Freemed-YiRC: Report Generator Module Walkthrough for Service Plans

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BEFORE YOU BEGIN

- The Report Generator module for Freemed-YiRC must be enabled. This should be done already, but in case it gets disabled, it can be re-enabled by:
  - Logging in as the *root* user.
  - Choosing *Settings* from the bottom of *root*'s main menu.
  - Choosing *Edit Module Settings*
  - Find *Report Generator* and set it to *Enabled*
  - Click *Update* at the bottom of the page
- The Report Generator module must be enabled for use by each FMYiRC *Group* you wish to use it with. To do so:
  - Choose *Group Database* from the main menu (you may need to be *root* to do this)
  - For each *group* you wish to enable the Report Generator for, do the following:
    - Choose *Modify* all the way to the right on the row of the group you wish to enable this for.
    - Find *Report Generator* and check the checkbox.
    - Click *Update* at the bottom of the screen.
    - Repeat this process for each *group* which will use the Report Generator
- Each user who is going to use the Report Generator module must be given the correct security permissions.
  - Choose *User Admin* from the main menu (you may need to be *root* to do this)
  - For each user you wish to add this for, do the following:
    - Find the user by clicking on the letter of the users login name.
    - Find the user in the list and click the *Modify* link in the *Security Permissions* column.
    - Find the *Report Generator* section of this list.
    - Any user who will need access to this module will need the *Access* permission.
    - Only users who should be able to modify things such as template composition will need the *Administration* permission.
    - Only users who are allowed to create new templates should get the *Template Creation* permission.
    - Click *Update* at the bottom of the screen
    - Repeat this process for each *user* who needs access to this module.
  - If you have many users for which you need to give access to this module, you can also try this alternative method:
    - In *User Administration*, choose the *Security DB – Multi-User Edit* option.
    - In the *Users* box, highlight all users you wish to give access to the Report Generator permission to. Use the *Control* key on the keyboard while clicking to select multiple users.
    - Keep the *Apply All?* checkbox UNCHECKED.
    - Find the *Report Generator* section of this list.
    - Check the box next to *Access* in the *Report Generator* section.
    - Click the *Update* button at the bottom of the page

<u>Concepts You Need To Be Familiar With</u>

A ***Template*** is a set of instructions used to create a report. The *Template* is like the blueprint, whereas the *Report* is the final product (the *finished house*).

A ***Report Group*** is used to keep different kinds of reports together. The Report Generator is very powerful, it can be used to create many different kids of reports. Initially, it's use is expected to be for Service Plans. However, in the future it can be used for any type of report which can be made into a template (*Monthly Reports*, etc...). The FMYiRC Report Generator also has the capability to have multiple report templates for certain reports. For example, you may have a report whose content may vary slightly depending on which type of client you are dealing with. The majority of the report may be the same, but there may be slight differences. Therefore, it's helpful to put these similar templates into *Report Groups*.

A ***Timeline*** is a way to identify the schedule upon which reports are due. Many reports are *periodic*, i.e., there is a set timeline for getting them done. The FMYiRC Report Generator has a method to deal with this in an automated manner. This will also tie into the newer FMYiRC *User/Group Calendar* modules, enabling the automated creation of e-mail alerts letting staff be notified ahead of time of reports that will be due soon.

There are currently two *timelines* set up in your system:

- *Service Plans – ISP*
- *Service Plans – ISP Review*

Both of these start with *Service Plans* because that's what they're for. If you create other types of reports, *Monthly Reports*, for example, you would name them *Monthly Reports – xxx*, etc... it's a useful nomenclature, especially as time goes on and more report types are possibly added.

Report ***Versions*** are used to keep a historical record of changes to any given documents. A given report may have only one version, i.e., the initial report created, or it may have many versions, created by a series of edits. Maintaining a history allows for a user to keep track of information in the event that mistakes were made. The first version of a document is known as *Draft V1.00*. The next versions would then be *Draft V1.01, Draft V1.02,* etc... After a document is deemed to be complete, it is marked as *Final*. At that point, it becomes version *Final V1.00*. If any edits are made after that, the version number is again incremented... *Final V1.01, Final V1.02,* etc...

