California Department of Public Health
Women, Infants and Children Program Division

WIC Information eXchange (WIX)

Training Guide

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1 Introduction

1.1 Overview

The WIC Information eXchange, (WIX) Training Guide provides instruction in accessing the WIX database and navigating in the applications provided. Guidance is included for the Autodialer appointment download, WIC MIS News, Canned Reports, My Favorites and Web Intelligence with access to the data universes for creating *ad hoc* queries and reports.

1.2 Prerequisites for Training

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

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

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

1.3 Training Objectives

By the end of the training you will:

- Learn the various functions available in WIX, including the **Autodialer**, **WIC MIS News**, and the **Reporting** functions, including **Canned Reports** and creating *ad hoc* reports.
- Learn how the reporting area is organized into universes of data and the kind of information you will find in each universe.
- Use the basic features of the reporting tool
- Complete sample queries and reports using the reporting tool.
- Create a query to answer a question you have about your agency's WIC MIS data
- Download and save data into Excel on your PC

2 Logon ID, Password and Logging On

2.1 The WIX Logon ID

To access WIX, you will need a **WIX Logon ID**. This ID is intended for individuals who need to use one or more of the applications provided in WIX. WIC clinic employees who use only WIC MIS to perform their jobs will not usually require access to WIX.

When a local agency staff member needs a **WIX Logon ID**, the WIC Director or manager sends a **WIX Logon ID Request** form by email to the WIC MIS Help Desk. This form can be found on the State WIC website at: http://www.cdph.ca.gov/programs/wicworks/Pages/WICInformationeXchange(WIX)Training.aspx

The **WIX Logon ID** is usually the first letter of the person's first name and up to the first seven letters of the last name. For example: Jane Doe's logon ID would be jdoe. Logon IDs are assigned when they are created by the WIC MIS Help Desk.

2.2 Logging On to WIX

To reach the WIX log on screen, go to https://wix.ca.gov . You may wish to create a shortcut to this link on your computer desk top.

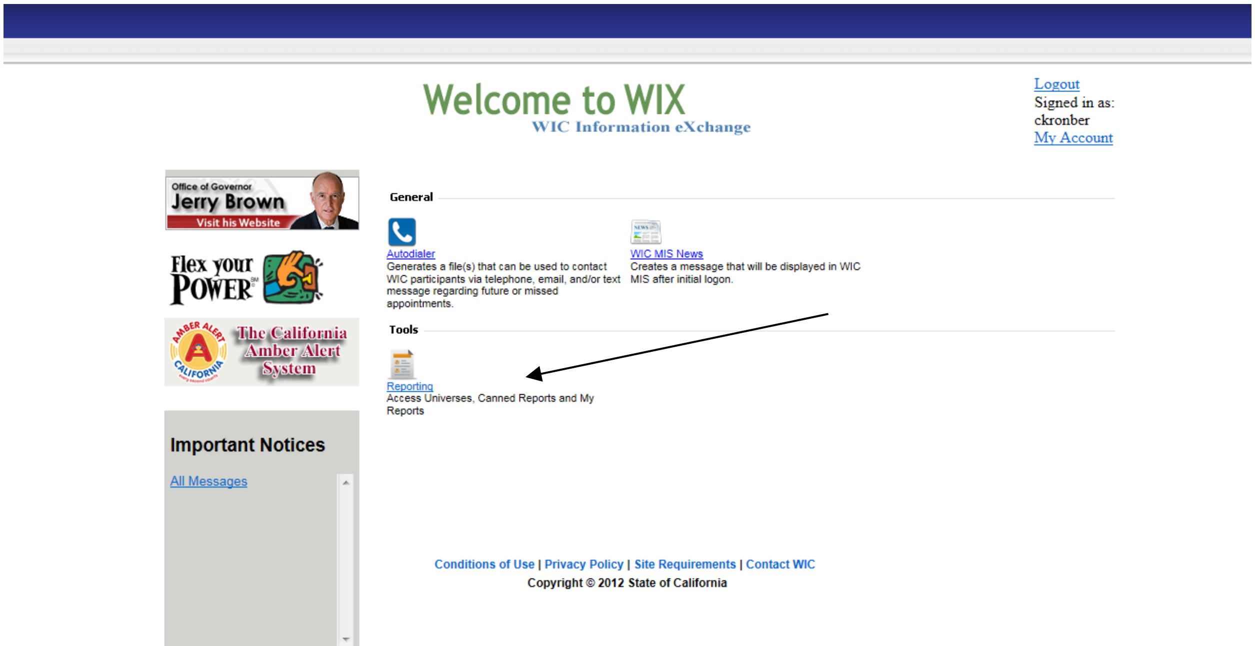
To log on to WIX, type in your **WIX Logon ID** and your WIX password.

Passwords must be between six and twelve characters in length and can contain alpha, numeric or special characters. Passwords cannot contain the Logon ID and they are case sensitive. The user account will be disabled after three failed attempts. If you need your password reset, contact the WIC MIS Help Desk.

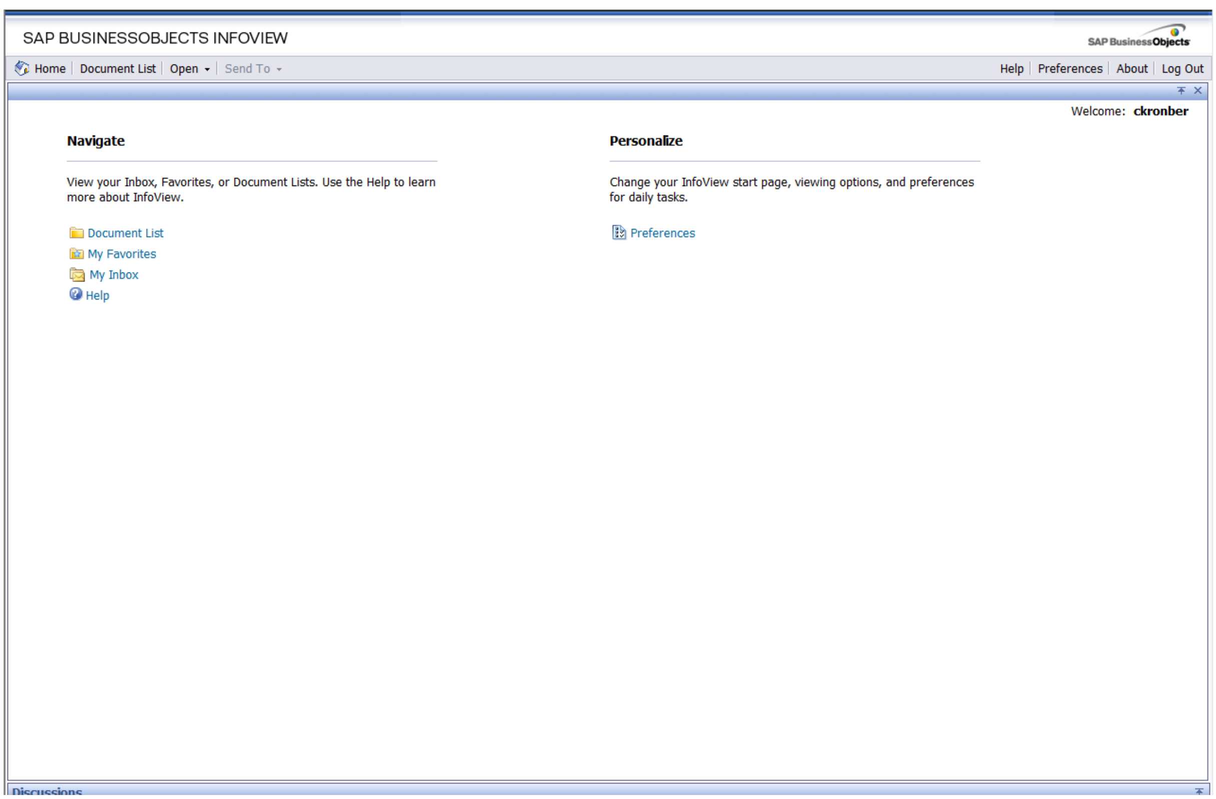
Click on **Log In**.

2.3 Getting to Reporting

Under **Tools**, click on **Reporting**.



This brings you to the SAP Business Objects Infoview home screen where you can access all of the reporting features of Web Intelligence.



Expired Password

WIX passwords expire after 90 days. Five days before your password expires you will begin to see the warning message below in the upper right of the WIX home page.

Once your password has expired, you will see the screen below when you attempt to logon with an expired password. Click the **Change Password** button to go to the **Change Your Password** screen.

2.4 How to change your WIX Password

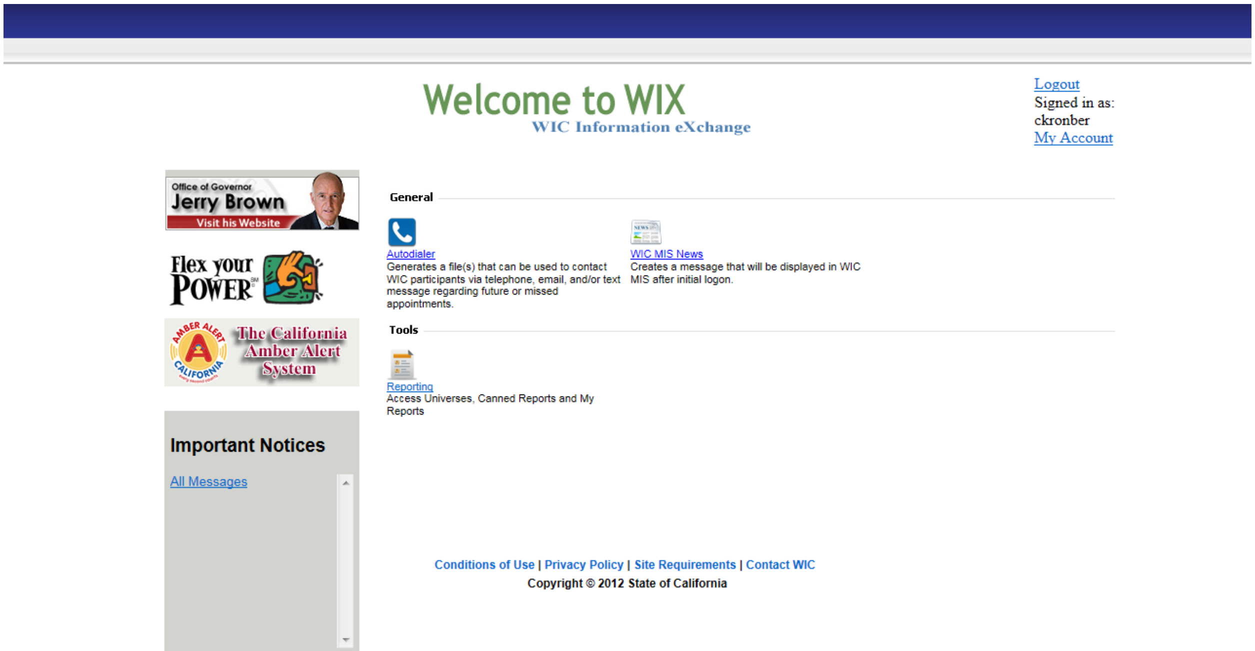
You can change your WIX Password anytime. From the WIX home page, select **My Account** in the upper right corner.

Then click on the word **GO** under the **Change Password** option. This will bring you to the **Change Your Password** screen.

- Enter your old password in the first **Password** field.
- Enter a **New Password**. Your new password must be between six and twelve characters in length. It may contain any combination of alpha, numeric or special characters. You cannot use your logon ID in your password and you cannot reuse your previous 10 passwords. Passwords are case sensitive.
- Type in your new password again in **Confirm New Password**.
- Click **Change Password** and you will see the screen below confirming that your password has been changed.

3 WIX Home Page Orientation

3.1 WIX Home Page



When you log into WIX you will see the **Welcome to WIX** home page above. The WIX home page displays the applications available from this page.

- **Logout:** Located in the upper right corner. Click this option to logout of WIX.
- **My Account:** Located in the upper right corner. This is where you can change your password and update personal information such as your email and phone number.
- **General:** Options link to the **Autodialer** function and to **WIC MIS News**.
- **Tools:** Access to **Reporting** with all of the reporting tools available in WIX.

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

Click on key word to transfer to the selected application.

3.2 Log Out of WIX

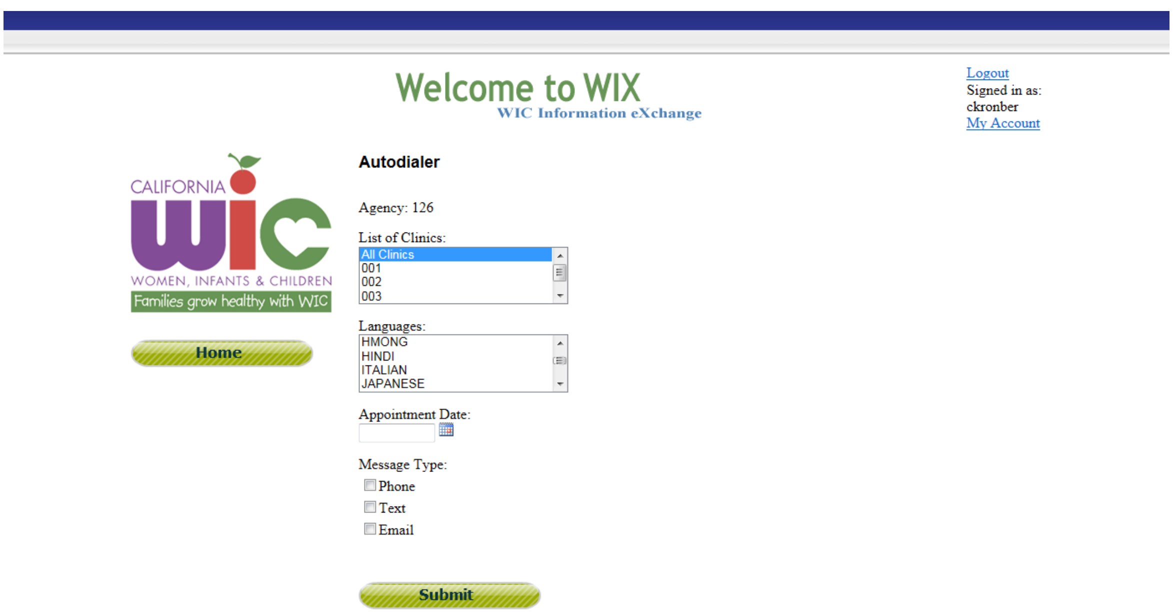
Click on **Logout** to close the WIX home page and return to the sign in screen.

4 Application Options

4.1 Autodialer

The **Autodialer** application allows you to generate a file that can be used to contact WIC participants via telephone, email, and/or text message regarding future or missed appointments. Files can be downloaded in the required format for transfer to the Autodialer.

From the WIX Home page click on **Autodialer.** This will take you to the screen below.



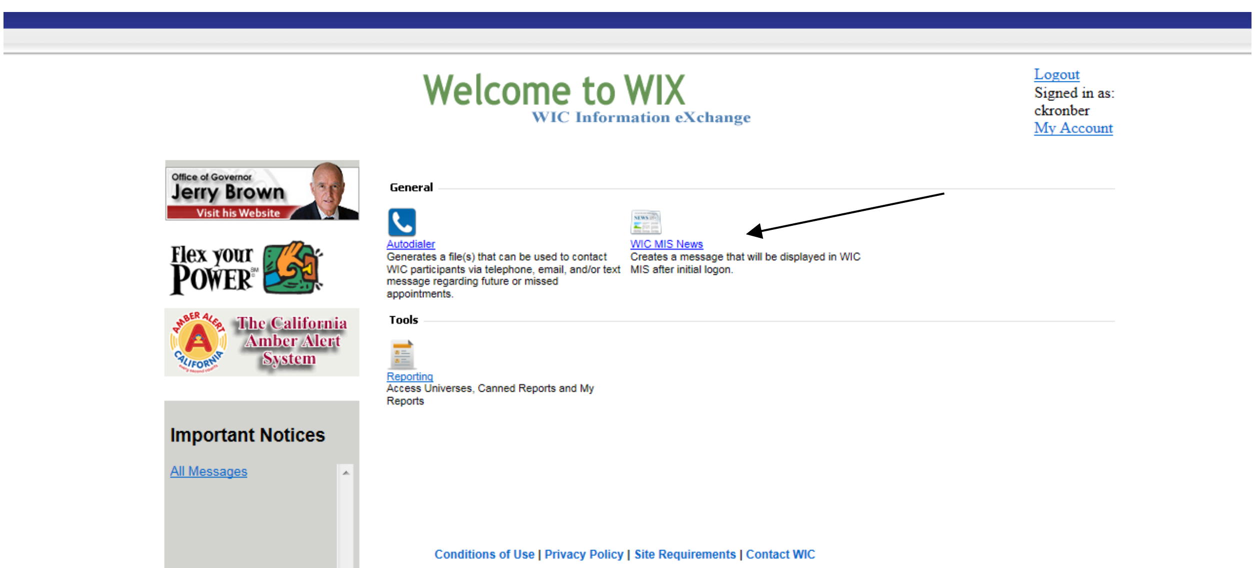
- **Agency** – Your agency number will be displayed at the top.
- **List of Clinics** – Select "**All Clinics**" for all clinics within your agency, click on one clinic ID number to select it, scroll to select a sequence of clinics, or hold the

Control key and click on multiple clinic IDs to select more than one, but not all clinics that are not in a sequence.

- **Languages** – Select "**All Languages**" to include all languages within your agency, click on one language to select it, scroll to select a sequence of languages, or hold the **Control** key and click on multiple languages to select more than one, but not all languages that are not in a sequence.
- **Appointment Date** – The default **Appointment Date** is initially blank, after this the last date selected is displayed. Click on the calendar button to display a calendar and click on the desired date. You may also enter the date manually if you choose.
- **Message Type** – Click to check the box next to the desired message type(s). You may choose one, two or all three message types, (**Phone, Text, or Email**).
- **Submit** – Click the **Submit** button and the system will retrieve your appointments from the database.
- After clicking the **Submit** button you will get a message like the two sample messages below if appointments are retrieved. The file names include the date in YYMMDD format.
  Save Phone Reminders to file 170118_A.rpt for appointments in the future, or Save Phone Reminders to file 170116_B.rpt for appointments in the past.
- Click on the link to save the file for transfer to the autodialer.
- Click on **Home** to return to the Home screen.

4.2 WIC MIS News

WIC MIS News allows you to create and send a brief message to some or all of the clinics at your agency. The message is displayed between initial logon and the Main Menu in WIC MIS.

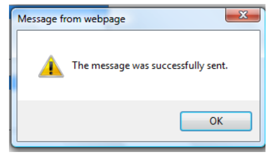


From the WIX home page, click on **WIC MIS News**.

Click on **Add Messages** to get to the **WIC MIS News** screen.

- **List of Agencies** – Your agency number will be the only one displayed.
- **List of Clinics** – Select "**All Clinics**" for all clinics within your agency, click on one clinic ID number to select it, scroll to select a sequence of clinics, or hold the **Control** key to select more than one, but not all clinics that are not in a sequence.
- **High Priority** – If the message is important, click **High Priority**. The message will be labeled high priority when it appears in WIC MIS.
- **Message Expiration Date** – Click on the calendar button to select a **Message Expiration Date**. The system will display a calendar. Click to select the expiration date or manually enter an expiration date if you choose. The system will not allow you to choose an expiration date before the current date or more than 30 days after the current date.

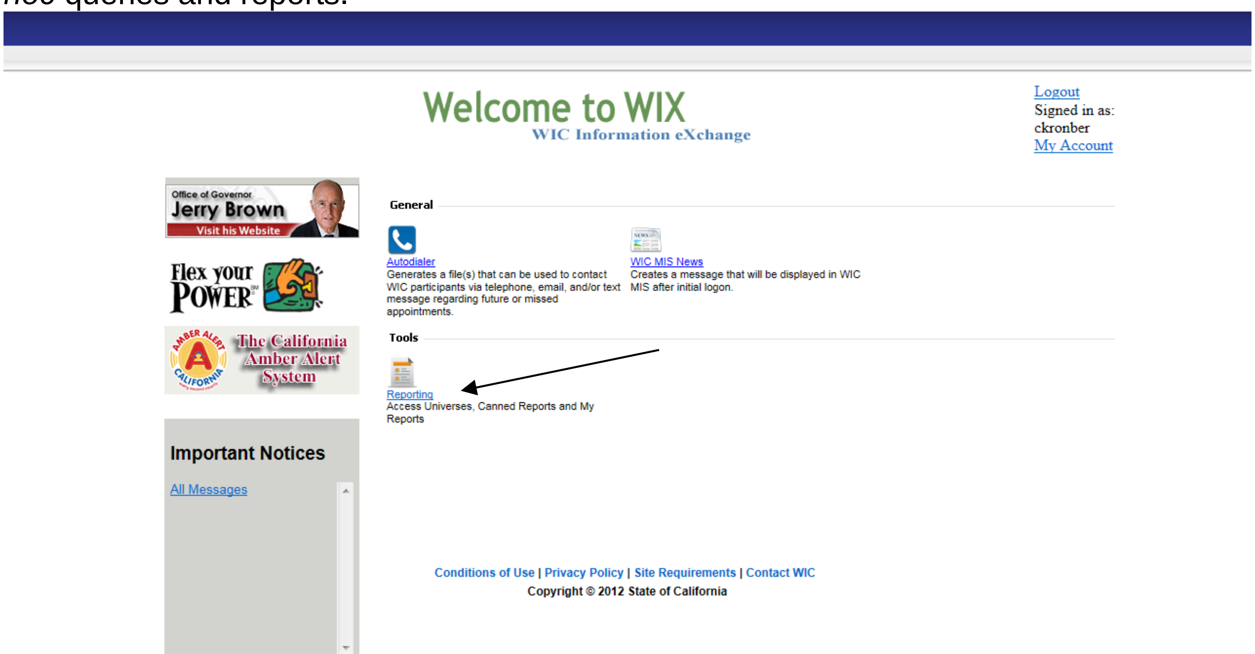
- **Message** – Enter the message text. You can use both upper and lower case characters. Note that **WIC MIS News** does not have a spell check function.
- **Submit** – Once you finish typing the message, click on the **Submit** button. There will be a pop-up confirming that the message was successfully sent. Click the **OK** button.



- **Show Messages** – Click on **Show Messages** to see a list of all active messages.
- **Delete** – Next to each message on the **Show Messages** list, there will be an option to delete. Click on the word **Delete** and click **OK** on the popup to delete the message or click **Cancel** to keep it. There will be another popup confirming that the message was successfully deleted. Click **OK**.
- To go back to the WIC MIS News screen, click the **Add Messages** button.
- Click on **Home** to return to the Home screen.

4.3 Reporting

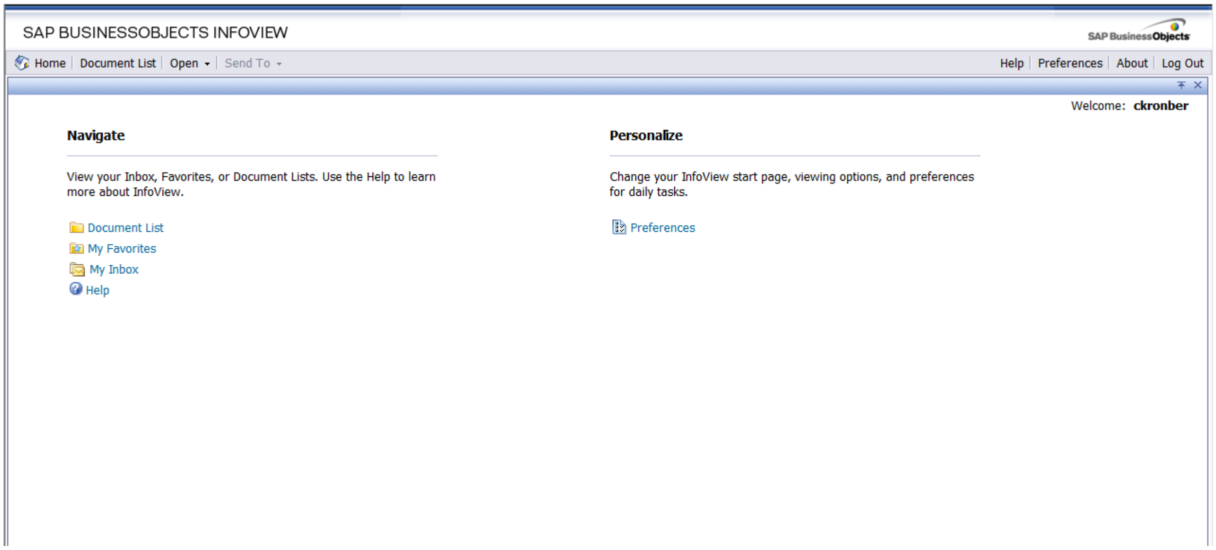
This option provides access to the WIX reporting tool with access to the **Canned Reports**, **My Favorites, My Inbox**, **Public Folders**, and the universes for creating *ad hoc* queries and reports.



From the WIX Home page, click on **Reporting** and the **SAP Business Objects InfoView Home** screen will appear in your web browser.

The **InfoView Home** page screen is divided into two panels.

1. Header panel
2. Workspace panel



4.3.1 Header Panel:

The Header panel across the top of the screen displays the name and logo for SAP Business Objects and contains the **InfoView** toolbar used to perform the following actions:

- **Hom**e: Displays this **InfoView** home page or user-defined **Preferences**
- **Document List:** Shows the **Document List** where you will find **My Favorites**, your **Inbox** and the **Public Folders**.
- **Open:** Opens **My InfoView** and **Encyclopedia**. Click **Open** again for the option to **Close My InfoView** or **Close Encyclopedia**.
- **Send To:** This function is not operational from this page
- **Help:** This displays the SAP Business Objects Enterprise InfoView User's Guide
- **Preferences:** Allows you to set how information is displayed. Note that the change password option here has been disabled. Change your password from **My Account**.
- **About:** Displays product information about InfoView and a link to the SAP Busiiness Objects website.
- **Log Out:** Logs the user out of **InfoView**. You will also need to log out of the **WIX Home** page.

4.3.2 Workspace Panel

This panel displays **InfoView** content while you are performing activities such as viewing, scheduling, and modifying objects, browsing the **Document List** and so on. The various toolbars available and the options available with a right mouse click will change according to your current task. The Info View Home page workspace panel is divided into two areas, **Navigate** and **Personalize**.

