears.



Select Enter a constant.

When you do this, a text box appears where you can type in the Category you want, I. Remember to capitalize the category code.



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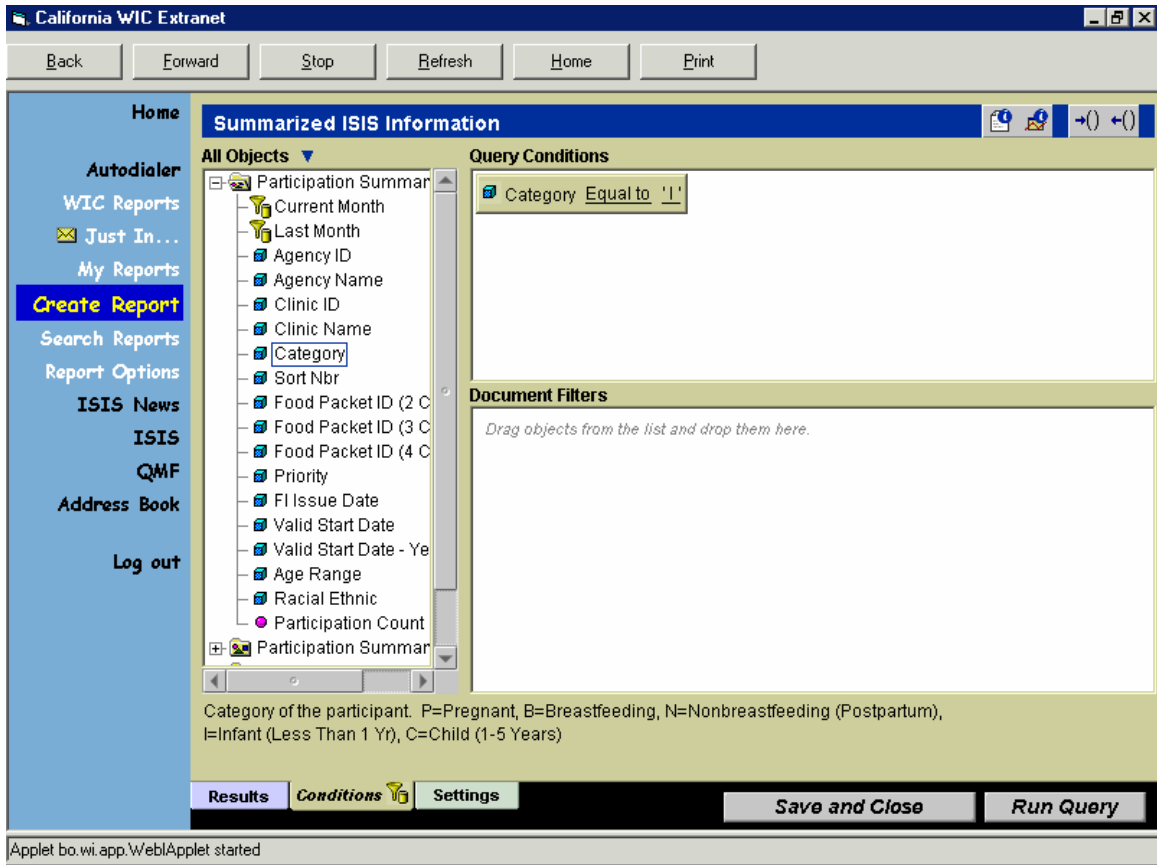
Another option is to select Show list of values instead of Enter a Constant. A list of all the category choices appears. Select the I for Infant and click on OK as shown in the screen below.

The screenshot shows the California WIC Extranet interface. The main window is titled "Summarized ISIS Information". On the left, there is a navigation menu with options like "Home", "Autodialer", "WIC Reports", "Just In...", "My Reports", "Create Report", "Search Reports", "Report Options", "ISIS News", "ISIS", "QMF", "Address Book", and "Log out". The main area is divided into "All Objects" and "Query Conditions". The "All Objects" list includes "Participation Summar", "Current Month", "Last Month", "Agency ID", "Agency Name", "Clinic ID", "Clinic Name", "Category", "Sort Nbr", "Food Packet ID (2 C)", "Food Packet ID (3 C)", "Food Packet ID (4 C)", "Priority", "FI Issue Date", "Valid Start Date", "Valid Start Date - Ye", "Age Range", "Racial Ethnic", "Participation Count", and "Participation Summar". The "Query Conditions" section shows a condition for "Category" set to "Equal to" with a dropdown menu set to "Show list of values". A "Select a Value" dialog box is open, showing a list of categories: B, C, I, N, P. The "I" category is highlighted. Below the dialog, a legend explains the categories: P=Pregnant, B=Breastfeeding, N=Nonbreastfeeding (Postpartum), I=Infant (Less Than 1 Yr), C=Child (1-5 Years). The interface also includes buttons for "Results", "Conditions", "Settings", "Save and Close", and "Run Query".

Tip:

Categories in ISIS can be typed in as their capital letters: P, B, N, I, C.

Once you type in the desired category, the condition prompt will look like the view below.



You have finished applying the specific category of Infants to the query.

Tip:

When using query conditions:

1. When you click and get a drop down list, you must click on an item in the list, even if it already appears selected as the default.
2. All constants are CAP sensitive and letters need to be capitalized.
3. Equal To is used for one constant.
4. In List is used for more than one constant. When entering more than one constant, separate them with a comma (,). For example, if you want the two categories, Pregnant and Breastfeeding, type P,B. Do not put in a space. (Exception: if you use Enter a Prompt, when you run the query and are prompted for the condition, use a semi-colon instead of a comma between items in the list, for example P;B).
5. For dates, separate the month, day, and year with either a hyphen (-) or a forward slash (/). October 5, 2006 can be either 10-5-2006 or 10/5/2006. Be sure to include the full four digit year.
6. Format the condition the way it will appear on the report. For example to put a condition on Age YY-MM Current, write the condition as 03-00 for age 3.

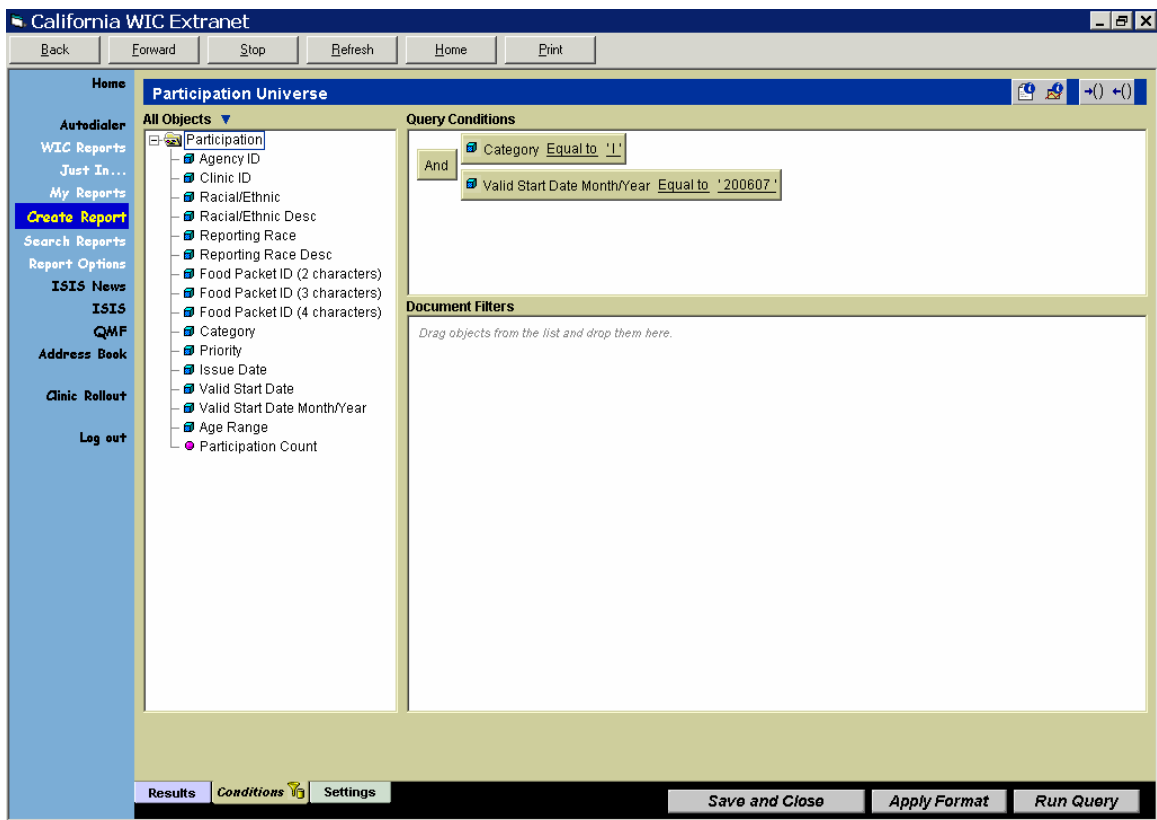
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For the second condition to this query you want just the information for prescriptions for last month. Looking at the objects within the first folder and you will see one called Valid Start Date Month/Year. Drag and drop it into the Query Conditions area.

While the object is highlighted, look in the lower left area of the screen and you will see the object description, "Prescription month and year in YYYYMM format." When you define the condition, you must write the month you want in that format.

Choose Equal to and then type the year and month for last month as YYYYMM, for example 200607 for July 2006.

Your screen should look like the view below.



You have now finished applying the conditions to limit the data in this query to the information you want.

7.1.4 Step 4: Running the Report

At this point, you can run the report. Click on the Run Query button on the bottom right of the screen.

The report will appear as shown on the next page.

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California WIC Extranet

Back Forward Stop Refresh Home Print

Home < Download Drill Refresh Edit Save Send <

Last refresh: 8/24/2006 04:24:46 PM

200607

Age Range	Food Packet ID (2 characters)	Participation Count
M00<01	IB	46
M00<01	IC	56
M00<01	IF	30
M01<02	IB	56
M01<02	IC	78
M01<02	IF	56
M02<03	IB	63
M02<03	IC	76
M02<03	IF	66
M03<04	IB	41
M03<04	IC	63
M03<04	IF	70
M04<05	IB	38
M04<05	IC	52
M04<05	IF	60
M05<06	IB	45
M05<06	IC	48
M05<06	IF	78
M06<07	IB	28
M06<07	IC	39
M06<07	IF	82
M07<08	IB	35
M07<08	IC	45
M07<08	IF	85

This report is rather difficult to read since some of the column information is redundant. The ages are repeated for each packet type and packet types are repeated for different ages. Reformatting the report can make it more readable.

For example, you will remember we placed the data object Valid Start Date Year Month in the Section area on the Results tab. It appears once at the top of the page instead of as a column. This creates a heading with the year and month for this report. In this example for July 2006, 200607 is at the top of the page.

To do more formatting select the Edit button at the upper right of the screen and return to the Results tab.

7.1.5 Step 5: Creating a Cross-Tab Report

A cross-tab with rows and columns will display the data in a more readable format. When designing a cross tab, it is generally recommended to put the object with the longer list of data on the left side and the object with the shorter list of data across the top. To create a cross-tab, drag the Food Packet ID object above the gray line at the top of the Table area. In a cross tab, always place a Count (pink dot) in the lower right hand area.

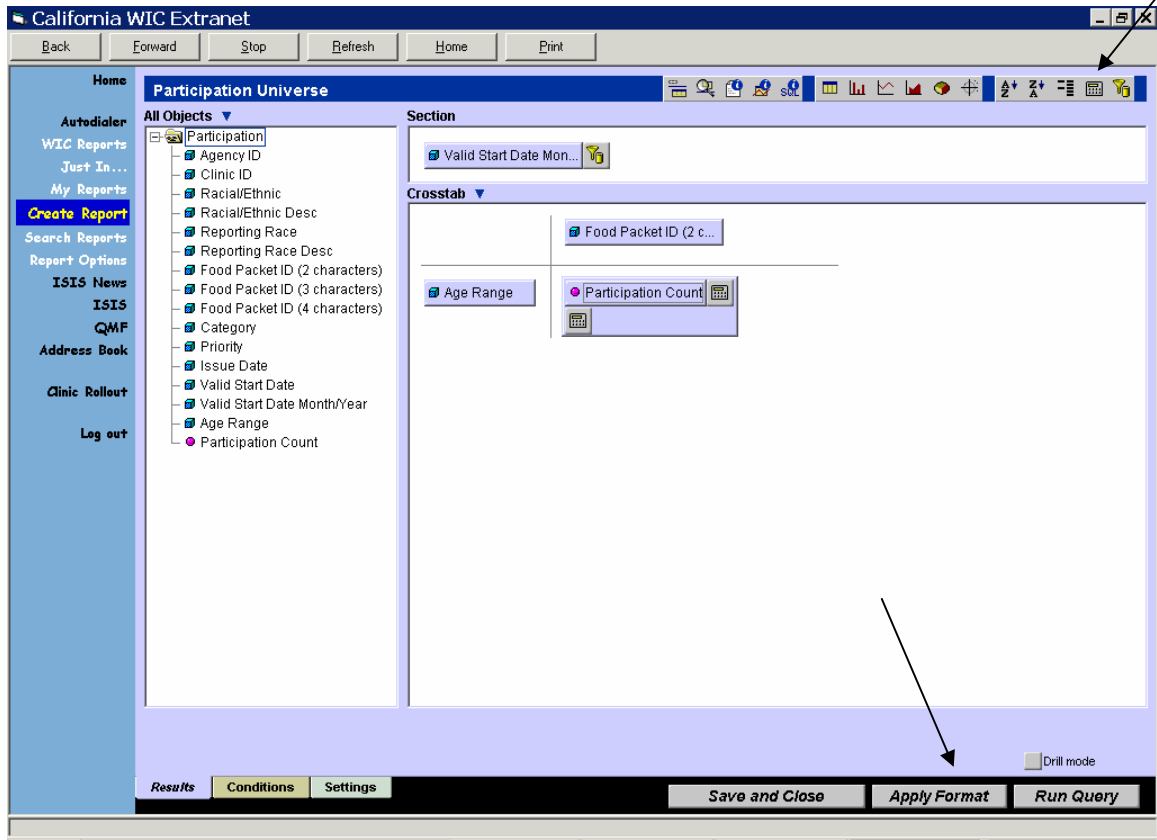
When you make a cross tab, you also want to have totals for each column and row. To do this, click on the Participation Count to open it. Then click twice on

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the calculator icon in the upper right corner of the screen. The calculators will add row and column totals to your report.

You can experiment with your queries to see what your report looks like by putting different objects into a cross tab table.

Your screen should look like the view below.



The first time you run a report, the Run Query button will be the only option available. After running the query, you can make formatting changes by selecting the Edit button at the upper right of the screen. As long as you do not add new objects or conditions, the Apply Format button will appear. Since the data for the report has already been retrieved from the database it is not necessary to run the query again. The Apply Format option quickly rearranges the data display according to your edits.

Always select the Apply Format button if it appears as an option. If the Apply Format button is grayed out, select Run Query.

The report will return in the new format as seen below.¹

	IB	IC	IF	IT	Sum:
	Participation Count	Participation Count	Participation Count	Participation Count	
M00<01	46	56	30		132
M01<02	56	78	56		190
M02<03	63	76	66		205
M03<04	41	63	70		174
M04<05	38	52	60		150
M05<06	45	48	78		171
M06<07	28	39	82		149
M07<08	35	45	85		165
M08<09	31	45	81		157
M09<10	31	38	104		173
M10<11	33	34	96		163
M11<12	13	14	52	78	157
Y01<02			1	55	56
Sum:	460	588	861	133	2,042

Page 1

To print the report, first click anywhere on the report to select it. This will prevent printing extra unwanted pages. Then click the gray Print button at the center top of the screen.

You can also save this report to My Reports by selecting the Save button at the upper right of the screen.

7.2 Using the Agency Snapshot Universe to Create a Report

All reports that you generate begin with a question. Identifying the question is the first step to a successful query.

7.2.1 Step 1: What is the Question?

You want to apply for a grant for overweight children. You would like to know which clinic has the highest percentage of overweight children. You need to know how many children are in each clinic in your agency and how many overweight children are in each clinic.

¹ Notice that most of the 11-12 month old infants received an IT packet. With an IT packet you cannot tell if they were breastfeeding or not. This data is only valid up to age M10<11 to determine breastfeeding rates.