<u>Accessing the Report Generator</u>

To access the FMYiRC Report Generator (assuming your user has the correct security permission and the module has been correctly set up as described on the first page of this document), from the main menu, choose the *group* you wish to access. Then click on the *Report Generator* link.

Setting Up A Client For The First Time

Access the Report Generator as described in the previous section. Choose a client from the list. The first time you do this, it should give you a message similar to *No Timelines Applied To This Resident.* This means that this resident has not been associated with any report timelines. You must tell the system which timelines you wish to apply to this resident.

To do so:

- Click on the *Apply A Timeline To This Resident* link.
- Choose the timeline you wish to apply (timelines must be applied one at a time).
- Depending upon the type of *timeline* this report uses, you may be asked to provide a *Seed Date*.
    - The *Seed Date* is used to indicate the beginning of the timeline.
    - For the *ISP*, an initial plan is due 30 days after the clients date of entry. Then the first detailed plan is due 90 days after the clients date of entry. This first detailed report would be the first *periodic* report the FMYiRC Report Generator would be used to generate. However, all following reports are due afterwards at six month intervals.
        - Therefore, the *Seed Date* for the ISP needs to be six months before the first detailed ISP is due. This would translate to three months before the client entered service.
        - To do this, click the checkbox that reads *Check Here To Use DOE*. The *Seed Date* will change to the clients DOE as listed in the FMYiRC *Contact Database*. Then, set the date back three months (i.e., if the DOE is *12/15/2008*, you should change it to *9/15/2008*).
        - Doing this will now properly set the timeline up so the first detailed ISP will be due *1/15/2009*, with the following reports due in 6 month intervals (*7/16/2009, 1/15/2010,* etc...).
    - For the *ISP Review*, the timeline is much simpler. Reports are due every 90 days routinely. Here, simply check the checkbox for *DOE*. Since the timeline is routine, i.e., the first report is due 90 days after the clients DOE and also every 90 days thereafter, you do not have to adjust the *Seed Date*.
    - Once the *Seed Date* has been chosen, click the *Continue* button. You should now see the report group for that timeline show up as a link.
- This procedure needs to be followed for any new client put in the system, for each type of timeline wished to be applied for that client.

Creating Reports

- Access the FMYiRC Report Generator module for a given module.
- Choose a client.
- Choose a report group.
- The next pages content will vary depending upon which report group you chose.
  - *Service Plans – ISP*
    - There are three sections here:
      - *PERIODIC REPORTS*
        - These are the detailed periodic reports which are due 90 days after the clients DOE and then every 6 months thereafter.
      - *INITIAL REPORT*
        - This is the initial, very stock, report due 30 days after a clients DOE.
      - *FINAL REPORT*
        - If a final report is due near the clients termination date, it would go here.
- In the *PERIODIC REPORTS* section, first it displays the *Current/Future Reports*. These are used to show you which is the current report, and then the next report date.
- To create the current report, click on the *Create* link for the entry marked *CURRENT*.
- The system will ask if you are sure if you wish to create this report. This is beneficial in case a user accidentally clicked on the link and didn't actually mean to create a report.
- After clicking *Yes* the report will be created. The system will use the associated *Report Template* as the blueprint to create the report.
- After the report has been created, the *Create* link for that entry will disappear and there will now be *Download* and *Manage* links. In addition, it will show the current version of a report.
- To view the report you just created, click the *Download* link.
- This will produce a screen with a link to the current report. The file name of the report is automatically generated and shows the report type, clients name, target date, and version.
- To view the file, click on the link. To save the file to your computer, right-click on the link and save it.

Editing Reports

If it's determined that the report needs to be modified after it's created, the report can be edited. However, the report itself can not be physically edited in FMYiRC itself. The report must be edited with a different program, for example, *OpenOffice.org*, *Microsoft Word*, or some other Word Processor. The reason for this is that word processing is not a task very suitable for the web. There are many already existing word processors which are much better suited for this task.

