HDIS
Health Department Information System
Helping You...Help Others

Daily Work Sheets
User Manual

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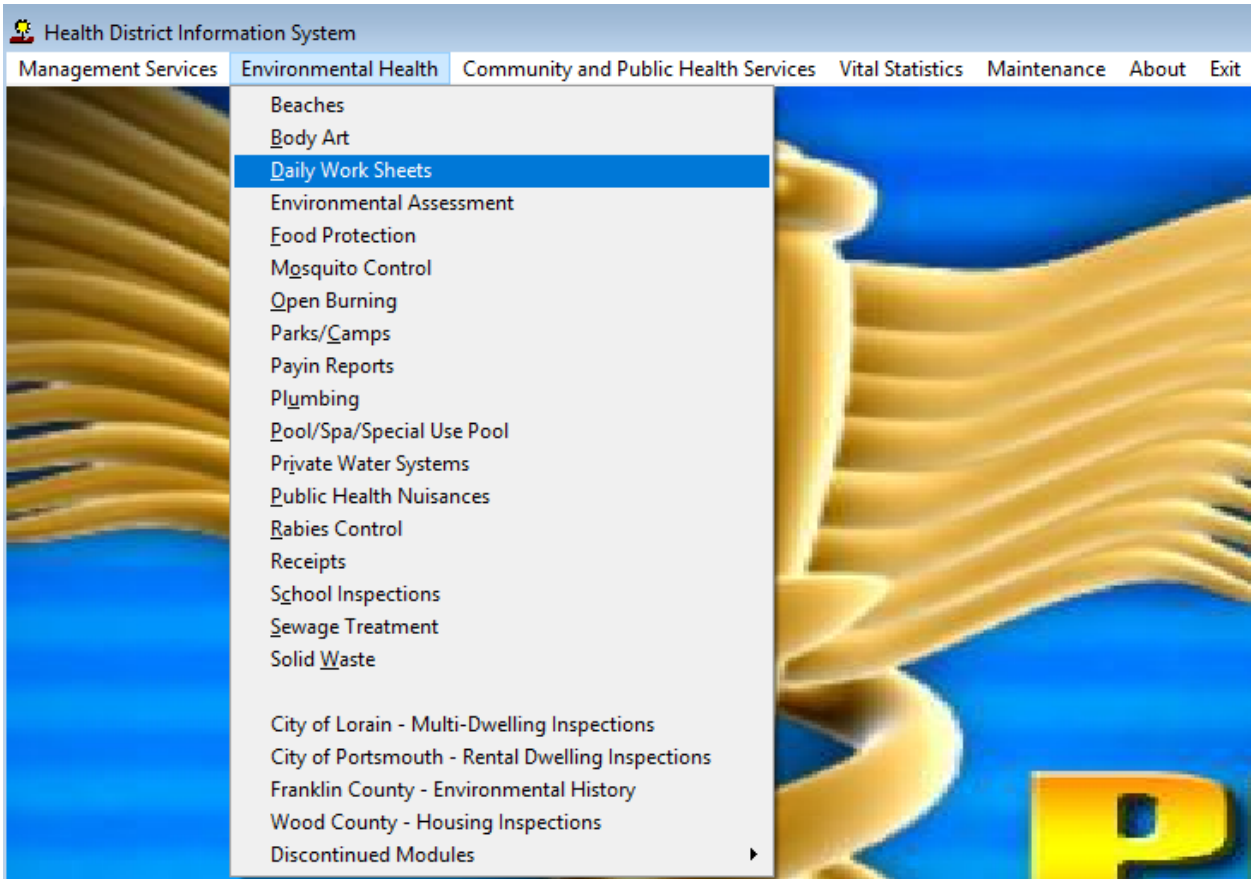
Chapter 1: Getting Started

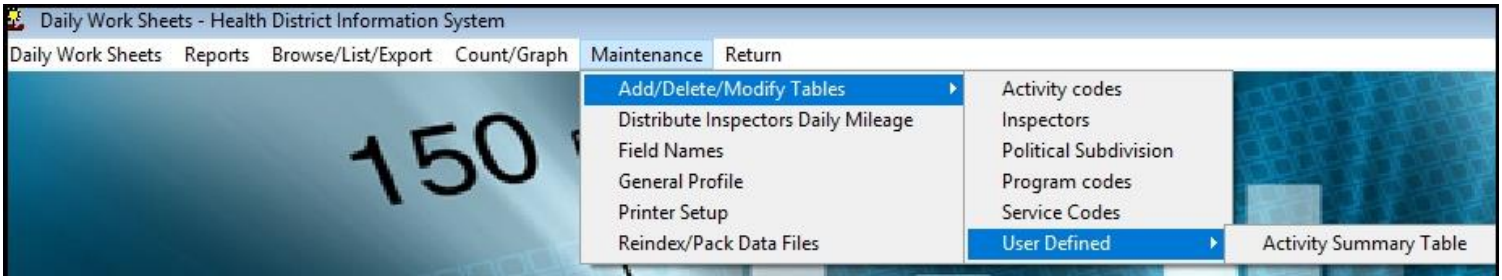
Access Daily Worksheets by navigating to:

Environmental Health > Daily Work Sheets



Once inside **Daily Work Sheets**, navigate to:

Maintenance > Add/Delete/Modify Tables

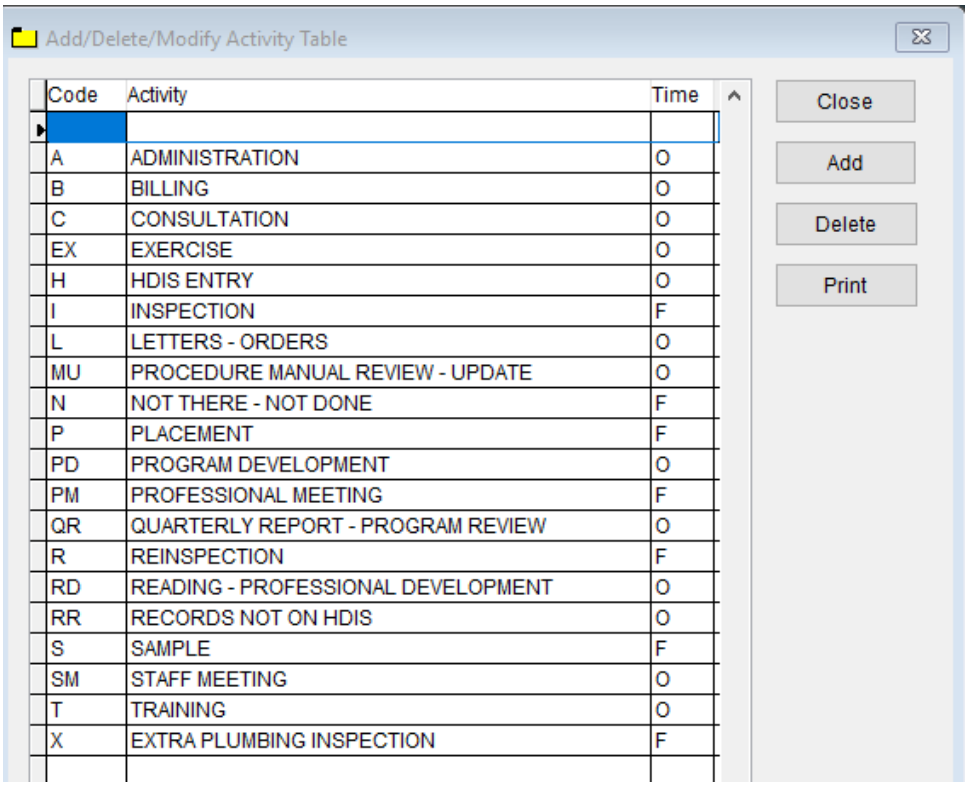


This section holds the control files that will drive the module.

When entering data into **Daily Work Sheets**, there will be a few drop-down boxes for quick/accurate data entry.

The tables in **the Maintenance > Add/Delete/Modify Tables** section hold the data that fill those drop-down boxes.