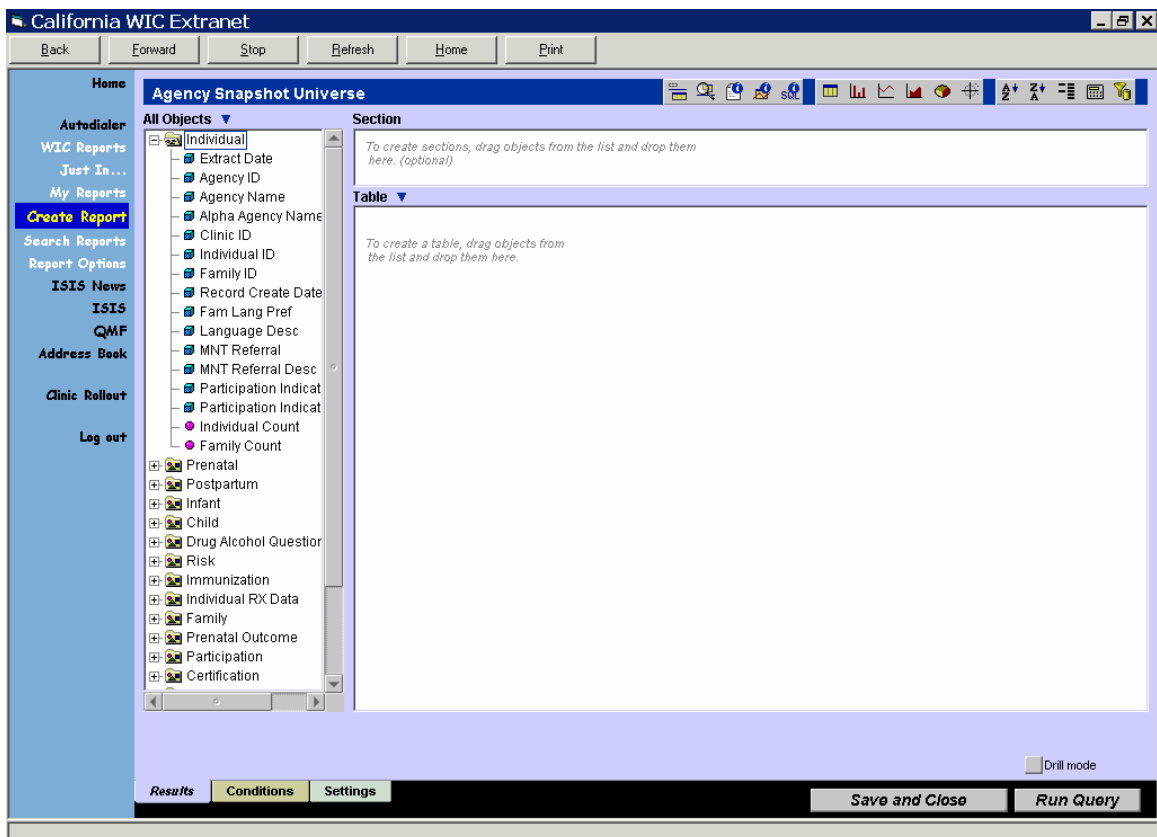
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Where will you start? What universe will you use? Which folder(s) will you use?

You are looking for a count, but you also want information about specific participants in your agency.

In this case, you can use either the ISIS Reporting Information universe or the Agency Snapshot universe. Both have the data objects you need to answer the questions. However, the Agency Snapshot universe has a consolidated data object that can give you all the information you need in one query.

Select the Agency Snapshot universe. You are ready to drag and drop the data objects to the Table area and/or Section area of the Results tab to create the foundation of your report.

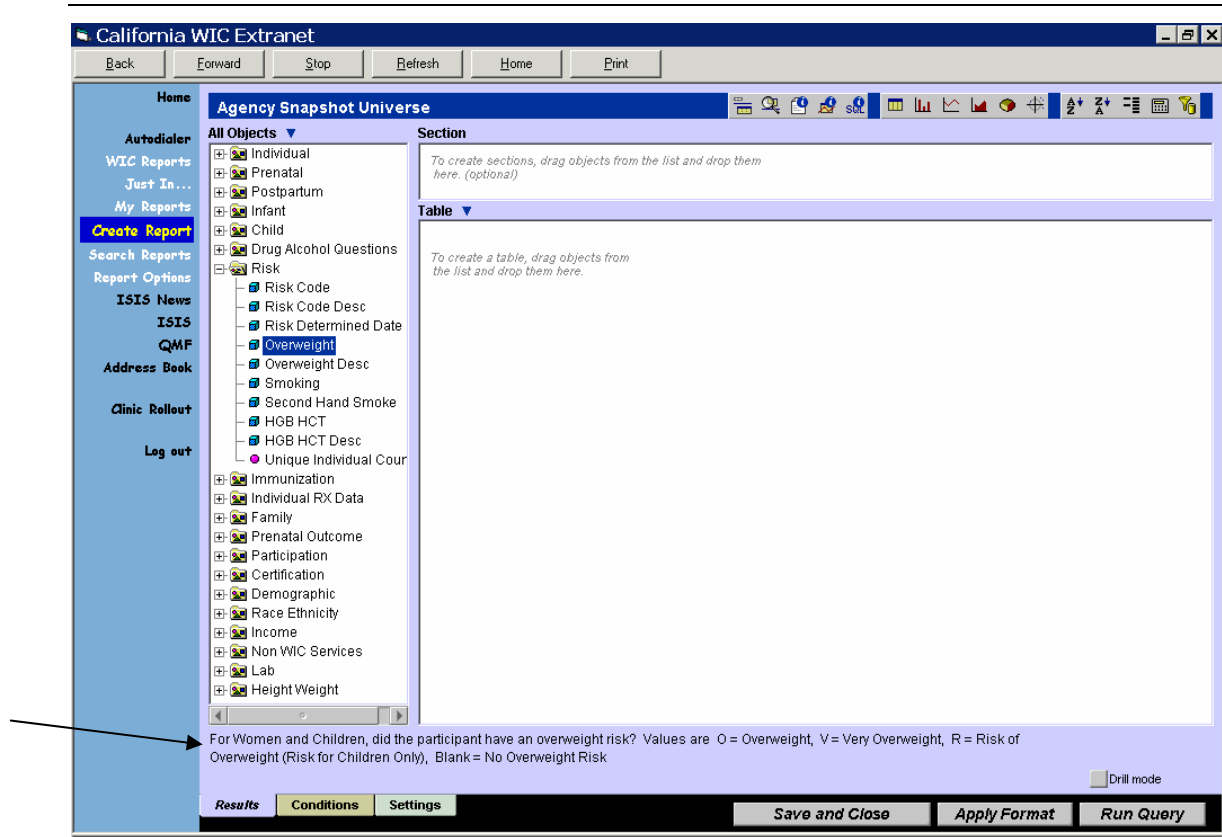


7.2.2 Step 2: Selecting Objects to Begin the Report

To determine the percent of overweight children at each clinic, you need to know the total number of children in each clinic and the number of overweight children by clinic

Find the Risk folder and open it. Highlight the data object Overweight and read the definition in the lower part of the screen.

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This is a consolidated data object that will return the number of overweight, at risk of overweight and those with no overweight risk. This is exactly what you need. Drag this data object to the Table section.

You also need a count (pink dot), so drag the data object for Unique Individual Count to the Table section.

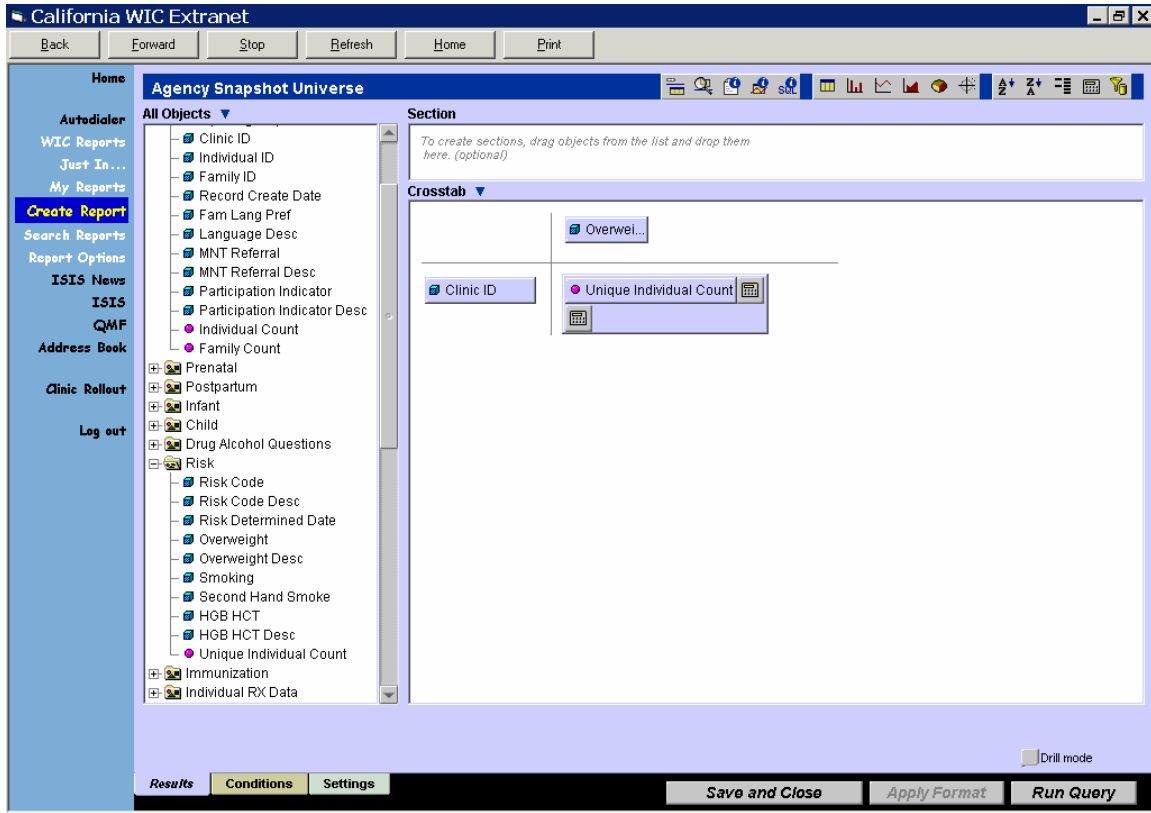
The data object for clinic is in the Individual folder at the top of the list. Add it to the table section.

Tip:

In this universe you can combine objects from one folder with those in another folder in the same query.

Now format the report into a cross tab, add the calculators and check your results with the example on the next page.

Your screen should look like this.



7.2.3 Step 3: Applying Conditions to the Report

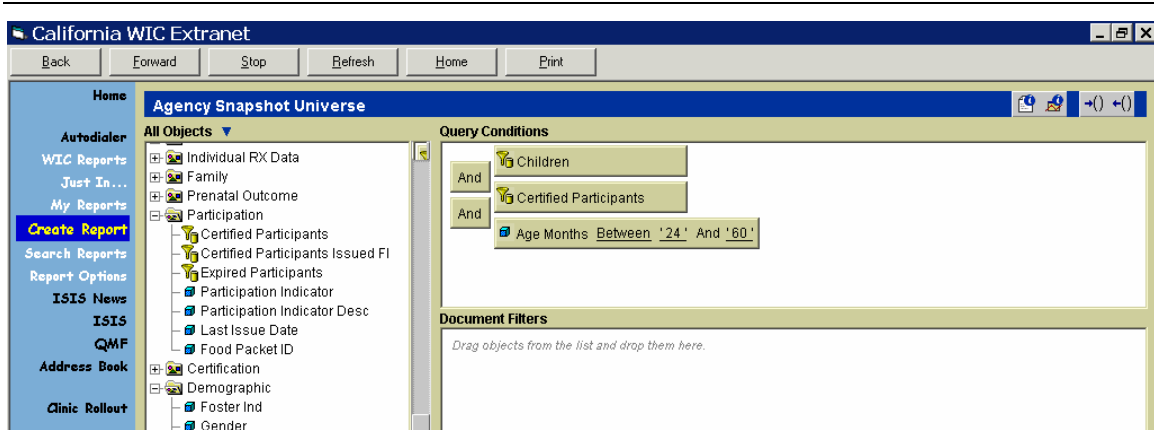
Go to the Conditions tab. In this report, you want only the number of children. Select the predefined condition Children from the list of objects within the first folder and drag it to Query Conditions.

The data object, Unique Individual Count, counts All Records, which includes certified participants as well as expired records. We want to count only the number of children who are currently enrolled in the program, (Certified Participants). To do this, find the Participation folder, and drag the data object for the predefined condition, Certified Participants to Query Conditions.

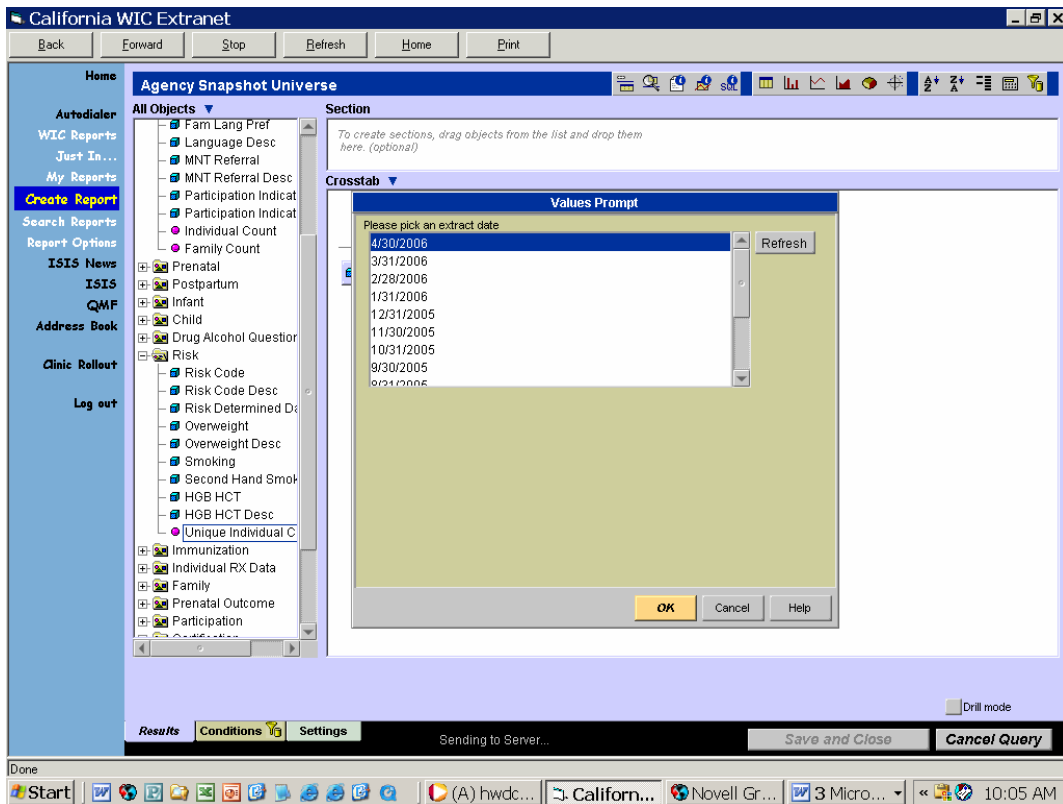
Also remember that children under age two cannot have an overweight risk in ISIS. If we include them in the count of children, the percent of overweight children will be artificially low. To exclude them, go to the Demographic folder on the Conditions tab and select Age Months. Select Between from the drop down list, and write 24 in the first blank space and 60 in the second space.

Compare your work to the example on the next page.

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At this point, you can run the report. Click on the Run Query button on the bottom right of the screen. A Values Prompt pop up box appears. There will be list of extract dates to choose from. These are the dates that the monthly snapshots of ISIS data were taken. Choose the most recent date available.



Once you have selected an extract date, click OK and the report will run. Wait for the results to appear.

Your report should look like the display on the next page.

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The screenshot shows the California WIC Extranet interface. At the top, there is a navigation bar with buttons for Back, Forward, Stop, Refresh, Home, and Print. Below this is a menu bar with options: Home, Download, Drill, Refresh, Edit, Save, and Send. A sidebar on the left contains a list of menu items: Autodialer, WIC Reports, Just In..., My Reports, Create Report (highlighted), Search Reports, Report Options, ISIS News, ISIS, QMF, Address Book, Clinic Rollout, and Log out. The main content area displays a table with the following data:

	O	R	Sum:
	Unique Individual Count	Unique Individual Count	Unique Individual Count
001	1481	433	381 2295
002	224	79	63 366
003	332	90	67 489
006	28	5	4 37
Sum:	2065	607	515 3187

Page 1

Last refresh: 5/17/2006 10:10:21 AM

7.2.4 Step 4: Setting Up the Format for the Report

This report tells you the number of children who are overweight, at risk of overweight and not overweight. However, in order to determine which clinic has the highest rate of overweight, we need to add percentages.