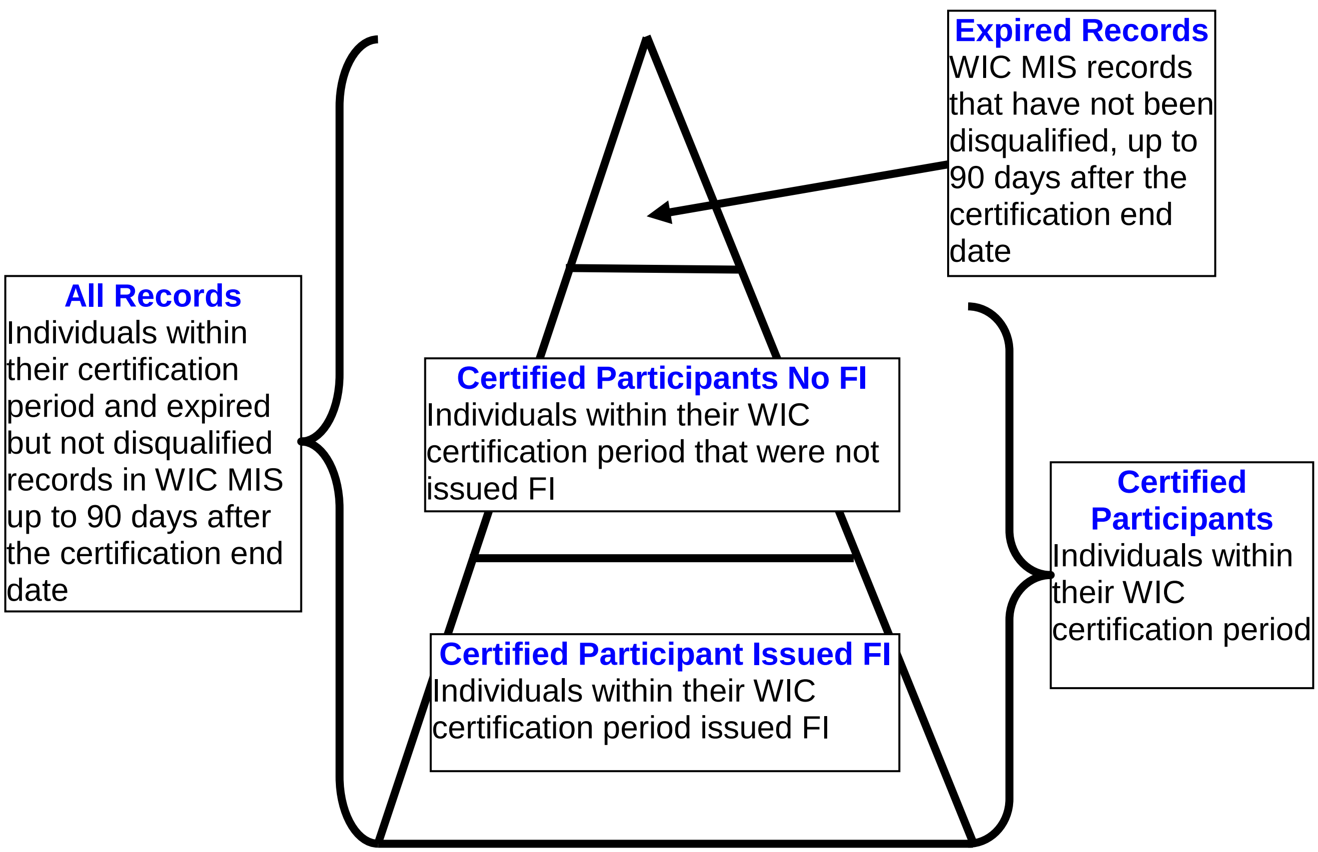
Under **Navigate**, the following options are available.

- **Document List:** Shows the **Document List** where you will find **My Favorites**, your **Inbox** and the **Public Folders**. This tales up to the same place as **Document List** in the Header panel.
- **My Favorites:** Takes you to the **Document List** but opens the **My Favorites** folder. This is where you will save the queries you create and may want to use again.
- **My Inbox:** Takes you to the **Document List** but opens the **My Inbox** folder. This is where you will receive queries and reports sent to you by other users.
- **Help:** This displays the SAP Business Objects Enterprise InfoView User's Guide.

Under **Personalize** the user can change the InfoView start page, set various viewing options, and select preferences for daily tasks. How to use **Personalize** will not be addressed in the level one course.

5 WIC Data Terminology and Description

Before proceeding to view and create reports, review the standards for WIC Data Terminology below. You will notice terms such as All Records and Certified Participants in various WIC reports. Below is a graphic display of WIC Data Terminology and Descriptions that provides the standard language used to define various types of data in WIX. 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 WIX reporting environment.



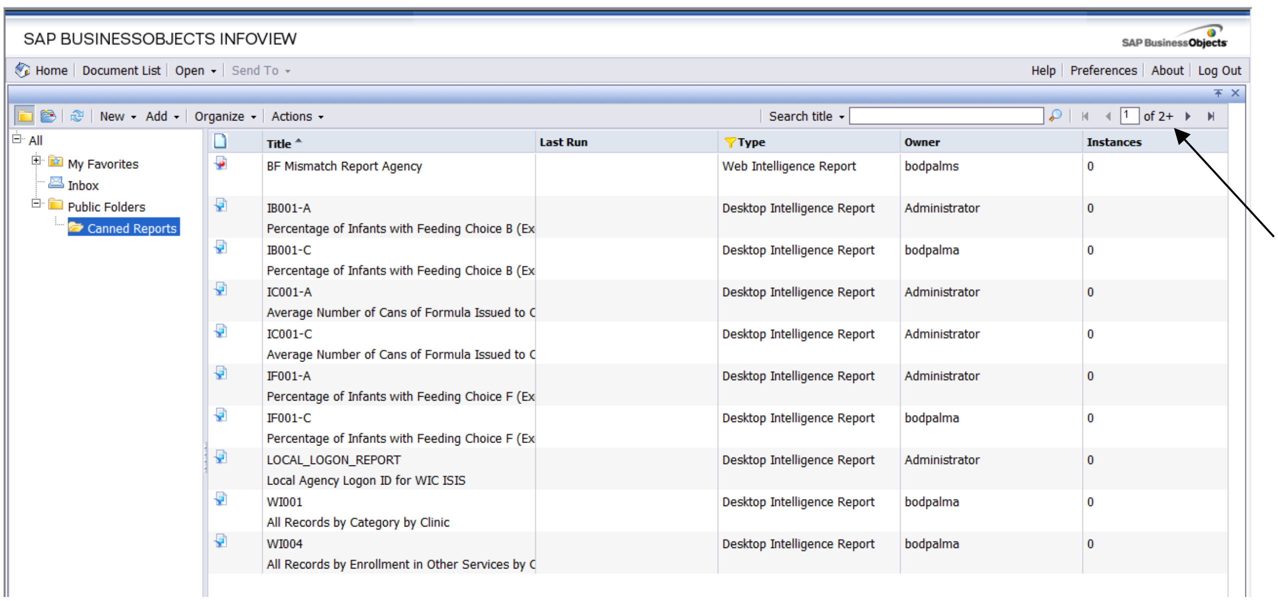
6 Canned Reports

WIX provides access to some ready-made or canned reports. To locate the **Canned Reports**, from the I**nfoView** home screen click on **Document List** and open the **Public Folders**.

Click on the folder labeled **Canned Reports**. A list of the available reports will be displayed. Notice that there is more than one page of reports listed. Click on the right arrow next to the page number to advance to the second page.

New reports will be added as they are developed.

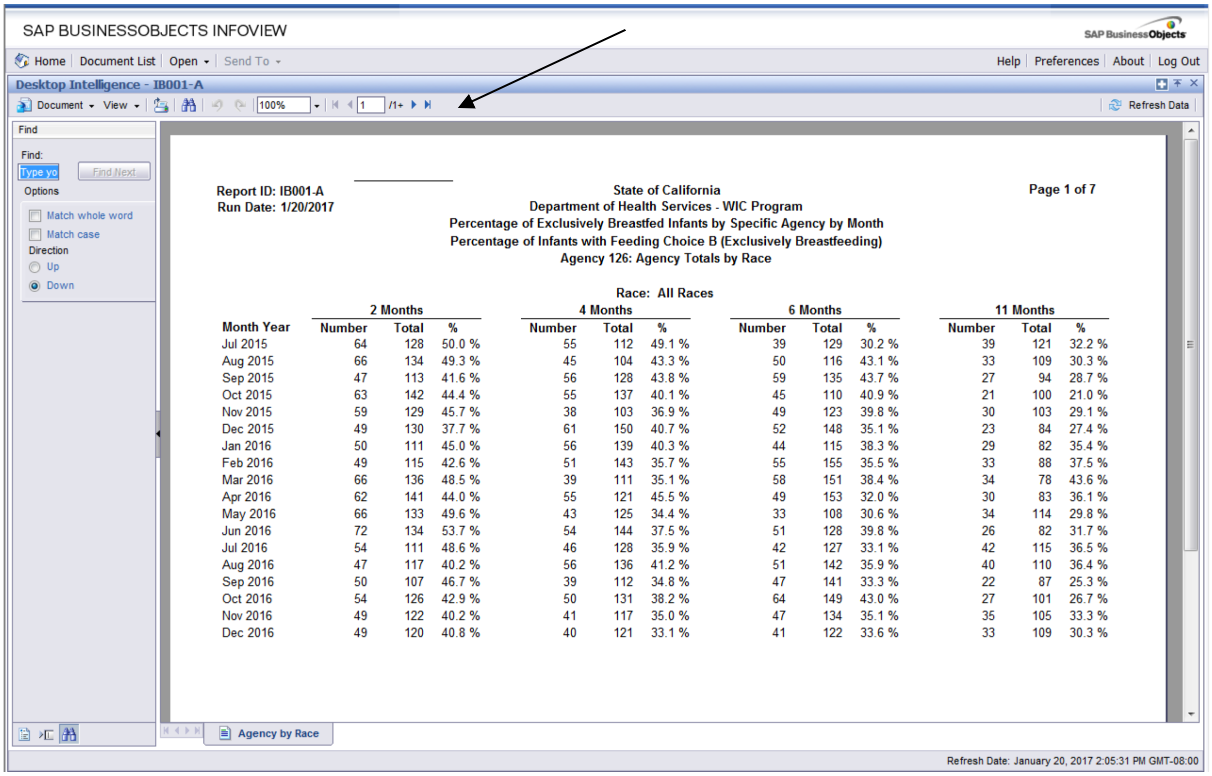
6.1 Canned WIC Reports Screen



Each report on the list has a descriptive name and most have a number followed by a letter A, C or S. The letter A stands for Agency and these reports provide agency wide data. The Letter C stands for Clinic and the reports will return data for the clinic you select. The S reports provide you with Statewide data so you can see how your agency compares to other agencies in the state.

Double click on the title of the second canned report listed, **IB001-A, Percentage of Infants with Feeding Choice B**, to open it.

The report will appear like the example on the following page.



Report ID: IB001-A
Run Date: 1/20/2017

State of California
Department of Health Services - WIC Program
Percentage of Exclusively Breastfed Infants by Specific Agency by Month
Percentage of Infants with Feeding Choice B (Exclusively Breastfeeding)
Agency 126: Agency Totals by Race

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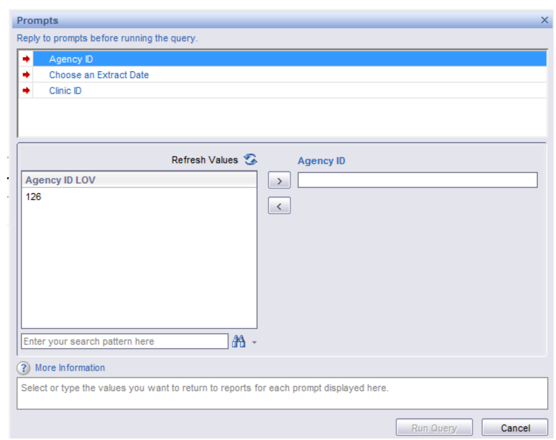
Race: All Races

	2 Months			4 Months			6 Months			11 Months		
Month Year	Number	Total	%	Number	Total	%	Number	Total	%	Number	Total	%
Jul 2015	64	128	50.0 %	55	112	49.1 %	39	129	30.2 %	39	121	32.2 %
Aug 2015	66	134	49.3 %	45	104	43.3 %	50	116	43.1 %	33	109	30.3 %
Sep 2015	47	113	41.6 %	56	128	43.8 %	59	135	43.7 %	27	94	28.7 %
Oct 2015	63	142	44.4 %	55	137	40.1 %	45	110	40.9 %	21	100	21.0 %
Nov 2015	59	129	45.7 %	38	103	36.9 %	49	123	39.8 %	30	103	29.1 %
Dec 2015	49	130	37.7 %	61	150	40.7 %	52	148	35.1 %	23	84	27.4 %
Jan 2016	50	111	45.0 %	56	139	40.3 %	44	115	38.3 %	29	82	35.4 %
Feb 2016	49	115	42.6 %	51	143	35.7 %	55	155	35.5 %	33	88	37.5 %
Mar 2016	66	136	48.5 %	39	111	35.1 %	58	151	38.4 %	34	78	43.6 %
Apr 2016	62	141	44.0 %	55	121	45.5 %	49	153	32.0 %	30	83	36.1 %
May 2016	66	133	49.6 %	43	125	34.4 %	33	108	30.6 %	34	114	29.8 %
Jun 2016	72	134	53.7 %	54	144	37.5 %	51	128	39.8 %	26	82	31.7 %
Jul 2016	54	111	48.6 %	46	128	35.9 %	42	127	33.1 %	42	115	36.5 %
Aug 2016	47	117	40.2 %	56	136	41.2 %	51	142	35.9 %	40	110	36.4 %
Sep 2016	50	107	46.7 %	39	112	34.8 %	47	141	33.3 %	22	87	25.3 %
Oct 2016	54	126	42.9 %	50	131	38.2 %	64	149	43.0 %	27	101	26.7 %
Nov 2016	49	122	40.2 %	41	117	35.0 %	47	134	35.1 %	35	105	33.3 %
Dec 2016	49	120	40.8 %	40	121	33.1 %	41	122	33.6 %	33	109	30.3 %

You can navigate through the various pages using the arrows to the right and left of the page number.



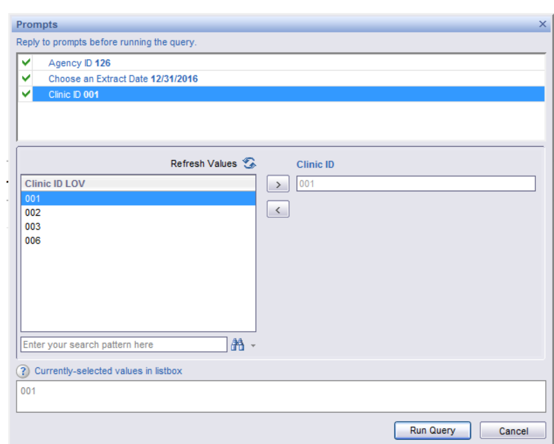
6.2 Prompts in a Canned Report

Some of the reports will require you to respond to a prompt before they will run. Double click on, **WI004, All Records by Enrollment in Other Services by Category (by Selected Clinic).** The prompt will pop up on top of the empty report. You must address each of the red arrows in the list at the top of the pop-up.

- Highlight **Agency ID** and then double click on your agency ID below. You will see the space for agency ID will be filled in and a green check will appear on the list in place of the red arrow.

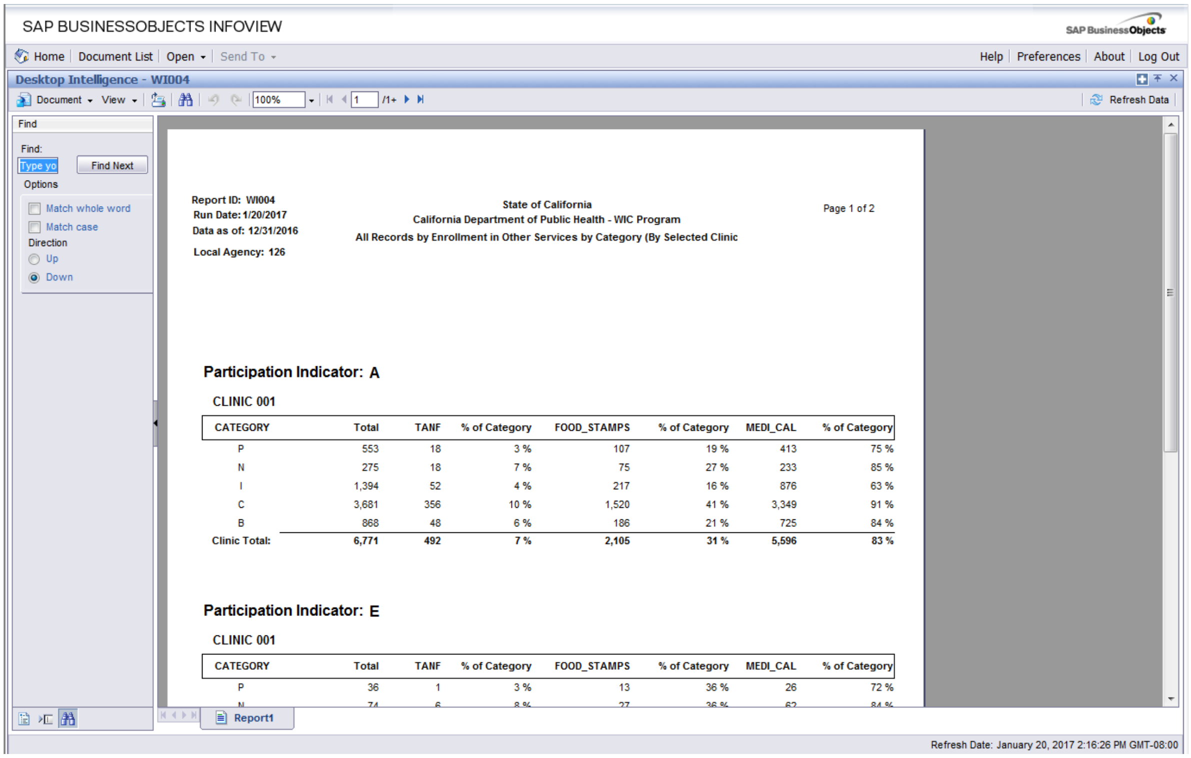
- Next highlight the **Extract date** and select the date you wish to include from the list provided. Do the same for the **Clinic ID** to select the clinic you want to include in the report from the dropdown list.

- Once all of the items are checked, the **Run Query** button will be activated (not grayed out) and you will be able to select it to run the query.



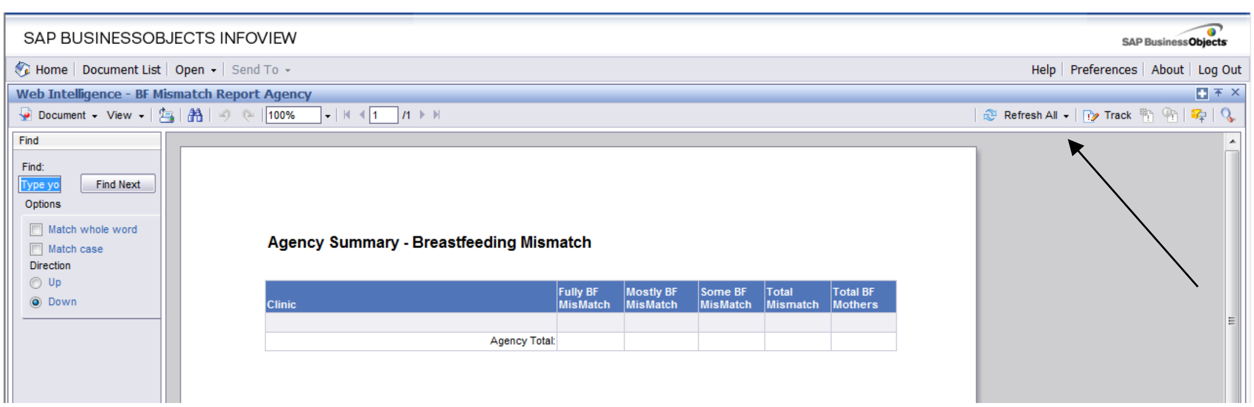
6.3 Report Results

Your report will be displayed and you can navigate through the various pages if there is more than one.

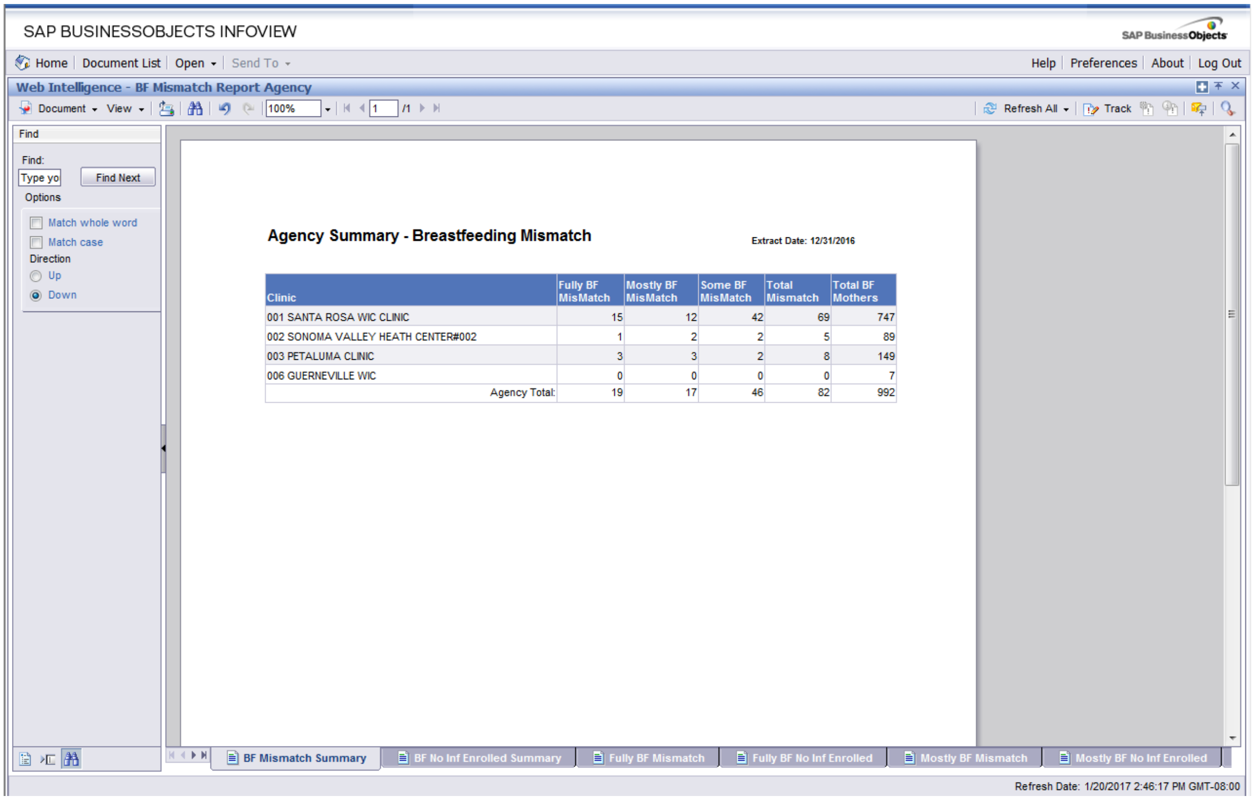


6.4 Multi-tab Report

Click on the first report on the canned reports list, BF Mismatch Report Agency. When this report first opens you will see that the report is empty, without any data. Click on Refresh All to populate the report with data. You will be prompted to select an extract date before you can run the query.

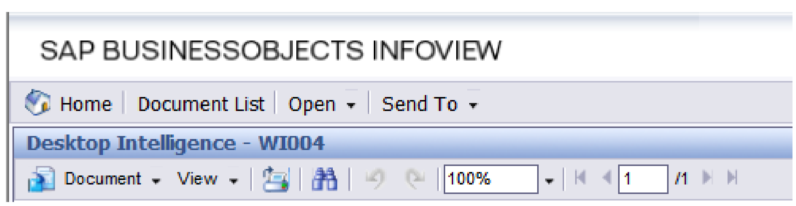


Once the report fills with data, notice the six tabs along the bottom of the report. This one query was used to produce several different reports by displaying the breastfeeding mismatch information in various ways. Click on each tab to study the reports.

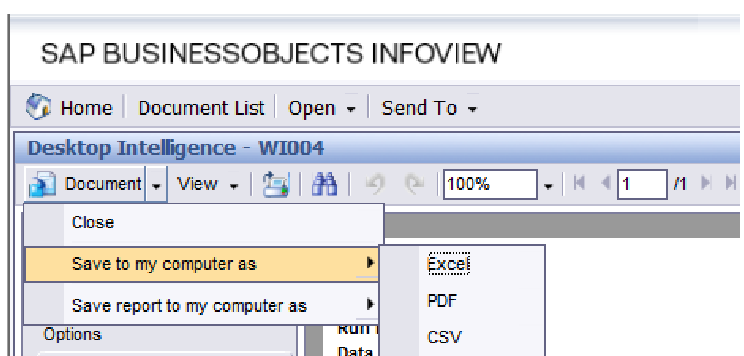


6.5 Saving, viewing, printing, and searching your report

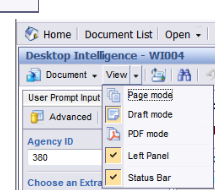
In the upper left side of your screen, there are options for saving, viewing, printing and searching your report.



Under **Document** are the options to **Close** the report or to **Save to my computer as** either **Excel, PDF** or **CSV**. Try this now and save the report as an Excel spreadsheet.



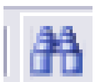
The next option in the upper left is **View**. Click on the drop down arrow to see the options for how the



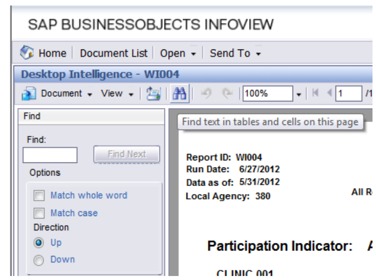
report is displayed on your screen. The report starts displayed in Page mode. Try changing it to **Draft mode** and then to **PDF mode**. Change it back to **Page mode** by **pressing View in HTML format** in the upper left of the PDF view.

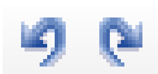
Un-checking the **Left Panel** box will remove the panel along the left side panel of the display. Un-checking the **Status Bar** box will delete the status bar along the bottom of the page. Just recheck the box to display them again.

Click on the printer icon to export the report to PDF for printing. Once you export the report to PDF, you can print it just like any other document.



The next icon opens the find panel on the left and allows you to find text in the tables and cells on this page. You can type in a letter, number, word or phrase and locate it wherever it appears on that page. Do this in draft mode to search the whole document.

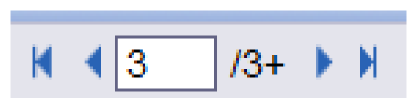




The next icons are two arrows that allow you to undo or redo the previous actions.

Next is a white box with a percent. Clicking the arrow shows a drop down list in various increments ranging from 10% to 500%. This lets you zoom in or out on the report by changing its size on the screen. You can also type in any number between 1% and 500% if you want a more precise size for viewing.

The next white box tells you the page number. You can type in a page number and press **Enter** to go directly to the desired page, or use the arrows to navigate forward or backward through the pages.



At the bottom of the left panel are three icons that select what is seen in the left panel of the report.

- The first, **Navigation Map**, will show the detail for various fields of the report and how it is organized.
- The second is **User Prompt Input** and will show you the prompts you selected when the report was run.
- The third brings up the **Find** panel that allows you to find a letter, word, number or phrase anywhere on the page just like the one above.

6.5.1 Inbox

Inbox is where you will receive reports sent to you by other WIX users, either within your own agency, from other local agencies or from the State.

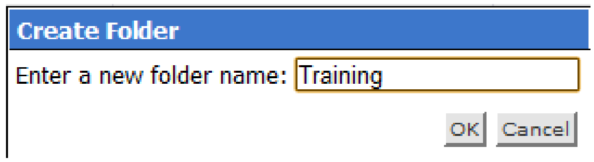
6.5.2 My Favorites

My Favorites is your personal file area where you will save queries that you create or that you receive from other users in your **Inbox**.

6.5.2.1 Create Folders in My Favorites

You can create new folders within **My Favorites** to organize your queries the way you want. This can be done either before or after you save the query. Let's prepare a folder where you can save the queries you create during this training.

- Go to the **Document List** and highlight the **My Favorites** folder in navigation panel.



- Click the **New** button on the Navigation Bar and select **Folder** from the drop-down list.

  The **Create Folder** pop-up opens in the workspace panel.

- Type in the folder name you wish to create. Create a new folder in your **My Favorites** and name it **Training.**
- Click **OK** and the new folder will appear in the **Navigation Panel** as a subfolder in **My Favorites**.

7 Creating Reports with Web Intelligence

The reporting function in Web Intelligence allows you to put together an *ad hoc* report quite easily. This reporting tool provides user-friendly access to the vast amounts of available the WIC MIS database.