To edit a report, you must first download it to your computer, as described in the previous section.

Then, open your word processor (or whichever program you are going to edit the document with). Then open the report you just downloaded.

PLEASE NOTE:

- The word processor you wish to use must be capable of opening/importing ***.html*** formatted files.
- Some word processors have additional capabilities of editing .html files and do not edit them as standard word processing files. You may need to instead use the *import* or *insert file* option instead.
    - For example, *OpenOffice.org* doesn't treat .html files as word processing files. When opening an HTML file, it attempts to edit it as a web-page. This is not what we wish to do.
    - Instead, use the following procedure:
        - Start a new word processing file: *File -> New -> Text Document*
        - Then: *Insert -> File*
        - Choose the report file previously downloaded.
        - You should now have the ability to edit the report.

Once a report has been edited by a word processor, you must then save it to your computer. Here you have several options.

- You can try and save it back into .html format if your word processor allows.
    - The upside to this option is you will be able to view the report directly from FMYiRC without having to open an external program to view the report (i.e., *OpenOffice.org* or *Microsoft Word).*
    - The downside to this option is .html only allows for very limited formatting/content placement/structural changes. Say, if you wish to have a header or table located in a very specific location on a page, this is very hard to do with .html.
- Or, you may instead opt to save the file in the standard format of your word processor, i.e., a *.doc* file for *Microsoft Word*, or *.odt* for *OpenOffice.org*.
    - The upside to this option is that the document will retain very fine-grained formatting/content placement/structural changes.
    - The downside to choosing this option is you will be required to view the report using an external program. i.e., you will not be able to view the report directly by clicking on it in FMYiRC, it'll have to be opened using the external program.
- A third option, if your program allows for it, is to save the edited version in the *.pdf* file format.
    - The upside to this option is that the document will be retain formatting. And, since .pdf is a nearly universal/standard format on the web (considering .pdf file viewers can be downloaded for nearly any browser and platform for free), viewing is not a big deal. An external program will need to be opened to view the file (*Adobe Acrobat Reader,* etc...), but it's free.
    - The downside here is that a document in .pdf format cannot be easily edited again without the

full version of *Adobe Acrobat,* etc... However, FMYiRC allows for multiple versions of a file, so the file could be stored in both it's original .html or .doc format AND a .pdf version could be used.

Once a report has been edited and saved to your computer, you must then upload that edited file into FMYiRC for storage.

To do so:

- Access the Report Generator module.
- Choose the client.
- Choose the report group.
- Now click the *Manage* link for the report entry you are working on.
- This will now show the full history for that report. If this report has just been created and no edits have yet been uploaded into the system, then only one entry will show for the *Draft V1.00* version of this document.
- To upload your edited document, click the *Browse* button in the *Upload New File For This Report*. Then choose the report file you created using your external program/word processor, etc...
- If you wish, you may type in some information into the *Notes* section. It's optional, but can be useful.
- Click the *Upload* button.
- There should now be multiple entries in the document history. If this is the first edit, it will be shown as *Draft V1.01.*

You may edit a document and upload it as many times as wished (technically, up to one hundred times). Each time this is done, the document version will be incremented.

Marking Documents As Final

Once a document is deemed complete (regardless of whether or not it was edited), it should then be marked as *Final*. When a document is first created and/or edited, it is marked as *Draft*.

To mark a document as *Final*, follow this process:

- Access the Report Generator
- Choose the client
- Choose the report group
- Click *Manage* next to the relevant report
- Click the *Mark As Final* link to mark the most current version of that document as *Final*.

The document is now marked as *Final V1.00*.

However, we all know that even though something is marked as final, future changes are always possible. In FMYiRC, more edits are still allowed. If a report is marked as final, the next file upload for that report will be marked as a version increment... i.e., *Final V1.01*, etc...