Click on Edit on the black menu bar to return to the Results tab where the foundation of your report is displayed. Triple left click on the calculator to the right of the Unique Individual Count. A Calculations option list will be displayed. Check the box next to Percentages and click OK. See the example on the next page.

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The screenshot shows the 'California WIC Extranet' interface. The main window is titled 'Agency Snapshot Universe'. On the left, there is a navigation menu with options like 'Home', 'Autodialer', 'WIC Reports', 'Just In...', 'My Reports', 'Create Report', 'Search Reports', 'Report Options', 'ISIS News', 'ISIS', 'QMF', 'Address Book', 'Clinic Rollout', and 'Log out'. The main area is divided into 'All Objects' and 'Section'. The 'All Objects' list includes 'Individual', 'Extract Date', 'Agency ID', 'Agency Name', 'Alpha Agency Name', 'Clinic ID', 'Individual ID', 'Family ID', 'Record Create Date', 'Fam Lang Pref', 'Language Desc', 'MNT Referral', 'MNT Referral Desc', 'Participation Indicat', 'Participation Indicat', 'Individual Count', and 'Family Count'. The 'Section' area contains a 'Crosstab' table with 'Clinic ID' as the column and 'Unique Individual Count' as the row. A 'Calculations' dialog box is open, showing a list of functions to apply: 'Sum' (checked), 'Count', 'Average', 'Minimum', 'Maximum', and 'Percentage' (checked). The dialog has 'OK', 'Cancel', and 'Help' buttons.

When you apply format, you will see the percentage of children in the various weight categories for each clinic. In the example below, the children at clinic 002 have the highest rate of overweight and risk of overweight.

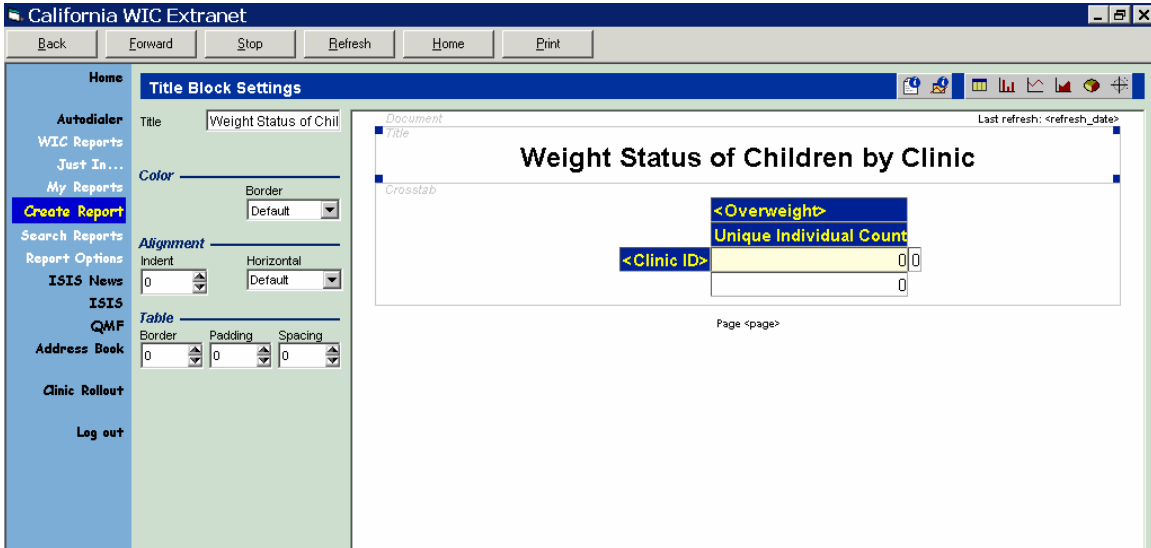
What did you learn about the children at your agency?

The screenshot shows the 'California WIC Extranet' interface displaying a data table. The table has columns for 'Unique Individual Count', 'O', 'R', 'Sum', and 'Percent'. The data is organized by clinic ID. The 'Sum' row at the bottom shows a total of 2065 for 'Unique Individual Count', 607 for 'O', 515 for 'R', and 3187 for 'Sum'. The 'Percent' column shows values for each clinic: 72.01% for 001, 11.48% for 002, 15.34% for 003, and 1.16% for 006. The interface also shows a navigation menu on the left and a 'Download Drill Refresh Edit Save Send' button at the top right. The last refresh time is 5/17/2006 10:10:21 AM.

	Unique Individual Count	O	R	Sum	Percent	
001	1481	433	381	2295	72.01 %	
002	64.53 %	18.87 %	16.60 %	63	366	11.48 %
003	224	79	67	489	15.34 %	
006	61.20 %	21.58 %	17.21 %	4	37	1.16 %
003	332	90	67	489	15.34 %	
006	67.89 %	18.40 %	13.70 %	4	37	1.16 %
006	28	5	4	37	1.16 %	
Sum:	2065	607	515	3187		

7.2.5 Step 5: Using the Settings Tab to Change the Report Appearance

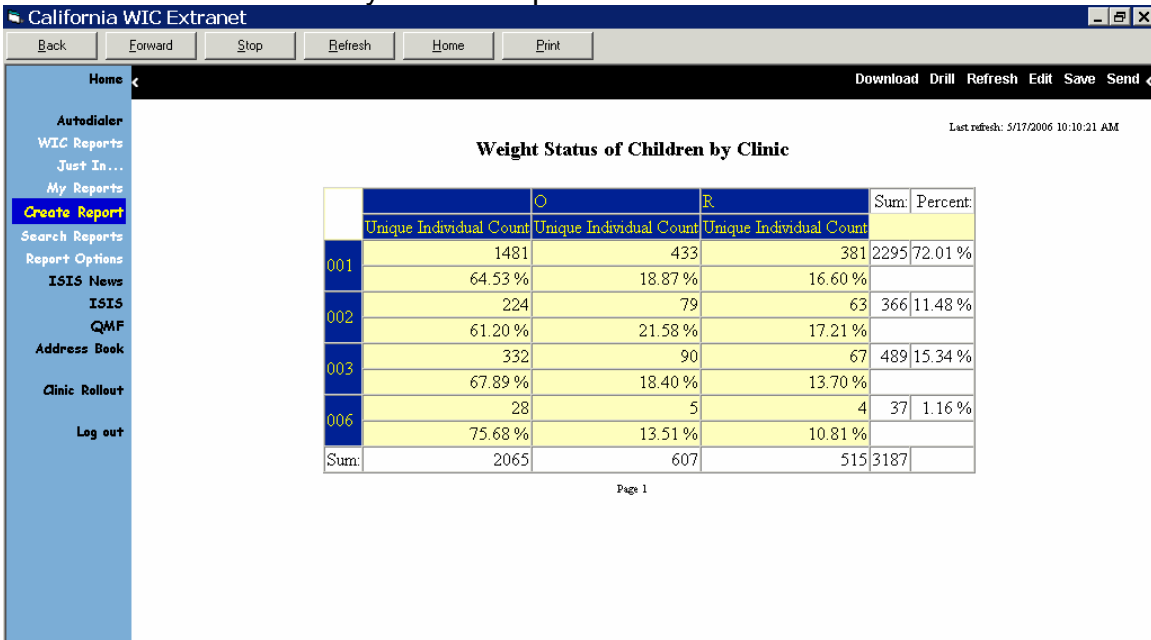
To add a title to the report, click on the Settings tab. Click on the white Title section. Click in the Title text box in the left side green panel area. Type the desired report title in this text box. In the example below, we typed the title **Weight Status of Children by Clinic**.



To center the report under the title, click in the white area of the Crosstab box. Go to the Horizontal box in the green panel area and click on the drop down arrow to select Center.

Select the Apply Format button and the title will be displayed in your report.

The screen below shows your final report.



To print the report, click on the report to select it and then click Print on the gray button at the top of the screen.

To save the report in My Reports, click on Save at the upper right of the screen.

Run the report again and choose the extract date for one year ago. Compare the rates of childhood overweight.

8 Downloading a Report

Hurray! You got the obesity grant. Now you want to pilot some family centered childhood obesity classes for the three and four-year-old children at clinic 002. Invitations to the special classes will be mailed to the families. You need to know the primary language so the flyer will be in the correct language. You also want to specify the child's name so the families will bring the right child to the group.

8.1 Using the ISIS Reporting Universe to Create a Report

Let's create a report to produce a mailing list and gather information about just the overweight children at clinic 002. We will create a database of overweight children at this clinic that can be downloaded into Excel.

8.1.1 Step 1: What are the questions?

- Who are the three and four-year old overweight children at clinic 002?
- What are the names and addresses of the families at clinic 002 with these overweight children?
- What is the primary language of each family?

For this query, we will use the ISIS Reporting Information Universe. The address fields in this universe are updated every few minutes, while those in the Agency Snapshot Universe are only updated once a month.

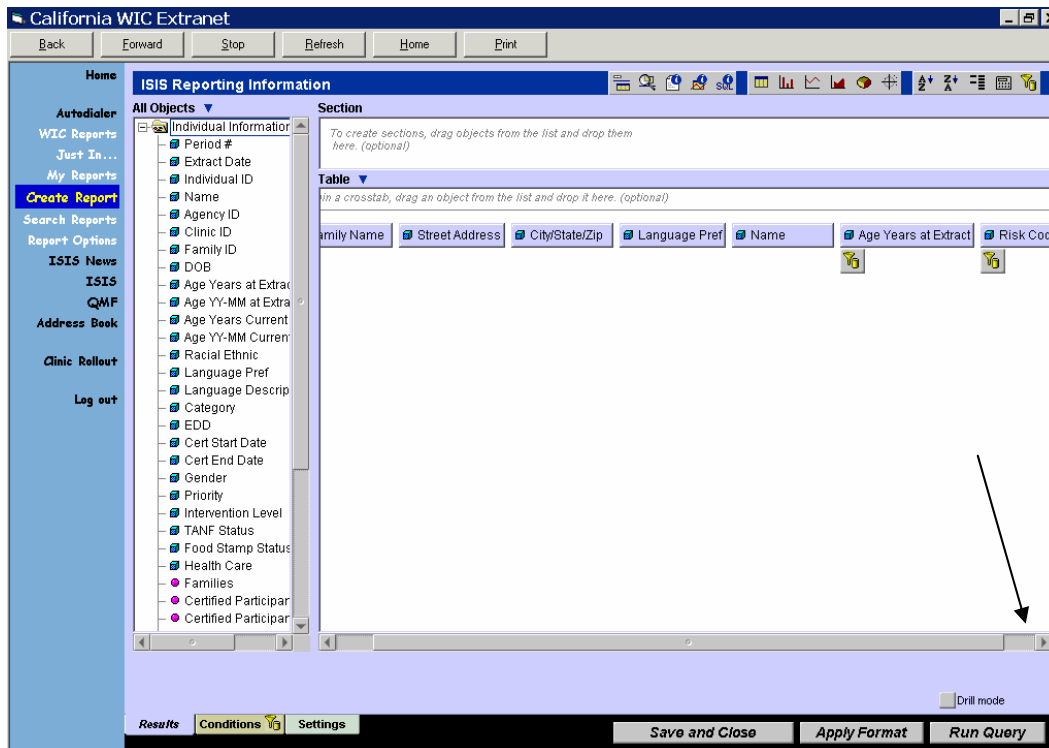
Go to Create Reports and select the ISIS Reporting Information Universe.

8.1.2 Step 2: Selecting Objects to Begin the Report Foundation

Since address is part of the family record in ISIS, open the Family Information folder to see the list of data objects. Drag and drop the objects for Family Name, Street Address and City/State/Zip to the Table section. These three data objects have all the information you need to make mailing labels. Just line them up in one long row.

Next drag and drop the object for Language Pref into the Table Area.

From the Individual Information list, add the objects for Name and Age in Years at Extract. From the Risk Information subfolder, select Risk Code and add it to the Table section. Compare your work to the one on the next page.



Tip:

Note that as more objects are added to the row, a scroll bar at the bottom of the Table Area appears and allows you to view the objects to the right. (Arrow)

8.1.3 Step 3: Applying Conditions to the Report

Go to the Conditions Tab. What conditions do you want to set to limit the data in your query?

- Limit the report to children.
- At clinic 002
- 3 and 4-year-olds
- Just the children who are overweight or at risk of overweight.

On the Conditions tab, drag and drop the predefined condition Children into the Query Condition area.

Next drag the object for Clinic ID into the Query Condition area. Click on the blank space with the single quotes and select Enter a Constant. Add the desired clinic ID by typing in 002.

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Tip:

You can set conditions on objects that are not in your report. In this example, Clinic ID is not on the Results tab and will not appear on your report. However, only information for clinic 002 will be returned when you run the query.

Drag and drop Age Years at Extract to the Query Conditions area. Click on Equal to and select Between from the drop down list. Two blank lines with single quotes will appear. Click on the first blank line, select Enter a Constant and type in a 3. Click on the second blank line, select Enter a Constant and type in a 4.

Tip:

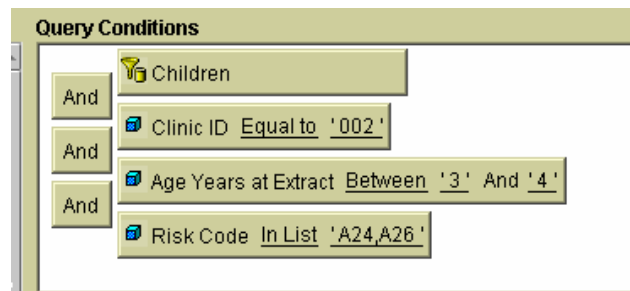
When putting a condition on numbers and dates always use Between, Not Between, Greater Than, Greater Than or Equal to, Less Than, Less Than or Equal to, instead of In List.

Next we want to place a condition so that only the children who are overweight or at risk of overweight will appear. In this universe, we have to do this by putting a condition on Risk Code. The Risk Codes for Overweight and Risk of Overweight are A24 and A26.

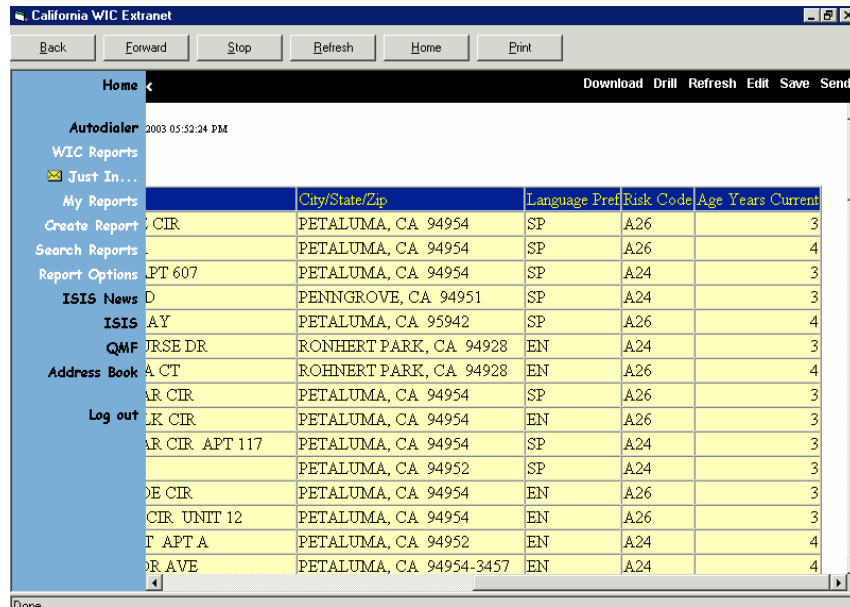
Let's try another way to set this condition. Go back to the results tab and click on the Risk Code box in the Table area to open it. Then click on the predefined condition icon in the upper right corner. This will automatically take you back to the conditions tab and places Risk Code in the Query Conditions area. All you have to do is fill it in.

Click on the Equal to and select In List from the drop down list. Type in A24,A26. Remember to capitalize the letters and do not put a space between the items.

Your conditions should now look like the example below.