7.1 Getting to Web Intelligence

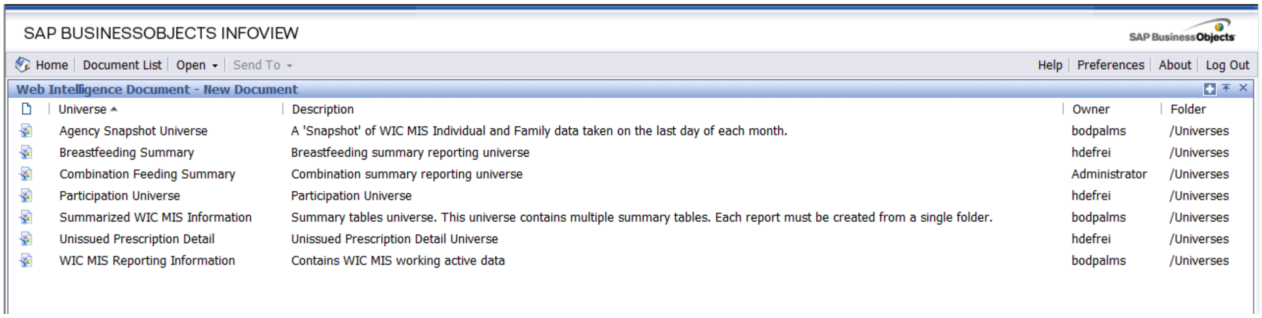
To get to the **Web Intelligence Document** screen from the **WIX Home** Screen

- Click on **Reporting**
- Click on **Document List**
- Select **New** from the menu across the upper left
- Select **Web Intelligence Document**.

This brings you to the list of universes and their descriptions.

7.2 Data Universes

The reporting data fields have been organized into groups called universes. The names of the universes available are listed on the screen below. More universes of data may be added and others may be deleted as WIX is developed.


SAP BUSINESSOBJECTS INFOVIEW

Home | Document List | Open | Send To | Help | Preferences | About | Log Out

Web Intelligence Document - New Document

Universe	Description	Owner	Folder
Agency Snapshot Universe	A 'Snapshot' of WIC MIS Individual and Family data taken on the last day of each month.	bodpalms	/Universes
Breastfeeding Summary	Breastfeeding summary reporting universe	hdefrei	/Universes
Combination Feeding Summary	Combination summary reporting universe	Administrator	/Universes
Participation Universe	Participation Universe	hdefrei	/Universes
Summarized WIC MIS Information	Summary tables universe. This universe contains multiple summary tables. Each report must be created from a single folder.	bodpalms	/Universes
Unissued Prescription Detail	Unissued Prescription Detail Universe	hdefrei	/Universes
WIC MIS Reporting Information	Contains WIC MIS working active data	bodpalms	/Universes

Take some time to explore each universe. When you create an *ad hoc* report, you will be creating it from within one or more of these universes. It is important to learn what fields and what type of information you can find in each universe so you will know which one to use when you want to retrieve information.

Tip: While you must specify a universe when you create a new report, you are not limited to a single universe and can create reports querying from multiple universes.

The **Agency Snapshot Universe** contains snapshots of specific information from WIC MIS individual and family records taken after the close of business on the last day of each month. These data snapshots are available for the 13 most recent extract dates for all fields. Even though you will see older extract dates listed, the data is no longer available in WIX. None of the fields is updated after the snapshot is taken. This universe contains many useful data fields not found in the other universes and allows you to monitor changes over time. Reports will retrieve data on **All Records** unless you specify which records you want. Note that there are four category specific folders, Prenatal, Postpartum, Infant, and Child. Items from one these four folders cannot be combined in the same query with items from another one of these four folders.

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. Information is available 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 so the records counted are **Certified Participants Issue FI**.

The **Combination Feeding Summary** universe contains information only on the combination fed infants who were 2, 4, 6, and 11 months old during the prescription month. Information is available 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 so the records counted are **Certified Participants Issue FI**.

The **Participation Universe** has the same information as Participation Summary I, the first folder of the Summarized WIC MIS Information universe. It has most of the same data elements, except that it contains data for the racial ethnic categories. It does not have the predefined conditions for current month and last month, or the sort number for category. Information in this universe goes back in time to January 2003. The participation count is updated through close of business the previous day. Only participants who received FIs are included so the records counted are **Certified Participants Issue FI**.

Summarized WIC MIS Information contains folders with counts of various parameters, for example, participation counts or counts of exclusively breastfeeding women for any given month. Details about specific individuals, families or risk codes are not available in this universe. The first folder, Participation Summary I is updated daily at close of business and goes back in time to January 2005. Participation Summary II is updated on the 2nd of each month and goes back in time to May 1997. The Priority by Category folder goes back to January 1996 and is updated on the 5th of each month.
The Ethnicity by Category folder also goes back to January 1996. It is based on old racial ethnic categories and will return accurate data only through April 2005. The Vaccination Aggregate folder is used only if your agency uses this application is WIC MIS. *The Summarized WIC MIS Information universe is the only universe where objects from different folders cannot be combined in the same query. Each query must be created with objects in a single folder.*

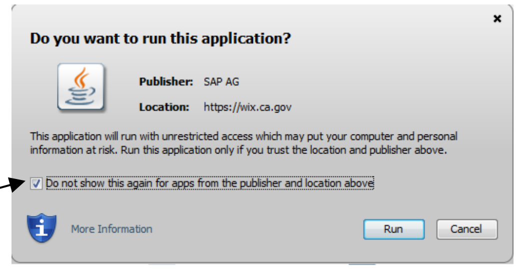
The **Unissued Prescription Detail** universe contains the fields needed to identify individuals and families who have not received food instruments for the current prescription month. It can be used to prepare a list, with the family name, phone number and address so that WIC staff can contact the families for follow up. Because it is based on the food prescription, this universe has only certified individuals who have a valid prescription for the current month. It will not identify missed appointments for enrollments, those past their cert end date, or certified participants without a valid prescription for the current month. The appointment dates and the unissued counts are updated nightly.

The **WIC MIS Reporting Information** universe contains specific detail on individuals and families from the current active WIC MIS record. The WIC MIS Reporting Information universe gives you the option of the two most recent monthly extracts to report against. The extract is done after close of business on the second of each month and is available on the third. Family information and some individual information are updated throughout the day several times per hour, so this universe has the most up to date name, address, phone number, and/or appointment date. Although many fields in the **WIC MIS Reporting Information** universe are updated regularly throughout the day, only records that existed on the extract date will be found. Information about new enrollments during the month will not be available in this universe until after the next extract date. The various counts available require that you choose whether you want All Records, Certified Participants, Certified Participants Issued FI or expired records.

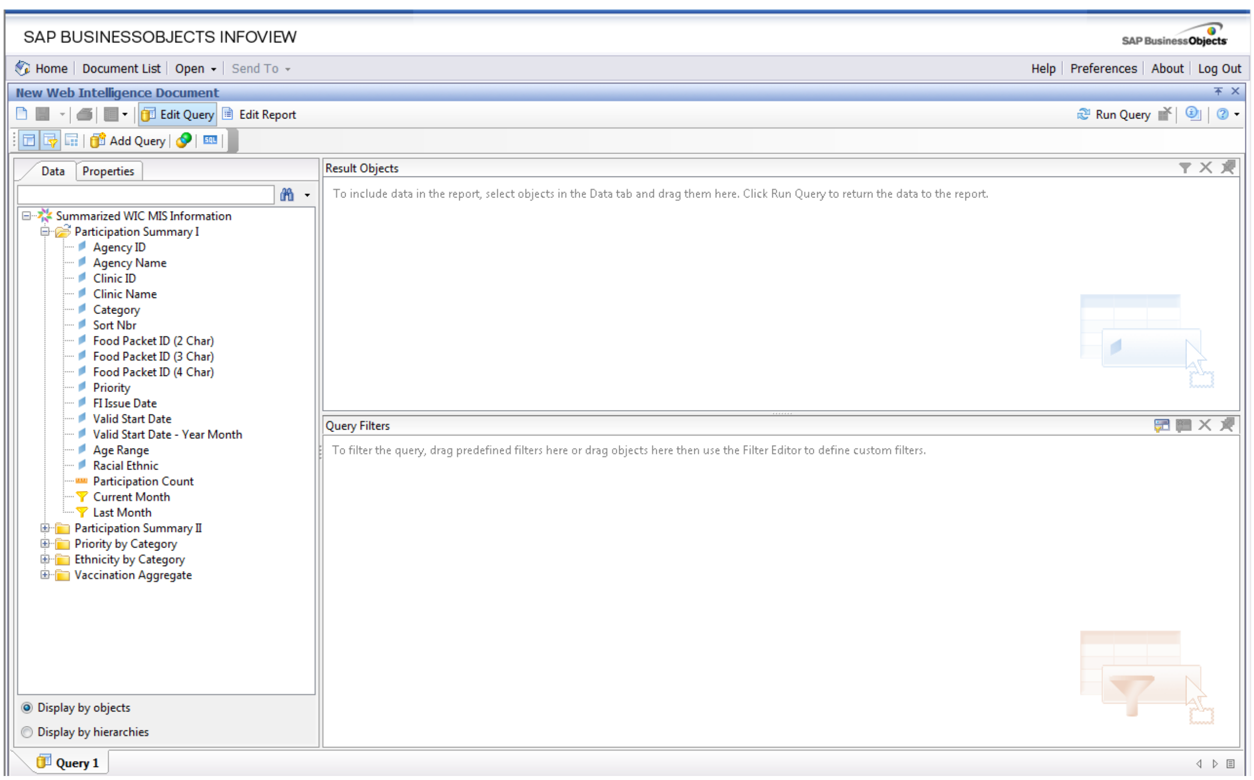
Web Intelligence – Features, Functions and Navigation

Before we launch into how to create an actual report, let's take a look at some basic components and navigation standards of this reporting tool. From the universe list, select the **Summarized WIC MIS Information** universe.

When you first open a universe, you may see this pop-up window asking if you want to run the Java application. Just check the box for "Do not show this again…" and click **Run**.



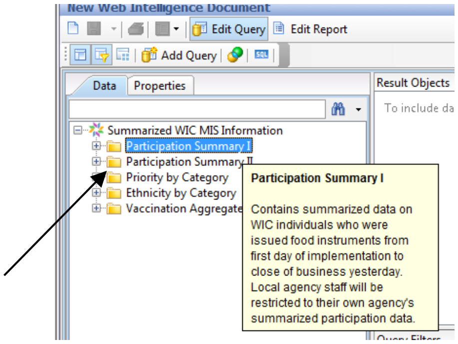
The following screen is displayed. Note that this screen is divided into three sections; the Objects list on the left, **Result Objects** and **Query Filters**. The default display shows the first folder open, with the data objects listed as shown below.



7.2.1 Objects List

The Object list is in the column on the left of the screen. On the **Data** tab, there are folders that contain the data objects available to place in the **Result Objects** and the **Query Filters** sections.

The **Summarized WIC MIS Information** universe contains five folders. Use the mouse curser to hover over any of the folders or objects in the list to show a brief description of the data object or the contents of the folder



Hover over **Participation Summary I** and read the description. Then hover on **Participation Summary II** to see the difference.

You will note that **Participation Summary I** is updated based upon food instruments issued as of the close of business yesterday while **Participation Summary II** is updated monthly.

Open the first folder and highlight some of the data objects to read the description. Each folder contains various data objects available to place into the **Result Objects** section. You just drag and drop or double click on an object to place it in the desired area.

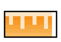
Tip: Click on the plus sign next to the folder to open it. Click on the minus sign next to an open folder to close it.

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.

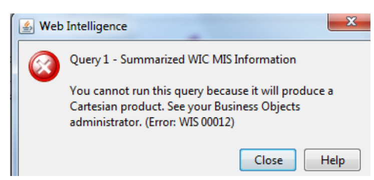
 Folders: Folders contain related data objects or subfolders.

Within each folder, there are two object types:

 Attributes or labels

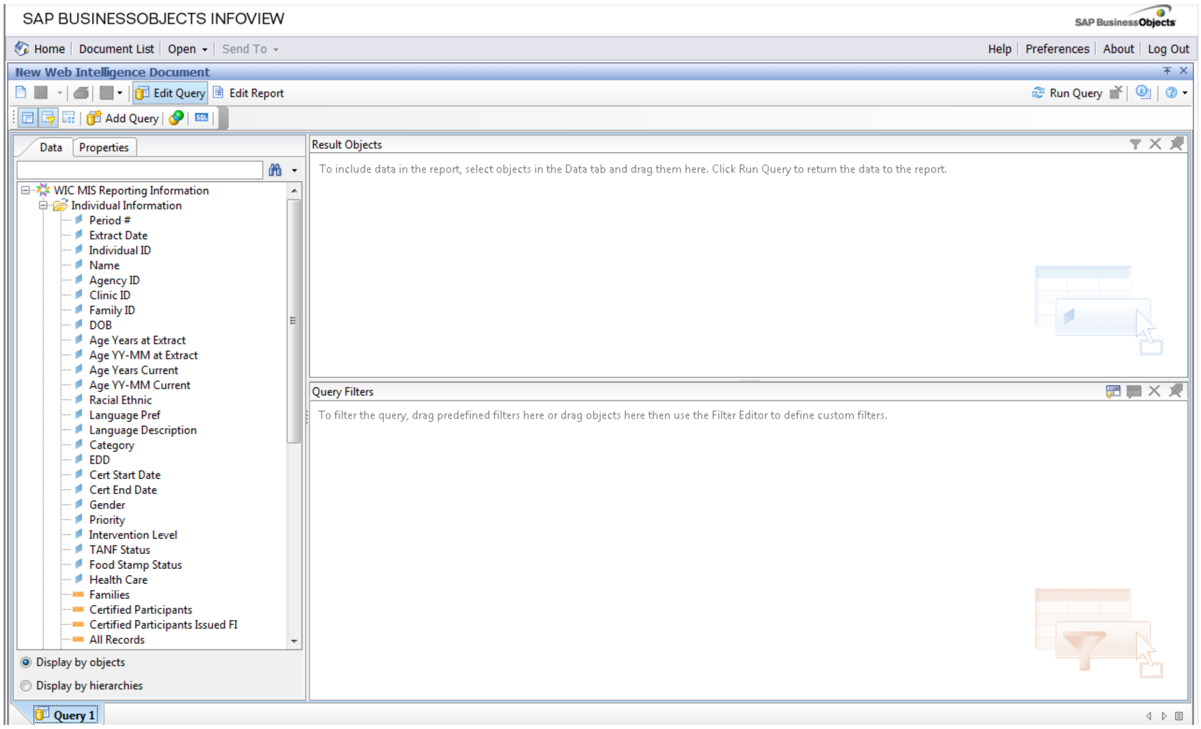
 Measures of data (counts)

In the **Summarized WIC MIS 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 this error message and the report will not run. Don't be afraid to try it and see what happens so you will recognize the problem if you do it later by mistake. In all of the other universes with more than one folder you can combine information from different folders into the same report.



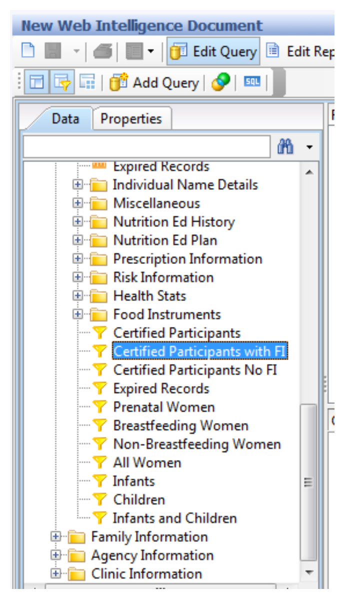
Let's look at the object list in a different universe. Go back to the universe list by clicking on the back arrow or clicking on **Document List** and then **New**, and selecting **Web Intelligence Document**. Select the **WIC MIS Reporting Information** universe from the list.

The following screen is displayed with the first folder, **Individual Information**, open.

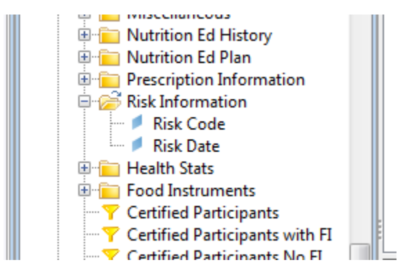


The **WIC MIS Reporting Information** universe consists of four folders; **Individual Information**, **Family Information**, **Agency Information**, and **Clinic Information**. In this Universe, it is perfectly okay to select and mix objects from different folders in the same query. In fact, you will 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 of the objects list to the right.



Open the **Risk Information** subfolder and a list of the data objects within this subfolder is displayed as in the example below.

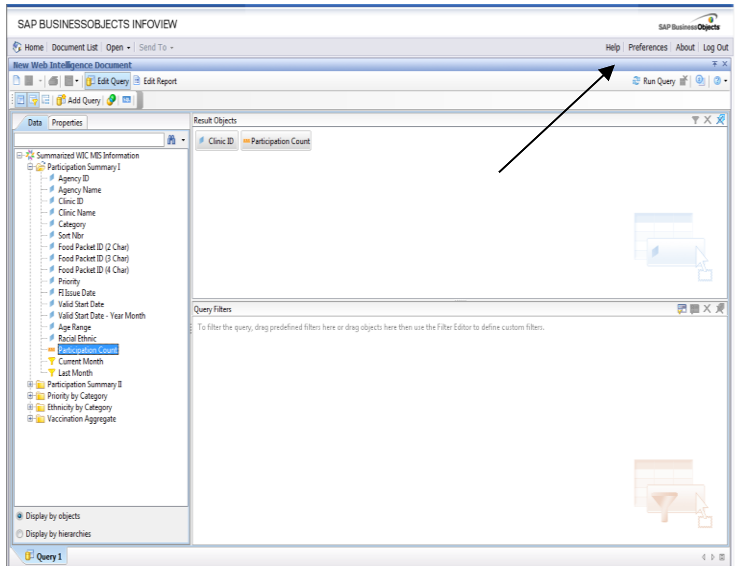


Similar to the data objects listed elsewhere, you can place data objects from subfolders, such as **Risk Code** and/or **Risk Date**, into the **Result Objects** area when you want to include them in your report.

Go back to the **Summarized WIC MIS Information** universe and we will create a simple query.

7.2.2 Result Objects

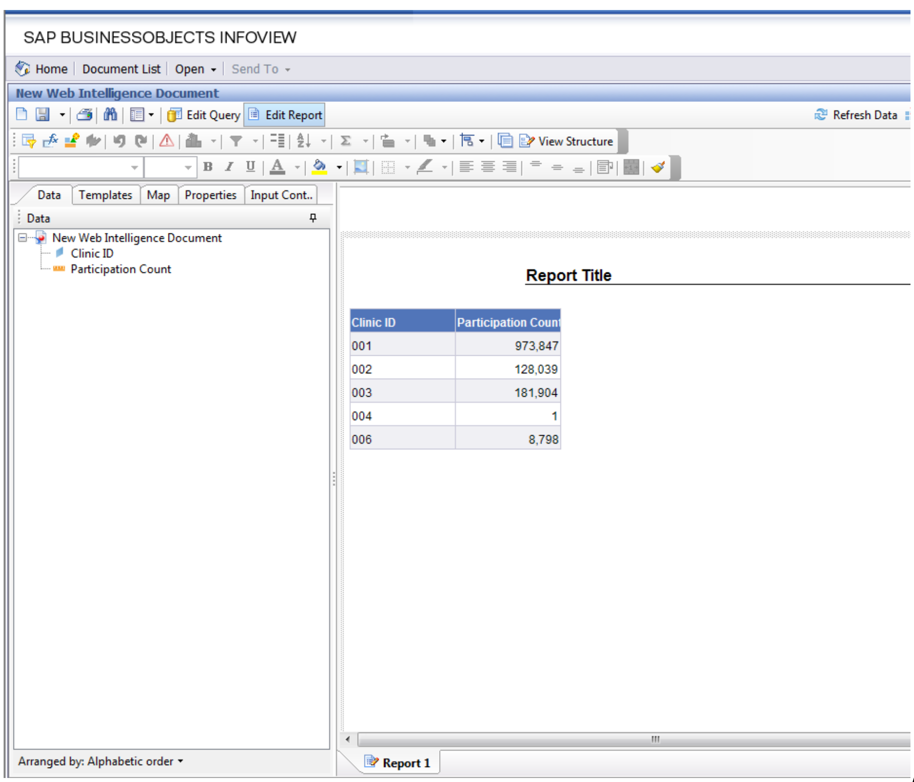
The **Result Objects** area is where you will place the data objects that you want to see on the report you are creating. Just double click on the object or drag and drop to move it to the **Result Objects** area. The data for each object initially will be displayed in the order in which it is placed in this area.



In the **Summarized WIC MIS Information** universe, double click on **Clinic ID** and then on **Participation Count**.

Next, click on **Run Query** in the upper right above the **Result Objects** area, (see arrow).

Your report will look something like the example below.



You will see a participation count for each clinic in your agency. How does this report look? Do the counts seem right or are the numbers really high for your agency? Remember

Tip: Always study the data you get when you create a new report. Does it make sense? The query will return exactly what you asked for, but did you ask for what you wanted and get what you expect? Just because a report runs and returns data, doesn't mean it's right or meaningful.

that in this universe the data goes way back in time. It has given you exactly what you asked for, the total of all the participation for each clinic for all of the months in the database. How do we get it to return something more useful, like the participation just for last month?

Click on **Edit Query** in the top menu bar above the report. This will take you back to the query-building screen.

7.2.3 Query Filters

The third area of the query-building screen is **Query Filters**. Filters place limits on or restrict the data objects in the report. The **Query Filters** section is where you place the data objects you wish to limit. Any of the data objects from the objects list can also be added to the **Query Filters** area.

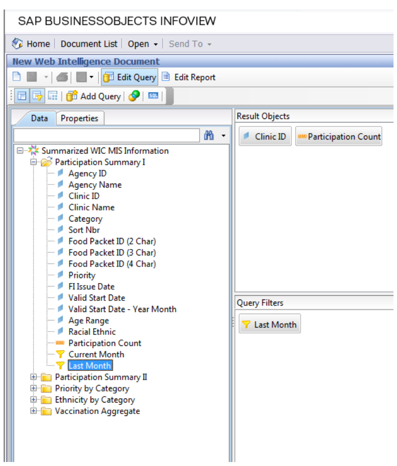
Additionally, you may have noticed a different icon on the objects list that looks like a small funnel. These are predefined filters.

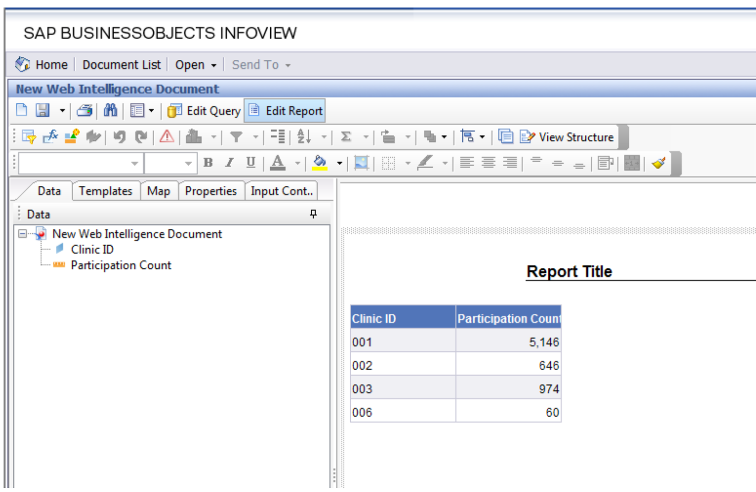
> **Tip:** Predefined date-related filters such as **Last Month** make regular monthly reports easy to run.

 Predefined filters

For example, since you want a participation count only for last month, drag the predefined filter for **Last Month** to the **Query Filters** area. In this example, this is a predefined filter on the attribute **Valid Start Date–Year Month**. With this object in the **Query Filters** area, the report will always retrieve data for the previous month, so in future months you will not have to edit the query to change the date.

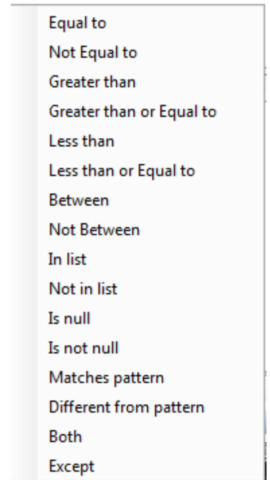
Here is an example of the query and the resulting report for participation count by clinic for last month.





If there is not a predefined filter that matches what you want, you can define the filter yourself. When you move any object to the **Query Filters** area some new fields appear. For example, let's get a count of just the women served last month. Drag the object for **Category** into the **Query Filters** area. You will see the words **In List** with a drop down list arrow, a blank space that you can type in, and then another drop down menu to select from.

Click on the arrow next to **In List** and you will see a list of options for the conditions you can set.   Choose the option you want by clicking its name on the list.

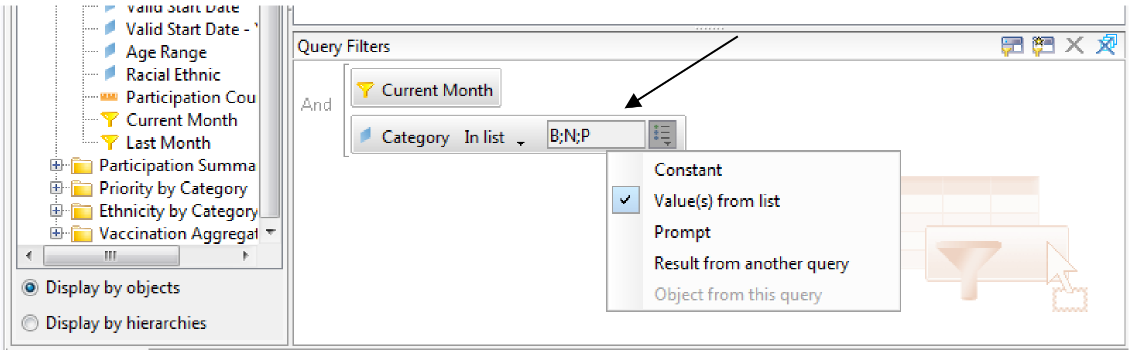


- **Equal to** is used when there is only one thing you want, such as one specific clinic or category.
- **In List** is used when there are two or more things you want, such as clinic 001 and 002. Place a semi-colon between items in the list but do not add a space between them.
- **Different from** is used when there is only one thing you don't want, such as all the clinics except (different from) 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. A null field is blank. For example, use Exam Date **Is not null** if you want to include only those participants with a date in the **Exam Date** field.
- **Matches pattern** and **Does not match pattern** are used with "wild card" symbols. Use _ for only 1 character, for example use the filter **Matches pattern C_** to get all two character food packet IDs for children. Use % for one or more characters, for example to count attendance at each of your group classes without listing the four digit code for each class, write the filter 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 underweight, A10.
- **Except** works like **Different from**, but it takes longer to run. For this reason, using **Except** is not recommended.

Note that when you choose options **Between**, **Not Between** and **Both**, two spaces will appear where you can type in the two filter definitions.

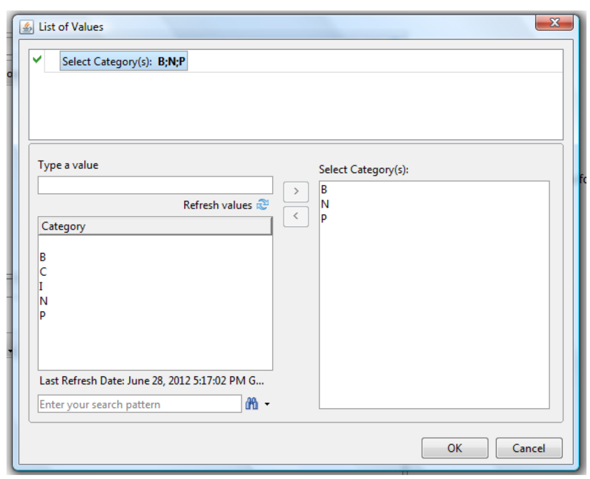
Choose **In List**. In the white space that says **Type a Constant**, type in the categories you want. Enter **B;N;P** to filter for only the women categories. Capitalize the letters and put a semi-colon between them in the list. Do not put a space between items on the list.