Activity Codes



Code	Activity	Time
A	ADMINISTRATION	O
B	BILLING	O
C	CONSULTATION	O
EX	EXERCISE	O
H	HDIS ENTRY	O
I	INSPECTION	F
L	LETTERS - ORDERS	O
MU	PROCEDURE MANUAL REVIEW - UPDATE	O
N	NOT THERE - NOT DONE	F
P	PLACEMENT	F
PD	PROGRAM DEVELOPMENT	O
PM	PROFESSIONAL MEETING	F
QR	QUARTERLY REPORT - PROGRAM REVIEW	O
R	REINSPECTION	F
RD	READING - PROFESSIONAL DEVELOPMENT	O
RR	RECORDS NOT ON HDIS	O
S	SAMPLE	F
SM	STAFF MEETING	O
T	TRAINING	O
X	EXTRA PLUMBING INSPECTION	F

To enter **Daily Work Sheets' Activity Codes**, follow these steps (use the tab key to advance to each field):

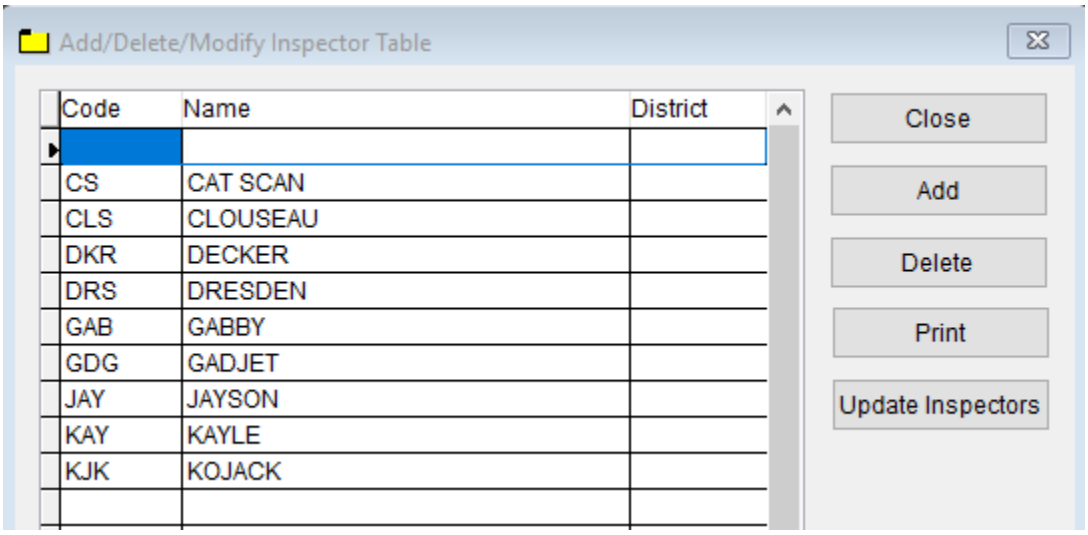
- Click **Add** and enter a **Code**.
- Enter the **Activity** under the Activity field.
- Enter the **Time** under the Time field.
- **Print** button will open printing option's window.

Click **Delete** to delete an entry.

Click **Close** to exit the table.

Enter O for OFFICE activity, or F for FIELD activity.

Inspectors



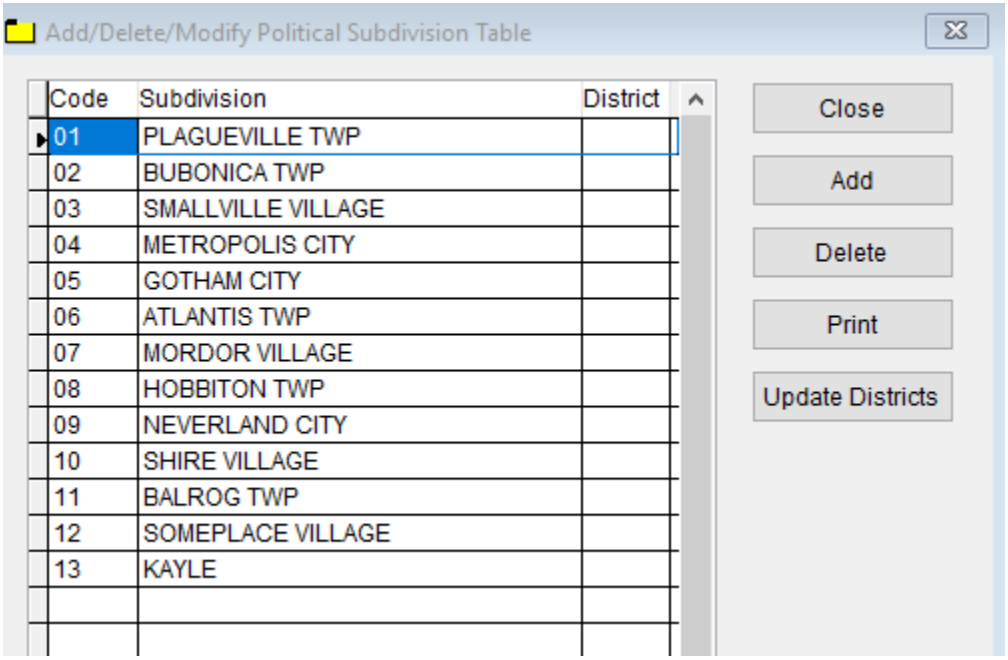
To enter **Inspectors**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Code** for the Inspector.
- Enter the **Name** under the Name field.
- Enter the **District** under the District field.
- **Update Inspectors** button will update data related to Inspector additions/modifications.
- **Print** button will open printing option's window.

Click **Delete** to delete an entry.

Click **Close** to exit the table.

Political Subdivision



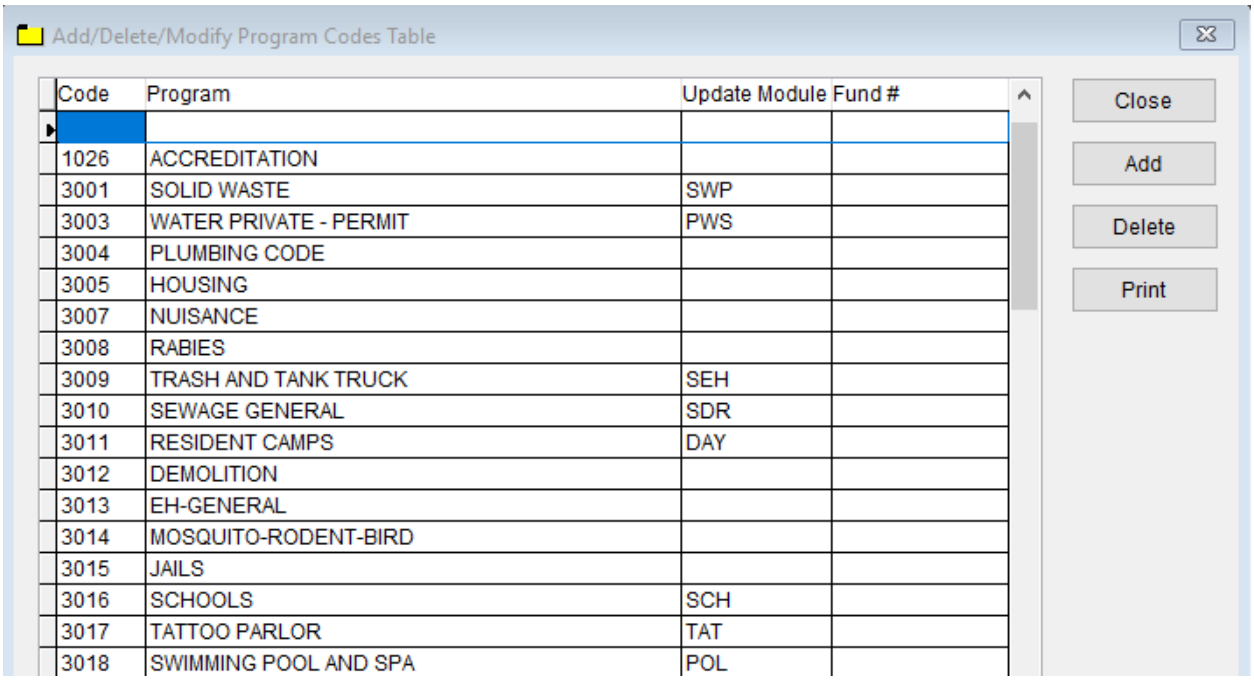
To enter **Political Subdivision**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Code** to identify the **Subdivision**.
- Enter the **Subdivision** Name in the Subdivision field.
- Enter the District in the **District** field.

Other options on this screen can be used as follows:

- To **Delete** an entry, select the entry **Code**, **Name**, or **District** and click the Delete button.
- **Print** button will open printing option's window.
- **Update Districts'** button will update the Political Subdivision table in Public Health Nuisances.
- Click **Close** to exit the table.

Program Codes



Code	Program	Update Module	Fund #
1026	ACCREDITATION		
3001	SOLID WASTE	SWP	
3003	WATER PRIVATE - PERMIT	PWS	
3004	PLUMBING CODE		
3005	HOUSING		
3007	NUISANCE		
3008	RABIES		
3009	TRASH AND TANK TRUCK	SEH	
3010	SEWAGE GENERAL	SDR	
3011	RESIDENT CAMPS	DAY	
3012	DEMOLITION		
3013	EH-GENERAL		
3014	MOSQUITO-RODENT-BIRD		
3015	JAILS		
3016	SCHOOLS	SCH	
3017	TATTOO PARLOR	TAT	
3018	SWIMMING POOL AND SPA	POL	