Run Query and the results will look something like the example on the next page. This example shows only the far right of the report and names have been removed to protect the privacy of the participants.



The screenshot shows the California WIC Extranet interface. At the top, there are navigation buttons: Back, Forward, Stop, Refresh, Home, and Print. Below these is a black bar with the text 'Download Drill Refresh Edit Save Send'. The main content area displays a table of reports. The table has columns for 'City/State/Zip', 'Language Pref', 'Risk Code', 'Age Years', and 'Current'. The data rows are as follows:

	City/State/Zip	Language Pref	Risk Code	Age Years	Current
Autodieler					
WIC Reports					
Just In...					
My Reports					
Create Report	CIR	PETALUMA, CA 94954	SP	A26	3
Search Reports		PETALUMA, CA 94954	SP	A26	4
Report Options	PT 607	PETALUMA, CA 94954	SP	A24	3
ISIS News	D	PENNGROVE, CA 94951	SP	A24	3
ISIS	AY	PETALUMA, CA 95942	SP	A26	4
QMF	IRSE DR	RONHERT PARK, CA 94928	EN	A24	3
Address Book	A CT	RONHERT PARK, CA 94928	EN	A26	4
Log out	AR CIR	PETALUMA, CA 94954	SP	A26	3
	AK CIR	PETALUMA, CA 94954	EN	A26	3
	AR CIR APT 117	PETALUMA, CA 94954	SP	A24	3
		PETALUMA, CA 94952	SP	A24	3
	DE CIR	PETALUMA, CA 94954	EN	A26	3
	CIR UNIT 12	PETALUMA, CA 94954	EN	A26	3
	T APT A	PETALUMA, CA 94952	EN	A24	4
	OR AVE	PETALUMA, CA 94954-3457	EN	A24	4

8.2 Downloading Data

You have two options for downloading your report to your PC.

- You can download the data for use in other applications such as MS-Excel and MS-Word. Your results will look like a database table and you will be able to manipulate and format the data as you wish.
- You can also download the report as HTML. In this case, the report will look much like it did in the ExtraNet. You will not be able to manipulate the data, but you can attach the report to email to send to others. This does not work for reports that are more than one page long. Only the first page will be downloaded.

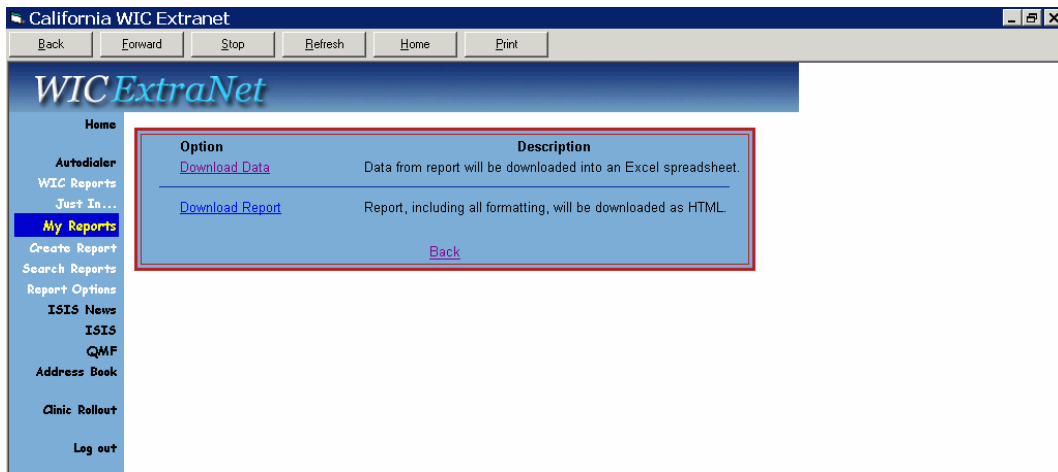
In this example, we will download the data.

Tip:

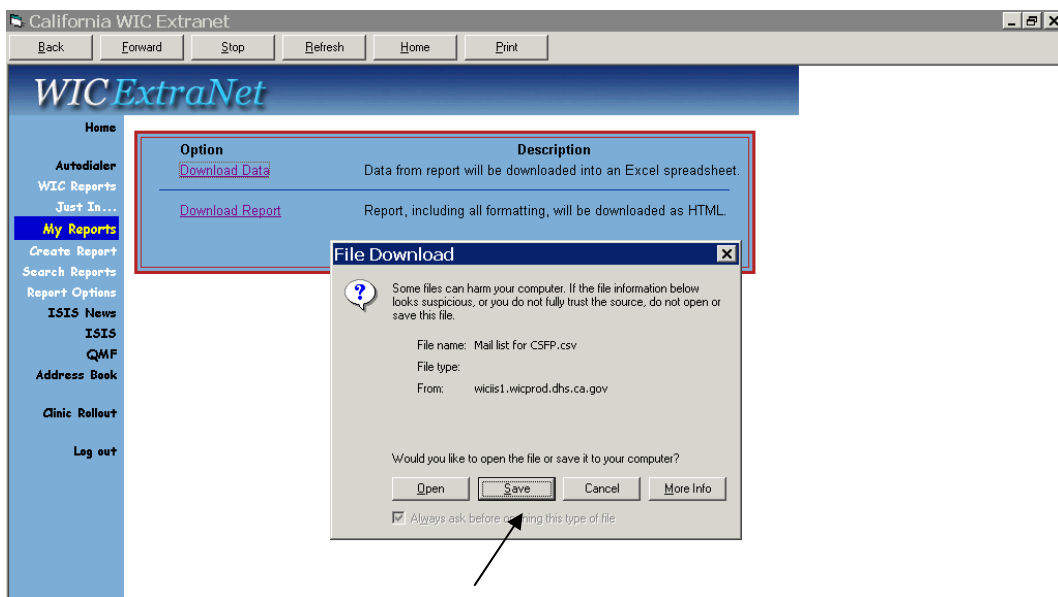
You can only download reports to the C drive of your PC. If you are on a local network and you normally save your work to a network drive, you will have to download and save the report to your C drive first. Once it is on your hard drive, you can save it to your network drive. The first time you download data, set up a folder on your C drive called Extranet Downloads.

To download the report click Download on the Black Bar. On the next screen choose Download Data.

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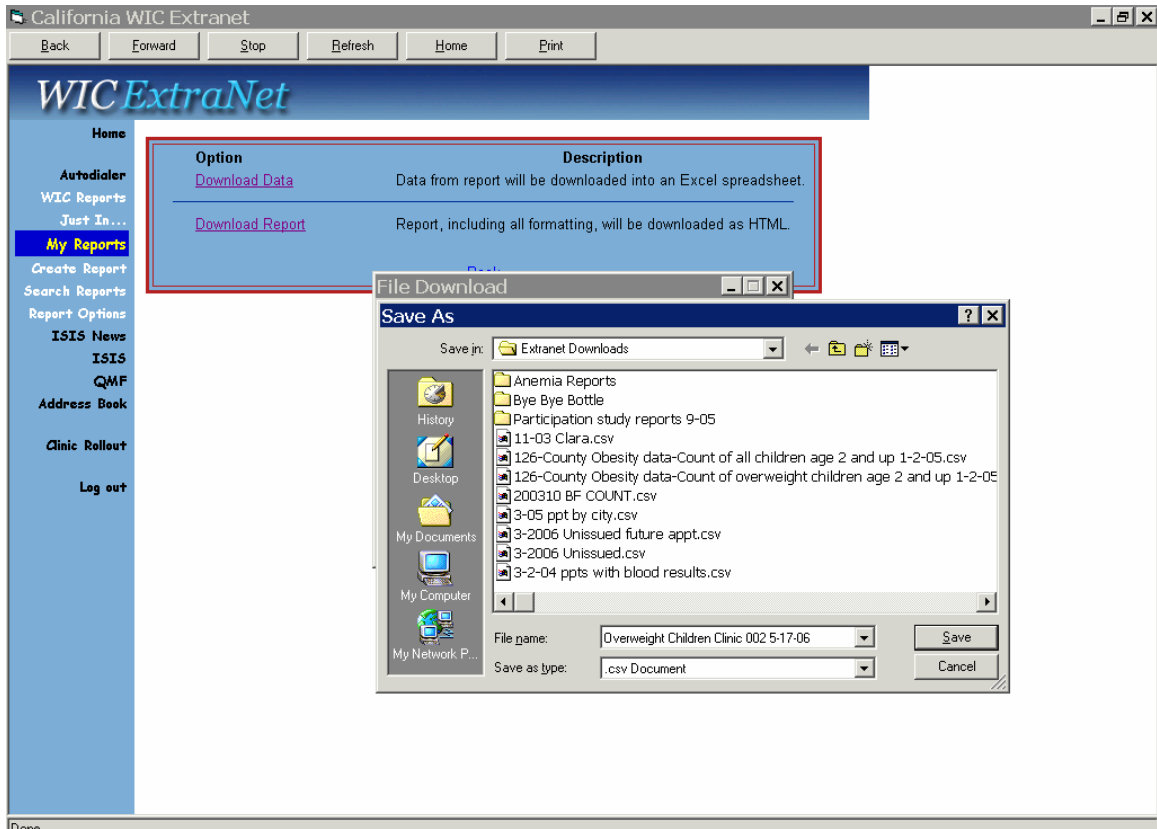


A file Download popup appears. Select Save. Notice the Save box is already selected.



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After you click Save, a dialog box appears called Save As. Make sure that the Extranet Download folder appears in the Save In box. In File Name, a default name for the report is created by the system. You can type in a new report name in the File Name window. In this example, we named the report Overweight Children Clinic 002 5-17-06.



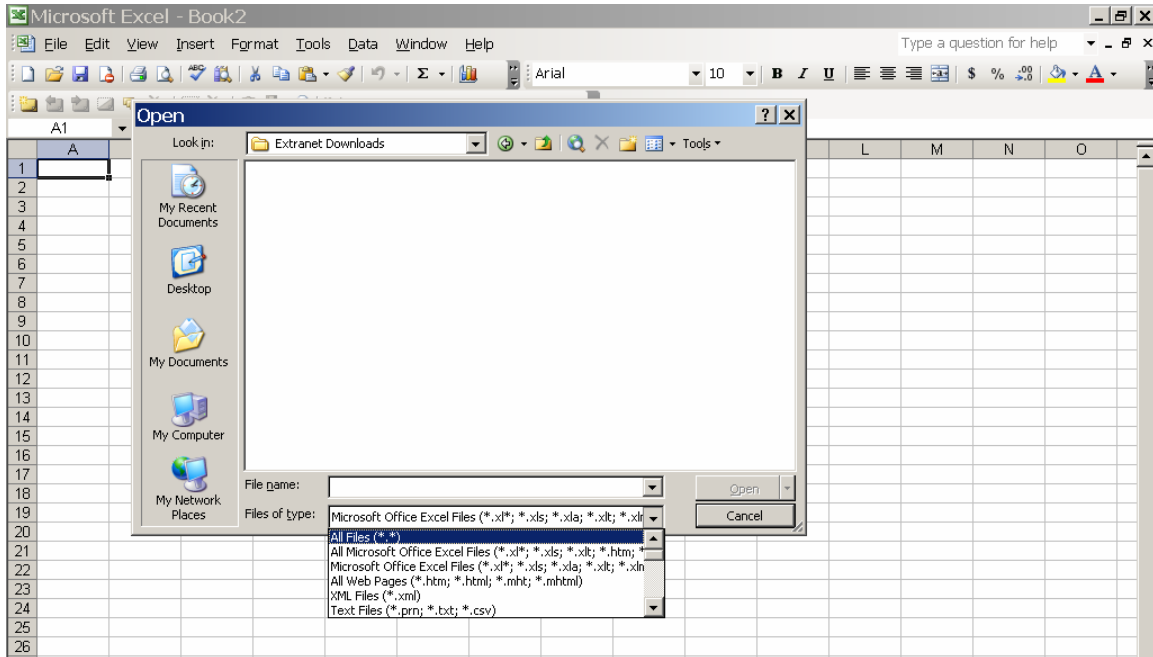
Tip:

It's always a good idea to add the date to the name of your data downloads.

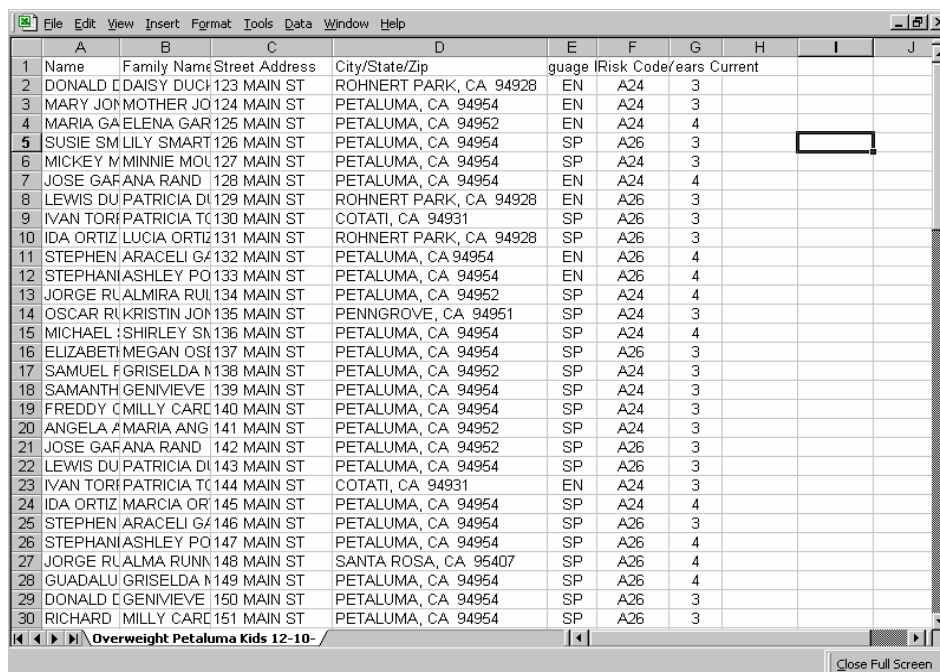
Click on Save. You will get a message indicating that the download is complete. You cannot open the downloaded report from within the ExtraNet, so click on Close.

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Open Excel. Find the Extranet Download folder on your C drive and open it. You won't see your report in the folder because it was saved as a CSV file and Excel is looking for Excel files. Change the Files of Type to All Files and your report will appear.



Double click on the file name. The file will open in Excel. The screen below shows a view of data in Excel that was downloaded from the ExtraNet.