Another way to do this after choosing **In List** is to click on the drop down menu next to the space. You will see the options other than Type a **Constant**. Five options are presented.

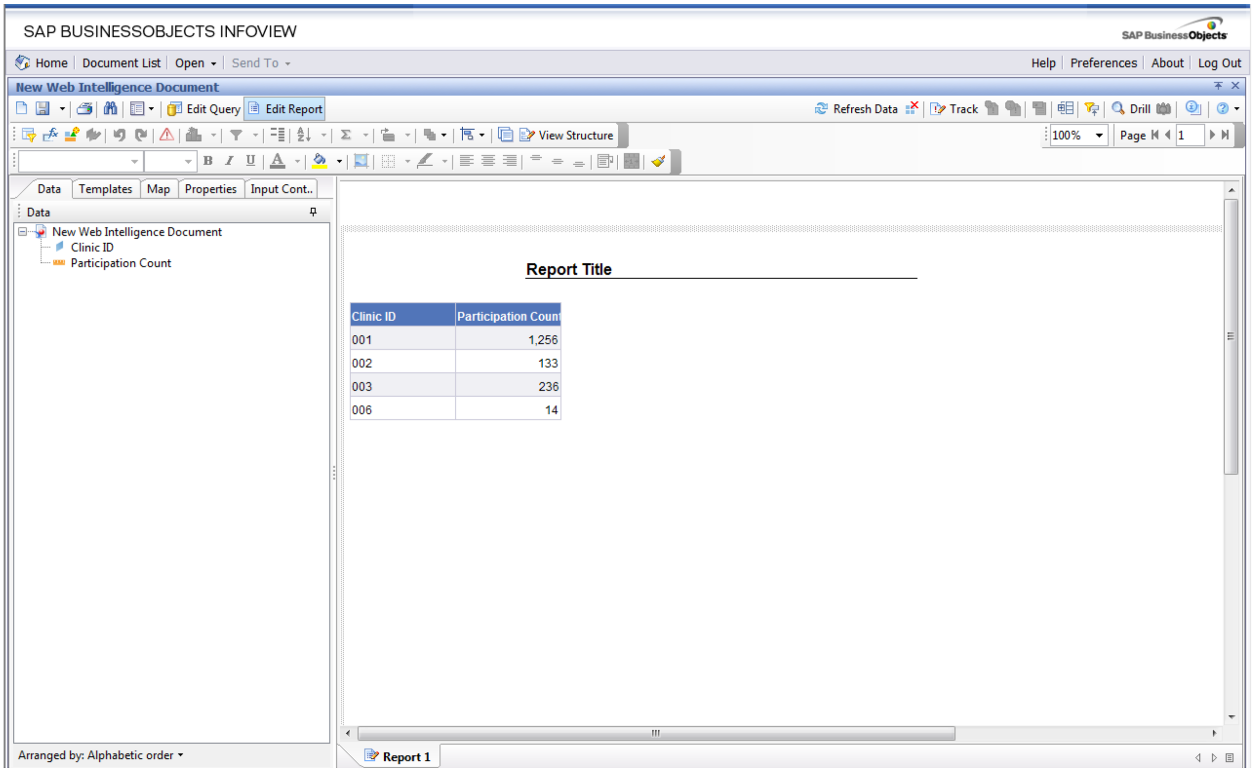


- **Constant** is used to type in a specific filter definition when you create the query, like we just entered B;N;P.
- **Value(s) from list** is used when you want to see a list of options to select from or are not sure of the correct formatting. For **Category** this will bring up a list of all the categories for participants in WIC MIS. The report will always show only the options you choose. An advantage of choosing the values from a list option when it is available is that you will make fewer mistakes. Your selection will be formatted correctly and you will not be able to add more than one option when you choose **Equal to**.
- **Prompt** is used when you may want to run the same query for different options. You will be prompted to select your choice from the values list 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 to the **Edit Query** screen to change it. This way you can easily use the same query to create reports for different dates, risk codes, clinics, etc.
- **Result from another query** allows you to make a filter based on an object from another query in a document with multiple queries.
- **Object from this query** allows you to make a filter based on another object in the same query.

Click on **Value(s) from list**. The **List of Values** pop-up will appear. Double click on the B, N and P to move them to the **Select Category(s)** section. Then click **OK**. This will type in the selected categories in the correct format for you.



Click on **Run Query**. Below is the same report with the participation counts for last month. Only the women are counted, but note that since we did not put category in the **Result Objects** area, the report is not displayed by category.



Open the **Agency Snapshot Universe** and explore the different folders, data objects, measures (counts), and predefined filters available. This universe has a long list of folders. Other than the four category specific folders, objects from different folders can be used in the same report.

Explore the other universes.

The **Breastfeeding Summary**, **Combination Feeding Summary**, **Participation Universe**, and the **Unissued Prescription Detail** universe each contain only one folder of data objects.

8 How to Design and Create Reports

8.1 Define the Question

All reports that you generate will begin with a question. You will often hear the words query and report used interchangeably. But there is a difference. Query is just another word for question. The report you will generate from a query is the answer to the question.

Clearly defining the question is the first and most crucial step to create a successful query that will generate a report and accurately provide the information you seek. In general, you should ask yourself: “What data am I trying to gather?” It is from this question that all other considerations will follow, including:

- Which Universe(s) to use
- Which Result Objects to select
- What filters to apply
- How the data should be presented

Asking the question begins a methodical approach to report building. This involves taking a program need for information -- for example, “How many of our infants are breastfeeding?” -- and breaking it into objective, quantifiable fields in the WIX database such as feeding choice, age, the month/year the food packet was issued, and a count of participation. A step-by-step system of definition, refinement, and confirmation of results will aid you in report building and in using the WIC MIS data from the WIX database to meet the information needs of your county or local agency.

Let’s start with this question: **How many infants and what percentage, by age in months, were exclusively breastfeeding, combo-feeding or formula feeding in your local agency last month?**

8.2 Design the Query

8.2.1 Step 1: Choose the Universe

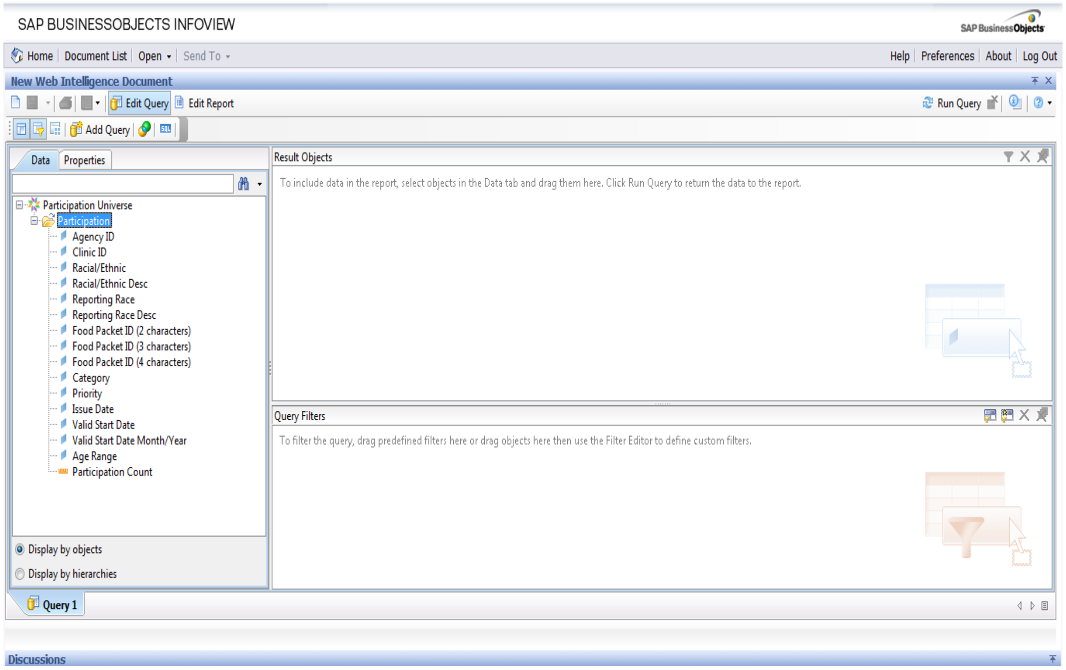
Where will you start? What universe will you use? Which folder will you use?

Remember that for this query you are looking for counts and not individual detailed information about the infants.

You have probably guessed that you want to select either the **Breastfeeding Universe**, the **Participation Universe** or the **Summarized WIC MIS Information** universe.

- **Breastfeeding Universe**: While this seems like the obvious choice, we can rule it out because the Breastfeeding Universe only includes the 2, 4, 6, and 11-month-old infants and we want all of the infants.
- **Summarized WIC MIS Information**: This one will work, and an advantage is that it has the predefined filter for **Last Month**.
- The **Participation Universe** also has all of the fields we need except the predefined filter for **Last Month**. But let’s select this one so we can practice writing the filter to get the data just for last month.

Selecting the universe will bring you to the **New Web Intelligence Document** screen with the **Participation** older open. This is the starting point for the query.



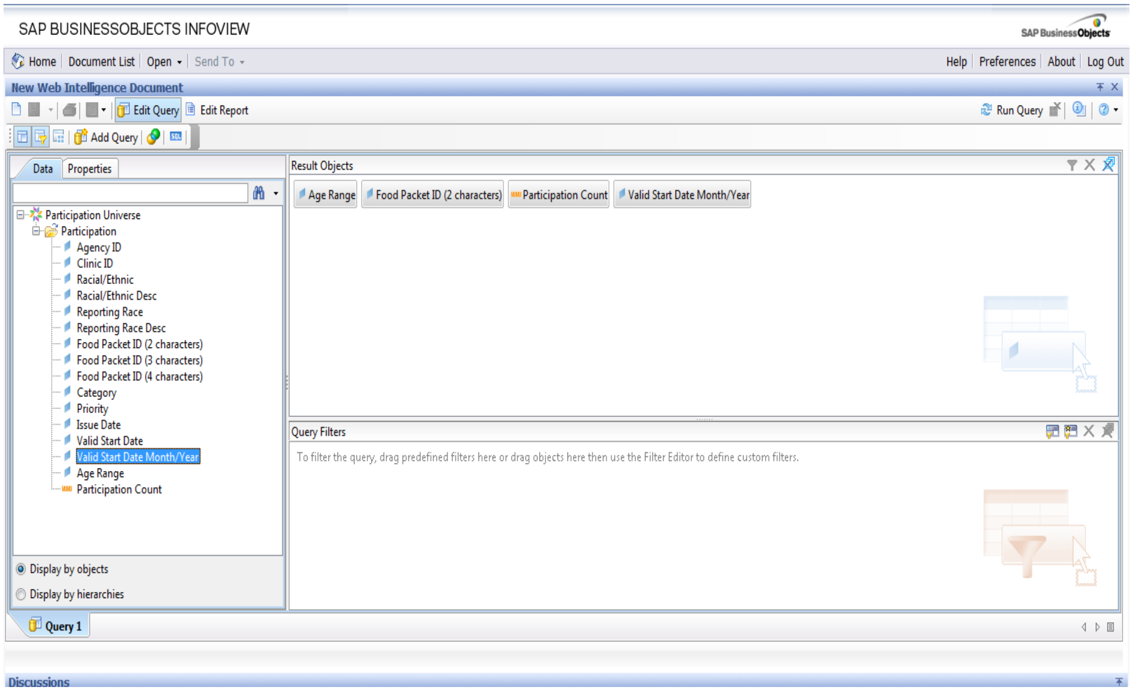
You are ready to drag and drop data elements from the objects list into the **Result Objects** area and the **Query Filters** section to create the basis of your report.

8.2.2 Step 2: Select the Objects

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

> **Tip:** Only the objects placed in the **Results Object** section will be available to appear in the report.

- You want to know about infants by age in months, therefore, you want to drag and drop the **Age Range** object to the **Result Objects**.
- You want to know the feeding method. This is determined by the type of food packet issued. Just the first two characters are needed to indicate the feeding method. Therefore, drag and drop the object **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. Drag and drop the object for **Participation Count** into the **Result Objects** area.
- You want the information for last month, so select **Valid Start Date Month/Year** and drag this object to the **Result Objects** area. Be careful not to choose **Valid Start Date** because that will list each date during the month separately.



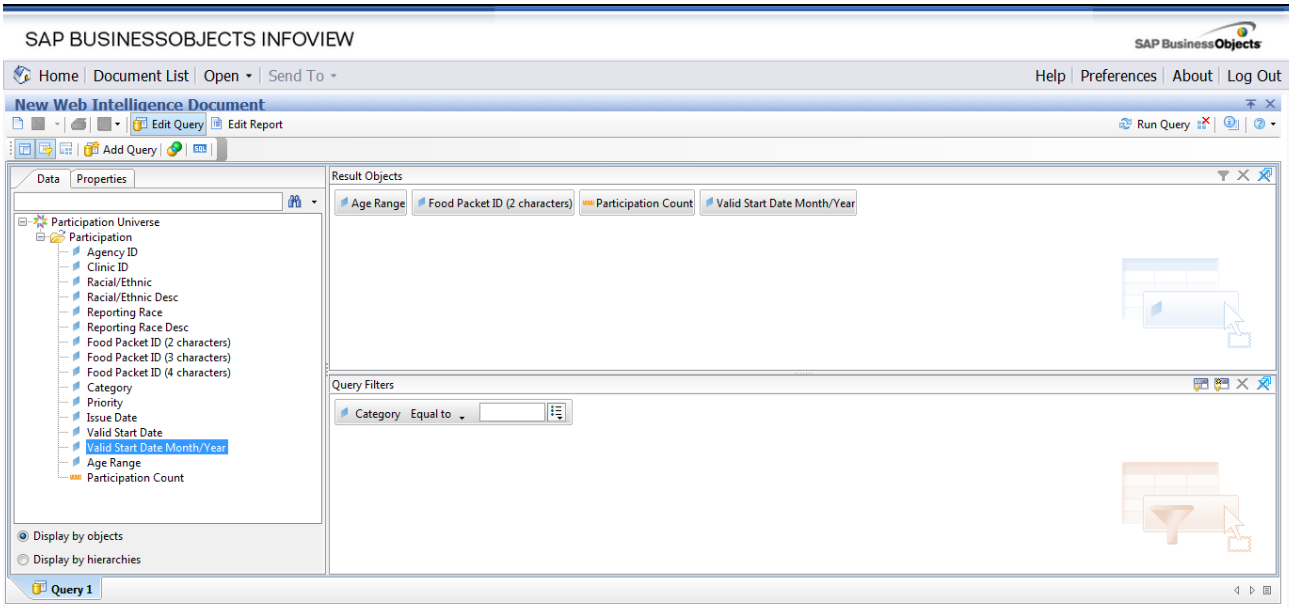
If you were to run the query now, you would get all the age ranges in the database, all of the various 2-character food package IDs, all of the months in the database, and a count of all the women, infants and children for each month, food package ID, and age range.

The next step is to restrict the information you ask for to just infants and for just last month,.

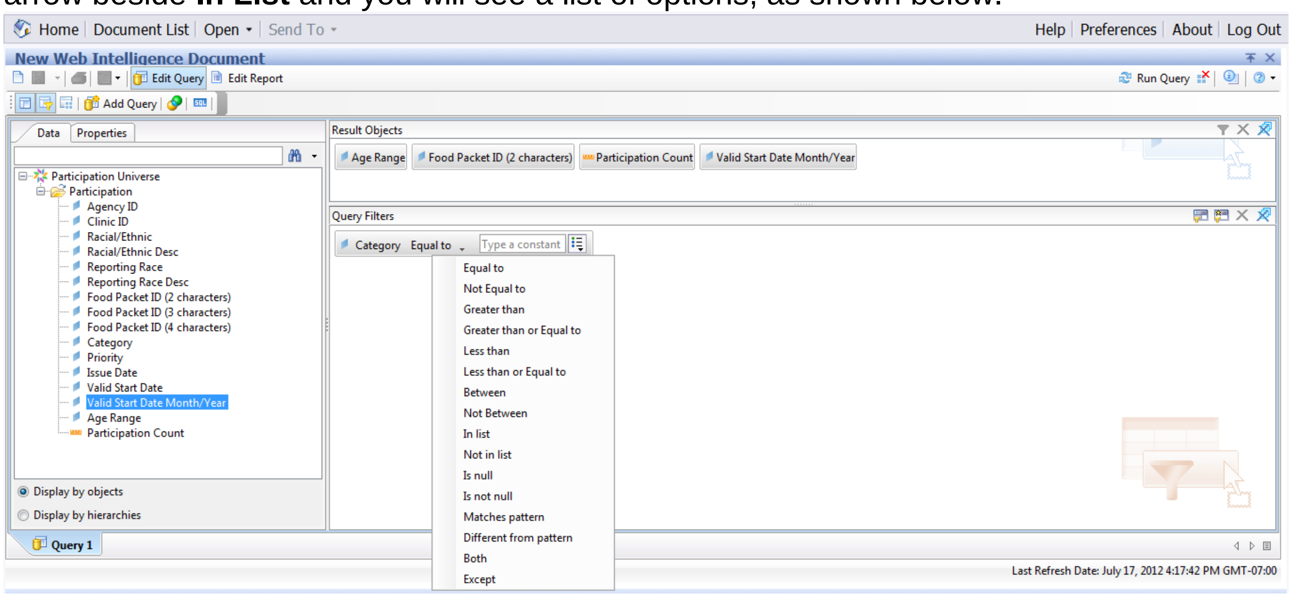
8.2.3 Step 3: Apply Filters

You apply filters to a query in order to limit the results to the information you want. In this example, there are two filters to apply to the query. You want information only on infant food packets and you want the count only for last month.

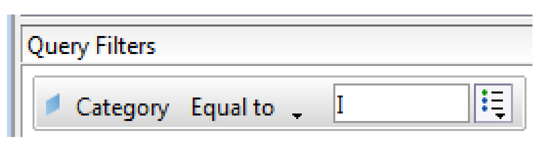
Since you are interested in the information for the infants you must tell the query to look only for participants in the category called Infant. Drag and drop the **Category** object into **Query Filters** area, as shown in the example on the next page, for the first filter.



Once you drag the **Category** object over to the **Query Filters** area, the space for you to define the filter appears. The default selection is **In List**. Click on the drop down menu arrow beside **In List** and you will see a list of options, as shown below.



In this example, select **Equal to**, since there is only one category you want. Make the Category equal to infants by typing a capital I in the white text box that says **Type a constant**. Once you type in the desired category, the first query filter is complete and will look like the view to the right.

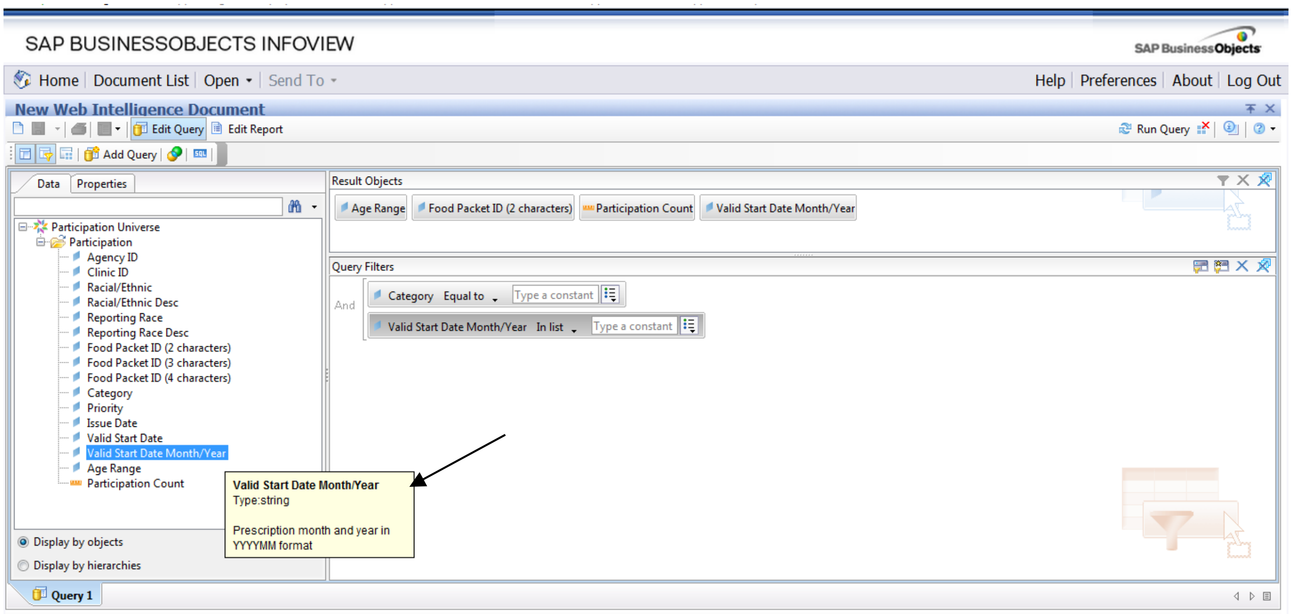


Can you think of other objects to use instead of category to filter information just for infants? Often there is more than one way to set a filter.

Age Range or Food Packet ID

For the second filter to this query you want just the information for food packets issued for last month. Look at the objects list and find the one called **Valid Start Date Month/Year**. Drag and drop it into the **Query Filters** area.

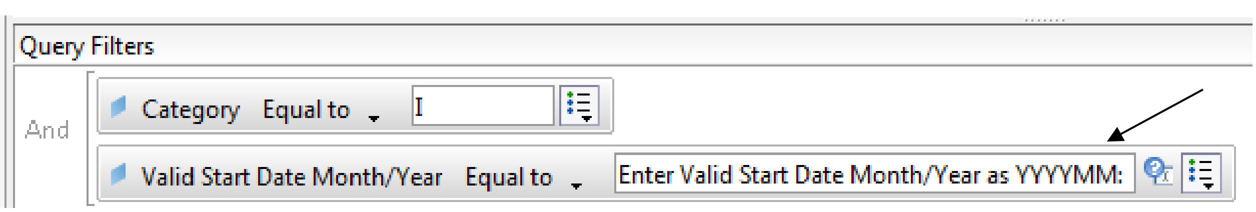
While the object is highlighted, place the mouse cursor over the object until you see the description pop-up. Note that the description reads, “Prescription month and year in YYYYMM format.” When you define the filter, you must write the month you want in that exact format.



Because you want data for just one month, choose **Equal to**. Go to the next drop-down list to the right of the **Type a Constant** space. From the drop down list choose **Prompt**. You will see that **Enter Valid Start Date Month/Year** is now written in the white box.

Wait! You will not type in the date yet. When you choose **Prompt**, whenever you run the query you will be prompted to add the date you want. This way you can use this same query to get the infant feeding rate for whatever month you want in the past and also use it for future months without having to edit the query.

To help you remember the correct date format for this universe, you can add a reminder. For example, type in “as YYYYMM” after the word Year so that it now reads **Enter Valid Start Date Month/Year as YYYYMM:**
Your query filter should look like the example below.



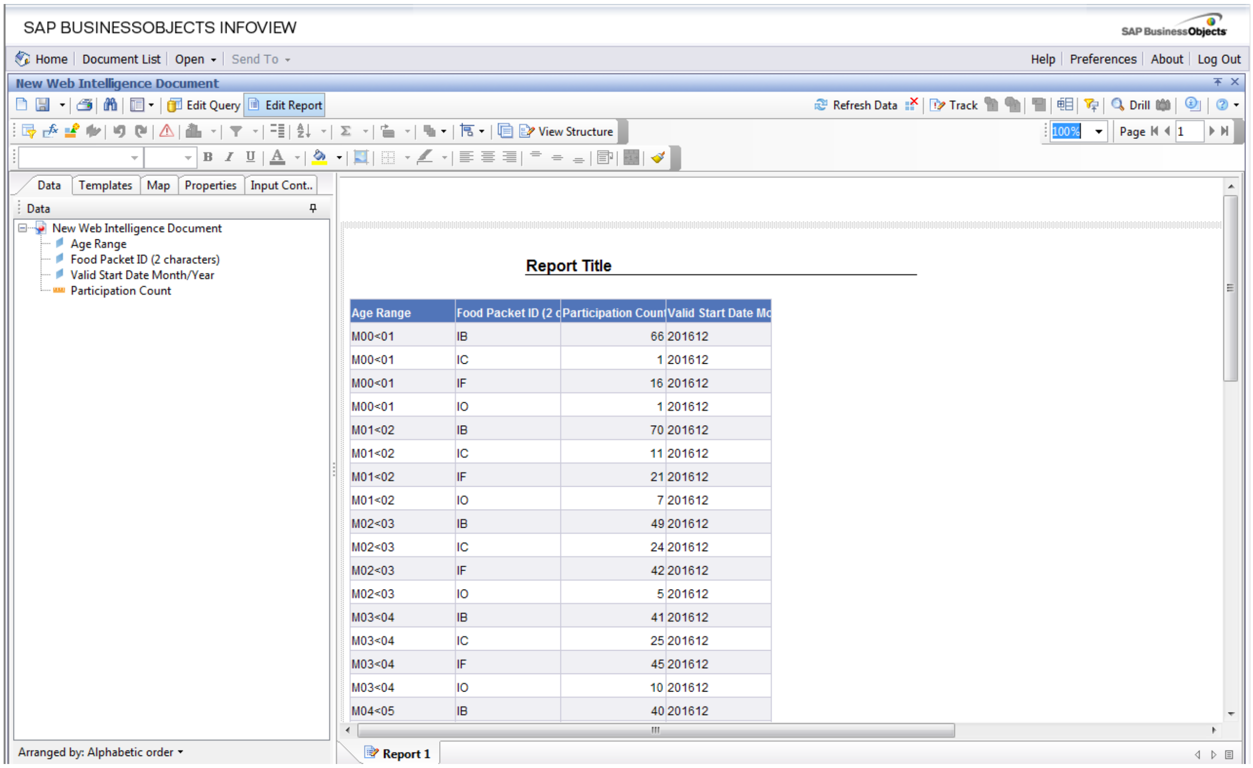
You have now finished applying the filters to restrict the data in this query to infant participants and to be prompted to add in the month in the correct format when you run the query.

Tip: When using query filters:

1. All constants are case sensitive and all letters need to be capitalized. Remember you are looking for information from WIC MIS and WIC MIS has only capital letters.
2. **Equal To** is used for one constant.
3. **In List** is used for more than one constant. When entering more than one constant, separate them with a semicolon (;). For example, if you want the two categories, Pregnant and Breastfeeding, type P;B. Do not put a space between them.
4. For dates, separate the month, day, and year with either a hyphen (-) or a forward slash (/). October 5, 2012 can be either 10-5-2012 or 10/5/2012. Be sure to include the full four-digit year.
5. Format the filter the way it will appear on the report. Check the object description if you are not sure.
6. When using a **Prompt** in a query filter, you can add or delete words to the enter instructions in the white box. For example, to remind yourself of the correct date format you can type in YYYYMM.

8.2.4 Step 4: Run the Query

Click on the **Run Query** button in the upper right of the screen. The **Prompts** window will appear with the instruction to **Enter Valid Start Date Month/Year as YYYYMM.** Type in the date for last month in the space provided, for example 201206 for June 2012. Click **Run Query**. In a few seconds the report will appear as shown below.