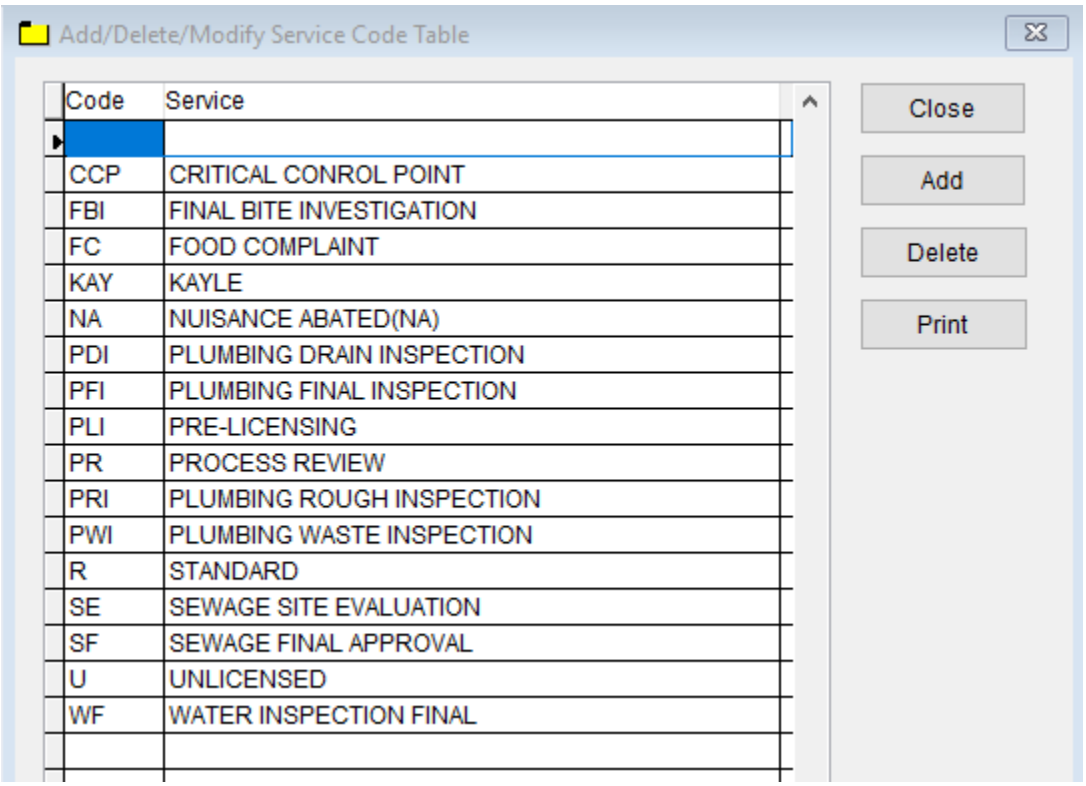
To enter **Program Codes**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Code** to identify the Program Code.
- Enter the Program's Name in the **Program** field.
- Enter the Update Module in the **Update Module** field.
- Enter the Fund number in the **Fund #** field.

Other options on this screen can be used as follows:

- Click on a Program Code's **Code**, **Program Name**, **Update Module**, or **Fund #.** Click **Delete** to delete the entry.
- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Service Codes



To enter **Service Codes**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Code** to identify the Service Code.
- Enter the Service's Name in the **Service** field.

Other options on this screen can be used as follows:

- Click on a Service Code's **Code** or **Service.** Click **Delete** to delete the entry.
- **Print** button will open printing option's window.
- Click **Close** to exit the table.

User Defined – Activity Summary Table

Add/Delete/Modify Table - Inspector's Activity Report

Program	Program From	Program To	Activity From Column 1	Activity To Column 1	Header Column 1	Activity From Column 2	Activity To Column
Aeration	434	434	882	882		885	885
Animal Nuisance	454	454	882	882		885	885
Burning & Other Nuisance	455	456	882	882		885	885
CEU	996	996	882	882		885	885
Cats	482	482	882	882		885	885
Davis Besse	473	473	882	882		885	885
Dogs	481	481	882	882		885	885
FSO/RFE	461	465	882	882		885	885
General EH	400	400	882	882		885	885
Housing Nuisance	452	452	882	882		885	885
Insect/Rodent Nuisance	453	453	882	882		885	885
Manufactured Home Park	431	433	882	882		885	885
Marina	441	447	882	882		885	885
Microwave	471	471	882	882		885	885
Mortgage Inspection	472	472	882	882		885	885
Other	484	484	882	882		885	885
Other Bathing Places	439	439	882	882		885	885
PHI	477	477	882	882		885	885
Paid Time Off	993	999	882	882		885	885
Private Waste Disposal	422	422	882	882		885	885
Private Water	412	412	882	882		885	885
Public Waste Disposal	421	421	882	882		885	885
Public Water	411	413	882	882	Field Insp.	885	885
Put-In-Bay Project	494	494	882	882		885	885
RV Park and Camp	434	437	882	882		885	885
Schools	440	440	882	882		885	885
Site Evaluation	426	426	882	882		885	885
Solid Waste/Garbage	451	451	882	882		885	885
Subdivision Review	428	428	882	882		885	885
Swimming Pool/Spa	438	438	882	882		885	885
TMACOG 319 Grant	486	486	882	882		885	885
Tattoo/Body Piercing	474	476	882	882		885	885
Vending	466	466	882	882		885	885

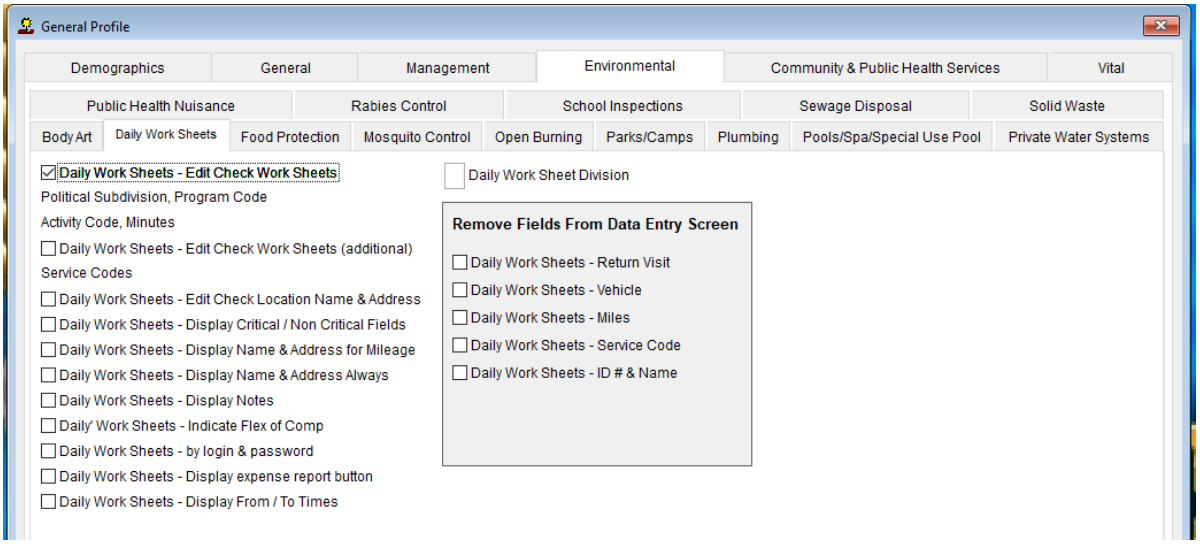
Close
Add
Delete
Print

To Activate Edit Checks for Environmental Daily Work Sheets

This must be done at each work station that enters daily work sheets.

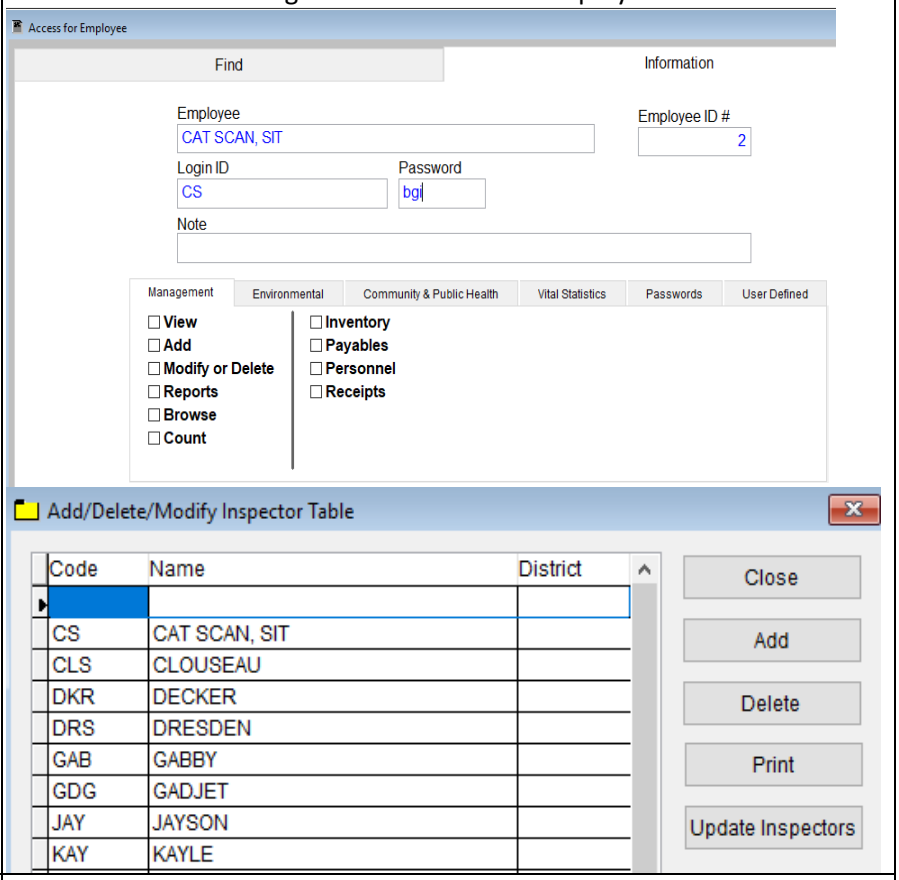
Navigate to: **Main Menu > Maintenance > General Profile > Environmental > Daily Work Sheets**