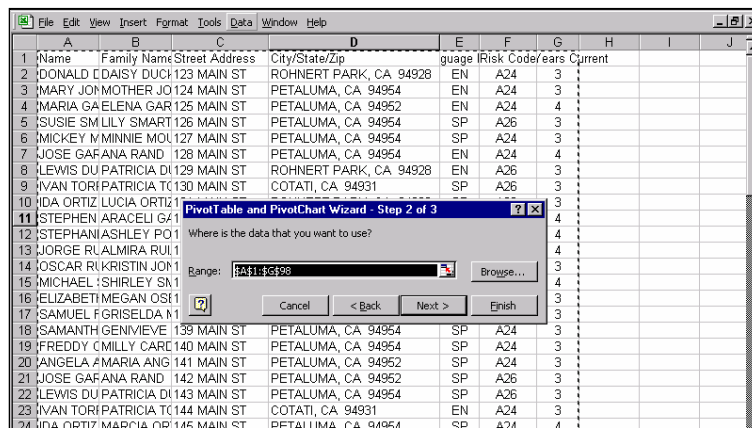
	A	B	C	D	E	F	G	H	I	J
1	Name	Family Name	Street Address	City/State/Zip	guage	I/Risk Code	ears	Current		
2	DONALD	DAISY DUCH	123 MAIN ST	ROHNERT PARK, CA 94928	EN	A24	3			
3	MARY JO	MOTHER JO	124 MAIN ST	PETALUMA, CA 94954	EN	A24	3			
4	MARIA GA	ELENA GAR	125 MAIN ST	PETALUMA, CA 94952	EN	A24	4			
5	SUSIE SM	LILY SMART	126 MAIN ST	PETALUMA, CA 94954	SP	A26	3			
6	MICKEY N	MINNIE MOU	127 MAIN ST	PETALUMA, CA 94954	SP	A24	3			
7	JOSE GA	FANA RAND	128 MAIN ST	PETALUMA, CA 94954	EN	A24	4			
8	LEWIS DU	PATRICIA DI	129 MAIN ST	ROHNERT PARK, CA 94928	EN	A26	3			
9	IVAN TORI	PATRICIA TC	130 MAIN ST	COTATI, CA 94931	SP	A26	3			
10	IDA ORTIZ	LUCIA ORTIZ	131 MAIN ST	ROHNERT PARK, CA 94928	SP	A26	3			
11	STEPHEN	ARACELI G	132 MAIN ST	PETALUMA, CA 94954	EN	A26	4			
12	STEPHANI	ASHLEY PO	133 MAIN ST	PETALUMA, CA 94954	EN	A26	4			
13	JORGE RU	ALMIRA RUI	134 MAIN ST	PETALUMA, CA 94952	SP	A24	4			
14	OSCAR RU	KRISTIN JON	135 MAIN ST	PENNGROVE, CA 94951	SP	A24	3			
15	MICHAEL	SHIRLEY SM	136 MAIN ST	PETALUMA, CA 94954	SP	A24	4			
16	ELIZABETI	MEGAN OS	137 MAIN ST	PETALUMA, CA 94954	SP	A26	3			
17	SAMUEL F	GRISELDA N	138 MAIN ST	PETALUMA, CA 94952	SP	A24	3			
18	SAMANTH	GENIEVIEVE	139 MAIN ST	PETALUMA, CA 94954	SP	A24	3			
19	FREDDY C	MILLY CARC	140 MAIN ST	PETALUMA, CA 94954	SP	A24	3			
20	ANGELA A	MARIA ANG	141 MAIN ST	PETALUMA, CA 94952	SP	A24	3			
21	JOSE GA	FANA RAND	142 MAIN ST	PETALUMA, CA 94952	SP	A26	3			
22	LEWIS DU	PATRICIA DI	143 MAIN ST	PETALUMA, CA 94954	SP	A26	3			
23	IVAN TORI	PATRICIA TC	144 MAIN ST	COTATI, CA 94931	EN	A24	3			
24	IDA ORTIZ	MARCIA OR	145 MAIN ST	PETALUMA, CA 94954	SP	A24	4			
25	STEPHEN	ARACELI G	146 MAIN ST	PETALUMA, CA 94954	SP	A26	3			
26	STEPHANI	ASHLEY PO	147 MAIN ST	PETALUMA, CA 94954	SP	A26	4			
27	JORGE RU	ALMA RUNN	148 MAIN ST	SANTA ROSA, CA 95407	SP	A26	4			
28	GUADALU	GRISELDA N	149 MAIN ST	PETALUMA, CA 94954	SP	A26	4			
29	DONALD C	GENIEVIEVE	150 MAIN ST	PETALUMA, CA 94954	SP	A26	3			
30	RICHARD	MILLY CARC	151 MAIN ST	PETALUMA, CA 94954	SP	A26	3			

You can transfer data from this table into Word or Access to make mailing labels for mailing the invitations to the families. You can also use Excel to make charts, counts and other summary reports of your data.

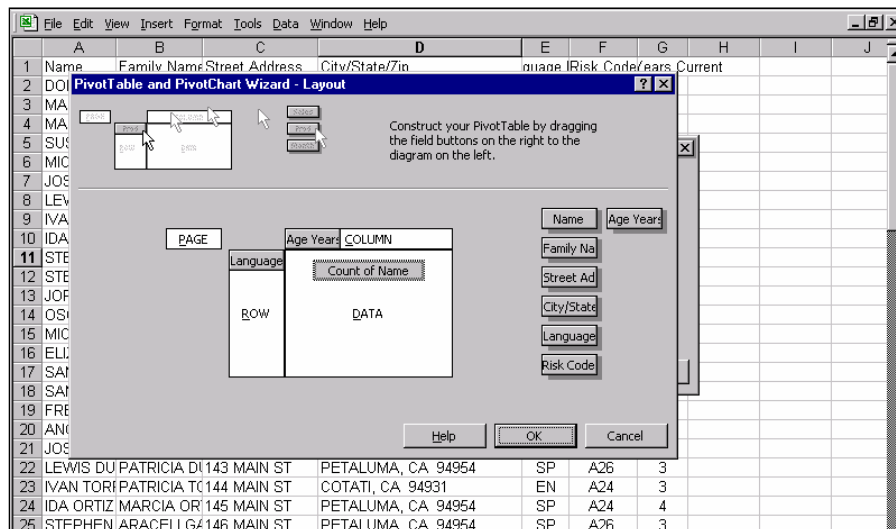
8.3 Making a Pivot Table in Excel

You want to make the invitations in the appropriate language. How many of each language will you need? How many 3 and 4 year-olds are in each language group? An Excel Pivot Table is an easy way to summarize large amounts of data.

In Excel, click on Data in the menu bar and then click on Pivot Table and Pivot Chart Report. A wizard will guide you through the process. Click Next and then Next again to select all the data in your spreadsheet.

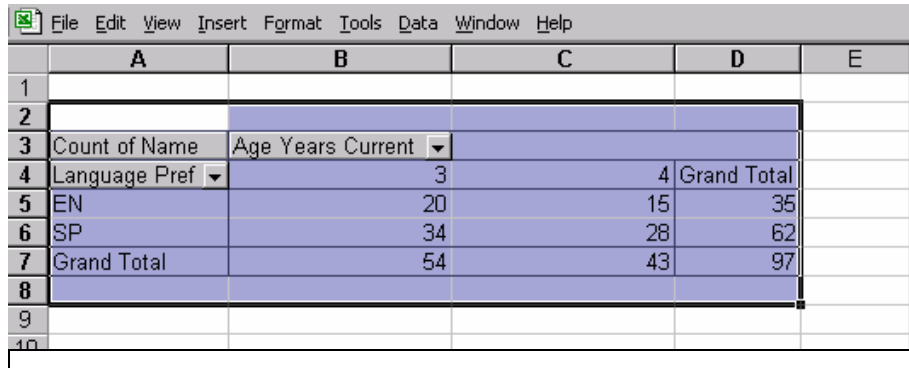


In the next box of the Pivot Table and Pivot Chart Wizard, click on Layout. Drag and drop the language box into the row section, the Age Years box into the column section, and the Name box into the data section. This is just like the cross-tab you made in the ExtraNet and will give you a count of the number of children (names) in each language and age group. Click OK.



WIC ExtraNet Training

Click on Finish. Excel will summarize your data like the chart below. It looks like we will need 35 English invitations and 62 in Spanish.



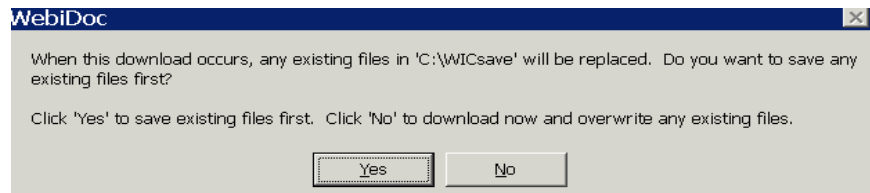
	A	B	C	D	E
1					
2					
3	Count of Name	Age Years Current			
4	Language Pref		3	4	Grand Total
5	EN		20	15	35
6	SP		34	28	62
7	Grand Total		54	43	97
8					
9					
10					

Look at the bottom left of your screen and note the Sheet 1 tab that was added. To get back to the data sheet, click on the tab labeled with your file name.

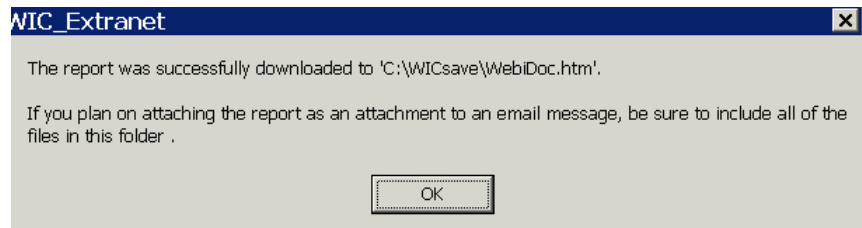
To save the file in Excel, click on File, Save As. In the Save As Type box, select the latest version of Excel from the drop down list. Click on Save.

8.4 Downloading a Report as HTML

Go back to the ExtraNet and download the report again. This time select Download Report. The first time you do this, a new file, WICsave, will be created on your C drive. This is where your reports will always be downloaded. A pop up will appear to ask you if you want to save any existing files in this folder, since the new download will replace anything else that is there. Click Yes if there is something there that you need to save. Click No to proceed with the download.



Once the file is downloaded, you will receive a popup with the name and location of the new file,



C:\WICsave\WebiDoc.htm. Locate the file, open it, and save it in a different file with a new name. The report is saved and can be emailed to others as an attachment.

9 Case Study 1—Risk Data Scenario

Your agency is considering doing some targeted intervention for participants who have anemia. Initially, you would like to know how many participants have a low hemoglobin / hematacrit in each category so you can better plan your efforts.

9.1 Step 1: What is the question?

You want to know how many participants in your agency have low or very low HGB or HCT. Which category of participant has the highest rate of low or very low HGB or HCT?

It is important to clarify what you are looking for when preparing your report. You want counts of participants, by category, who have a normal, low or very low HGB or HCT .

You want to limit the count to those who are currently certified and to those who have up-to-date blood test results in their record.

Now that you have specified your questions, you are ready to begin building your report.

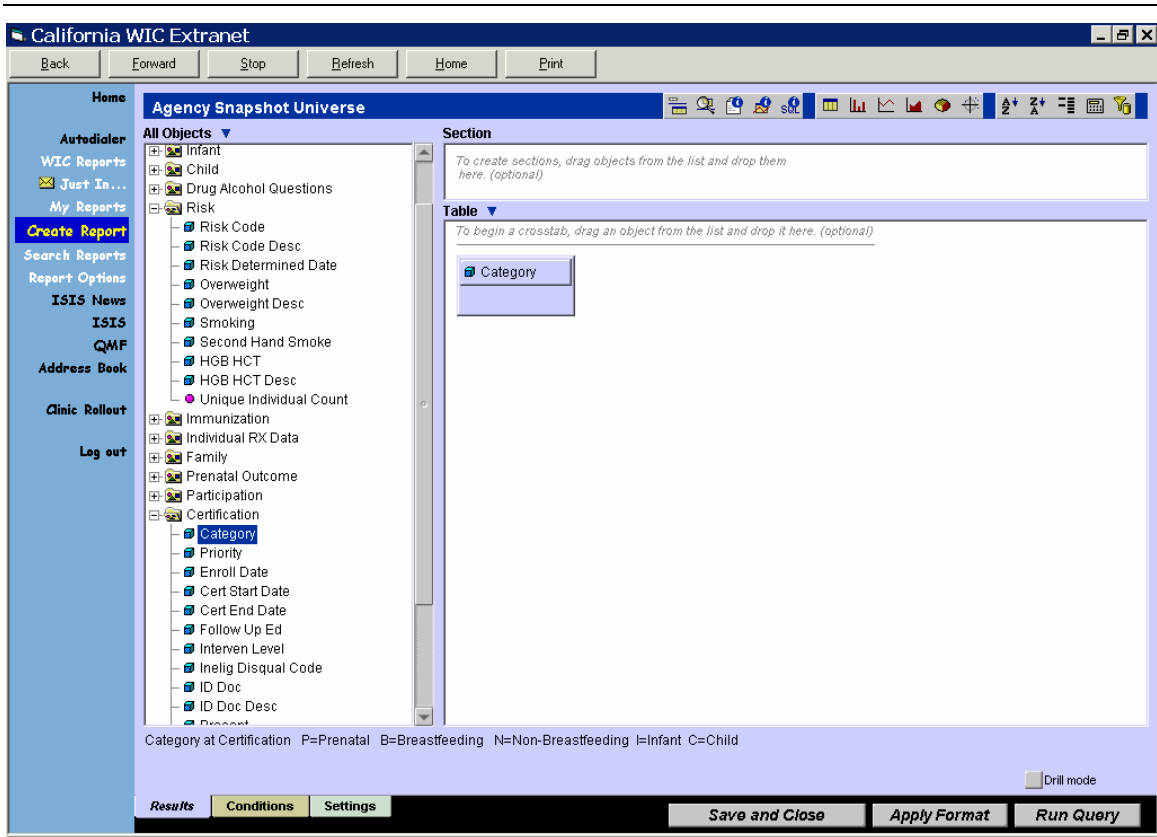
9.2 Step 2: Selecting a Data Universe

In this exercise you will be using the Agency Snapshot Universe. This universe has a consolidated field that includes those with low and very low HGB or HCT as well as those with no HGB HCT risk. This universe also has a condition that will limit your query to participants with an up-to-date HGB HCT value in the record.

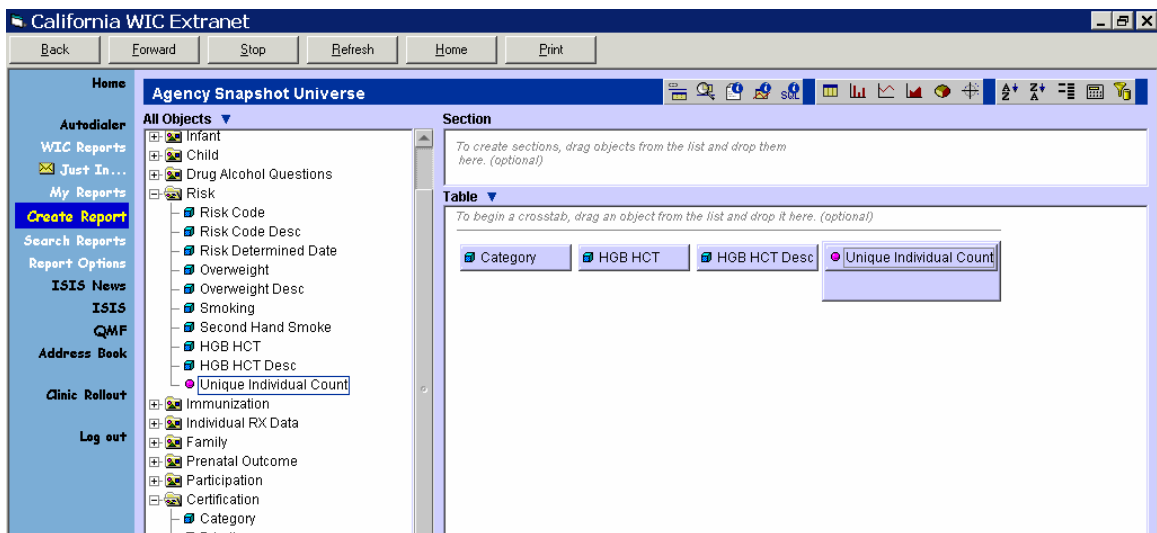
9.3 Step 3: Choosing the Columns you want to show on your Report

After clicking on the Agency Snapshot Universe you will be presented with the screen on the next page. While on the Results tab, drag and drop the Category object into the Table area. You will find this in the Certification folder.