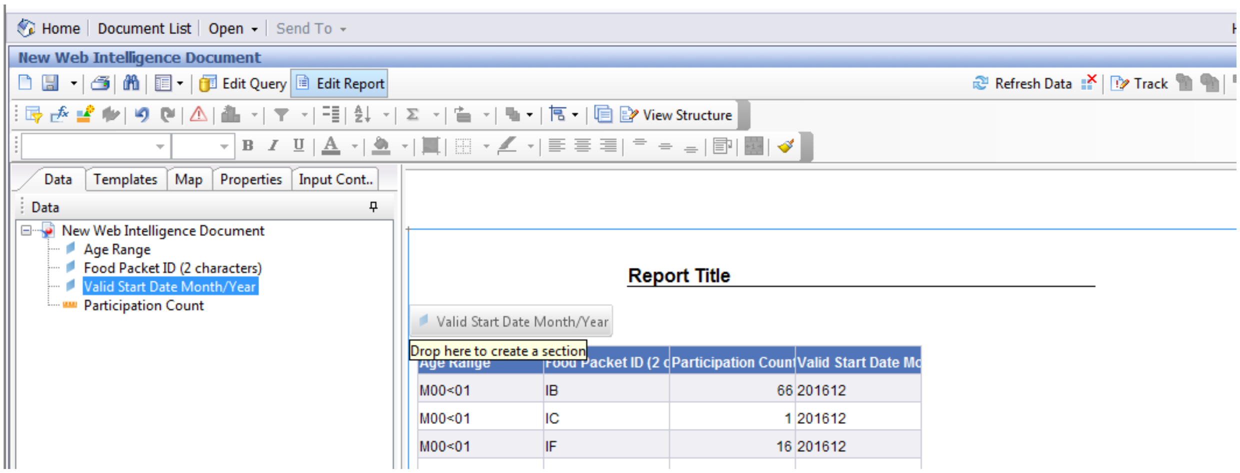


8.2.5 Step 5: Format the Report

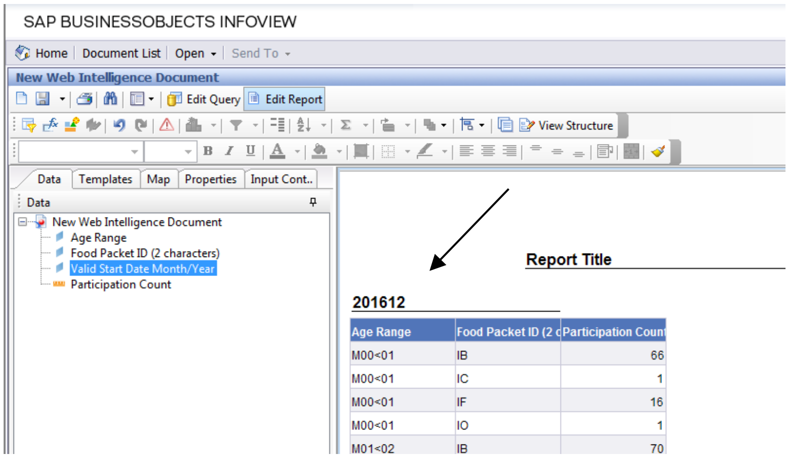
This report has great information but it is difficult to read because some of the column information is redundant. The ages are repeated for each packet type, packet types are repeated for different ages and the month is repeated in every row. The report is also not visible on one page. Reformatting the report can make it more readable.

8.2.5.1 Create a Section

First, let’s move the **Valid Start Date Month/Year** up to the top of the report. In the **Data** tab of the left panel of the screen, highlight the object and drag it to the space between the report title and the top of the report. You will see a message that says, “Drop here to create a section” when you hit the right spot. This makes a heading with the year and month for this report. Then delete the date column from the report. You can also just drag and drop the column heading from the report to this position to move it and create a section.

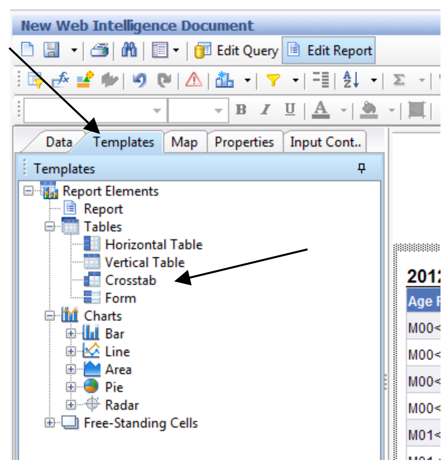


In this example for December 2016, the date 201612 is now at the top of the report. If the report had more than one month, creating a section would break the report into a separate table or section for each month.



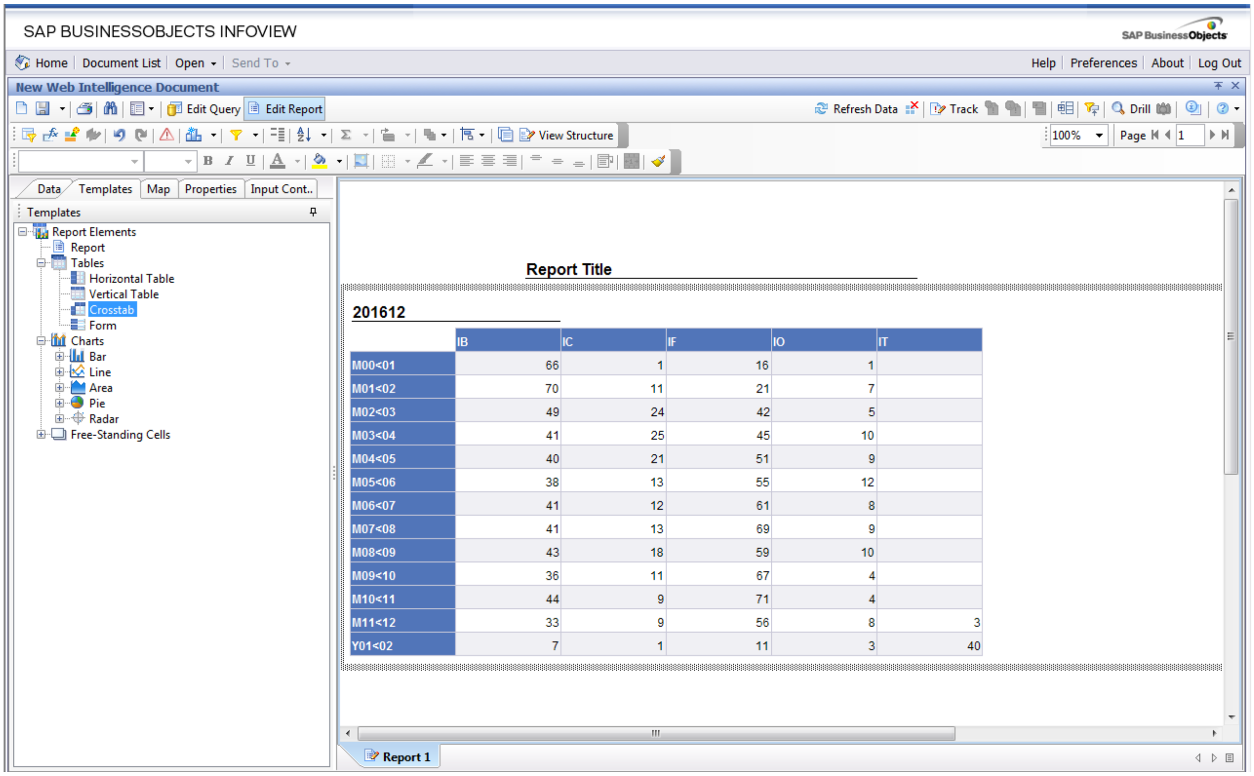
8.2.5.2 Create a Crosstab Report

A crosstab with rows and columns will display the data in a more readable format. When designing a crosstab, it is generally recommended to put the object with the longer list of data on the left side (row headings) and the object with the shorter list of data across the top, (column headings).



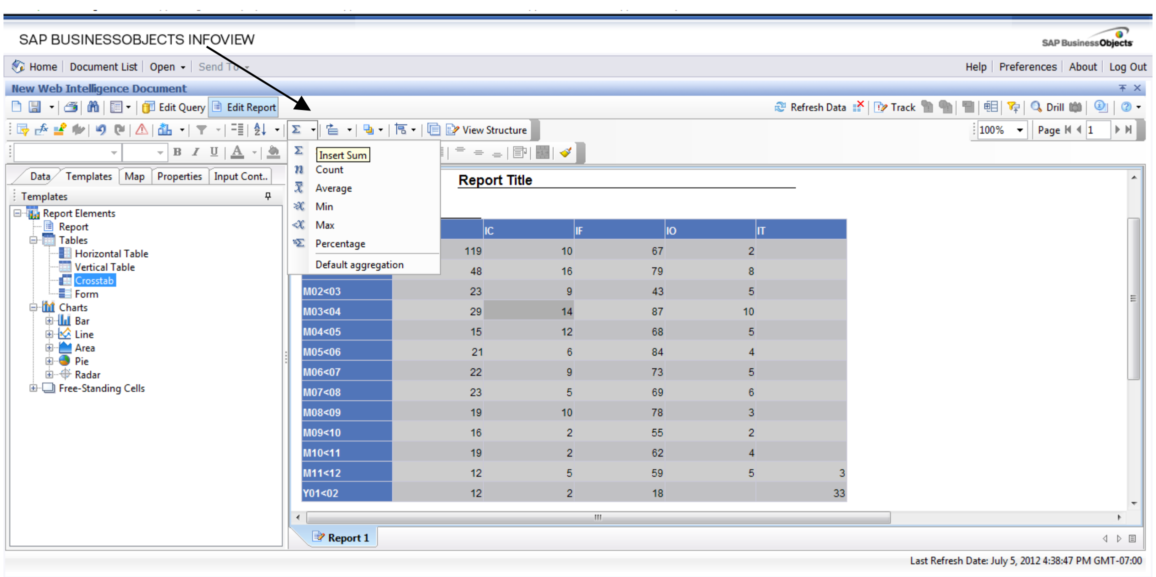
To create a crosstab, go to the **Templates** tab in the left panel of your screen, as seen to the right. Drag the object **Crosstab** and drop it on top of the report. This will convert the table to a crosstab. You may need to drag and drop the objects on the report and move them around to get them displayed exactly the way you want.

The same information is displayed as a crosstab in the example below. You can see all of the information at once and the report is a lot easier to understand.

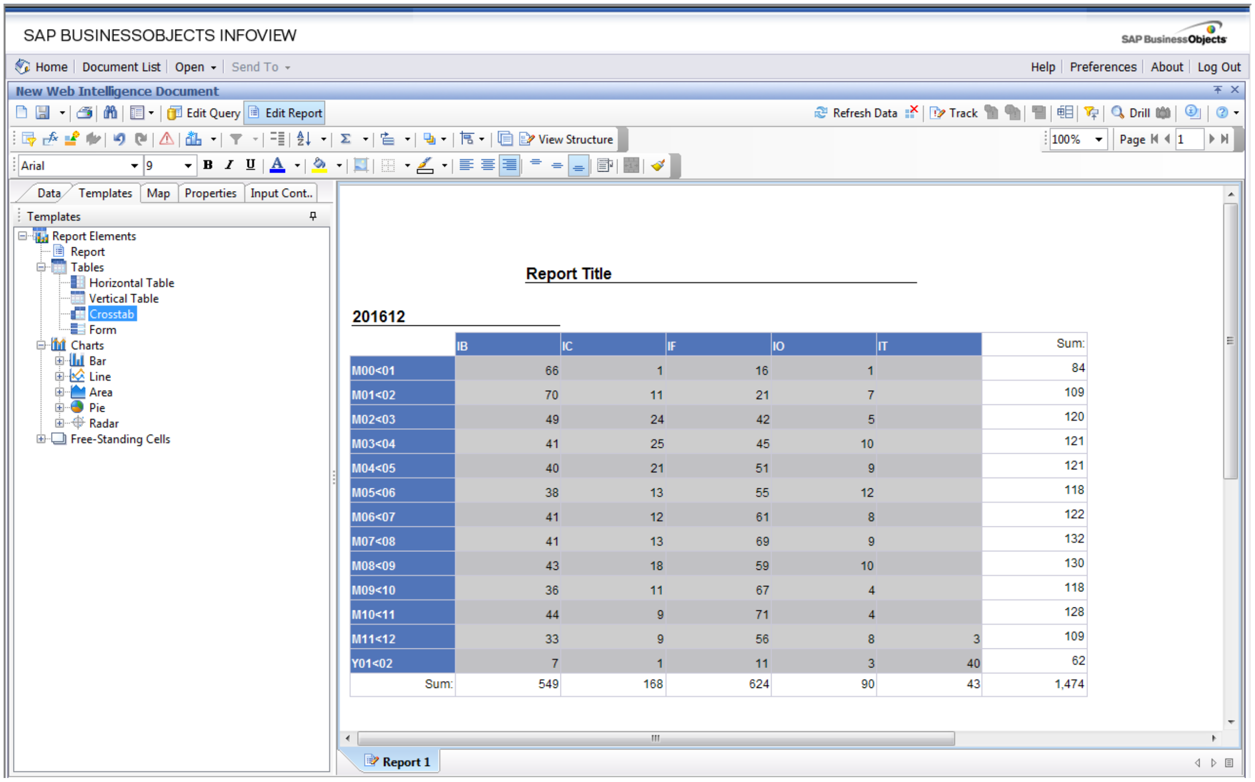


8.2.5.3 Add Totals and Percentages

When you make a crosstab, you will usually want to have totals and/or percentages for each column or row. Highlight the data area of the report. This activates the sum icon. Click on the sum symbol (∑) along the upper left of the screen. You will see a drop down menu of options, including **Insert Sum**, **Count**, **Average**, **Minimum**, **Maximum**, and **Percentage**.



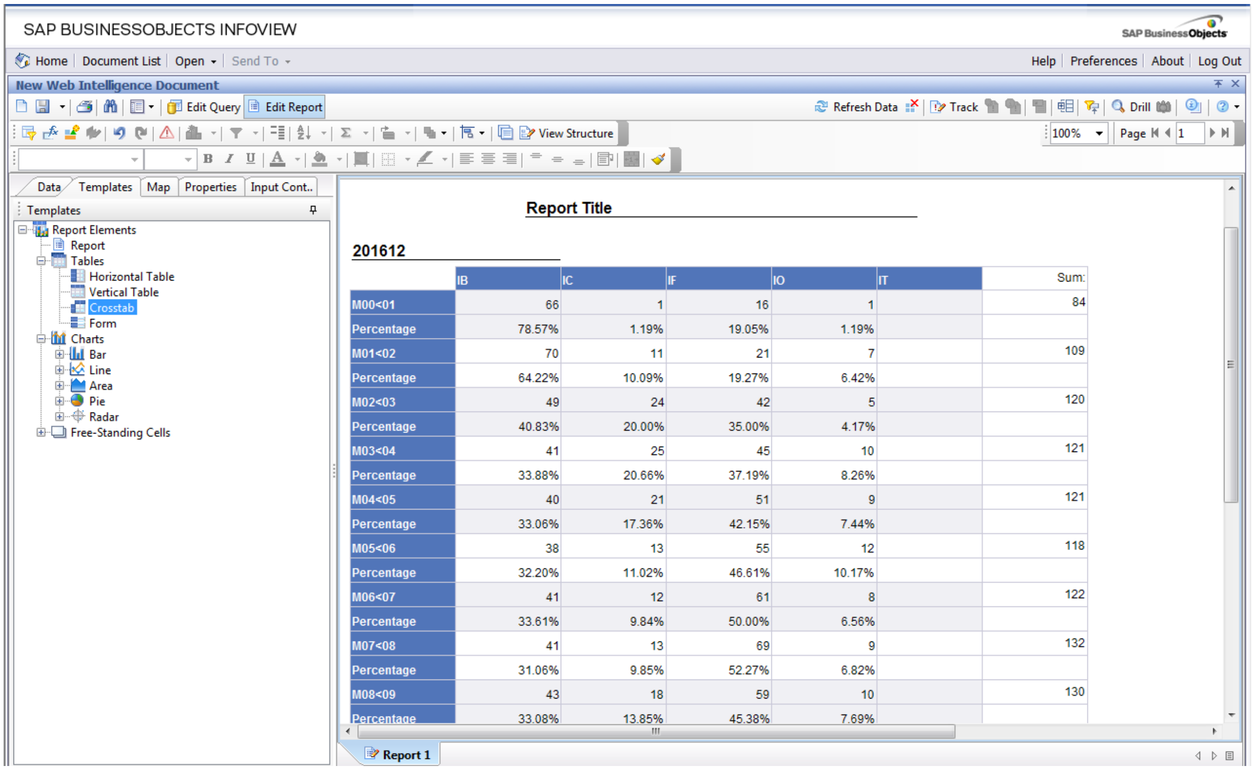
Click on **Insert Sum** to add row and column totals to your report.



Click on **Percentage** to add percentages to the report. Percentages will be added both across and down the report.

- By row, going across, the report shows the percentage of infants within each age that got each packet type, for example, the percentage of 2-month-olds that were breastfeeding, combo and formula feeding. This is the information you want.
- By column, going down, it shows the percentage of infants within each packet type who are in each age range, for example, the percentage of breastfeeding infants that were 2 months old, 3 months old, etc. This reflects the relative number of babies in each age group not the feeding method and is irrelevant.

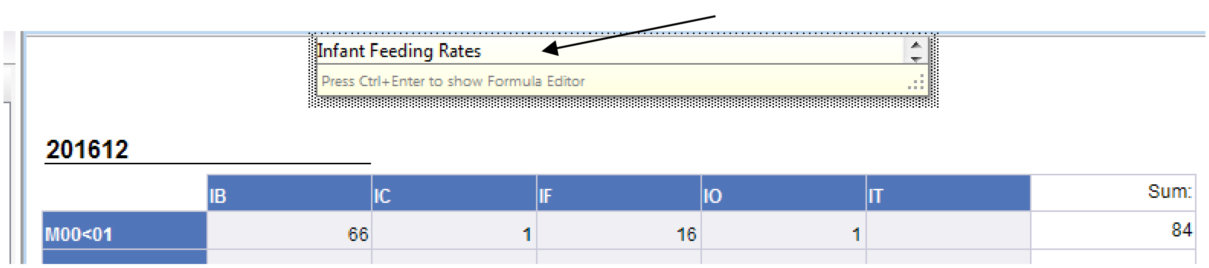
Since you only want the percentage by packet type (across), remove the columns that show the percentage of each age. Highlight a **Percentage** column, right click your mouse, choose **Remove,** and then **Remove Column**. This makes the report easier to read and interpret.



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

8.2.5.4 Add a Title

To add a title to your report, double click on Report Title at the top of your report. A text box will appear where you can type in the title you want.

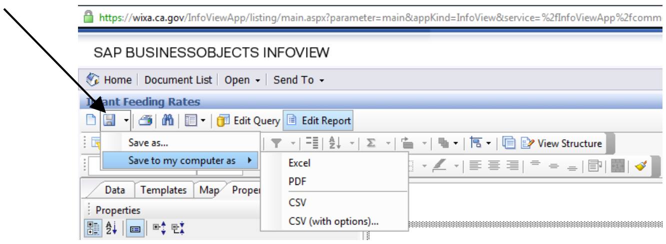


8.2.6 Step 6: Save the Query and Report

Click on the **Save** icon in the upper left corner of the screen.

- Choose **Save as** to save your queries to your **My Favorites** folder.
- Choose **Save to My Computer As** to save your reports to your personal computer or network drive. Reports can be saved as Excel, PDF or CSV. Be careful when

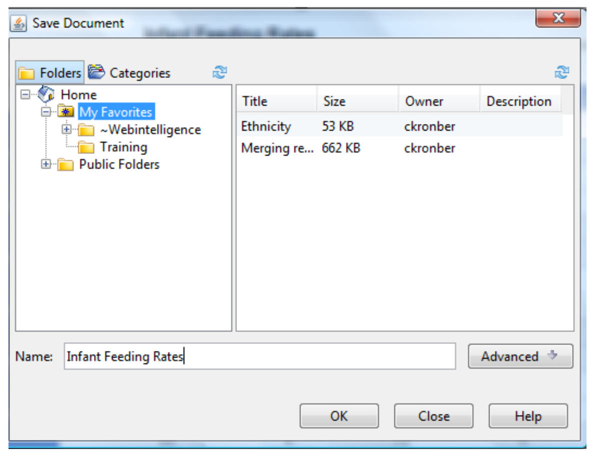
downloading and saving a report that contains identifying participant information. To avoid compromising participant confidentiality, always save these reports to a secure network drive.



Tip: Notice the difference between saving a query in **My Favorites** and saving a report on your computer. Saving a query saves the question that you may want to ask again at a different time. Saving the Report saves the answer to the question at the particular time that you ran the query. Over time you may accumulate many "answers" or reports from the same query.

8.2.6.1 Save the Query to My Favorites

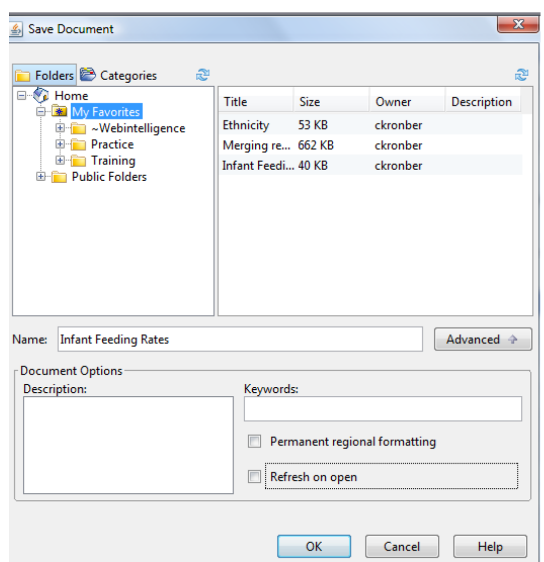
Choosing **Save As** will produce the pop-up at the right. Highlight the folder or subfolder you want to save the query to and type in a brief name for the query. Highlight Training to save this query to the folder you made earlier.



Before clicking OK, choose **Advanced** for additional options.

With **Advanced** you can:

- type in a brief description of the report that will appear under the title in the folder contents list,
- add key words to aid in a search,
- check the **Refresh on open** box so that when you open the report you will get up to date information. This is recommended. If you do not check this box you must remember to click on **Refresh data** to rerun the query after you open the report.

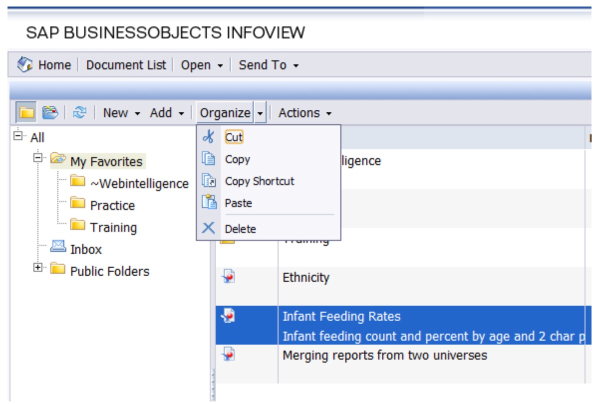


Click **OK** to save the query.

8.2.6.2 Copy and Move Documents and Folders

Using the **Workspace Panel** and the **Navigation Panel** toolbars in **Documents List** you can move or copy documents from one folder to another or move copy or move a subfolder to a different folder.

To copy a document



- In the **Navigation Panel** or document list, locate and select the document you want to copy.
- Click the organize button from the toolbar above the document list or right click to get the same options.
- Select **Copy** from the dropdown menu
- In the **Navigation Panel**, select the location to paste the copied document
- Click **Organize**
- Select **Paste** from the dropdown menu

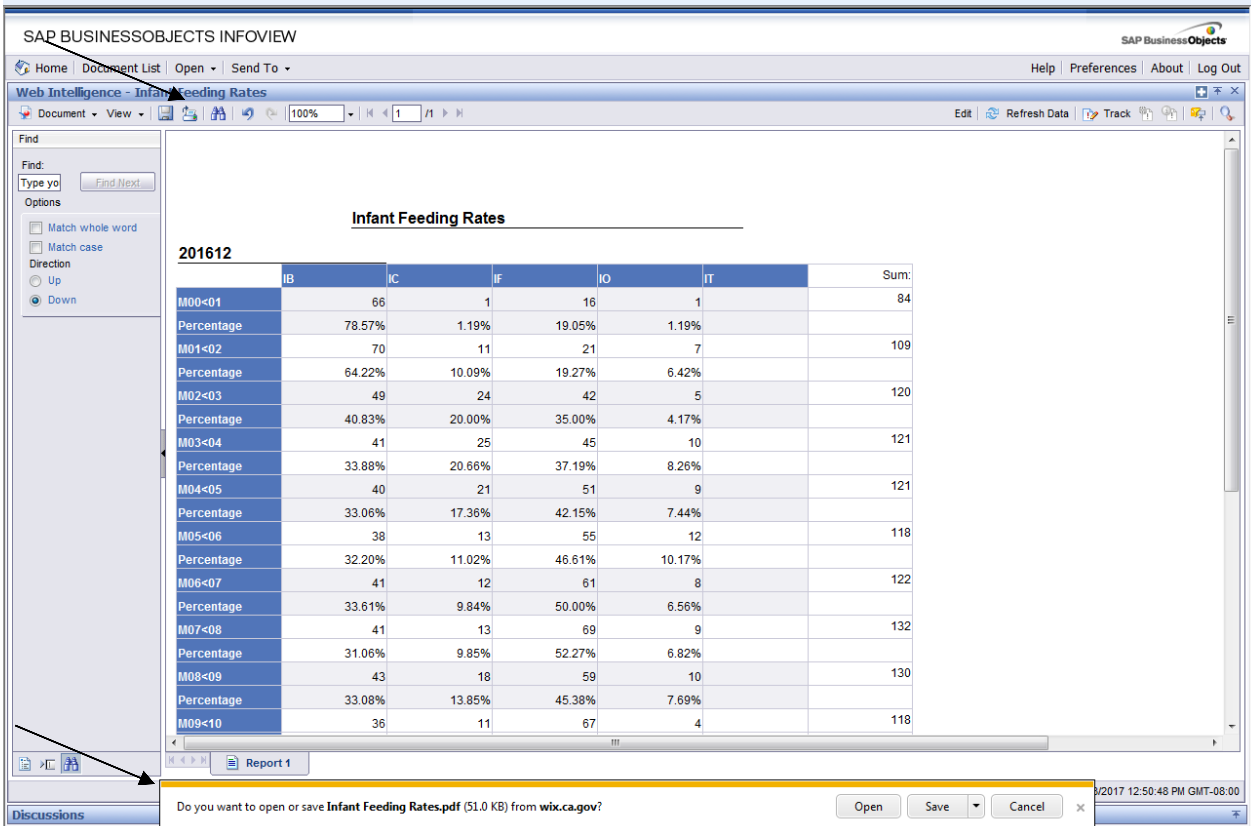
The screen will refresh and the copied document or folder will display in its new location as well as in its original location.
To move a document or folder from one location to another, use the same procedure with **Cut** and **Paste** instead of **Copy** and **Paste**. It will be deleted from its original location.

8.2.6.3 Delete a Document or Folder

You can delete documents and folders by using the **Delete** function in the **Organize** drop-down menu from the **Navigation Panel**.

8.2.7 Step 7: Print the Report

To print a report, it must be open in Edit Report or opened from My Favorites. Click on the print icon in the toolbar in the upper left of the screen. A pop-up will appear at the bottom of the screen asking if you want to Open or Save the document. You can open it and print it without saving or save it to your computer before printing.



	IB	IC	IF	IO	IT	Sum:
M00<01	66	1	16	1		84
Percentage	78.57%	1.19%	19.05%	1.19%		
M01<02	70	11	21	7		109
Percentage	64.22%	10.09%	19.27%	6.42%		
M02<03	49	24	42	5		120
Percentage	40.83%	20.00%	35.00%	4.17%		
M03<04	41	25	45	10		121
Percentage	33.88%	20.66%	37.19%	8.26%		
M04<05	40	21	51	9		121
Percentage	33.06%	17.36%	42.15%	7.44%		
M05<06	38	13	55	12		118
Percentage	32.20%	11.02%	46.61%	10.17%		
M06<07	41	12	61	8		122
Percentage	33.61%	9.84%	50.00%	6.56%		
M07<08	41	13	69	9		132
Percentage	31.06%	9.85%	52.27%	6.82%		
M08<09	43	18	59	10		130
Percentage	33.08%	13.85%	45.38%	7.69%		
M09<10	36	11	67	4		118

The document will open as a PDF and can be printed on any of the printers that are available to you locally.