Click the check box that says **"Daily Work Sheets – Edit Check Work Sheets Political Subdivision, Program Code Activity Code, Minutes"**



Other boxes in General Profile > Environmental >Daily Work Sheets

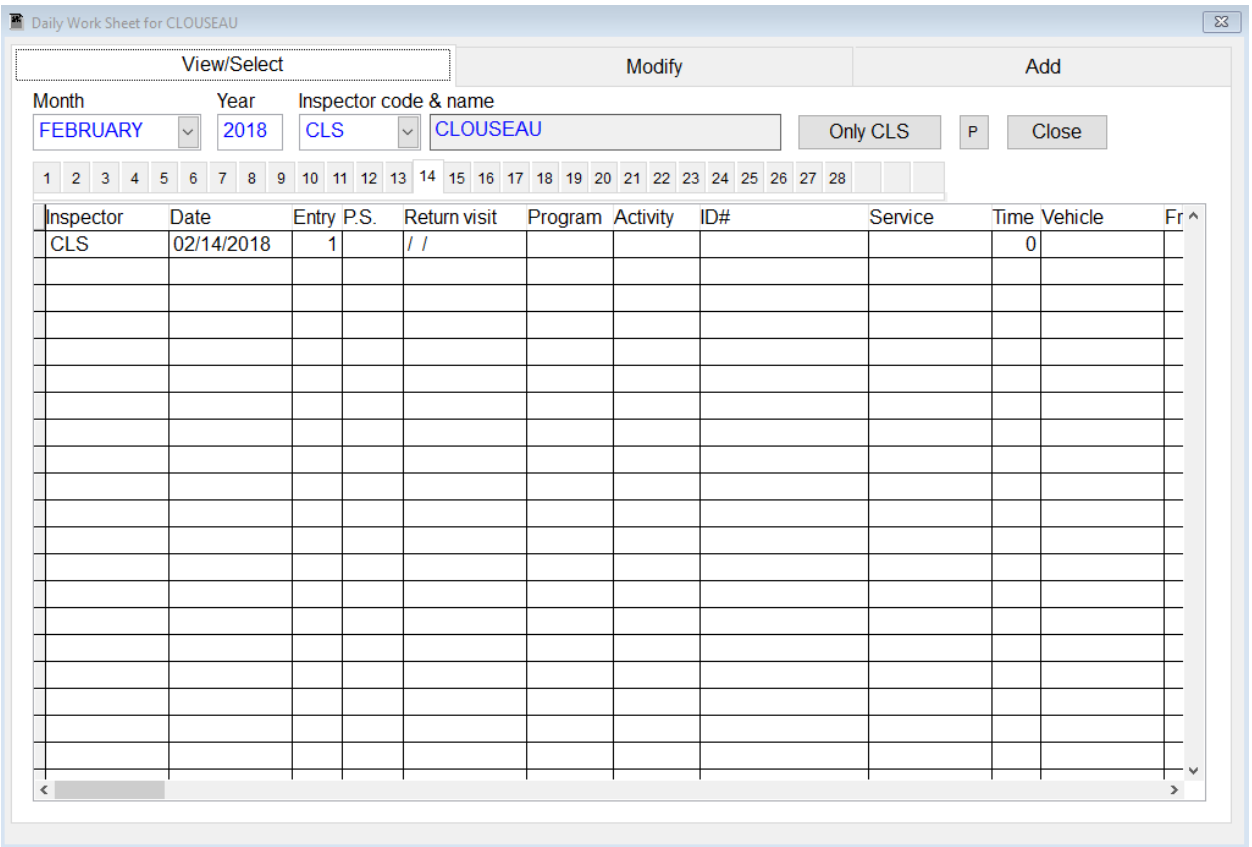
Field/Button	Description
Daily Work Sheets – Edit Check Work Sheets (additional) Service Codes	Checkmark this box to add edit check work sheets service codes.
Daily Work Sheets – Edit Check Location Name & Address	Checkmark this box to add edit check Location Names & address.
Daily Work Sheets – Display Critical / Non Critical Fields	Checkmark this box to display critical/non critical fields in daily work sheets.
Daily Work Sheets – Display Name & Address for Mileage	Checkmark this box to display name and address for mileage in daily work sheets.
Daily Work Sheets – Display Name & Address Always	Checkmark this box to display name and address always in daily work sheets.
Daily Work Sheets – Display Notes	Checkmark this box to display notes in daily work sheets.
Daily Work Sheets – Indicate Flex of Comp	Checkmark this box to indicate flex of comp in daily work sheets.

Daily Work Sheets – by login & password	Checkmark this box to have a user be allowed to only enter data based on their name/login-id. Specific Employee/Inspector must have matching credentials to work. Login ID == "Code" and Employee == Name. 
Daily Work Sheets – Display expense report button	Checkmark this box to display expense report button in daily work sheets.
Daily Work Sheets – Display From/To Times	Checkmark this box to display from/to times in daily work sheets.

Chapter 2: Entering in Daily Work Sheets

Navigate to: **Environmental Health > Daily Work Sheets > Daily Work Sheets**

View/Select Tab



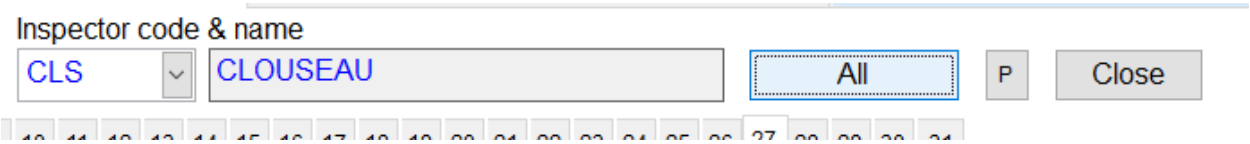
After clicking on **Daily Work Sheets** a window will be displayed and you will automatically start at the **View/Select tab.**

This tab is for viewing an employee's previously entered worksheet.

To **add** a daily work sheet; choose the **Month**, **Year**, **Inspector Code & Name**, and choose the **Day** from the tab bar on top of the grid.

To add a record for the **current day**, just click the add tab and begin to enter the record.

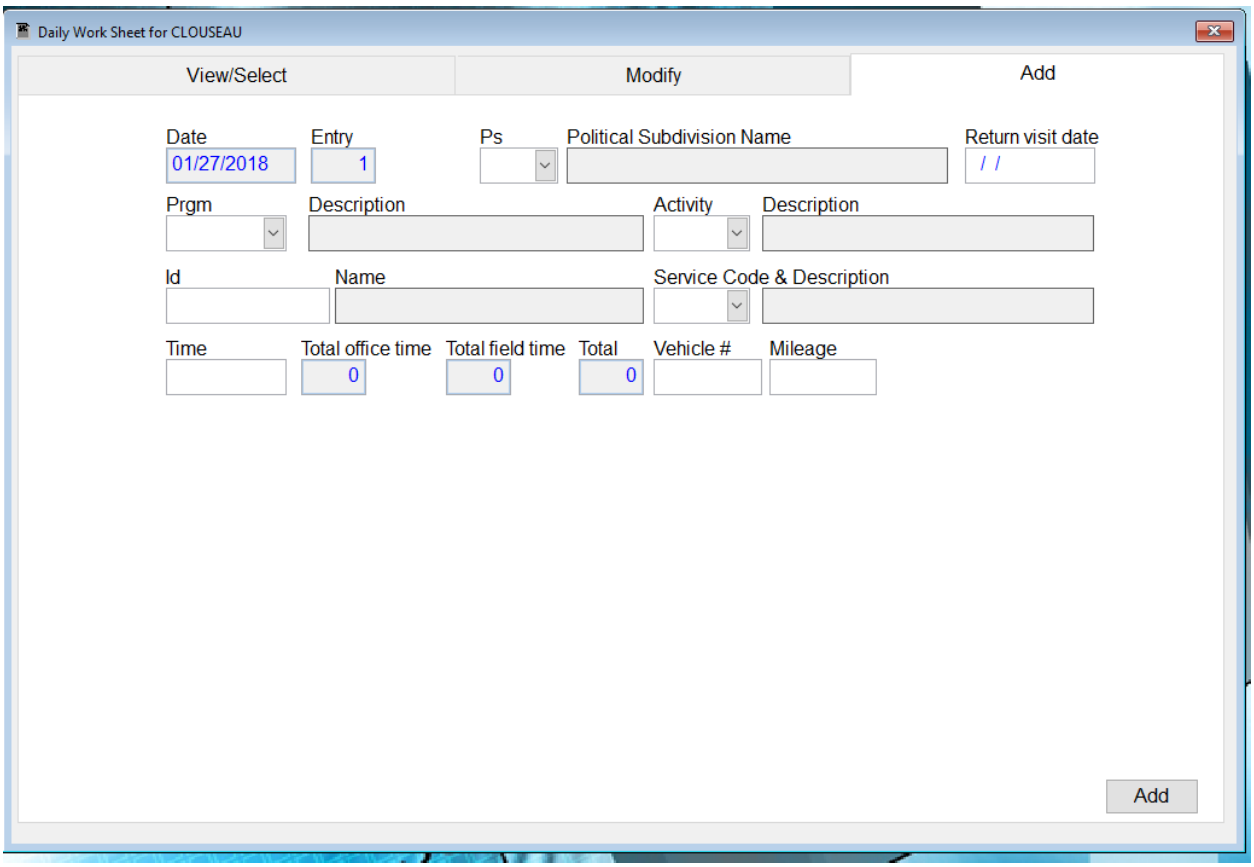
The **Preview** button will allow you to preview any input for a particular day. To see a preview on the View/Select page, click on the date tab and then click the '**P'** button.