WIC ExtraNet Training

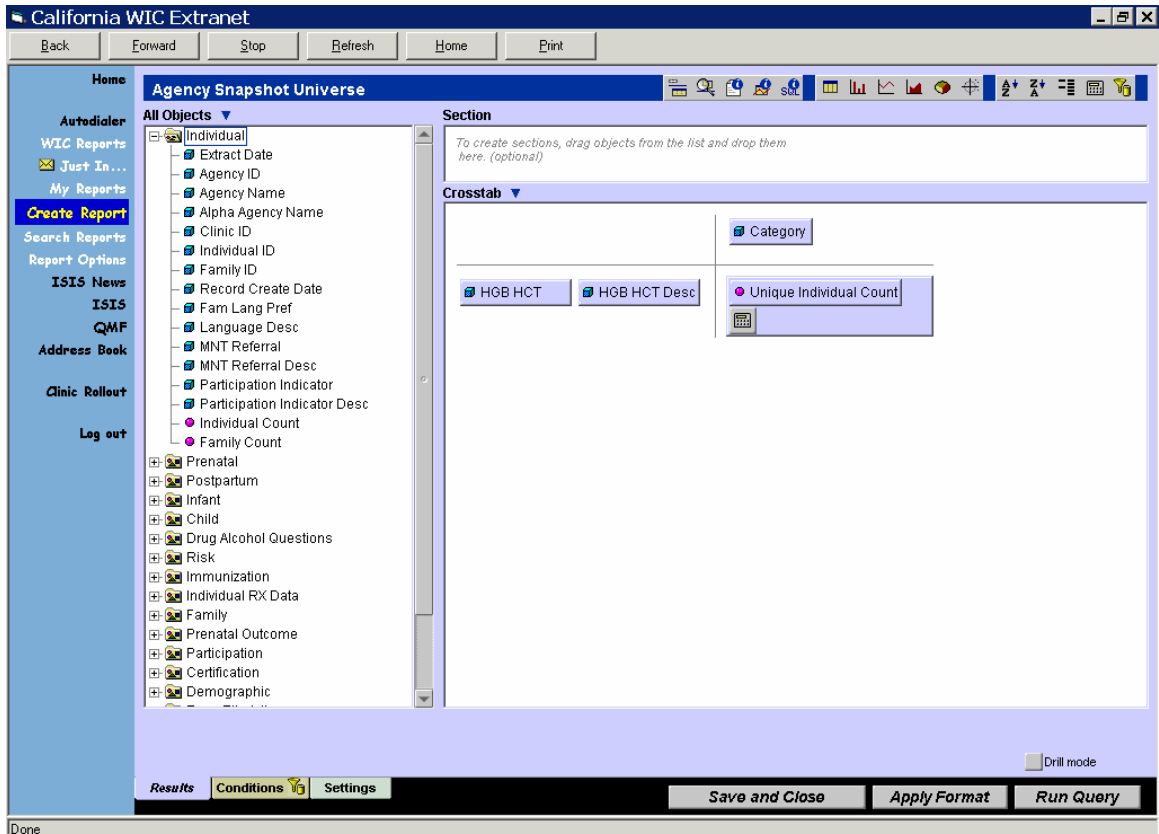


After choosing Category, open the Risk folder and drag and drop the HGB HCT and the HGB HCT Desc objects to the table area. Also add the Unique Individual Count. Your screen should now look like the one below:



9.4 Step 4: Creating a Cross-Tab Report

Once you have selected all of the objects, convert the display to a cross tab by moving the object for category above the gray line. Add one calculator below the Unique Individual Count. Triple click on the calculator and check the box next to Percentage. When you are finished, the screen should look like this.

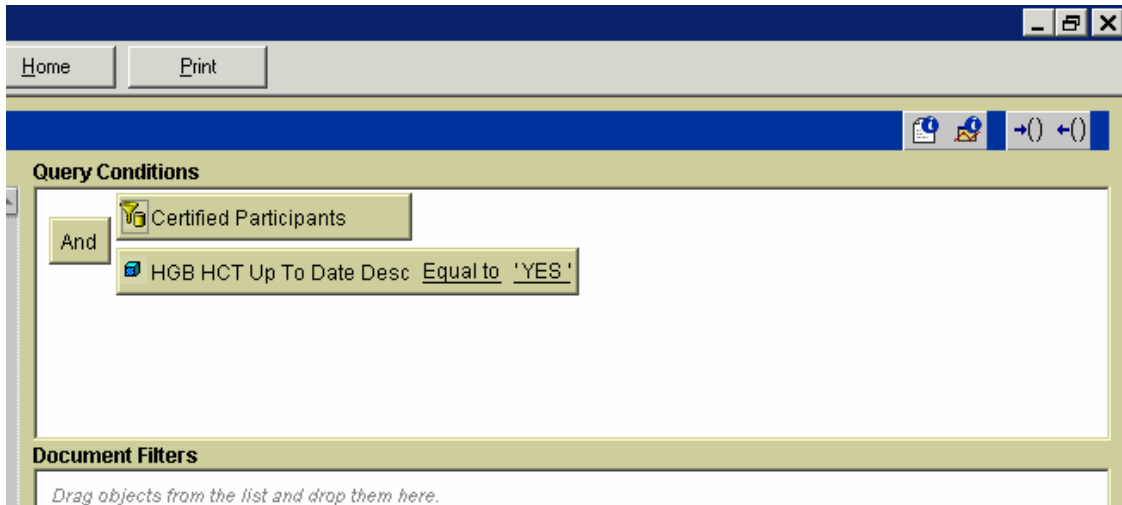


Now that you have identified what you want to see on the report add the conditions.

9.5 Step 5: Applying Conditions to the report

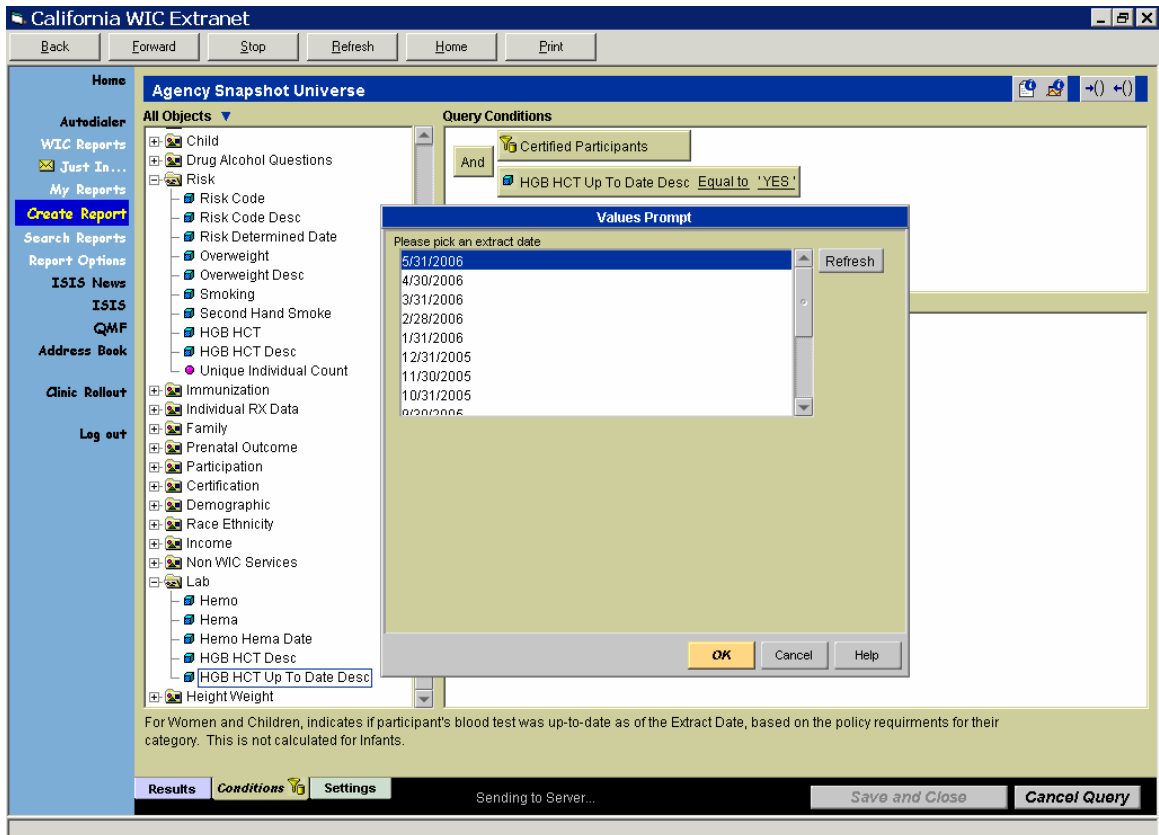
At the beginning of this exercise, we said that you want certified participant who have no, low or very low HGB HCT risks. To include only certified participants, drag and drop the predefined condition Certified Participants to the Query Conditions area. You will find this condition listed in the Participation folder.

You want to limit the report to participants who have an up-to-date blood test results in their records. Scroll down in All Objects and open the Lab folder. Drag and drop the HGB HCT Up To Date Desc object under Certified Participants in the Query Conditions area. Click in the blank space next to Equal to, select Enter a Constant and type YES in the space. Your Conditions should look like the example on the next page.



9.6 Step 6: Running your report

Now you are ready to run the report! Click on Run Query. You will be prompted to pick an extract date. Choose the most recent date. Click OK.



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While your report is running there is a Cancel Query button available in the bottom right corner. This button can be used to cancel your query if you wish. Please note that it takes this button awhile to stop a report from processing. If you start to run a query and then decide you want to change it, you will find it quicker to let the report run and then make your changes in edit and run it again.

The report results will look similar to the example below.

California WIC Extranet

Back Forward Stop Refresh Home Print

Home < Download Drill Refresh Edit Save Send <

Last refresh: 6/20/2006 02:35:02 PM

		B		C		N		P	
		Unique Individual Count		Unique Individual Count		Unique Individual Count		Unique Individual Count	
	NO HGB/HCT RISK	178	37.24 %	2741	93.45 %	39	33.33 %	436	93.56 %
L	LOW HGB/HCT	229	47.91 %	149	5.08 %	57	48.72 %	24	5.15 %
V	VERY LOW HGB/HCT	71	14.85 %	43	1.47 %	21	17.95 %	6	1.29 %
	Sum:	478		2933		117		466	
	Percent:	11.97 %	100.00 %	73.44 %	100.00 %	2.93 %	100.00 %	11.67 %	100.00 %

Page 1

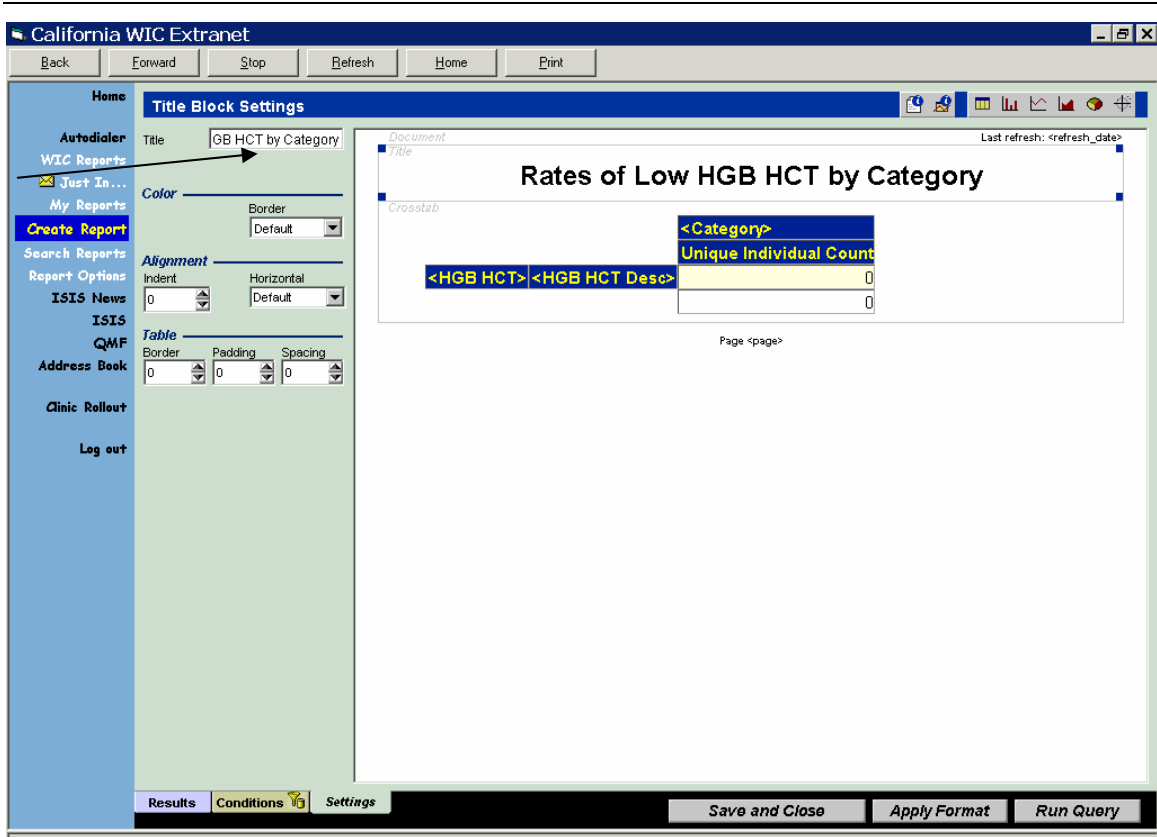
Look at your report. What did you learn about your agency? Which category has the highest number of participants with a low or very low HGB HCT? Which category has the highest percentage of participants with a low or very low HGB HCT?

Run the report again and pick an extract date from a year ago. Did your rates of a low or very low HGB HCT increase or decrease in the last year?

9.7 Step 7: Adding a Title to the Report

Now you are on the last step in the creation of your report, adding the title. Click on the Edit command one more time. Next, click on the Settings Tab. That will bring up the screen on the next page.

WIC ExtraNet Training



Click once in the white Title portion of the screen. Your options in the light green portion of the screen will change to those related to the Title.

Click on the text box next to the Title prompt and type the title you wish to give your report. You will notice that as you type the title appears in the Document portion of your report.

You can then use the other options to change the font, size, color etc of your title. When you are finished, click on the Apply Format button.

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There you have it, your final report. You may now click on the Save command in the upper right portion of the screen and save your report.

California WIC Extranet

Back Forward Stop Refresh Home Print

Download Drill Refresh Edit Save Send

Home

Autodialer

WIC Reports

Just In...

My Reports

Create Report

Search Reports

Report Options

ISIS News

ISIS

QMF

Address Book

Clinic Rollout

Log out

Last refresh: 6/20/2006 02:35:02 PM

Rates of Low HGB HCT by Category

	B		C		N		P		
	Unique	Individual Count	Unique	Individual Count	Unique	Individual Count	Unique	Individual Count	
L	NO HGB/HCT RISK	178	37.24 %	2741	93.45 %	39	33.33 %	436	93.56 %
L	LOW HGB/HCT	229	47.91 %	149	5.08 %	57	48.72 %	24	5.15 %
V	VERY LOW HGB/HCT	71	14.85 %	43	1.47 %	21	17.95 %	6	1.29 %
Sum:		478		2933		117		466	
Percent:		11.97 %	100.00 %	73.44 %	100.00 %	2.93 %	100.00 %	11.67 %	100.00 %

Page 1

9.8 Step 8: Saving your report

Click on Save in the upper right corner of the screen.

Enter a name for your report and a brief description. It is suggested that you give it the same name as the Title of the report. You also have the option of saving the report into an appropriate Personal Category.

When you are done, click on the Save button.

Now this report is available to you whenever you need it. Just open it from My Reports, click on the Edit command and click on Run Query.

Congratulations, you have successfully completed the case study.

10 Case Study 2 -- Participation Scenario

You would like to check your participation every morning to see how you are doing for the month. Create a report that shows participation by clinic and by category for the current month.

10.1 Step 1: What is the question?

From the description above you are looking for participation counts for your agency. You want this count broken down by clinic and again by category with totals for each breakdown.

You want this information for the current month

10.2 Step 2: Selecting a Data Universe and Folder

Click on the Create Report and select the Summarized ISIS Information Universe. This universe contains summarized information, one type of which is Participation information.

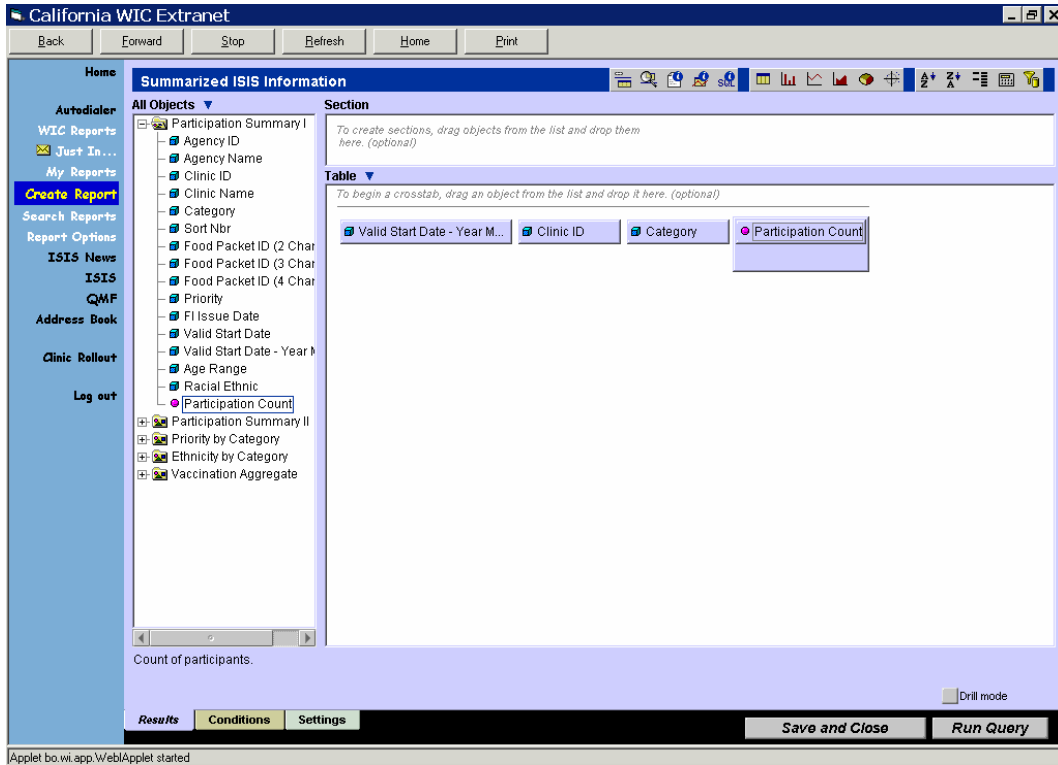
The screenshot shows the California WIC Extranet interface. At the top, there is a navigation bar with buttons for Back, Forward, Stop, Refresh, Home, and Print. Below this is the WIC ExtraNet logo and a search bar. A sidebar on the left contains various menu items: Home, Autodialer, WIC Reports, My Reports, Create Report (highlighted), Search Reports, Report Options, ISIS News, ISIS, QMF, Address Book, and Clinic Rollout. The main content area displays a table of data universes with columns for Name, From, and Date. The table is titled "This list was last refreshed: Aug 25 2006 09:35:26 .".