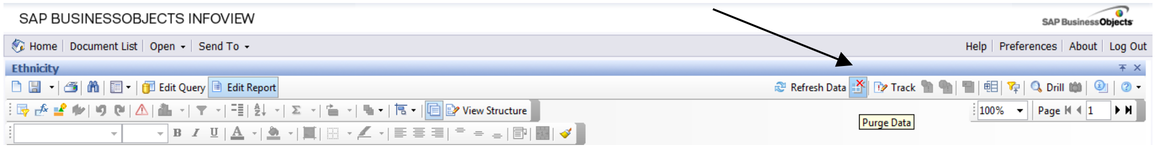
8.2.8 Step 8: Send Reports and Queries to Other Users

You can send queries to WIX users in your own agency, in other local agencies and at the State. To share queries with other WIX users, you send them directly to their WIX **Inbox** folder.

8.2.8.1 Purge Data

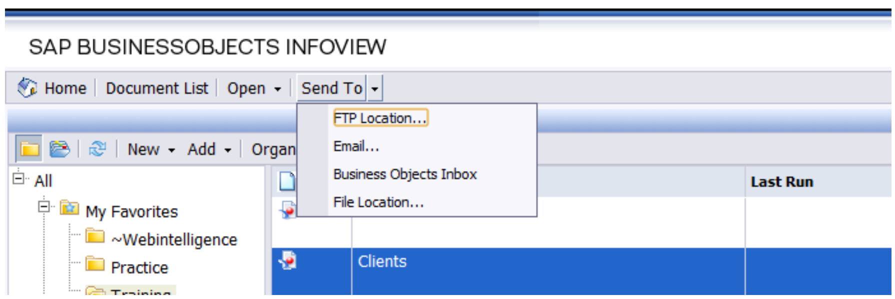
Queries and reports that you may want to send to users in other local WIC agencies should be purged of data before you save and send them. When the recipient opens the document, they will be able to refresh the query and view the report containing their own agency's information.

In Edit Report, click on the **Purge Data** icon in the toolbar in the upper right of the screen. The data will be purged from the report and you can then save the query as described previously. Check the **Refresh on Open** box so that the report will run and display new data when the recipient opens the document.



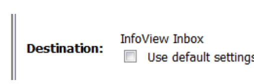
8.2.8.2 To send a query and report to other WIX Users:

- Queries can be sent from the Document list, My Favorites or another folder. The report should not be opened. From the **Navigation Panel** in the **Document List**, click + to expand the folder containing the document you want to send. The available documents will display in the workspace.
- Select to highlight the document you want to send.
- Click the **Send To** drop-down arrow on the **Navigation Bar** to display the available options on the menu.

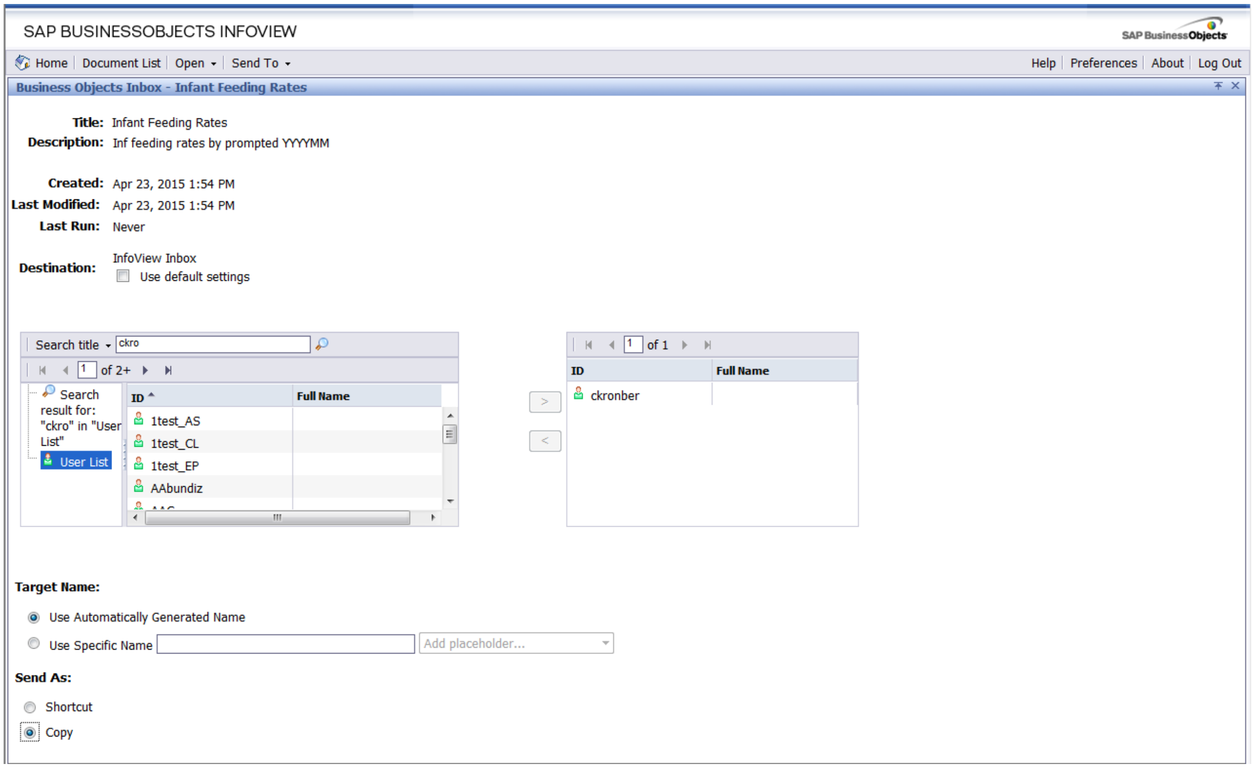


- Select **Business Objects Inbox**. The **Business Object Inbox** page displays.

- Un-check the **Destination** box next to **Use default settings** so that you can view the full page.



- Select the user or users you want to send the document to and move them to the selected area by using the **>** button. You can navigate through the pages of user names with the page number arrows or use **Search title** to locate specific users. Be sure to move back to the **User List** between searches if you are searching for more than one recipient.



- Select the appropriate **Target Name**. The Target Name is the name of your report.
  - ➢ Leave the **Use Automatically Generated Name** option selected to send the document without changing its filename.
  - ➢ To create a new filename, check **Use Specific Name** and type in a new name in the **Specific Name** field.
- In the **Send As** area, deselect **Shortcut** and select **Copy** to send a copy of the query. Do not send queries to other users as a Shortcut.
- Click on **Submit** in the lower right corner of the screen and the document will be sent and received in the **Inbox** of the WIX users you selected.

8.2.8.3 Send a Report to Non-WIX Users

If you want to send reports to non WIX users, open the report in Excel or as a PDF on your computer so that it can be attached to an email in the usual way and the recipient can view or print the report.

8.3 A Review of Queries and Reports

8.3.1 Step 1: Define the Question and Select the Universe

You have decided to apply for a grant for overweight children. The application asks that you **identify which one of your sites has the highest percentage of overweight children**. You need to know many children are in each clinic in your agency and how many of them are overweight?

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

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

For this query, you can use either **the WIC MIS 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 simple query.

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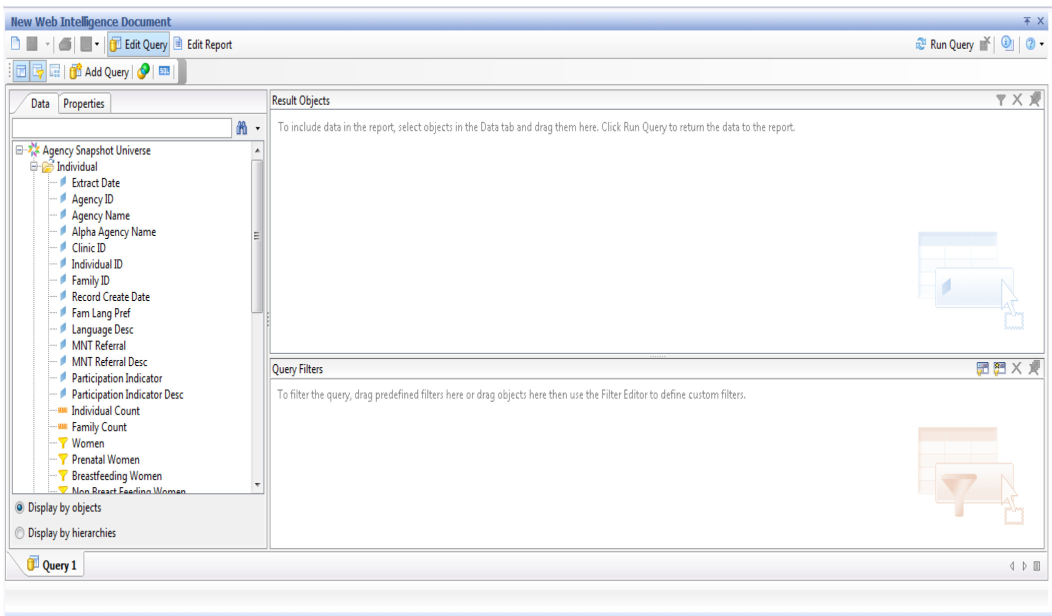
From **Documents List**, click on **New** and choose **Web Intelligence Document**. From the universe list select the **Agency Snapshot Universe**. You are ready to drag and drop the data objects to the **Result Objects** area to create the foundation of your report.

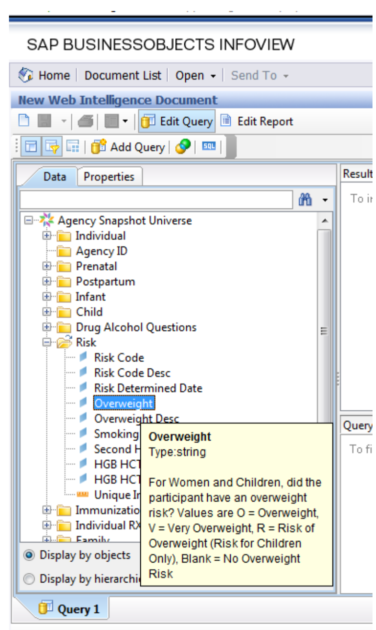


8.3.2   Step 2: Select Objects

To determine the percent of overweight children at each clinic, you need to count the total number of children in each clinic and not just the number who are overweight.

Close the **Individual** folder. Find the Risk folder and open it. Place the mouse over the data object **Overweight** and read the definition in the description box.

A consolidated data object is not an actual field in WIC MIS. It was created to answer the question, "Did the woman or child have an overweight risk?" It will return the number of very overweight, overweight, and at risk of overweight, as

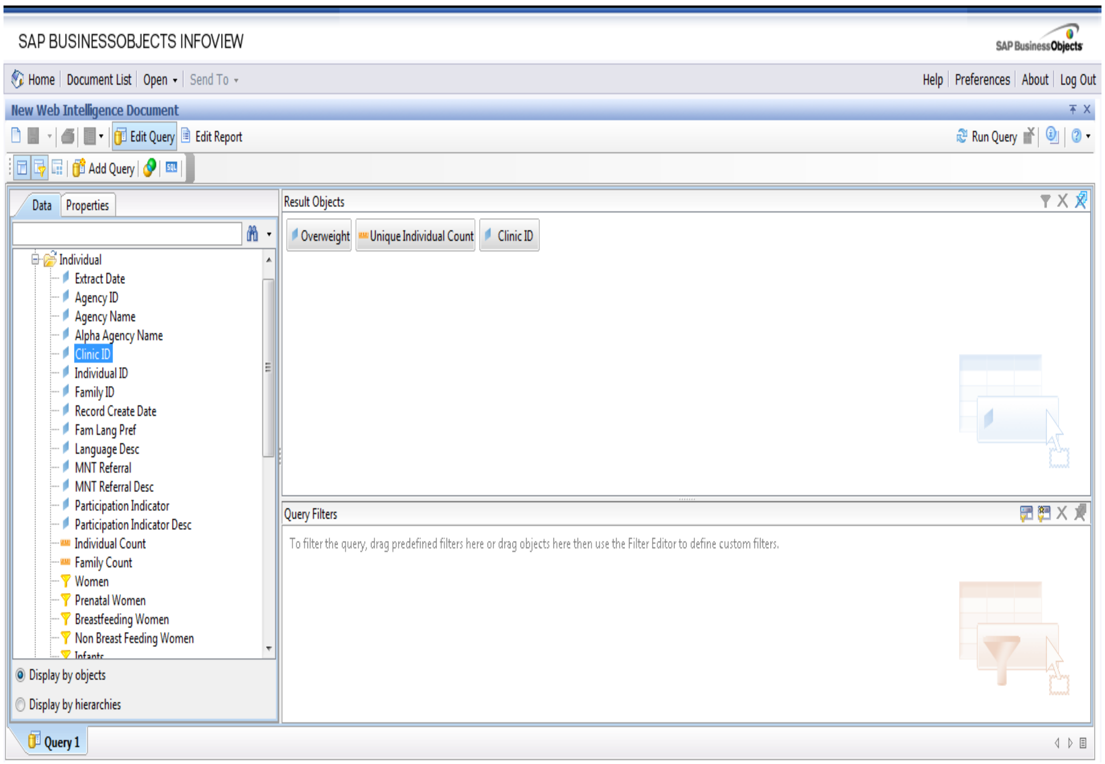


well as the number of those with no overweight risk. This is exactly what you need to know. Drag or double click on this data object to place it in the **Result Objects** area.

You also need a count, so drag the data object for **Unique Individual Count** to **Result Objects**.

The data object for clinic is in the **Individual** folder at the top of the list. Add it to the **Result Objects** area.

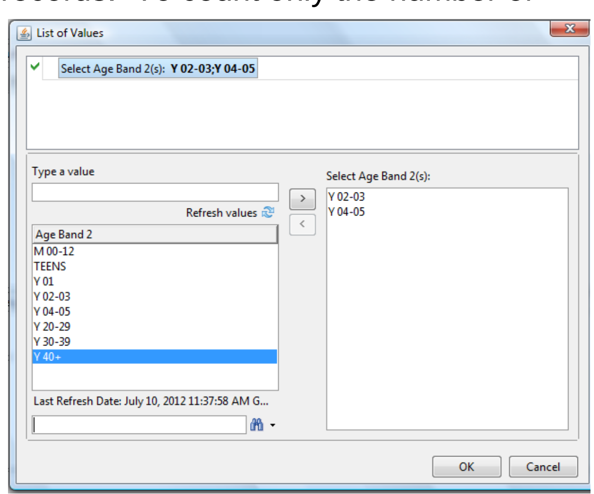
Your screen should look like this.



8.3.3 Step 3: Apply Filters

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 Filters** area.

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



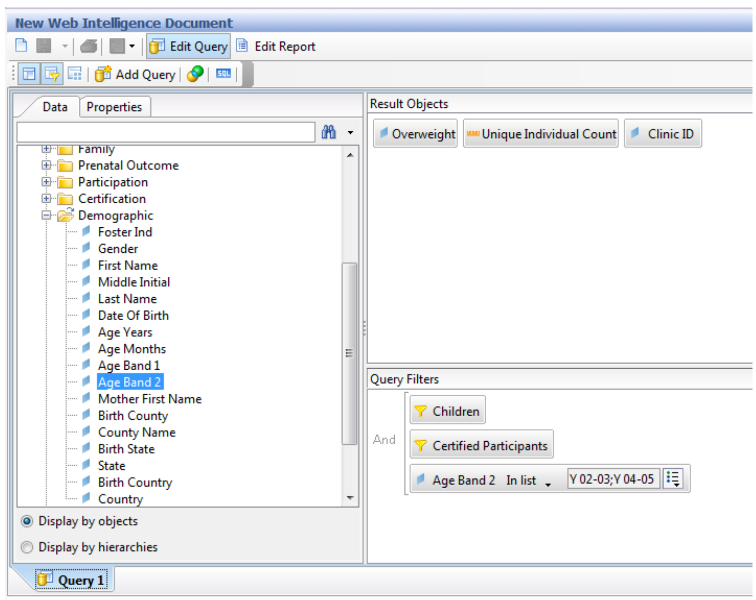
Remember that children under age two cannot have an overweight risk in WIC MIS. If we include them in the total count of children, the percent of overweight children will be inaccurately low. To exclude them:

- Go to the **Demographic** folder and select **Age Band 2**.
- Choose **In List** from the first drop down list, and
- Choose **Value(s) from List** from the second drop down menu.
- Select the age band for 2-3 year olds and 4-5 year olds. Double click or use the **>** button to move them to the Select area.
- Click **OK**

Compare your work to the example at the right.

This query asks for a count of individuals by weight status and by clinic.

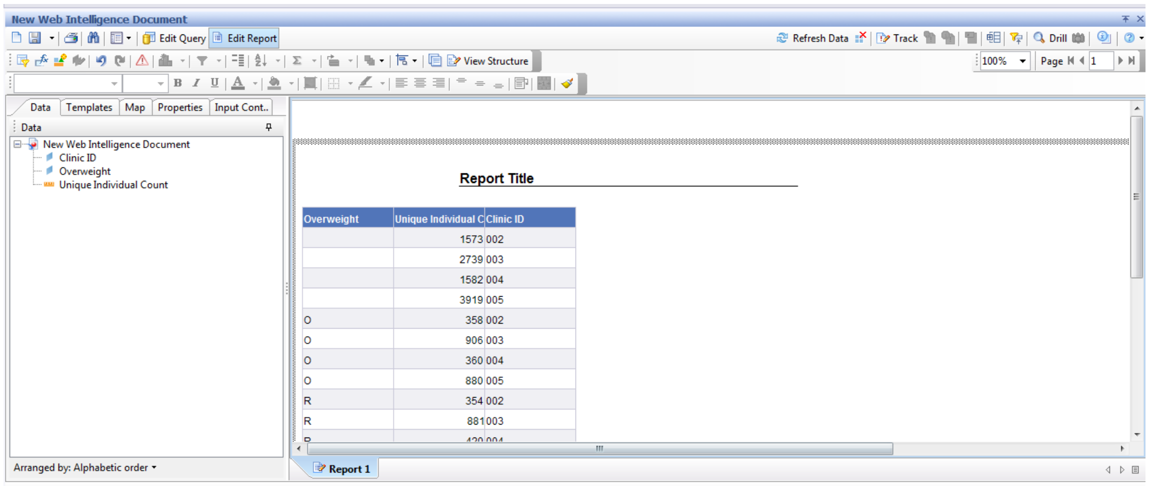
With the query filters, the information is restricted to children who are certified and in the age groups between two and five years old.



8.3.4 Step 4: Run the Query

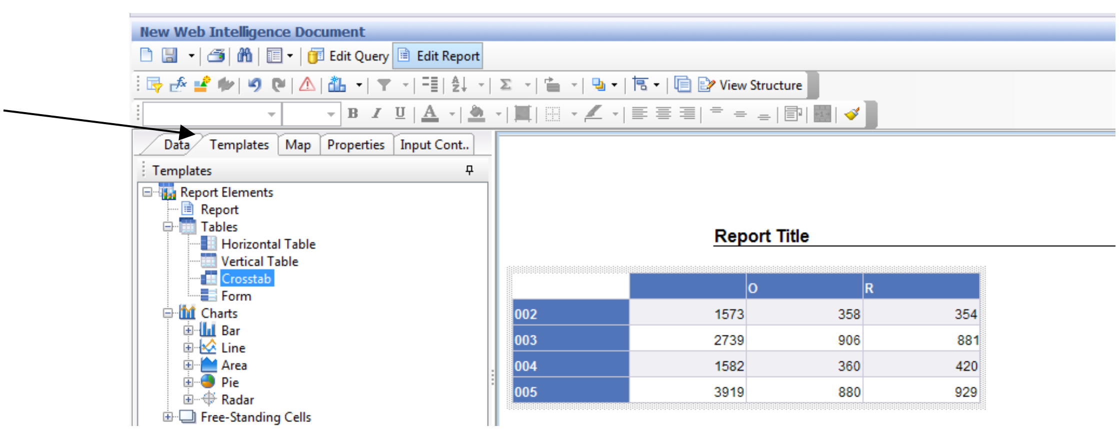
At this point, you can run the query. Click on the **Run Query** button on the upper right of the screen. A **Prompt** pop-up appears with a list of extract dates to choose from. These are the dates that the monthly snapshots of WIC MIS data were taken. Choose the most recent date available and click on **Run Query**. Wait for the results to appear.

Your report should look like the example below.



8.3.5 Step 5: Format the Report

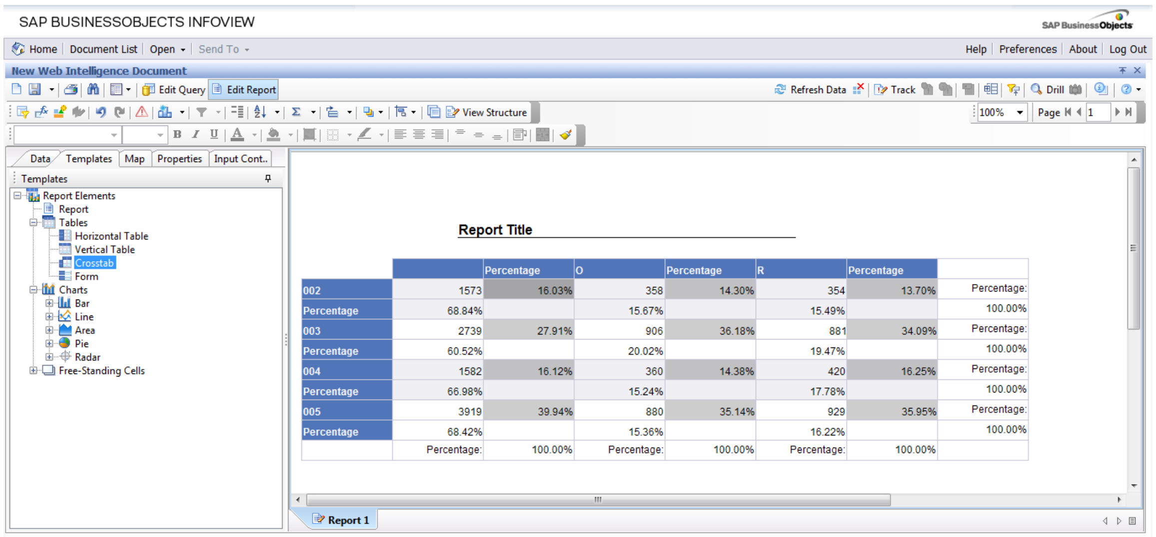
This report tells you the number of children who are overweight (O), at risk of overweight (R) and not overweight (blank) at each clinic. Make the report easier to read by formatting it into a crosstab. Click on the **Templates** tab and drag the object for **Crosstab** on top of the report.



In order to determine which clinic has the highest rate of overweight, we need to add percentages. Highlight the individual count area on the report and the sum symbol ∑ will be activated. Click on the dropdown arrow and select **Percentage** from the list. Percentages are automatically inserted in both directions.

- The percentages reading in rows across indicate the percentage of children for each clinic who have each of the three weight status options. This is the information you need.

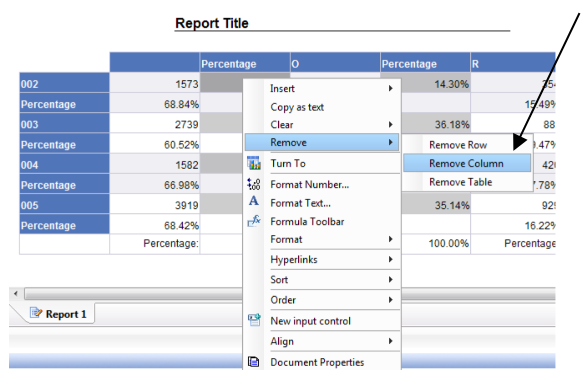
- The percentages reading down indicate the percentage of the total children within each weight status at each clinic. Since this is a reflection of the relative caseload size at the clinic and not the weight status, we can delete these irrelevant columns and make the report a lot easier to read.



- Select one of the columns that has the **Percentage** heading. Selecting one selects them all.

- Right click your mouse and select **Remove**.

- Use the **Remove Column** option to delete these columns from the report.



The report now shows the number and percentage of children in each of the three weight status categories for each clinic.

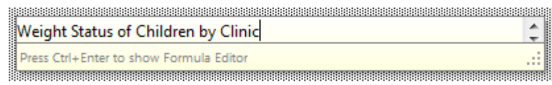
In the example on the following page the children at clinic 003 have the highest rate of overweight and risk of overweight, nearly 40 percent.

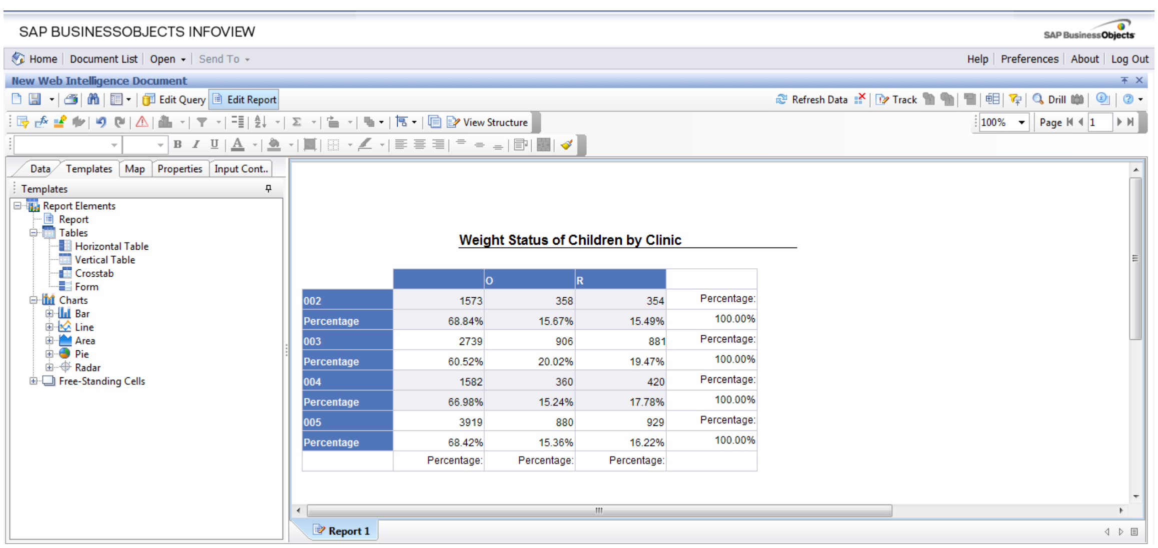
What did you learn about the children at your agency?

Report Title

		O	R	
002	1573	358	354	Percentage:
Percentage	68.84%	15.67%	15.49%	100.00%
003	2739	906	881	Percentage:
Percentage	60.52%	20.02%	19.47%	100.00%
004	1582	360	420	Percentage:
Percentage	66.98%	15.24%	17.78%	100.00%
005	3919	880	929	Percentage:
Percentage	68.42%	15.36%	16.22%	100.00%
	Percentage:	Percentage:	Percentage:	

Finish the report by giving it a new title. Double click on the **Report Title** and type in the new name in the space provided. Press enter. Click **Yes** if you are asked to validate the formula.

