Session 9: Module 1 - HuBERT Reports - State Office Module

SCRIPT

Description	Text
Introduction	<no script>
Overview	The modules in this session will provide an overview of how to access reports within the HuBERT Reports Environment and use Filezilla to access the File Transfer Protocol (FTP) site.
Objectives	After reviewing the modules in this session, you will be able to:
	Understand the differences between the Reports Environment and the Clinic Application;
	Use the icons on your desktop to login to and access the HuBERT pre-defined reports;
	and use Filezille to access reports created during the End-of-Month, or EOM, process and stored on the FTP site.
Reports	There are two locations where HuBERT reports can be found.
	The first is in the HuBERT application via the Reports Environment.
	The Production database, or clinic information, is copied every night to the Reports database, which results in the Reports Environment being 12 hours behind the data found in the clinic application.
	We will review the Reports Environment in Modules 1 and 2.
Reports1	FileZilla provides access to a File Transfer Protocol, or FTP, site where report files are posted by our contractor.
	These reports are run during the End-of-Month process.
	We will review FileZilla in Module 3.
Reports2	<no script>
<rpts>	Pre-defined HuBERT reports are available in several modules within the HuBERT application:
	the State Office module…
	the Clinic module…
	and the Central Administrative Site, or CAS module.
Recertified	The pre-defined reports available in the Reports Environment are in the process of being reviewed to ensure they are working as designed and are providing accurate data.
	This process is called "recertification".
	Reports that have been recertified are listed in the HuBERT Reports Guidance available on the MDH WIC web site.
<icons>	The icons that access the Reports Environment all begin with “REPORTS” and are available on your HuBERT workstation’s desktop.
Reports3	Users must have a separate login to access the Reports Environment.
	The username for reports access will always begin with "rpt".
	Coordinators or supervisors can request reports access for their users by sending an email to tami.matti@state.mn.us. It will generally take about 5-7 days to receive a login.

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<environment>	So, let's talk about the Reports Environment.
	Why do we have a separate Reports environment?
	Well, reports utilize a lot of server resources…
	…and we wanted to make sure that users providing services to WIC participants in the clinic application on the Production server wouldn't be affected by other users running reports at the same time...
	…and that users could have access to reports at any time during their work day without having to worry about bogging down the server.
	So, we created a separate environment that houses a separate server that we can use to run reports on at any time of the day.
	We already know that we can access the Reports environement by using the REPORTS icons on the desktop.
	But how do we know what environment we're in?
	We can tell when we are in the reports environment the same way we've already learned to see who is logged into the clinic application on a workstation…
<environment1>	...by hovering the mouse over the WIC Session Manager icon in the toolbar's task tray.
<environment2>	Just like with the clinic application, the user is identified by their username…
	...which begins with RPT…
	...and the URL has "reports" in it indicating we are in that environment.
Switch	<no script>
<logoff>	We can see that we are currently in the Production environment because "hubert" is in the URL.
	However, in order to run reports, we must switch to the Reports environment.
<logoff1>	When switching between two different HuBERT environments…
	…such as Production and Reports…
	…we must completely log off before attempting to access the other environment.
<logoff2>	We should already know how to log off the Production environment since we do it at the end of each clinic day.
	And, how do we do that?
	Yep. We right click on the WIC Session Manager icon.
	Unfortunately, one of the limitations to this training module is that the right click does not function on a web browser. Therefore, all RIGHT clicks will be performed for us in this module.
	So, to open the WIC Session Manager, we would RIGHT click on it.
<logoff3>	<no script>
<logoff4>	Click Log off.
<logoff5>	<no script>
<logoff6>	Click Yes to exit the current environment.
<logoff7>	Remember, we have to wait for the WIC Session Manager icon to disappear before we are truly logged off.

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Description	Text
<logoff8>	<no script>
<so>	We are now ready to open a module in the Reports environment.
	Let’s open the State Office module first.
	Double-click the REPORTS - State Office icon.
<so1>	<no script>
<so2>	Remember, when logging into the Reports environment, we have to use our reports login that begins with “RPT”.
	We are going to quickly get us logged in since the login process is the same as the Production environment.
<so3>	<no script>
<so4>	Go ahead and click the OK button.
<so5>	<no script>
<so6>	<no script>
<so7>	<no script>
<so8>	<no script>
<so9>	<no script>
<so10>	Before we do anything in the Reports environment we must first Reset our Local Reference Data.
	Resetting the Local Reference Data is essential whenever we switch between environments.
	Just like with the Production environment, the first time we open the Reports environment on any given day, we should Reset the Local Reference Data.
	In order to reset, we have to close the module we just opened.
	Go ahead and click the X in the top right corner.
<reset>	And where do we go to reset our local reference data?
	Right. Back to the WIC Session Manager icon.
	Once again, we are going to RIGHT click on the icon (and since we can’t RIGHT click in the training module, it’ll be done for us).
<reset1>	Click on Reset Local Reference Data.
<reset2>	<no script>
<reset3>	<no script>
<reset4>	Now that we’ve reset, we can re-open the State Office module.
	Double-click the REPORTS-State Office icon.
<reset5>	<no script>
State Office	<no script>
<so11>	OK. So what is the State Office module?
	Well, it’s a read-only or view-only module that can be used by State Office staff to view all participant records.
	Local Agency staff have access to the State Office module in the Reports environment because it provides some pre-defined reports that cannot be found in any of the other modules.
	The State Office module should only be used to generate reports.
	Reports in all modules are found in the File menu.
	Let's click on the File menu.

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<so12>	Next, click on System Outputs.
<so13>	Click on Reports.
<so14>	<no script>
<so15>	The Generate Reports window lists all of the reports available in the State Office module.
	It also provides a short description of each report.
	Let's click the area to the right of the scroll bar to see what else is in this window.
<so16>	Application just refers to the type of report, which is used in the technical naming convention for HuBERT reports.
	Go ahead and click the area to the left of the scroll bar to return to our original view.
<so17>	We are going to scroll through the available reports.
<so18>	<no script>
<so19>	Let's take a look at the Year-to-Date Participation and Outlays report.
	This report can be used daily to ascertain your participation count.
	Double-click on the report.
<so20>	<no script>
<so21>	The window that opens when a report is selected allows you to specify the appropriate filters or criteria for your report.
	It varies depending on the selected report.
	For this report, you can select the year and month…
	…and whether to run the report by Clinic, Agency, Community Health Board/Tribal Organization/Non-Profit (which is also known as the Grantee), State or All.
	The drop-down lists are enabled based on the selection made in the Report by section.
	For instance, if we only wanted data for a specific clinic, the Grantee, Agency and clinic all have to be selected.
	If we click on the Agency radio button...go ahead…
<so22>	...we only select the Grantee and Agency.
	When we click the Grantee radio button…
<so23>	We only have to select the Grantee.
	What do we think has to be selected if we select State or All?
	Go ahead and click the State radio button.
<so24>	Yep. Nothing. Same goes for the All radio button.
	The Report Destination for this report defaults to Display on Screen but we can also Save a PDF, Send to Printer, or Save to Excel.
	Once we've identified all of our filters and how we want to view the report, we would click the OK button to run it.
	The State is in the process of developing reference guidance for the recertified reports, which will provide information about the criteria used to create the reports and how to read the data provided on them.
	Go ahead and click the Cancel button.

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Description	**Text**
<so25>	Let's exit the State Office module.
	First, click the Close button on the Generate Reports window.
<so26>	Now click the X in the top right corner.
<end>	In the next module, we will take a look at the other two Reports modules: Clinic and Central Administrative Site.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the HuBERT Questions form on the MDH WIC website.