Name	From	Date
Agency Snapshot Universe (ASNAP)	Universe.	5/15/2006 7:33:05 AM
Breastfeeding Summary (BF_SUMMM)	Universe.	8/22/2006 1:42:34 PM
Combination Feeding Summary (BFICSUMM)	Universe.	8/22/2006 1:46:55 PM
Participation Universe (PARTCP)	Universe.	8/22/2006 1:43:14 PM
Participation WIC Reports Universe (PARTOFF)	Universe.	6/19/2006 2:18:20 PM
Summarized ISIS Information (SUMMARY1)	Universe.	7/9/2002 9:22:59 AM
Unissued Prescription Detail (UNISSDTL)	Universe.	6/19/2006 2:20:33 PM
ISIS Reporting Information (WorkingA)	Universe.	7/9/2002 9:33:12 AM

The Participation Summary I folder contains information on WIC participants from the beginning of ISIS until the close of business yesterday. Since you want up-to-date information for the current month, this is the folder to use.

10.3 Step 3: Choosing the columns

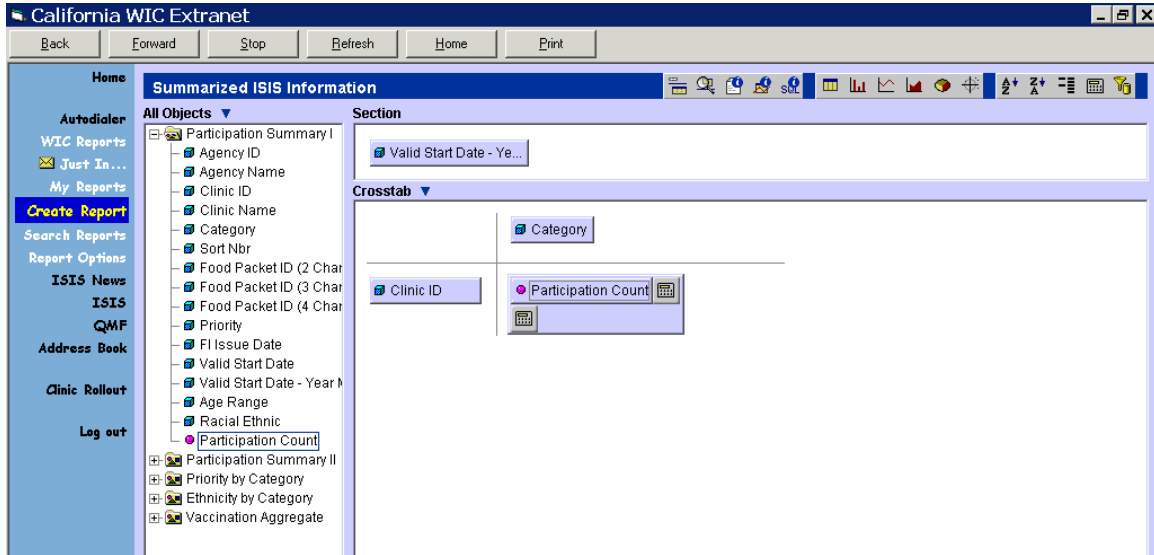
From within the Participation Summary I folder, choose the following columns: Valid Start Date – Year Month, Clinic ID, Category, and Participation Count.



Initially the layout of the data looks like this, (see above). Now change it around so that you create a nice looking, easy to read report.

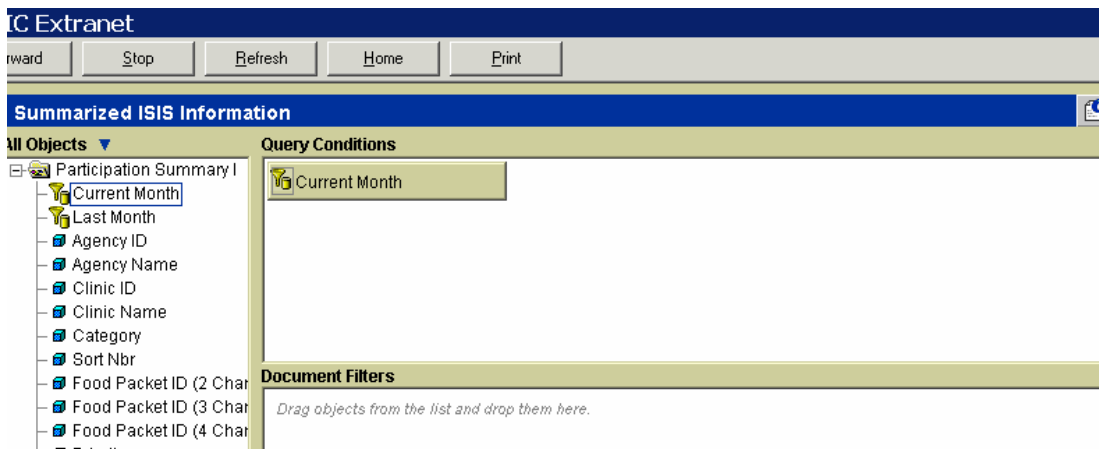
10.4 Step 4: Arranging the columns to create a Crosstab

Drag and drop the objects to make your screen look like the one below:



10.5 Step 5: Adding a Predefined Condition

Now you are ready to add a predefined condition to the report. Remember that you want the report for the current month. Click on the Conditions Tab and find the predefined condition in the Participation Summary I folder for the Current Month. Drag and drop it to the Query Conditions section of the screen.



10.6 Step 6: Running your report

Click on Run Query. In a couple of seconds you will see the query results.

	B	C	I	N	P	Sum:
	Participation Count	Participation Count	Participation Count	Participation Count	Participation Count	Participation Count
001	662	2,590	1,225	213	528	5,218
002	90	396	176	32	70	764
003	163	521	272	38	112	1,106
006	2	25	7	2	6	42
Sum:	917	3,532	1,680	285	716	7,130

10.7 Step 7: Formatting the report

Click on the Edit command in the upper right and choose the Settings tab.

To center the categories over their respective columns, click on the <Category> cell. Click on the Alignment Horizontal setting and select Center from the drop down list. You will notice that the word <Category> is now centered over the column.

The Cell Settings dialog box is open, showing the following options:

- Color:** Background (Default), Text (Default)
- Alignment:** Vertical (Default), Horizontal (Center)
- Font:** Name (Default), Size (Auto), Style (Regular), Strikethrough (unchecked), Underline (unchecked)

The preview area shows a table with the following structure:

<Valid Start Date - Year Month>	<Category>	<Clinic ID>
	Participation Count	###0,0;0;0;###0,0;0;0
		###0,0;0;0

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Click on the Apply Format button at the bottom to see the results of the change.

Feel free to experiment with the options on the Settings Tab. There are many combinations to choose from to give the report different looks.

Save your final report in My Reports.

11 Case Study 3 -- Missed Food Instruments

Some families have missed their appointments and have unissued checks for the current month. You want to identify them and give them a call to reschedule or arrange to mail their food instruments.

Results Tab: Using the Unissued Prescription Detail universe, put together a report showing the Clinic ID, Family ID, Family Name, Language, Phone Number, Phone Type, Appointment Date, Appointment Type and the number of unissued FI's in the family .

Conditions Tab: All of the selected families should have an appointment in the past.

Formatting: Finally, section the report by clinic and sort it by language and the Unissued Individual count, placing the families with the most certified participants first within each language.

Your report should look similar to the one below when it is completed.

001

Family ID	Addr Line 1 (Family Name)	Fam Lang Pref	Primary Phone Number	Primary Phone Type	Schedule Date	Contact Type	Count
AA301860021	ANA ANABEL	EN	7075252525	BLANK	6/13/2006	S	4
AA301860022	ANNE ARNO	EN	7075252535	HOME	6/22/2006	GC45	3
AA301860023	AMY ADAM	EN	7075252545	CELL	6/7/2006	GP01	2
AB520123854	ALISHA BELL	EN	7075252565	MESSAGE	6/5/2006	S	2

Please note that this report includes only families with Unissued FIs. It does not include missed appointments that were scheduled for new enrollments or for those who are past their certification end date.

11.1 Download the report

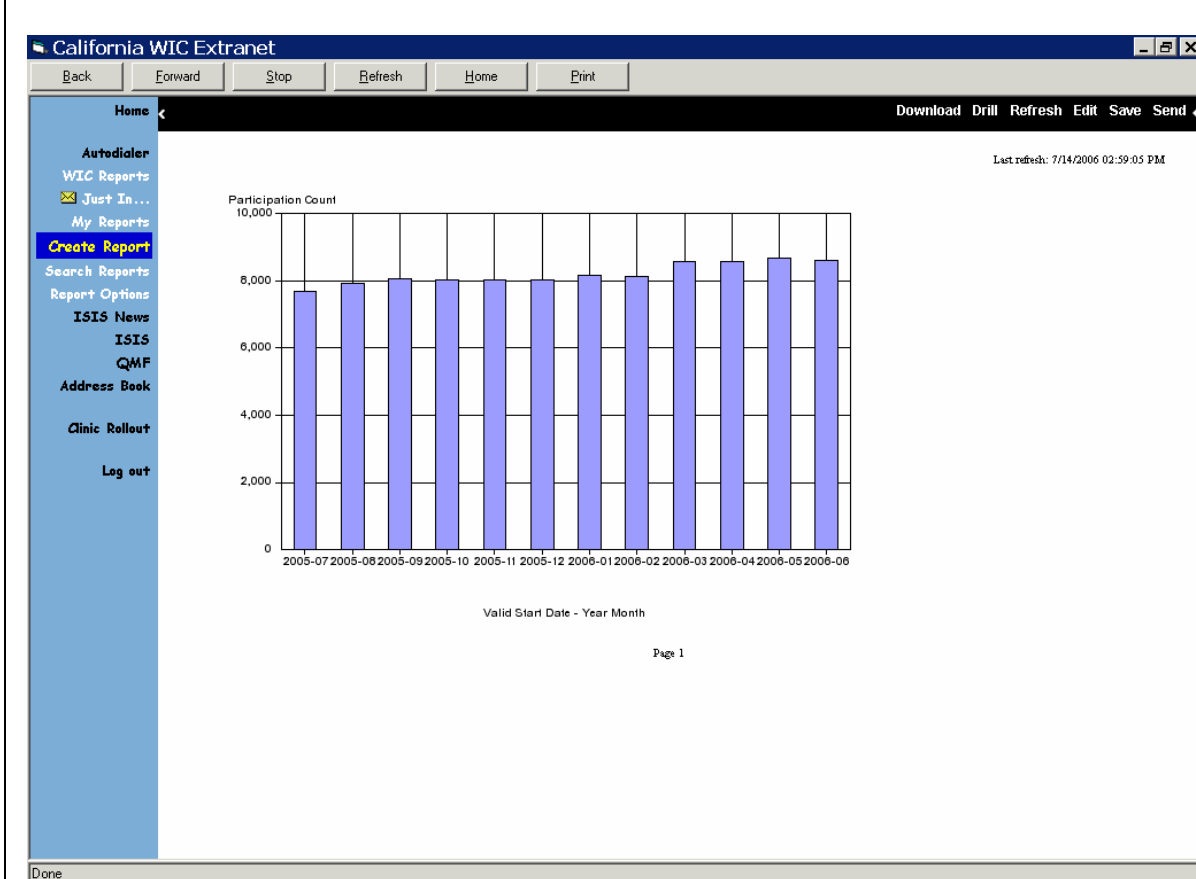
When you are finished, download the report and open it in Excel.

Make a pivot table to show the sum of individuals with missed appointments by clinic and language.

12 Case Study 4 – Participation Graph

Make a graph showing your total monthly participation for the last year. Put together a report showing the Valid Start Date Year Month and Participation Count. Include all those with a valid start date between one-year before the first of this month and the end of last month. Format the results into a Bar Chart.

Your report should look like the one below when it is completed.



12.1 Variations

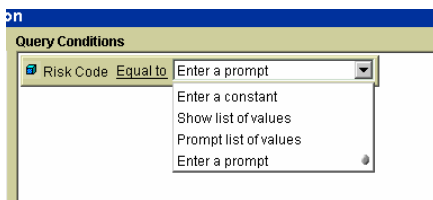
Below are some suggested variations to add to the report. If you need help, see Section 13 on the next page for instructions on advanced techniques.

1. Edit the report and section it by clinic. Run the query again.
2. Edit the report to section it by category. Run the query again. Use Drill mode to look at one clinic at a time.
3. Use a Document Filter to display only the women categories.

4. Use Custom Scope of Analysis and Apply Format to switch between clinic and category views.
5. Use Enter a Prompt in the Valid Start Date range condition and run the query for different time periods.
6. Turn the graph in to a cross tab table by Valid Start date and Category.
7. Section the cross tab by clinic.
8. Download the report as HTML (Download Report) and attach it to an email to a coworker.

13 Some Advanced Techniques

13.1 Enter A Prompt



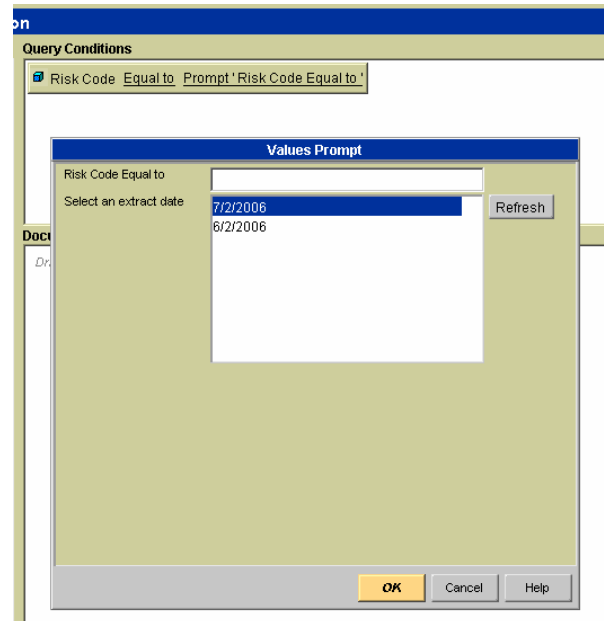
On the Conditions tab, use “Enter a prompt” instead of “Enter a constant” when creating a condition when you may want to run the same report for different choices, like different clinics, categories, risk codes, dates or date ranges. Every time you run the query you will be

prompted to type in your choice. For example, as a condition on:

Risk Code, with Enter a Prompt you can use the same query for reports on different risk codes without having to go into edit and change the condition.

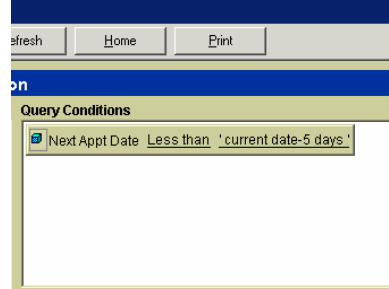
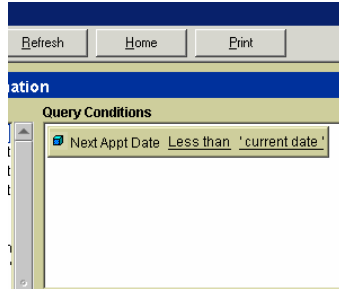
Dates: you can run the same query every month for different dates or date ranges.