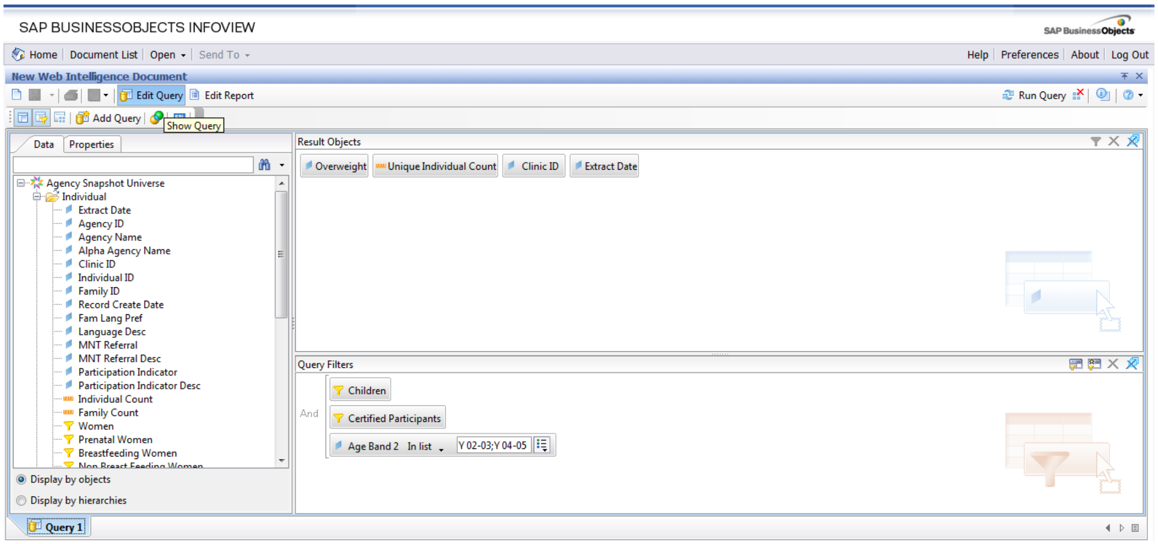




8.3.6 Step 6: Edit the Query

At any point in creating a report, you may wish to add or delete an object. This is easy to do. So that you will remember the **Extract Date** that was selected for this report, add it to the query so we can put it on the report.

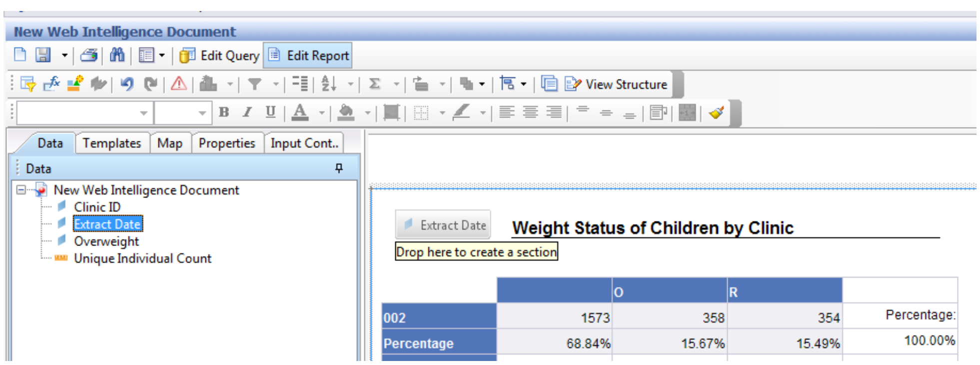
Click on **Edit Query** in the menu bar in the upper left of the screen. This takes you back to the query building page. Add the object for **Extract Date** to the **Result Objects** area.



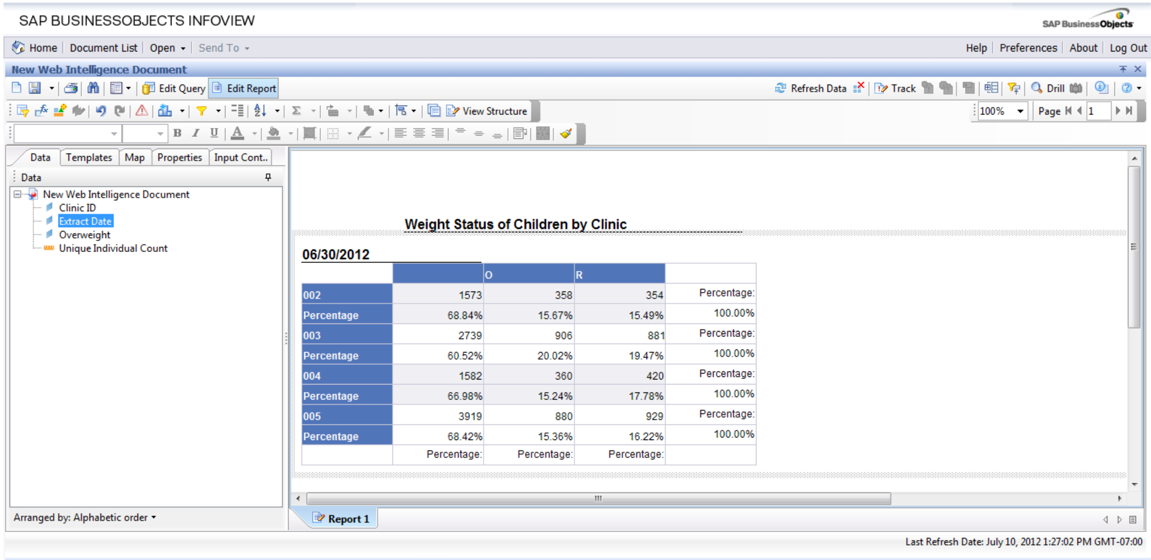
Click **Run Query**.

When the report appears, you will notice that it looks exactly the same. However, the object for **Extract Date** is now on the list on the left side under the **Data** tab. Anytime you add an object after you have already run the query, it will not be displayed on the report until you manually place it on the report.

Drag the object for **Extract Date** to the report to create a section. Drop it when you see the words "Drop here to create a section." This will place the **Extract Date** at the top of the report, under the title.



The example on the following page shows the final report. The same query can be used with different extract dates to produce reports to so that you can monitor the childhood obesity rates for your agency over time.

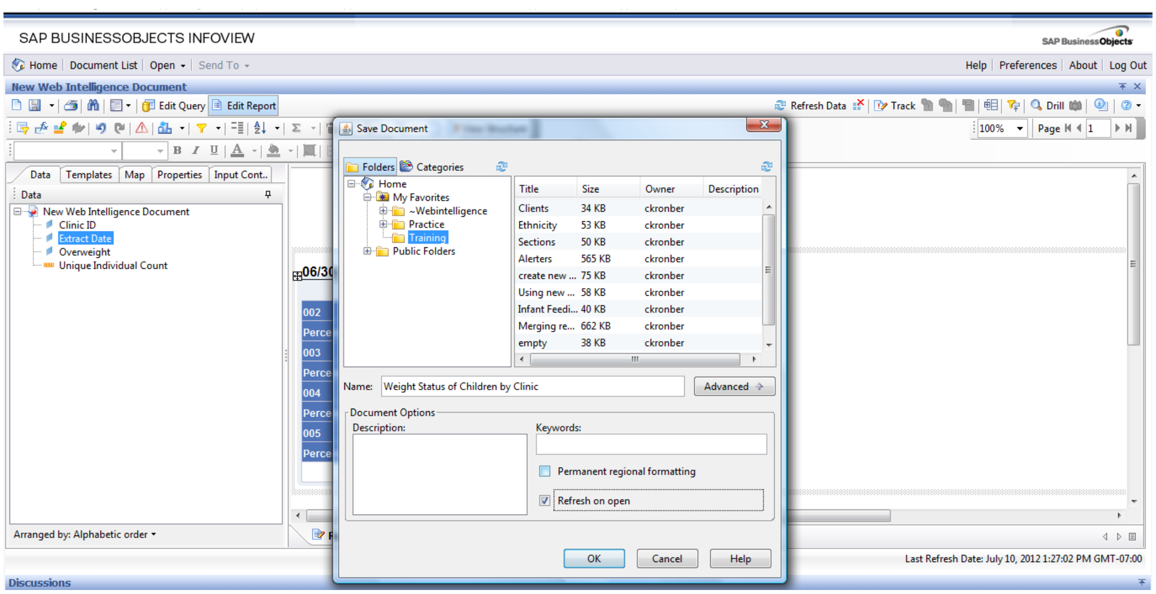


Run the query again and choose the extract date for one year ago. Compare the rates of childhood overweight at each clinic between now and one year ago.

8.3.7 Step 7: Save the Query

To save the query in **My Favorites**, click on the save icon at the upper left of the screen and choose **Save as** to get the **Save Document** pop-up.

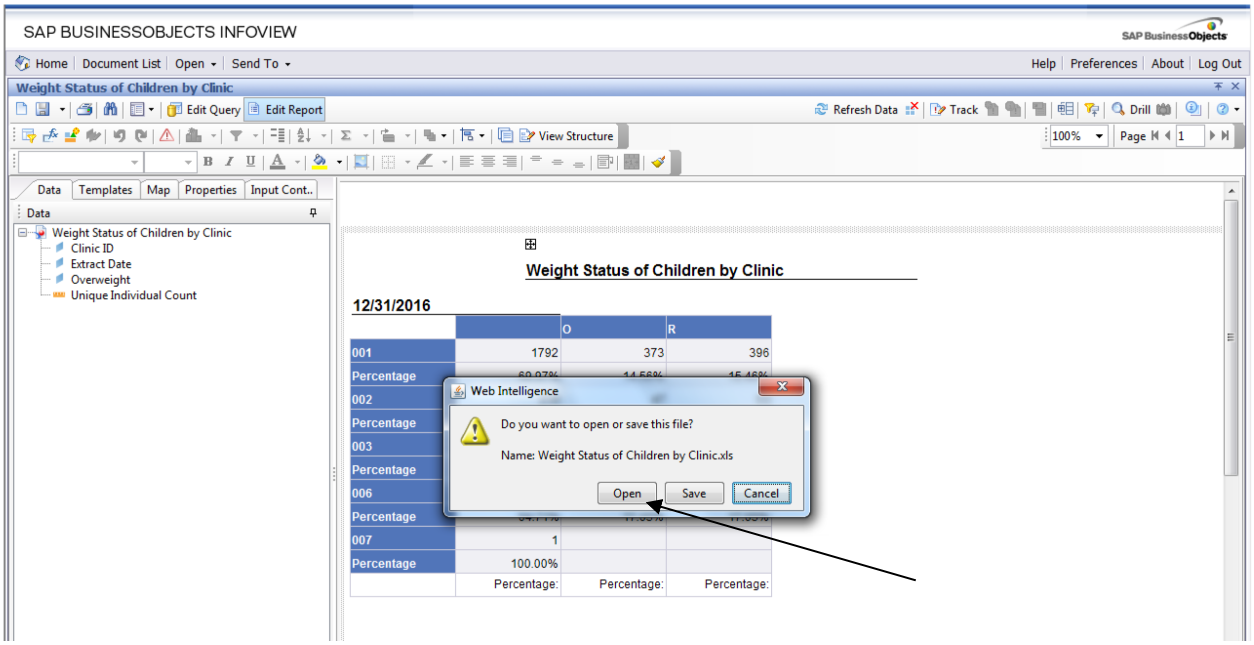
Place the query in the **Training** folder and give it a name. Click on **Advanced** and check the box to **Refresh on open**. Add a description if you wish. Click **OK** to save.



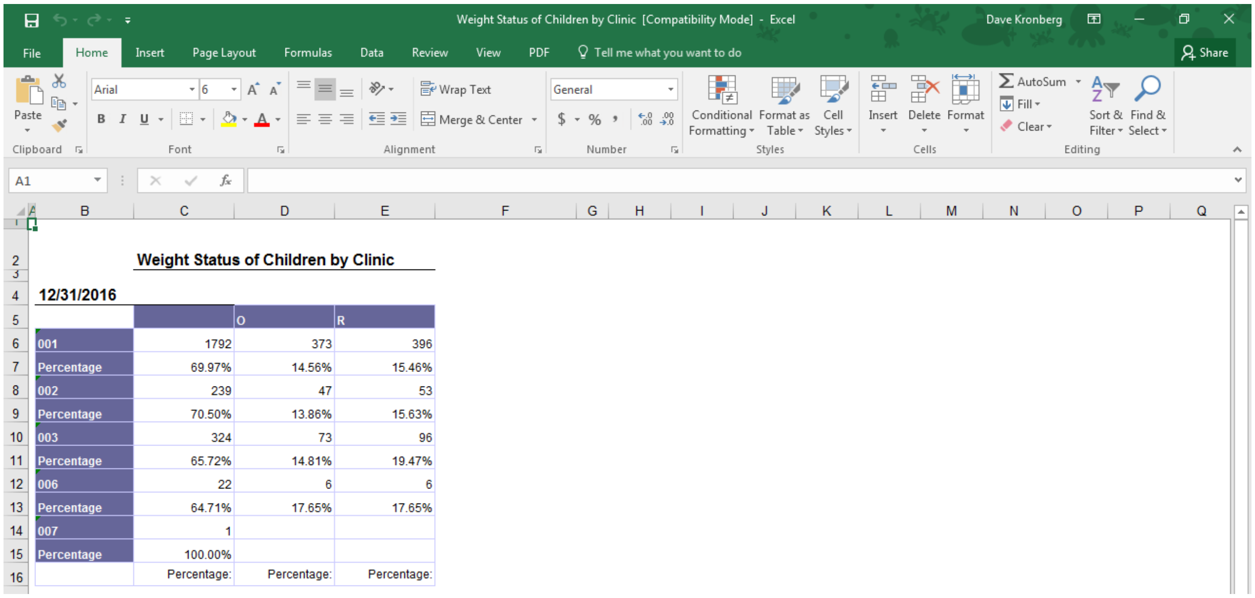
8.3.8 Step 8: Download the Report

Download the report and save it on your computer in Excel.

Click on the save icon at the upper left of the screen. Choose **Save to my computer as** and choose **Excel**. You will get the pop-up below asking if you want to open or save the file. Save will bring up a Save As popup for Excel. Open will open the report in Excel where you can see it, manipulate it and save it when you wish.



Click on the Open and it will open in Excel. Now you can save the report in your own computer files. It's a good idea to use the extract date in the name of the report when you save it.


Weight Status of Children by Clinic

12/31/2016

		O	R
001	1792	373	396
Percentage	69.97%	14.56%	15.46%
002	239	47	53
Percentage	70.50%	13.86%	15.63%
003	324	73	96
Percentage	65.72%	14.81%	19.47%
006	22	6	6
Percentage	64.71%	17.65%	17.65%
007	1		
Percentage	100.00%		
	Percentage:	Percentage:	Percentage:

9 Case Study 1 -- Participation Scenario

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

Try each step before you read the instructions. Then check your work before you move on to the next step.

9.1 Step 1: Define the question

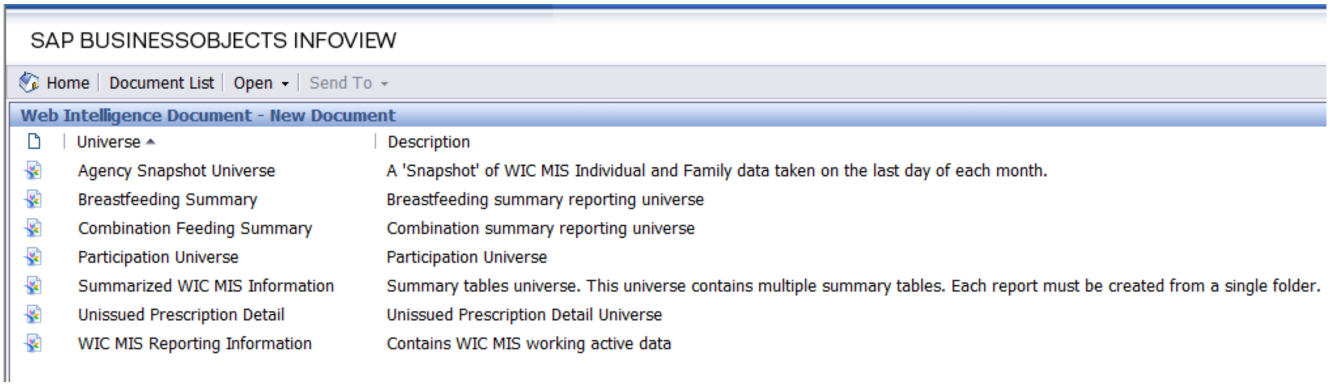
From the description above you are looking for:

- participation counts for your agency
- broken down by clinic and
- by category,
- restricted to information for the current month with
- totals for each clinic and category

9.2 Step 2: Select the Universe

Since you are just looking for a count of participation and not information about individuals, for this query you can use either the **Participation Universe** or the **Summarized WIC MIS Information** universe. Both are updated as of close of business yesterday. However, the **Summarized WIC MIS Information** universe has a predefined filter for **Current Month**. If you use that, you won't have to type the new dates into a prompt every morning when you run the report.

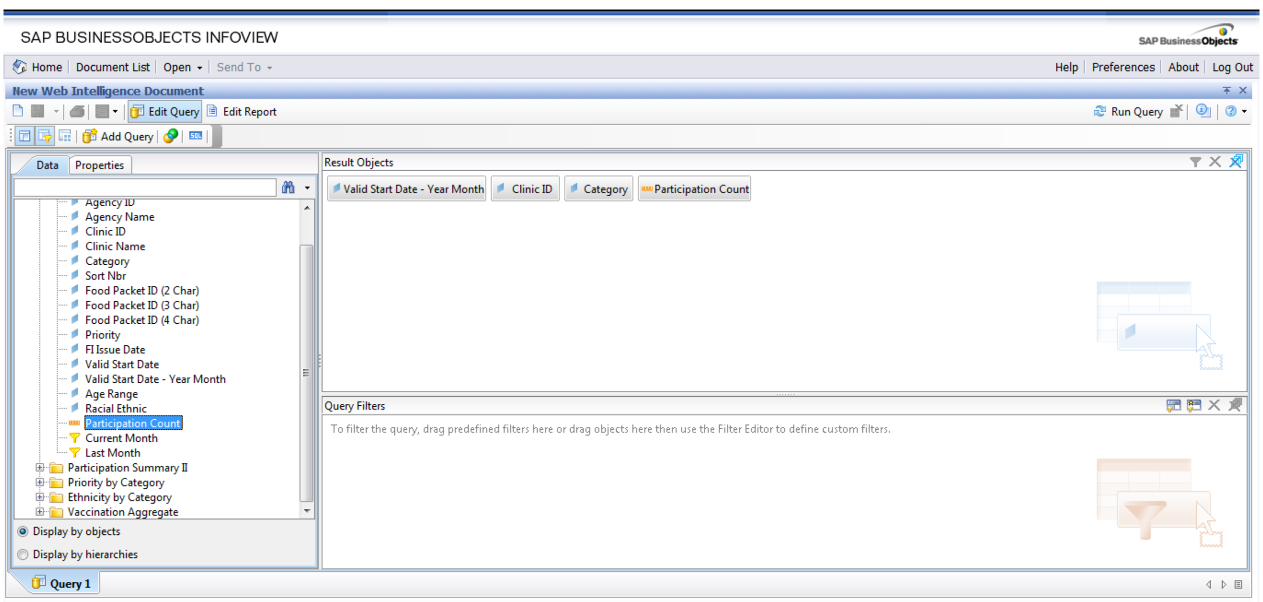
Click on the **New**, **Web Intelligence Document** and select the **Summarized WIC MIS Information** universe.



This universe contains summarized information in several different folders. The first one is Participation Summary I. The Participation Summary I folder contains information on WIC participation as of the close of business yesterday. Since you want up-to-date information for the current month, this is the folder to use.

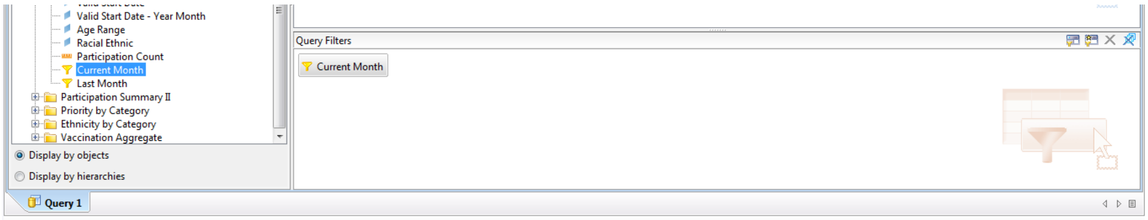
9.3 Step 3: Select the Objects

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



9.4 Step 4: Apply Filters

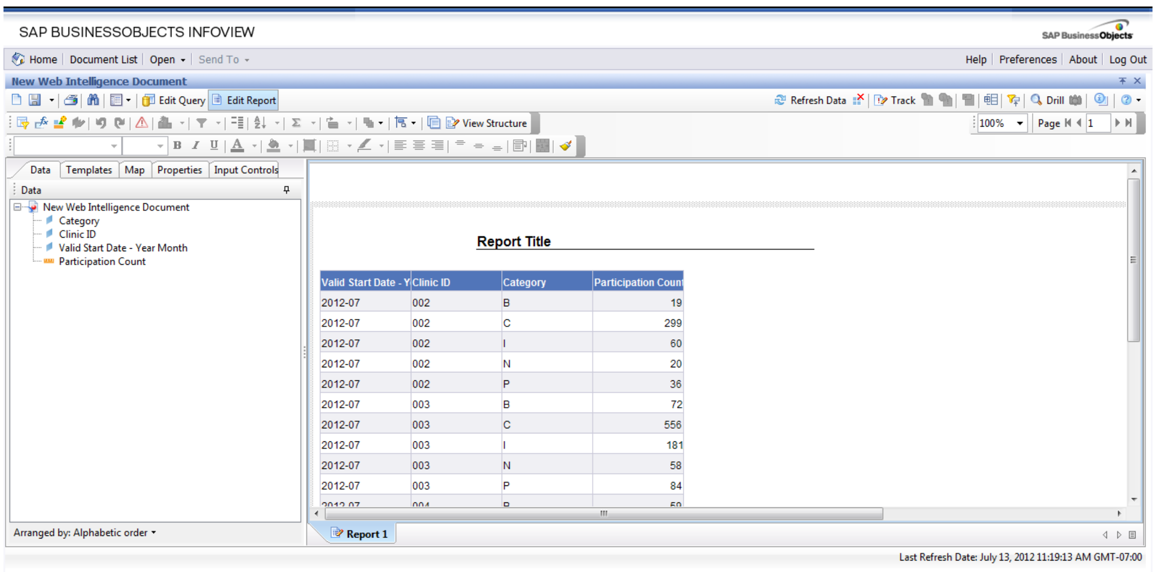
Now you are ready to add the filter to the query to restrict the information it will return. Remember that you want the report for the current month. Find the predefined filter in the **Participation Summary I** folder for **Current Month**. Drag and drop it to the **Query Filters** section of the screen.



9.5 Step 5: Run the Query

Click on **Run Query**. In just a few seconds you will see the report resulting from the query.

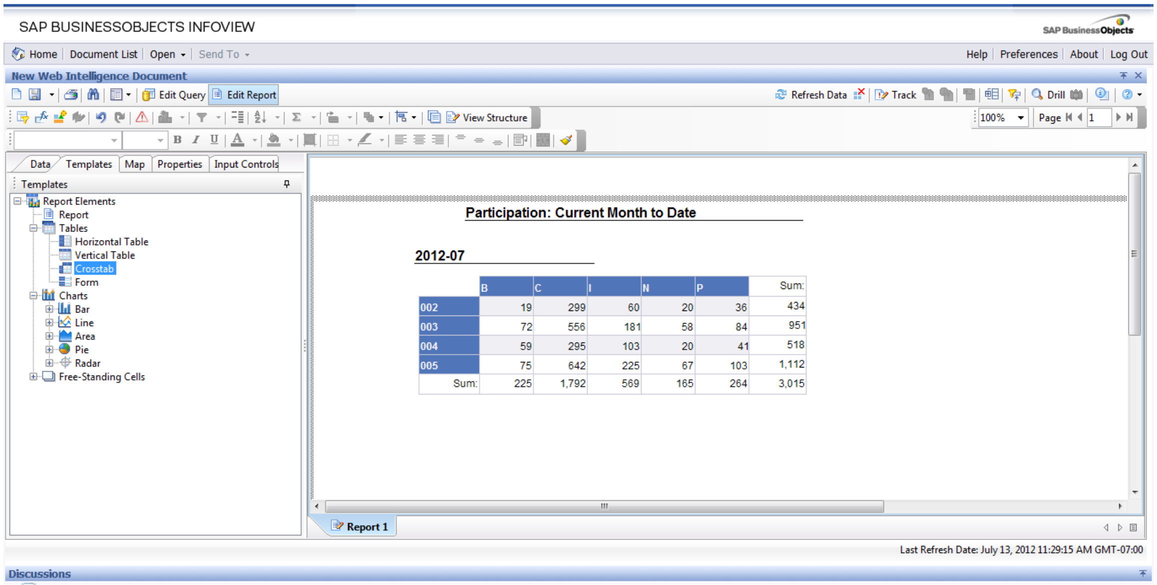
It should look something like the example on the following page.



9.6 Step 6: Format the Report

Initially the layout of the data will look like the example above. Format the report so that you create a nice looking, easy to read report.

- Change the report to a crosstab with the year-month as a section header at the top of the report.
- Add totals to the columns and rows.
- Make the title of the report “Participation: Current Month to Date”
- Adjust the column widths by selecting the line between the columns and moving it from right to left as desired to widen or narrow the column.
- Center the report and title on the page. Just select the selection you want to move and drag and drop it to the new location.



9.7 Step 7: Save the Query

Save your final report in the **Training** folder in **My Favorites**.

9.8 Step 8: Send the Query

Send the query to the **Business Objects Inbox** of another WIX user in your agency.

Congratulations! You have successfully completed the first case study.

10 Case Study 2—Participant Address List

Hurray! You got that obesity grant. Now you are going to hold some family centered childhood obesity classes for the three and four-year-old children at clinic 003[1]. Invitations to the 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.

As you begin each step of this case study, try to do it yourself. Then check your work and compare it to the suggestions following the heading.

10.1 Step 1: Define the question

- Who are the three and four-year old overweight children at clinic 003?

[1] Use the clinic number for whichever site at your agency had the highest percentage of overweight children.

- What are the names and addresses of the families at clinic 003 with these overweight children?
- What is the primary language of each family?

10.2 Step 2: Select the Universe

Create a query to produce a mailing list with the above information about just the overweight children at clinic 003. Once you create the report, you can download it into Excel and use it to produce personalized letters and mailing labels.

For this query, you can use either the **Agency Snapshot Universe** or the **WIC MIS Reporting Information** universe. Both universes have the risk codes for individuals to identity the overweight children and both universes have the individual name, family name and mailing address. However, the address fields in **WIC MIS Reporting Information** are updated every few minutes, while those in the **Agency Snapshot Universe** are only updated once a month.

To be sure you get the most up-to-date address information, go to **New**, **Web Intelligence Document** and select the **WIC MIS Reporting Information** universe.