The button next to **the Inspector code & name** section is labeled **All** or **Only ___**. This button will toggle between records belonging to only a specific Inspector you have selected or all records.

Add Tab

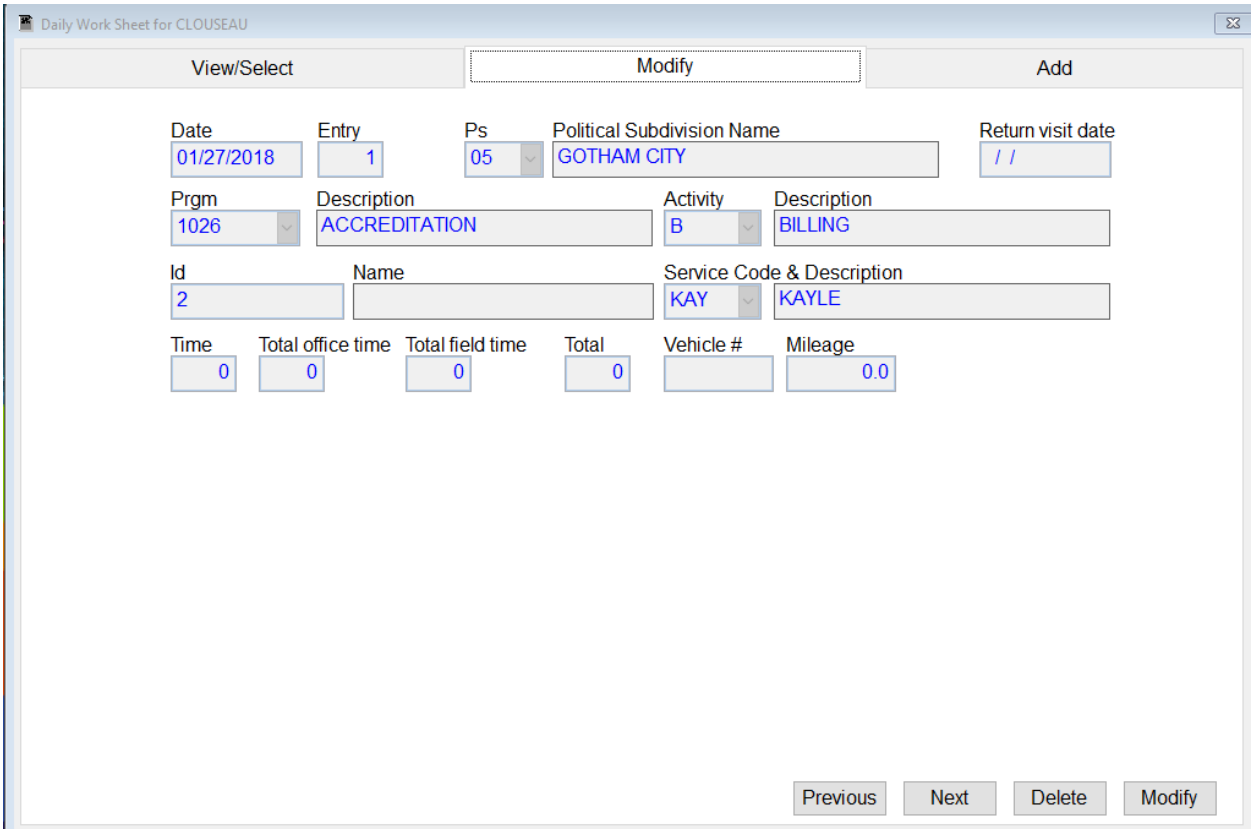
Once on the **Add tab**, enter in the information about the chosen Inspector. Click add when finished to update Daily Work Sheets.



Use the drop down lists to enter the **Political Subdivision Name, Program/Description, Activity, and Service Code & Description.**

Modify Tab

Go to the Modify Tab if you need to change an existing record.



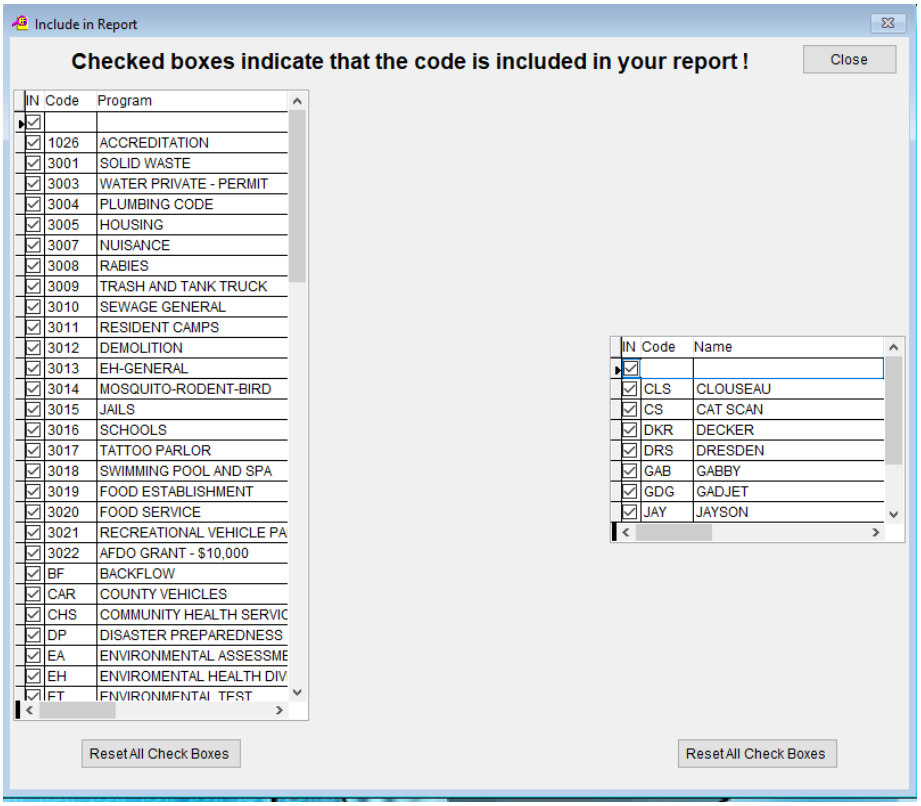
Click the **Modify** button to modify the record, **Previous** button to go to a previous record, **Next** button to go to the next record, and **Delete** button to delete the record you are currently on.

Chapter 3: Reports

Navigate to: **Environmental Health> Daily Work Sheets > Reports**. There will be a drop down menu for different types of reports you can create/modify.

Reports can be filtered.

The "**Include**" button on many of the report option screens allows you to choose the information to be included in the report. If you wish to include the codes, place a checkmark in the "IN" box.