Create a query to search by a single field that you cannot do in ISIS, like first name, last name, date of birth, street.



13.2 Current date

If you will always want to use the current date in a query, you can just type in the words, “current date” under Enter a Constant on the Conditions tab. The example below was used to query for families who have missed their appointments. You can also use current date plus or minus a number of days, for example, “current date – 5 days” to get only those who are more than five days past their missed appointment date. Current date + 3 days is another option.



13.3 Drill Mode

Sometimes you may want to display only a portion of the data in a report. Drill Mode allows you to select all or just one item in each object field to display. You can display data in different ways without having to redo and rerun the query. To get into drill mode in Edit, click on the gray button in the lower right hand corner labeled Drill Mode. Apply format to see drill mode options displayed. From an open report, just click on Drill in the upper right of the screen. When you are in Drill Mode, the option at the upper right will change to End Drill.

Across the top, you will now see a drop down box for each field in the report. You have the option to look at all of the values in a field or just one item at a time. Click on the drop down arrow to select an option.

In the example on the next page, just one of the clinics (002) was selected from the drop down list. The display shows the results for clinic 002 in Drill Mode.

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California WIC Extranet

Back Forward Stop Refresh Home Print

Home < Download End Drill Refresh Edit Save Send <

Autodialer
WIC Reports 002 Overweight (All values)

My Reports
Create Report
Search Reports
Report Options
ISIS News
ISIS
QMF
Address Book
Clinic Rollout
Log out

Weight Status of Children by Clinic Last refresh: 5/17/2006 10:10:21 AM

	O	R	Sum	Percent
Unique Individual Count	Unique Individual Count	Unique Individual Count		
002 Δ	224	79	63	366 100.00 %
	61.20 %	21.58 %	17.21 %	
Sum:	224	79	63	366

Page 1

Experiment with drill mode in a report by selecting items for the objects available in your query.

13.4 Document Filters

Document Filters work like drill mode, but allow you to select more than one item to display. This is another way to display data in different ways without having to redo and rerun the query.

Writing a document filter is just like writing a condition. The difference is that you put it in after you have run the report. You can only put a Document Filter on objects that are already in your report on the Results Tab.

To use document filter to see the results in the report above for only Clinic 001 and 002, in Edit go to the Conditions Tab. Drag and drop the object for Clinic to the Document Filter area. Click on In List and select Enter a Constant. In the blank space, type in the clinic numbers without a space and with a comma between them. This will filter out everything except clinic 001 and 002. You will notice that the option to Apply Format is still available after adding a Document Filter. It would not be if you added a new condition. Click on Apply Format.

California WIC Extranet

Back Forward Stop Refresh Home Print

Home < Download End Drill Refresh Edit Save Send <

Autodialer
WIC Reports Clinic ID (All values) Overweight (All values)

My Reports
Create Report
Search Reports
Report Options
ISIS News
ISIS
QMF
Address Book
Clinic Rollout
Log out

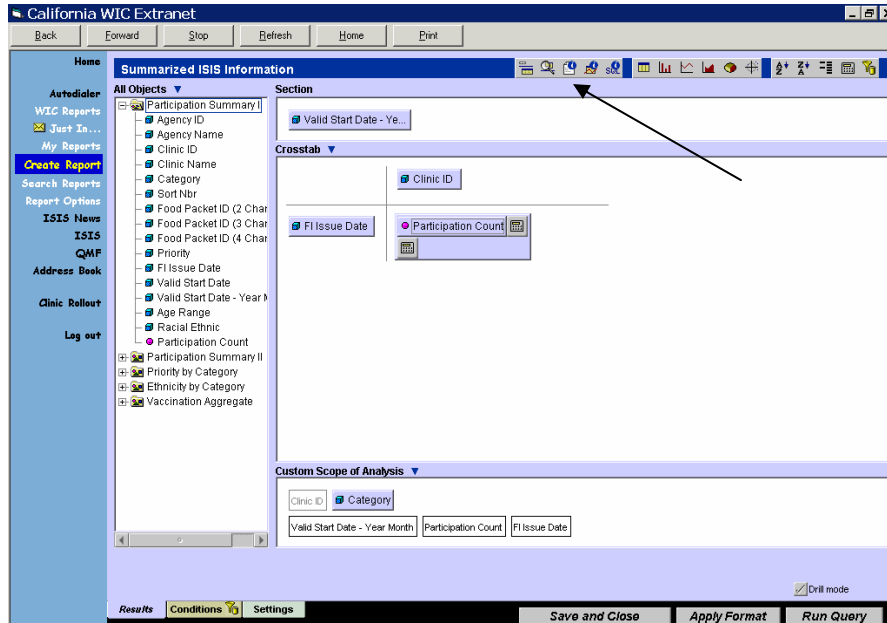
Weight Status of Children by Clinic Last refresh: 5/17/2006 10:10:21 AM

	O	R	Sum	Percent
Unique Individual Count	Unique Individual Count	Unique Individual Count		
001 Δ	1481	433	381	2295 86.25 %
	64.53 %	18.87 %	16.60 %	
002 Δ	224	79	63	366 13.75 %
	61.20 %	21.58 %	17.21 %	
Sum:	1705	512	444	2661

Page 1

13.5 Custom scope of analysis:

Custom Scope of Analysis is another way to run a query once and then display the data in different ways to make different reports. In the report below, participation data was collected with both Category and FI Issue Date. While in Edit, click on icon for Custom Scope of Analysis. This creates a separate section at the bottom of the screen labeled Custom Scope of Analysis. You can move an object there, and it will not be displayed in the report when you Apply Format.



California WIC Extranet

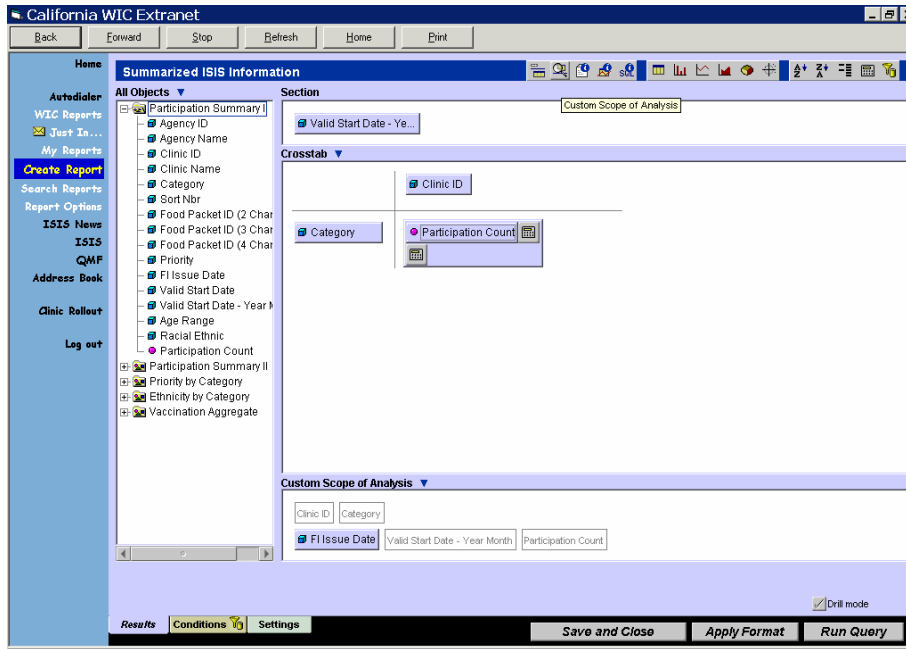
Download End Drill Refresh Edit Save Send

Clinic ID (All values) Category (All values) FI Issue Date (All values) Valid Start Date - Year Month (All values)

Last refresh: 01/2006 03:37:31 PM

2006-07

	001 Δ	002 Δ	003 Δ	006 Δ	Sum
	Participation Count	Participation Count	Participation Count	Participation Count	
05/01/2006	45	7	0	0	52
05/02/2006	45	14	0	0	59
05/03/2006	47	0	30	0	77
05/04/2006	52	0	23	0	75
05/05/2006	51	0	24	0	75
05/08/2006	59	12	0	0	71
05/09/2006	69	17	0	0	86
05/10/2006	54	0	27	0	81
05/11/2006	50	0	18	0	68
05/12/2006	35	0	0	5	40
05/15/2006	68	26	0	0	94
05/16/2006	34	23	0	0	57
05/17/2006	72	0	41	0	113
05/18/2006	42	0	23	0	65
05/19/2006	42	0	12	0	54
05/22/2006	61	10	0	0	71
05/22/2006	50	16	0	0	66



Download End Drill Refresh Edit Save

Clinic ID (All values) Category (All values) FI Issue Date (All values) Valid Start Date - Year Month (All values)

Last refresh: 8/1/2006 03:37

2006-07

	001 △	002 △	003 △	006 △	Sum:
	Participation Count	Participation Count	Participation Count	Participation Count	
B	774	106	193	4	1,077
C	3,140	443	614	30	4,227
I	1,514	208	312		2,042
N	298	40	51		394
P	729	88	141		965
Sum:	6,455	885	1,311	54	8,705

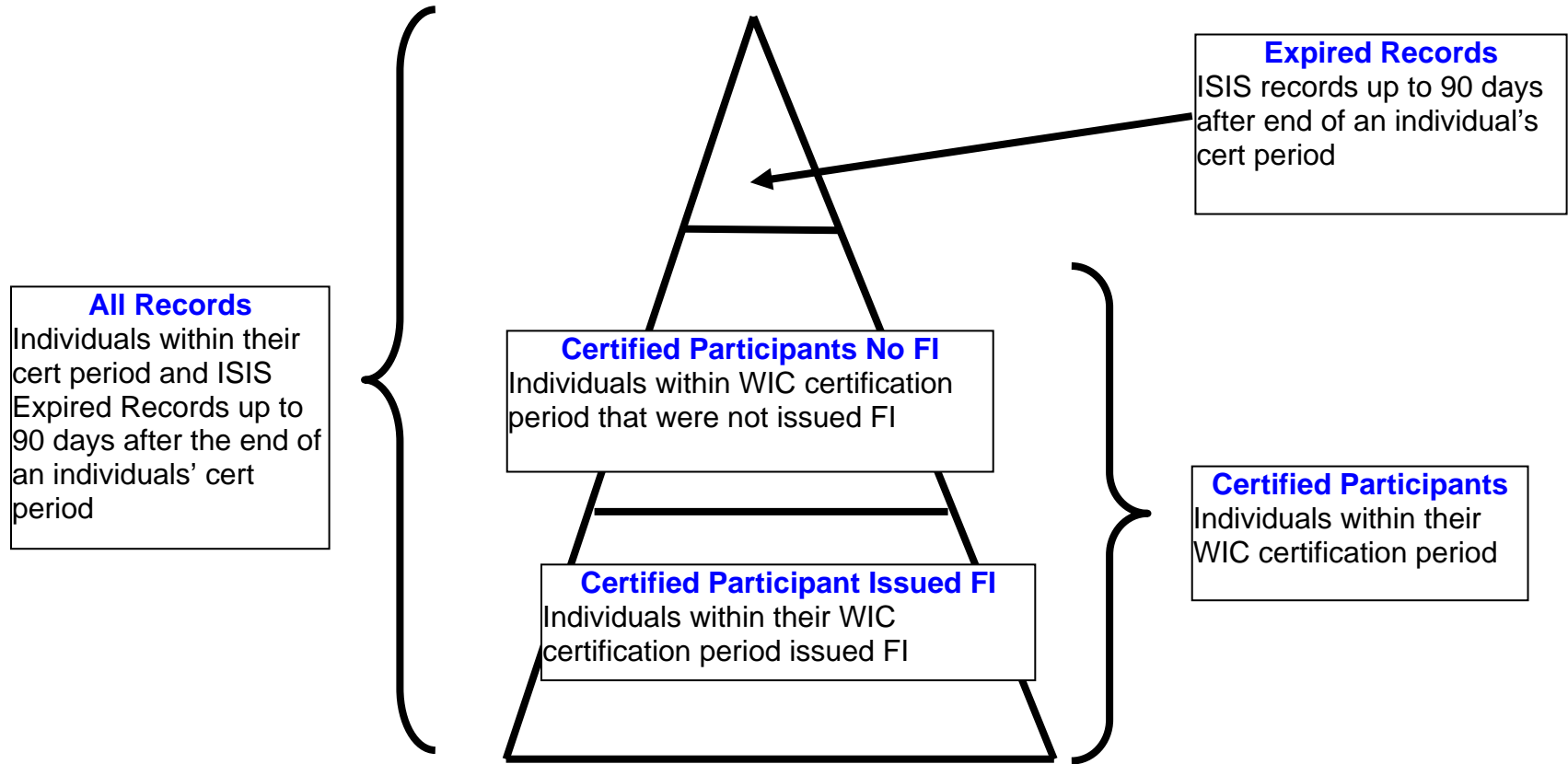
13.6 FI Issued Period Number

When running a query that includes information from the Food Instrument sub folder, you can only get information for one prescription month at a time. When the query runs you will be prompted to select the FI Issued Period number for the prescription month you want. Available period numbers include the current month, back three months and forward two months.

- 1-December or June
- 2-January or July
- 3-February or August
- 4-March or September
- 5-April or October
- 6-May or November

14 Appendix
















14.1 Approved WIC Data Terminology & Descriptions







14.2 Toolbar Icon Descriptions

Tip: You can rest cursor on each icon on the tool bar to view description.









Below is a brief description of the icons on the **Results** toolbar.

	Show/Hide sections –show or hide the section panel.
	Custom Scope of Analysis –remove some data fields from display without rerunning the report
	Document Settings – go to the Settings tab, document settings
	Block Settings - go to the Settings tab, block settings
	Block Types –display data in various block styles: Table, Financial, Form, or Crosstab
	Bar Charts – display data in various bar chart styles: grouped, line and bar, stacked, percent, 3D
	Line Charts – display data in various line chart styles: mixed, stacked, percent, 3D, 3D surface
	Area Charts – display data in various area chart styles: mixed, stacked, percent, 3D, 3D volume
	Pie Charts – display data in various pie chart styles: pie or doughnut
	Radar Charts - display data in various radar chart styles: radar line, stacked radar area, polar, scatter.
	Ascending Sort – sort the object or count in ascending order (A to Z).
	Descending Sort – sort the object or count in descending order (Z to A).
	Break –separate the report by the object
	Calculations –calculate percentages, sums, count, average, minimum, maximum
	Conditions – insert the object into Query Conditions and go to the Conditions tab





Below is a brief description of the icons on the **Conditions** toolbar.

	Show Document Settings – go to the Settings tab, document settings
	Show Block Settings - go to the Settings tab, block settings
	Shift Right – moves data to the right.
	Shift Left – moves data to the left.

Below is a brief description of the icons on the **Settings** toolbar.

	Show Document Settings – switch to Document Settings
	Show Block Settings – switch to Block Settings
	Block Types - display data in various block styles: Table, Financial, Form, or Crosstab
	Bar Charts – display data in various bar chart styles: grouped, line and bar, stacked, percent, 3D
	Line Charts – display data in various line chart styles: mixed, stacked, percent, 3D, 3D surface
	Area Charts – display data in various area chart styles: mixed, stacked, percent, 3D, 3D volume
	Pie Charts – display data in various pie chart styles: pie or doughnut
	Radar Charts - display data in various radar chart styles: radar line, stacked radar area, polar, scatter.

14.3 Meanings of symbols:

-  Folders and sub-folders
-  Objects within the folder
-  Count of data
-  Conditions – predefined conditions

14.4 Document Settings

Drill mode-Turn Drill mode on and off. Select all or just one item in each object field to display.

Show prompts within the report-Currently disabled. Check this box to display all the prompts in a frame at the top of the document.

Fetch duplicate rows-Retrieve duplicate rows, if there are any, from the database.

Avoid duplicate rows aggregation-The reporting tool aggregates duplicate results with proper totals for your report. Checking this box turns this feature off.

Limits Settings

Max rows fetched-Include only a specified number of rows from database. You never have to change this option.

Max fetch time-Set maximum report run time before it times out. You never have to change this option.

Row count per page-Change the number of rows displayed on each page. The reporting tool uses the web browser for printing, so this setting can be useful in printing your reports.

Certificate of Completion

This certifies that

has completed

WIC ExtraNet Training

Signed

Date