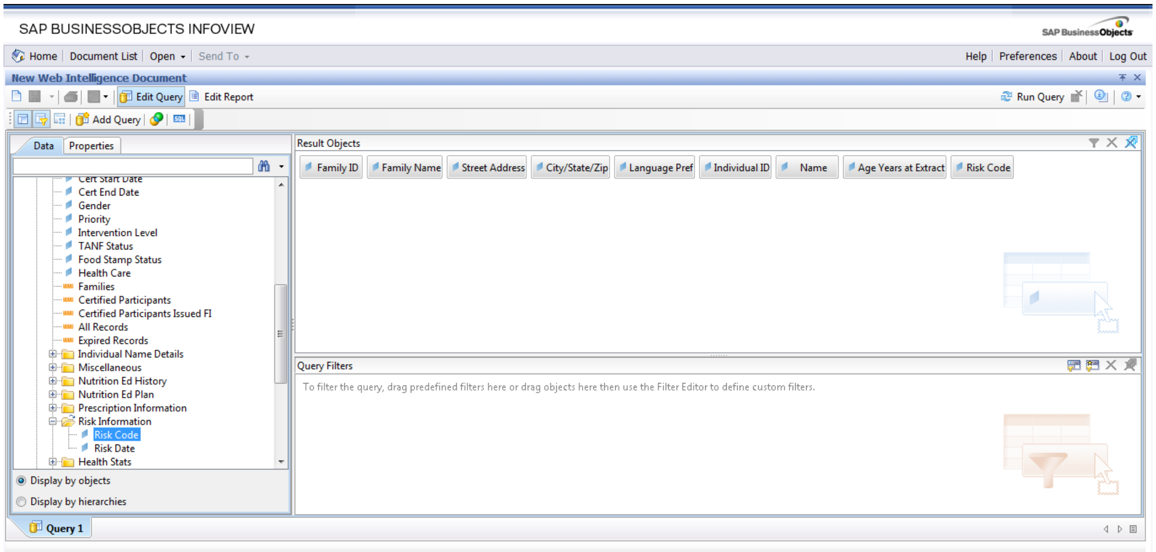
10.3 Step 3: Select the Objects

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

It's always a good idea to add the **Family ID** and/or **Individual ID** to a query that lists individuals and/or families so that you have a unique identifier for each record. Add **Family ID** to the **Result Objects**.

Next drag and drop the object for **Language Pref** into the **Result Objects** area.

From the **Individual Information** folder, add the objects for **Individual ID**, **Name** and **Age in Years at Extract**. From the **Risk Information** subfolder, select **Risk Code** and add it to the **Result Objects**. Compare your work to the example below.



10.4 Step 4: Apply Filters

What filters do you want to set to restrict the data in the report?

- Limit the report to children.
- At clinic 003 (or whichever clinic at your agency had the highest percentage of overweight children)
- Only the 3 and 4-year-olds
- Only the children who are overweight or at risk of overweight.

Tip: You can put filters on objects that are not in your report. In this example, Clinic ID is not in the Result Objects area and will not appear on your report. However, only information for clinic 003 will be returned when you run the query.

Drag and drop the predefined filter **Children** into the **Query Filters** area.

Next drag the object for **Clinic ID** into **Query Filters**. Change **In List** to **Equal to** since you want the children from only one clinic. In the blank space indicate the desired clinic ID by typing in 003[2].

Drag and drop **Age Years at Extract** to the **Query Filters** area. Click on the arrow next to **In List** and select **Between** from the drop down list. Two blank boxes will appear where you can type in a constant. Type in a 3 in the first space and type a 4 in the second space.

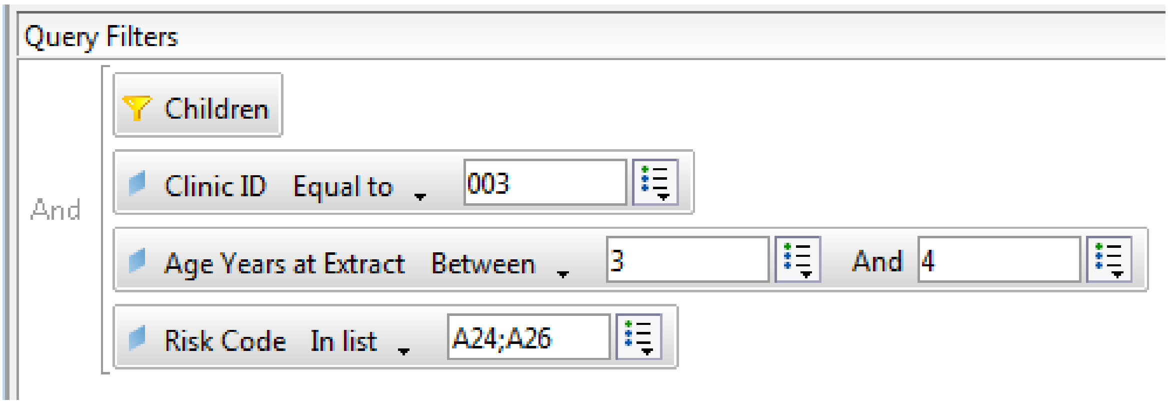
Tip: When putting a filter on numbers and dates always use Equal to, Between, Not Between, Greater Than, Greater Than or Equal to, Less Than, Less Than or Equal to.

Next place a filter to restrict the report to only the children who are overweight or at risk of overweight. 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.

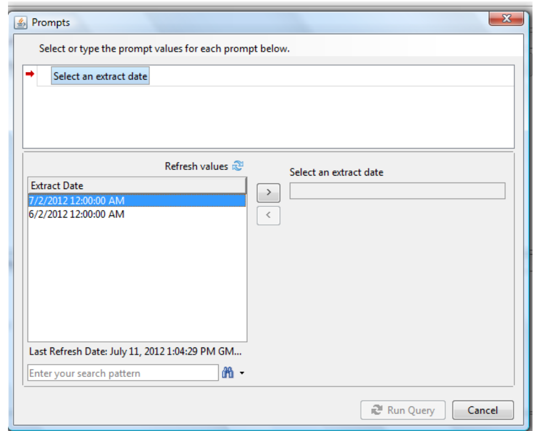
[2] Be sure to use the clinic ID for the site in your local agency with the highest percentage of overweight children.

Use **In List** for Risk Code. Type in **A24;A26** in the blank space. Remember to capitalize the letters and put a semi-colon but not put a space between the items.

Your **Query Filters** should now look like the example below.



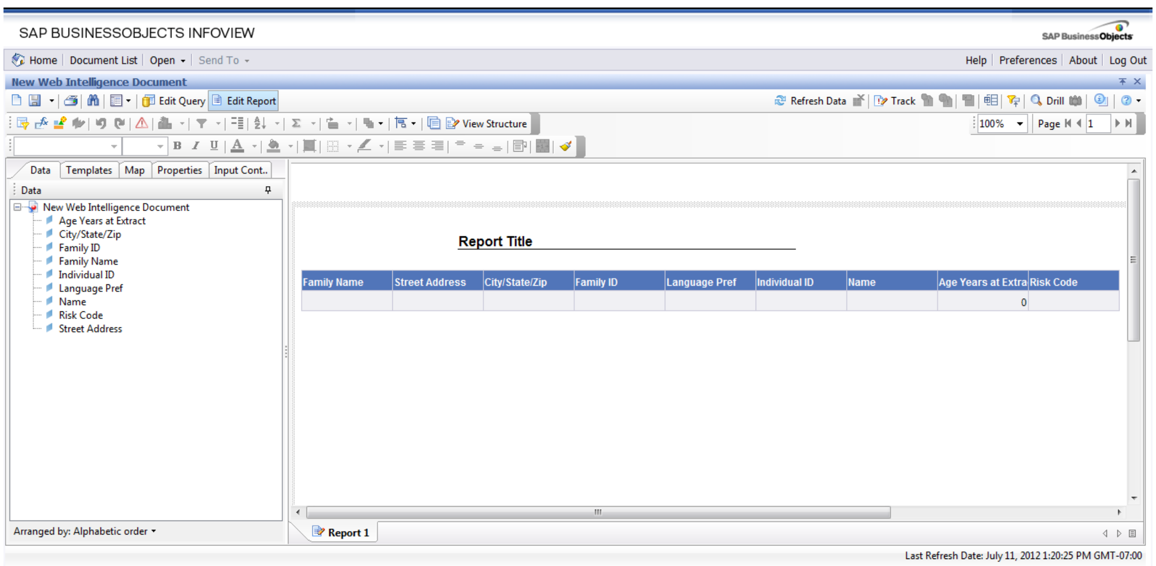
10.5 Step 5: Run the Query



Click **Run Query**.

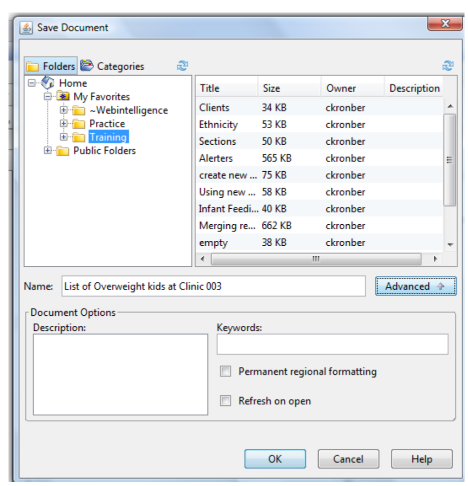
Select the **Extract Date** in the **Prompts** pop-up and click **Run Query**.

The report will look similar to the example below. The headings should look the same; however in this example the data has been removed to protect the privacy of the participants.



There you have it, your final report. You may now click on the save icon in the upper left portion of the screen to save the query and download your report.

10.6 Step 6: Save the Query



Use **Save as** to save the query to the **Training** folder in your **My Favorites.**

Give it a brief name that will help you remember what the query does.

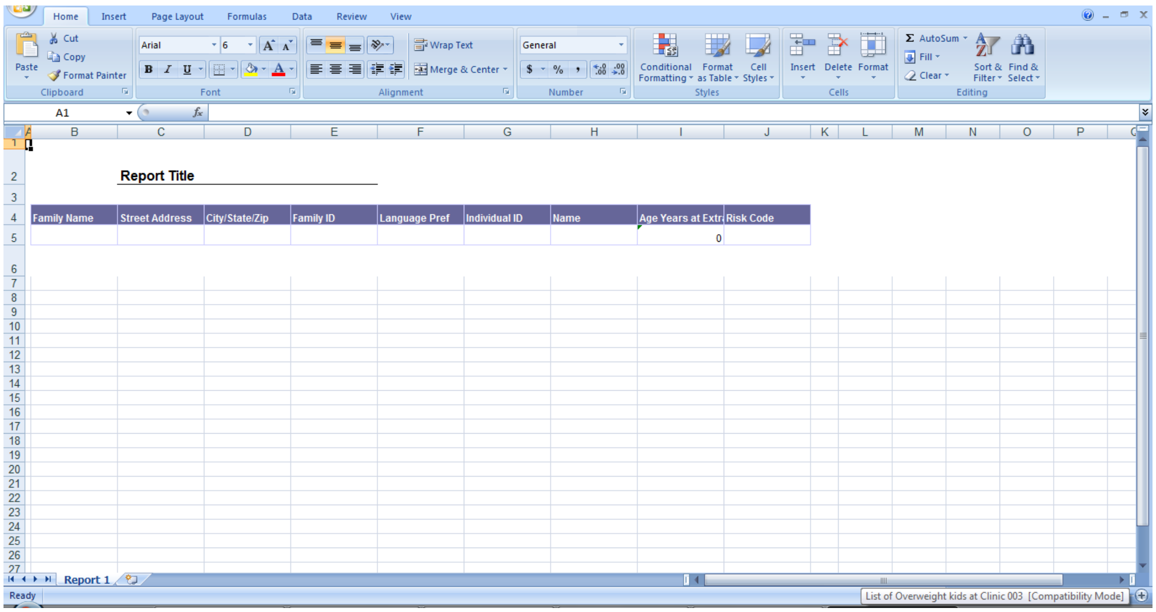
If you want to add more detail, click **Advanced** and add a short description. Check **Refresh on Open** if you want to get fresh data whenever you open the query. You will always be prompted to select an extract date.

10.7 Step 7: Download the Data to Excel

> **Tip:** Remember it's always a good idea to add the extract date to the name of your data downloads when you save them.

Use **Save to my computer as** to save your report in Excel. Since we did no formatting of the report, your results will look like a database table and in Excel you will be able to manipulate and format the data as you wish. See the example below.

Once you have the data open in Excel you can save it to your PC or network drive in the usual way.



Now this report is available to you whenever you need it. Just open it in Excel from the location you have it saved on your computer.

You can also run the query again from **My Favorites**. Double click on the name of the query from your documents list. If you had checked **Refresh on Open** when you saved the query, the query will run and return fresh data.

If not, when the report opens, choose **Edit** in the upper right of the screen if you want to change something or add a field to the query. If you want to edit the query before you run it, instead of clicking on the report to open it, just highlight it, right click and select Edit to go directly to the Edit Query screen without opening the report first.

Click **Refresh Data** if you want to run it again with updated information. You will be prompted to select an extract date whenever the query runs.

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 their appointment or arrange to mail their food instruments.

Result Objects: Using the Unissued Prescription Detail universe, put together a report showing the clinic site, family ID, family name, language, phone number, phone type, schedule date, contact type, and the number of individual unissued prescriptions in the family. Note that some of the fields in this universe have different names than in other universes.

Query Filters: Select only the families that have missed their appointment. (The family appointment in WIC MIS is in the past.)

Formatting: Section the report by clinic and then sort it by language and the count of unissued individuals. Sort first by language and then by count, placing the families with the most unissued participants at top of the list.

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

001

Family ID	Addr Line1 (Family Name)	Fam Lang Pref	Primary Phone Number	Primary Phone Type	Schedule Date	Contact Type	. Uniss Indiv Count
GA987654321	ANA GARZA	EN	7075252525	BLANK	7/13/2012	S	4
AM123456789	MARIA ARNO	EN	7075252535	HOME	7/22/2012	GC45	3
JA876543210	AMY JONES	EN	7075252545	CELL	7/7/2012	GP01	2
BT192837465	TISHA BELL	EN	7075252565	MESSAGE	7/5/2012	S	2

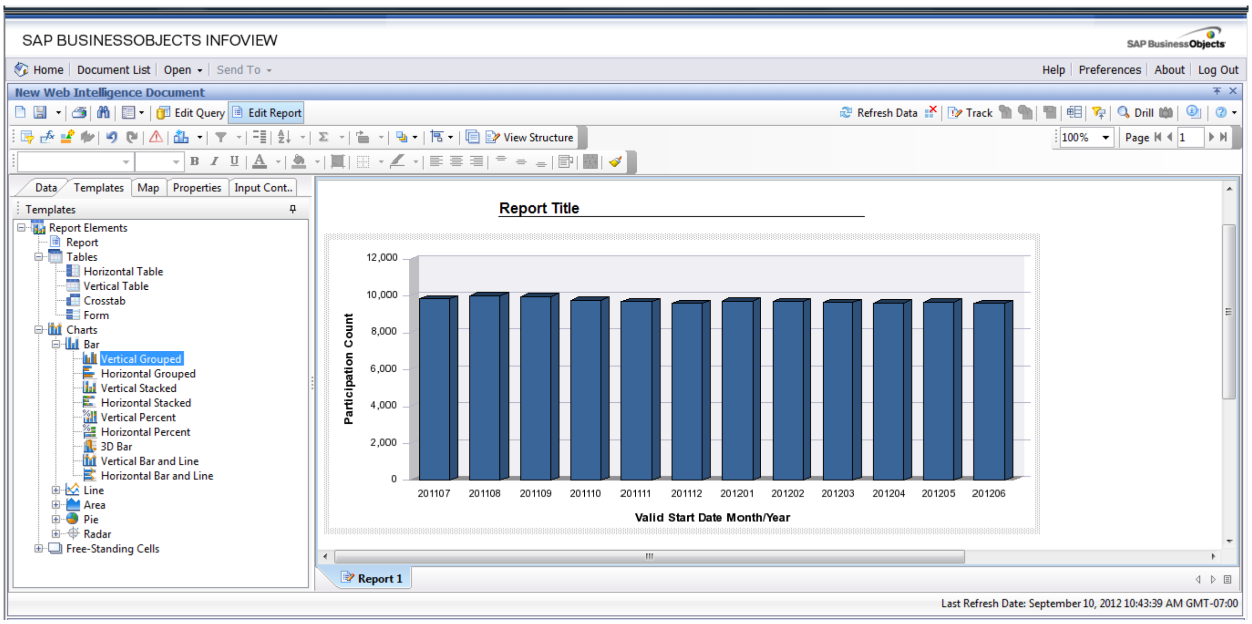
Please note that this report includes only families with unissued FIs in the current month. It does not include missed appointments that were scheduled for new enrollments, for those who are past their certification end date or for certified individuals without a valid prescription in their WIC MIS record.

When you are finished, save the query to your **Training** folder. Download the report and open it in Excel.

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 Month/Year** 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 try with this report.

1. Edit the query to add the **Clinic ID**. Run the query again and section the report by clinic to show a separate graph for each clinic in your agency.

2. Edit the query to add **Category**. Run the query again. Remove the section for clinic and section the report by category

3. Add clinic ID to the **Report Filter Bar** (Use the show hide report filter bar ) and look at just one clinic at a time by category.

4. Add a filter to look at just the categories for women.

5. Edit the **Query Filters** to add a **Prompt** in the **Valid Start Date** range spaces and run the query for a different time period.

6. Turn the graph in to a cross tab table by **Valid Start Date Month/Year** and **Category**. Add totals to the columns and rows.

7. Section the cross tab by clinic.

8. Make one table showing the percent of total participation by category. Remove unnecessary row and/or columns.

9. Save the report to your computer as PDF and attach it to an email to a coworker.

10. Give the report a title and save the query to your **Training** folder in **My Favorites**.

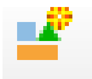
13 Case Study 5 – Create Your Own Report

Think of a question you have about the participants in your agency. Write a query and create a report to answer the question.

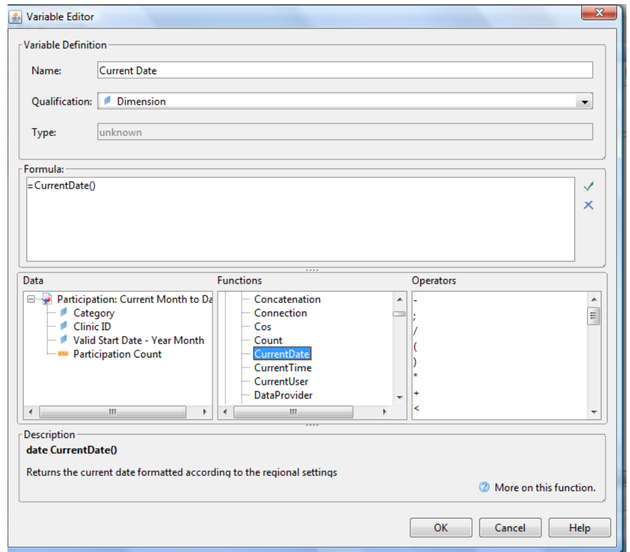
14 Advanced Procedures

Open Case Study 1, Participation: Current Month to Date. Click on **Edit**.

14.1 Variable Editor



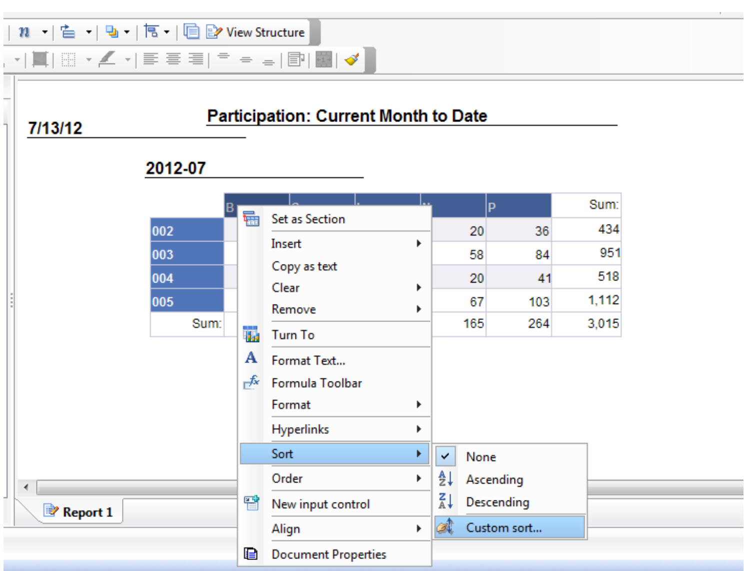
Use the **Variable Editor** to create a new object to add the current date to the top of the report.

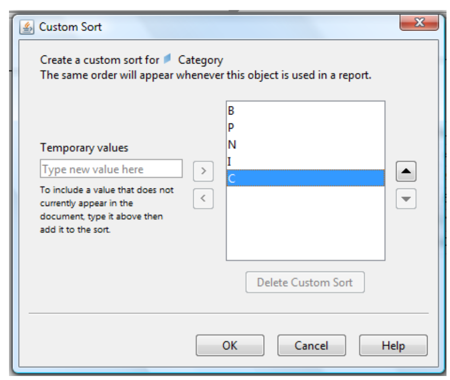


- Open the **Variable Editor** by clicking the icon in the toolbar in the upper left of the screen.
- Type the **Name** in as **Current Date**
- From the **Functions** list, choose **Current Date**. Double click to add it to the **Formula** area.
- Click **OK**.
- **Current Date** will appear as an object on the **Data** tab of your report.
- Add it to the report as a section above the month and year.

14.2 Change the Sort Order

Highlight the categories on the report and right click the mouse. From the list select **Sort** and then choose **Custom Sort**.



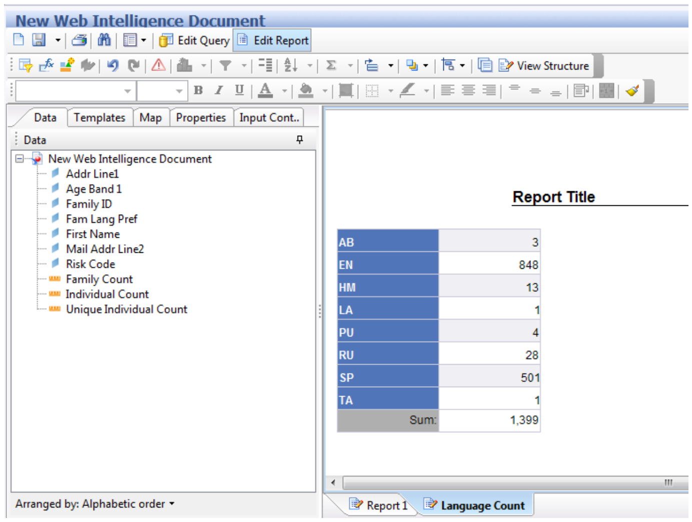


Use the up and down arrows to change the sort order for **Category** to **P,B,N,I,C**. Click **OK**. Category will be displayed in the new order on the report.

14.3 Produce Multiple Reports with the Same Query

Open Case Study 2, **Overweight children at Clinic 003**.

- Click on **Edit** and then on **Edit Query**.
- Add an **Individual** or **Family Count** to case study 2 and run the query.
- Right click on the **Report 1** tab at the lower center of the screen. Choose **Duplicate Report**.
- Right click on the new tab (Report 1(1) and change its name to **Language Count**.
- On the **Language Count** tab, remove all of the objects from the report except for **Language**.
- Add the **Family** or **Participant Count** to the report
- Use **Templates** to create a **Vertical Table**.
- You now have a count of families or children (individuals) by language.



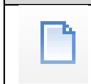
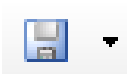
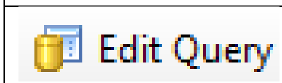
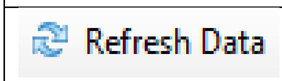
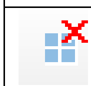
Open Case Study 3, **Missed Food Instruments**. Make copy of the report on a new tab. Remove all objects except the ones for clinic, language and the individual count. Create a crosstab to show the sum of individuals with missed appointments by clinic and language.

15 Toolbar Icon Descriptions

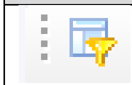
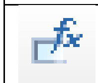
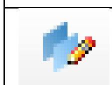
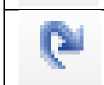
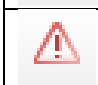
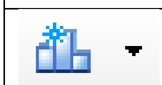
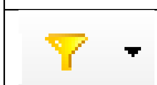
Below are brief descriptions of the functions of various toolbar options available.

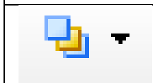
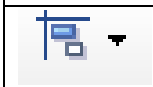
> **Tip:** You can rest the cursor on each icon on the tool bar to view a brief description.

15.1 Standard Toolbar Buttons

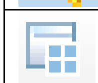
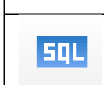
Button	Description
	**New Document** Creates a new blank document in the currently selected Universe
	**Save** Allows you to save documents to Personal and Public folders or to save documents on your own computer.
	**Print** Enables you to print a copy of your report.
	**Find** Allows you to find specified text on the displayed report page.
	**Configure Views** Allows you to show and hide the different Report Manager tabs as well as show and hide each of the three toolbars.
	**Edit Query** Opens the Query panel. Allows you to define data content of the document.
	**Edit Report** Opens the Report panel. Allows you to view or format the document.
	**Refresh Data button** Allows you to rerun the query and retrieve the most recent data from the database.
	**Purge Data** Allows you to remove the data retrieved by one or more queries from your document.
	**Activate Data Tracking** Allows you to display the difference between the most recent data and either the data before the last refresh, or fixed reference data.
	**Show/Hide Report Filter Toolbar** Shows Report Filter pane that allows you to add simple filters to a report that can select one or all of an object variable from a drop down menu.
	**Drill** Starts and ends drill mode. Allows you to analyze report values by drilling down or across the dimensions displayed in the tables and charts.
	**Take Snapshot of Drilled Report** Allow you to make a duplicate of a drilled report so that you can keep a copy of the drilled values in the same document.

15.2 Reporting Toolbar Buttons

Button	Description
	**Show/Hide Filter Pane** Shows Report Filter pane that allows you to create new filters on report objects in order to restrict the amount of data displayed in the report.
	**Show/Hide Formula Toolbar** Allows you to create custom formulas using a graphical editor and save them as variables for reuse in the document.
	**Variable Editor** Allows you to create a new variable by building a formula and defining it with a name in the **Variable Editor.**
	**Merge Dimensions** Allows you to merge objects with common values from multiple queries into a single dimension that can be use join data into a block.
	**Undo** Allows you to cancel the previous action.
	**Redo** Allows you to redo the previous undone action.
	**Alerters** Allows you to create, edit or delete alerters. Alerters allow you to highlight results that meet or fail specific targets.
	**Apply/Remove Ranking** Allows you to show only the extreme ranges of data, by ranking the top or bottom values of a given dimension on the basis of a given measure.
	**Add Quick Filter** Activated when you select an object in the **Result Objects** pane and allows you to select a value to filter data on.
	**Insert/Remove Break** Insert or remove a break on a table column or row.
	**Apply/Remove Sort** Apply to or remove a sort from a column of data. Clicking the down arrow displays the descending and custom sort options as well.
	**Insert Sum** Insert Sum or display the list of calculations you can apply to a column of data. Clicking the down arrow displays the additional calculations.
	**Insert Count** Insert Sum or display the list of calculations you can apply to a column of data. Clicking the down arrow displays the additional calculations.

Button	Description
	**Insert Row Above** Insert a new row above the selected row. Clicking the down arrow displays additional insert options to add rows below or columns to left or right.
	**Order** Allows you to define the order in which overlapping blocks display in a report.
	**Align Blocks and Cells** Allows you to align positioning
	**Switch Page/Quick Display** Allows you to toggle between the normal view of a report and a preview of how the report will appear on the page when printed.
	**View Structure** Toggles between viewing the structure of the report and the results.

15.3 Query Toolbar Buttons

Button	Description
	**Show Hide Data Manager** Shows or hides the left data panel.
	**Show/Hide Filter Pane** Shows or hides the Query Filters pane.
	**Show Hide Scope of Analysis Pane** Shows or hides the Scope of Analysis pane that show objects in the query that are not displayed on the report.
	**Add a New Query** Allows you to add an additional query tab and select the same or a new universe. When run, provides the option to display data in a new or on the same report. Reports may be then combined in a block using **Merge Dimensions** on data elements in common.
	**Add a Combined Query** Allows you to combine two separate queries from the same universe into the same report.
	**View SQL** Opens SQL viewer and allows you to view, copy generated SQL or create and validate custom SQL.

Certificate of Completion

This certifies that

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has completed

WIX Web Intelligence

Level 1Training

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Signed Date