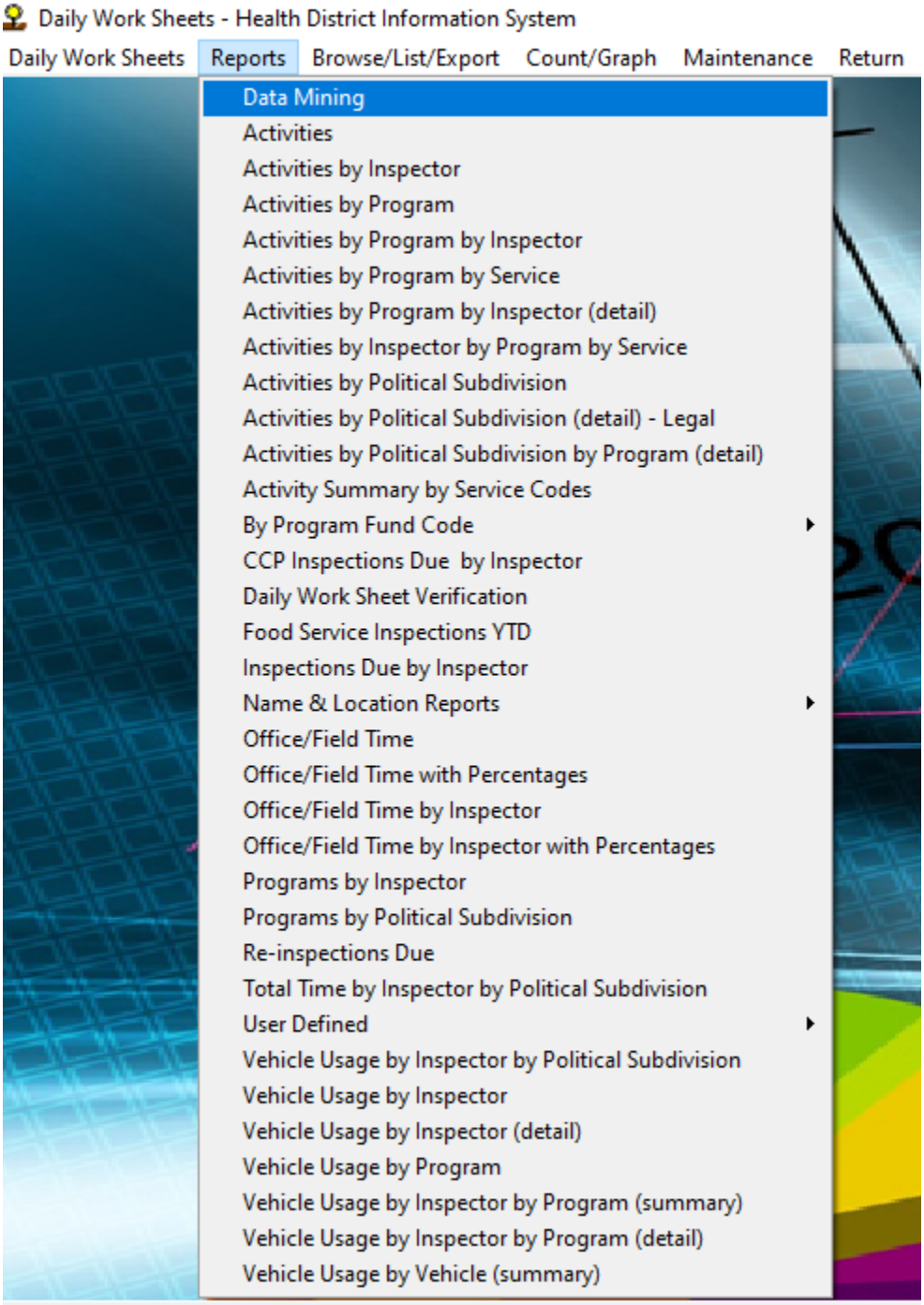
Report	Description
Activities	Generates a count report for all the activities performed based on the time frame you indicate in the "From" and "To" date fields. The activities will be broken down between "Office" and "Field" and will also include a "total" along with percentage.
Activities by Inspector	Generates a count report for all the activities performed based on the time frame you indicate in the "From" and "To" date fields for each employee. The activities will be broken down between "Office" and "Field" and will also include a "total" along with a percentage.
Activities by Program	Generates a count report for all the activities performed for each program based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time" for and "average time" for each activity.
Activities by Program by Inspector	Generates a count report for all the activities performed for each program, by each employee based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time" and "average time" for each activity.
Activities by Program by Service	Generates a count report for all the activities performed for each program, by service based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time" and "average time" for each activity.
Activities by Program by Inspector (detail)	Generates a count report for all the activities performed for each program, by each employee based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time", "average time", and "date" for each activity.
Activities by Inspector by Program by Service	Generates activities by Inspector by Program by Service report.
Activities by Political Subdivision	Generates a count report for activities by each political subdivision based on the time frame you indicate in the "From" and "To" date fields.
Activities by Political Subdivision (detail) – Legal	Generates activities by political subdivision in detail report.
Activities by Political Subdivision by Program (detail)	Generates a count report of activities by political subdivision based on the time frame you indicate in the "From" and "To" date fields. The report also includes average time and mileage.
Activity Summary by Service Codes	Generates an activity summary by service codes report.
By Program Fund Code - Office/Field Time with Percentages	Generates a fund code count report with office versus field time with percentages based on the time frame you indicate in the

	"From" and "To" date fields
By Program Fund Code - Office/Field Time by Inspector with Percentages	Generates by program fund code report based on office/field time by inspector with percentages.
By Program Fund Code - Office/Field Time by Inspector by Date	Generates by program fund code report based on office/field time by inspector by date.
By Program Fund Code - Vehicle Usage by Fund	Generates by program fund code report based on vehicle usage by fund.
CCP Inspections Due by Inspector	Generates a CCP inspections due by inspector report.
Daily Work Sheet Verification	Generates a daily work sheet verification report.
Food Service Inspections YTD	Generates a food service inspections YTD report.
Inspections Due by Inspector	Generates inspections due by inspector report.
Name & Location Reports	Generates a name and location report.
Area Detail List	Generates an area detail list report.
Detail Call Report	Generates a detail call report.
Entries by Inspector by Day	Generates a report with entries by Inspector by day.
Plumbing Call Report	Generates a plumbing call report.
Office/Field Time	Generates an office/field time report.
Office/Field Time with Percentages	Generates an office/field time report with percentages.
Office/Field Time by Inspector	Generates an office/field time report by inspector.
Office/Field Time by Inspector with Percentages	Generates an office/field time report by Inspector with percentages.
Programs by Inspector	Generates a report based on programs by Inspector.
Programs by Political Subdivision	Generates a report based on programs by Political Subdivision.
Re-inspections Due	Generates a report based on re-inspections due.
Total Time by Inspector by Political Subdivision	Generates a report based on total time by Inspector and Political Subdivision.
User Defined – Activity Summary Report	Generates a user defined report based on activity summary.
User Defined – Time Card	Generates a user defined report based on time card.
User Defined – Travel/Meeting Expenses	Generates a user defined report based on travel/meeting expenses.
Vehicle Usage by Inspector by Political Subdivision	Generates a vehicle usage by inspector by political subdivision report .

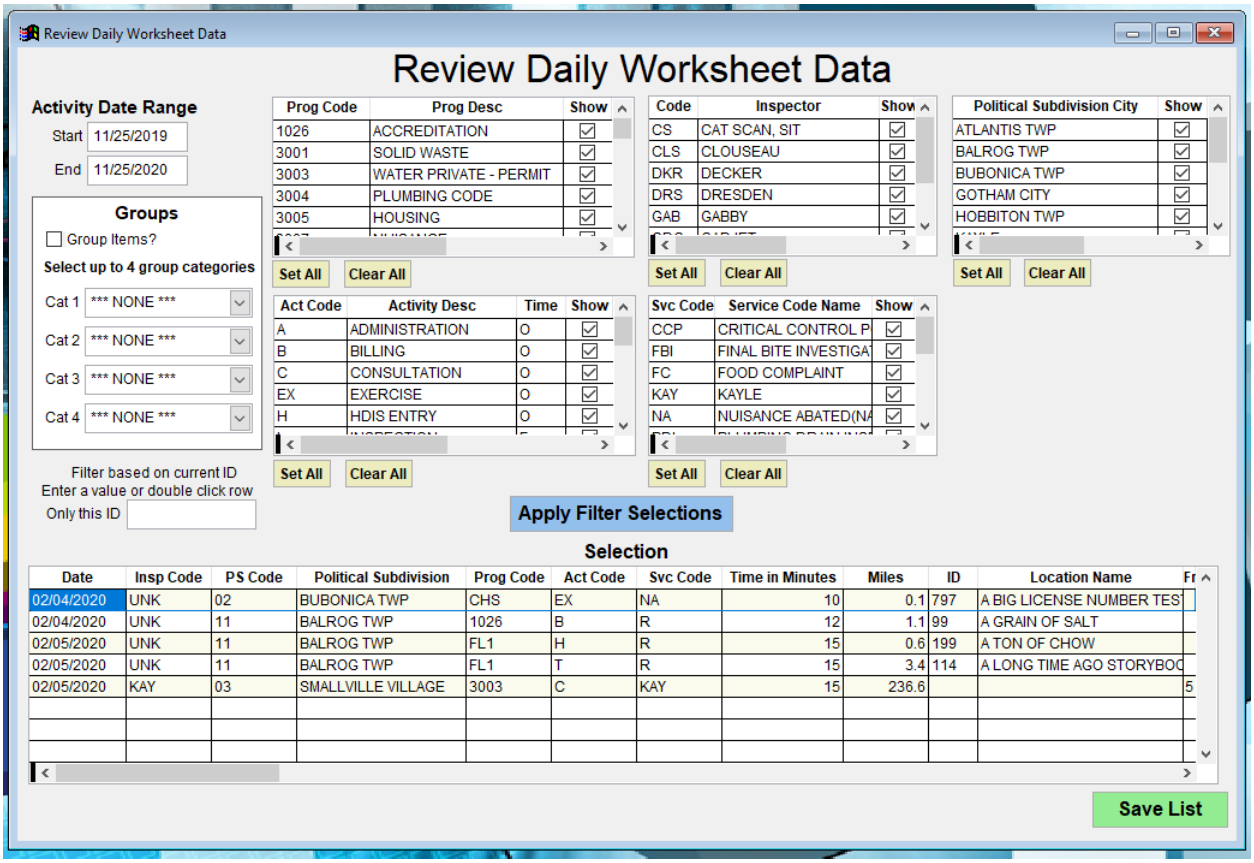
Vehicle Usage by Inspector	Generates a vehicle usage report by Inspector based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Inspector (detail)	Generates a vehicle usage report by Inspector based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Program	Generates a vehicle usage report by program based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Inspector by Program (summary)	Generates a vehicle usage report by Inspector by Program summary report based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Inspector by Program (detail)	Generates a vehicle usage report by Inspector by Program with details based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Vehicle (summary)	Generates a vehicle usage report for each vehicle based on the time frame you indicate in the “From” and “To” date fields.

Data Mining

Navigate to: **Reports > Data Mining**



Once **Data Mining** is clicked, a new window should appear.



Data Mining allows for unique filter combinations to find data results that might not be available through regular Reporting.

Each filter selection displayed holds values set from the **Maintenance** > **Add/Delete/Modify** screens.

Once a filter combination is determined, click the “Apply Filter Selections” button at the middle of the window.

The bottom section of the window will display the results applied from the filters.

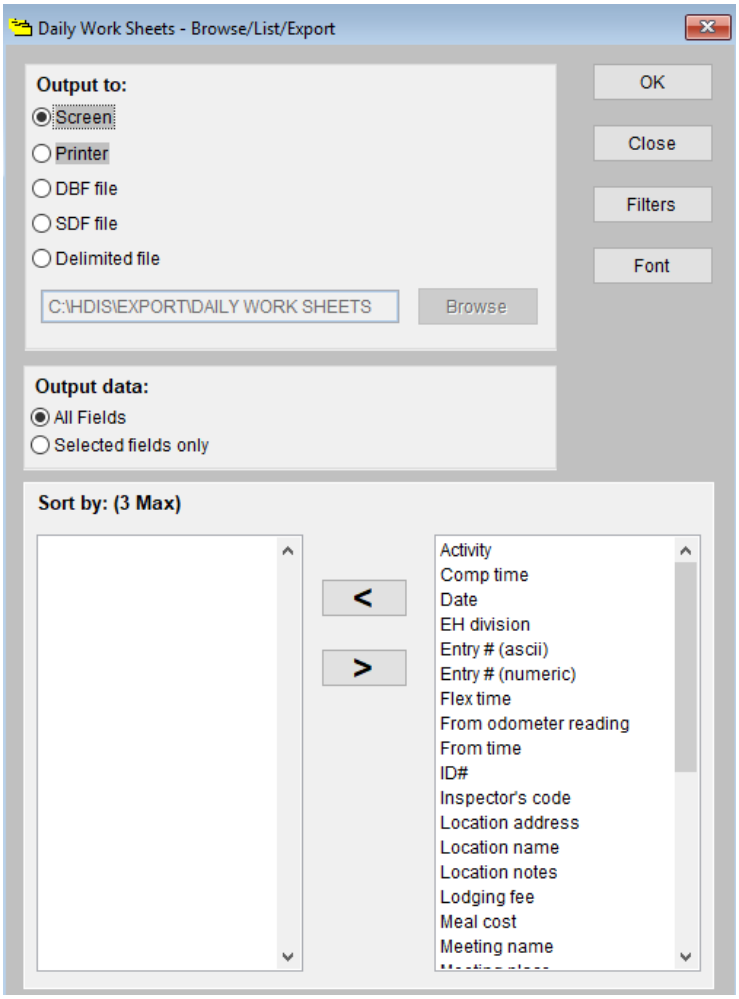
Click **Save List** button to save the result set.

Chapter 4: Browse/List/Export

Inside the **Daily Work Sheets** module navigate to the "**Browse/List/Export.**"

This section allows the exportation of data, also allowing the user to use Filters.

There are also multiple ways for you to output the data: Screen, Printer, DBF file, SDF file, and Delimited file. If you pick DBF file, SDF file, or Delimited file make sure you select the appropriate path. Select "Browse" to find the needed path.

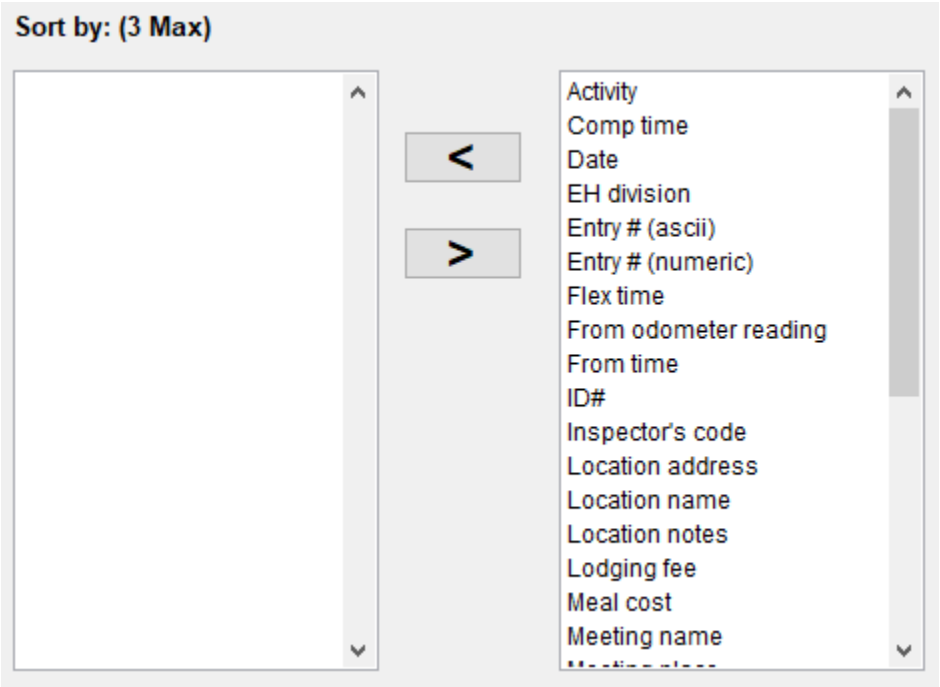


Sort By

Sorting by Field Names (3 Max) is an option.

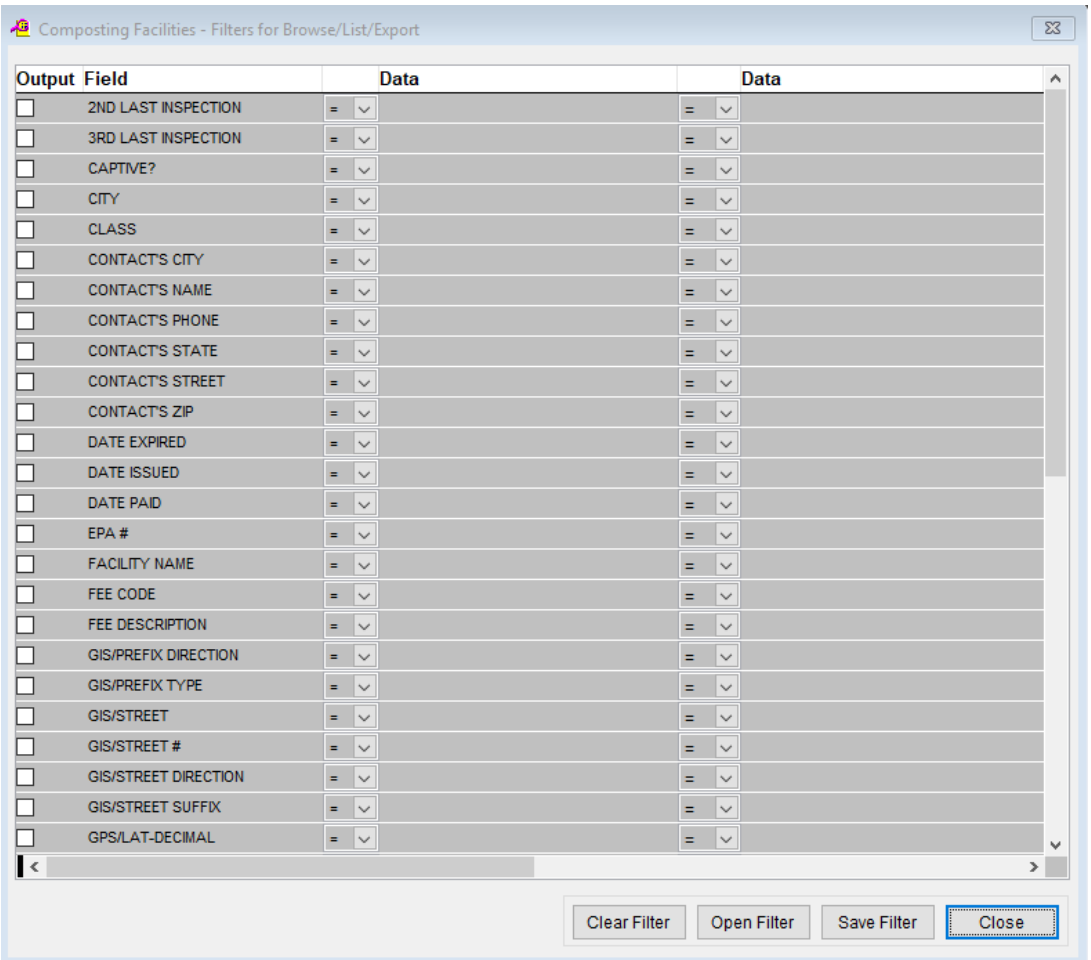
Click on the Field Name you want to sort by and press the "**<**" symbol to move the Field Name to the empty box.

If you want to remove a Field Name, click the Field Name and press the "**>**" symbol.



Filters

From the **Browse/List/Export,** click on the **Filters** button. This section allows you to set filters based on the **Output Field**. Put a mark in the output field checkbox next to any field you want included in your report. If you do not select any fields, they will all be included in the report.



**** Note **** If you are attempting to create a filter to search for ***only*** blank data use: **(Blank)**

(Blank) is appropriate when you are searching for an unspecified name, date, or Boolean (True/False – Yes/No).

**** Note **** If you want to search for a string with some spacing after the characters use: AB(B)

Example for characters with a space:

Desired Search Result: Monkey Inc

Appropriate Search: Monkey(B)

Chapter 5: Count Graph

Inside the Daily Work Sheets module navigate to the **Count/Graph.** Select the section you would like to access.

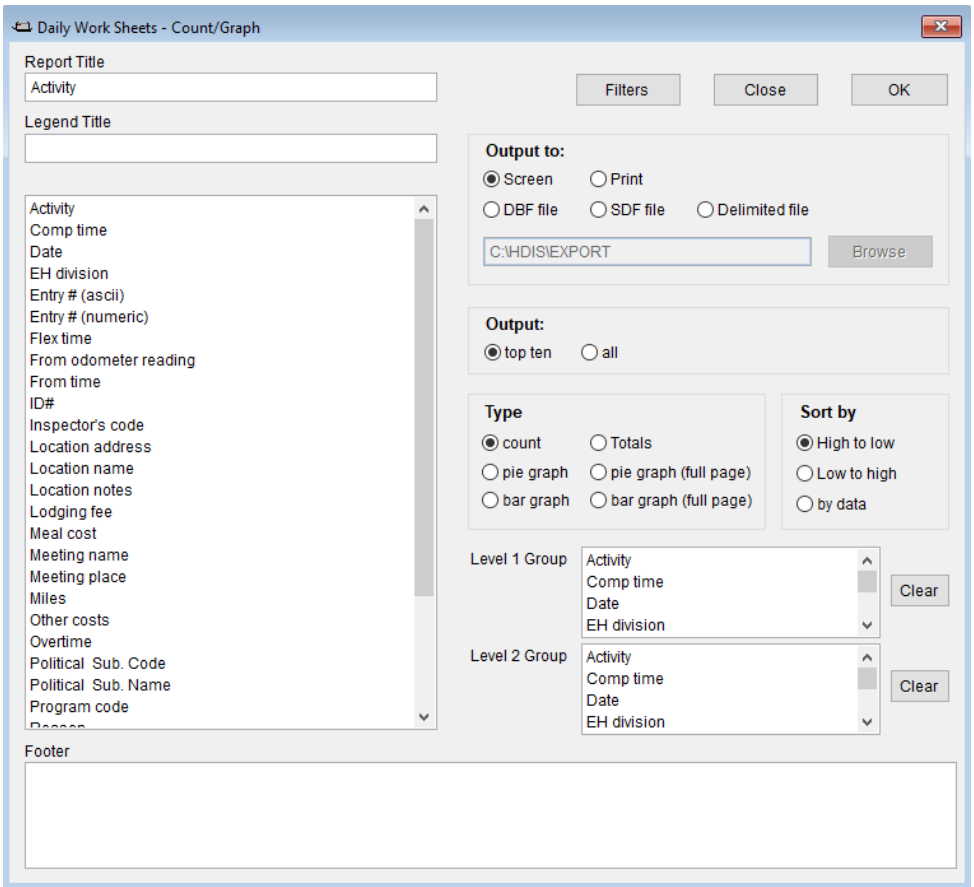
This section allows you to create a Count, Pie graph, or bar graph of the data. There is a **Report Title**, **Legend Title**, **List of Field Names**, **Footer, and Output to** section. The **Output to** gives you options on how you want to display or store your results.

Under the **Output**: there is an option to show the ***top ten*** or ***all*** results.

There is a **Filters** button which is identical to the Filters in the **Browse/List/Export** section. The purpose of the filters section is so you can manipulate the type of results. For example: Let's say you wanted to see results from a certain date range. If you go into filters you can create a date range and the results will only display those records.

There is a **Sort by** section where you can organize your results from *High to low (Greatest value to lowest value)*, *Low to high (Lowest value to greatest value)*, and by *data* (results will be displayed organized based on the data. Example: If it is based on ID numbers, the numbers will be organized in order).

In the **Type** area, if you select Totals**: Level I Group** and **Level 2 Group** options will display. Select the best options dependent on your search type.



Count

Here is an example of what the "**Count**" type would look like.

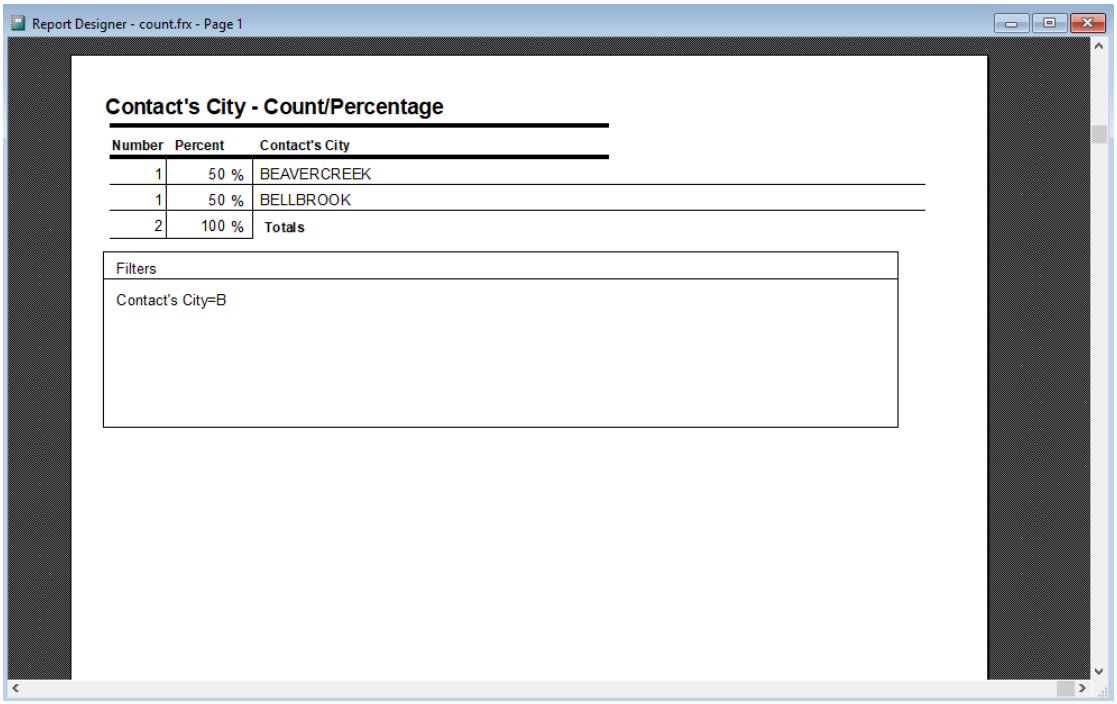
There are percentages and totals on the side and bottom of the page.

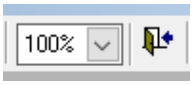
Report Designer - count.frx - Page 1

1st contact date - Count/Percentage

Number	Percent	Location city
2419	89 %	/ /
6	0 %	02/23/2016
5	0 %	03/17/2016
5	0 %	04/26/2016
5	0 %	06/03/2016
5	0 %	09/01/2016
4	0 %	04/25/2016
4	0 %	09/09/2016
4	0 %	12/28/2015
266	10 %	OTHER
2723	100 %	**Totals**

If you choose to add filters, those will also be shown at the bottom of the page.



Click on the door icon next to the percent to return to the menu: 

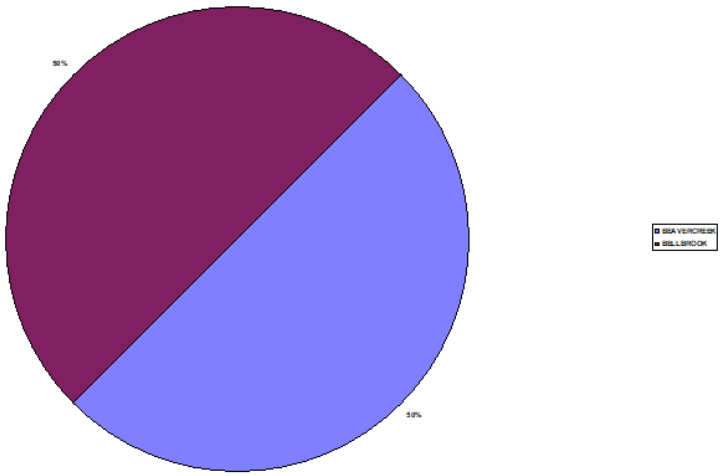
Pie Graph

Here is an example of what the "**Pie Graph**" type would look like.

Depending on the data chosen, the percentages are altered to reflect it.

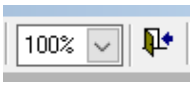
There is a legend displaying the data chosen and the color representation.

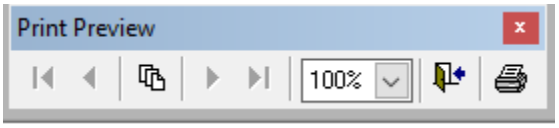
Contact's City



Filters
Contact's City=B

BGI HD 11/30/2017

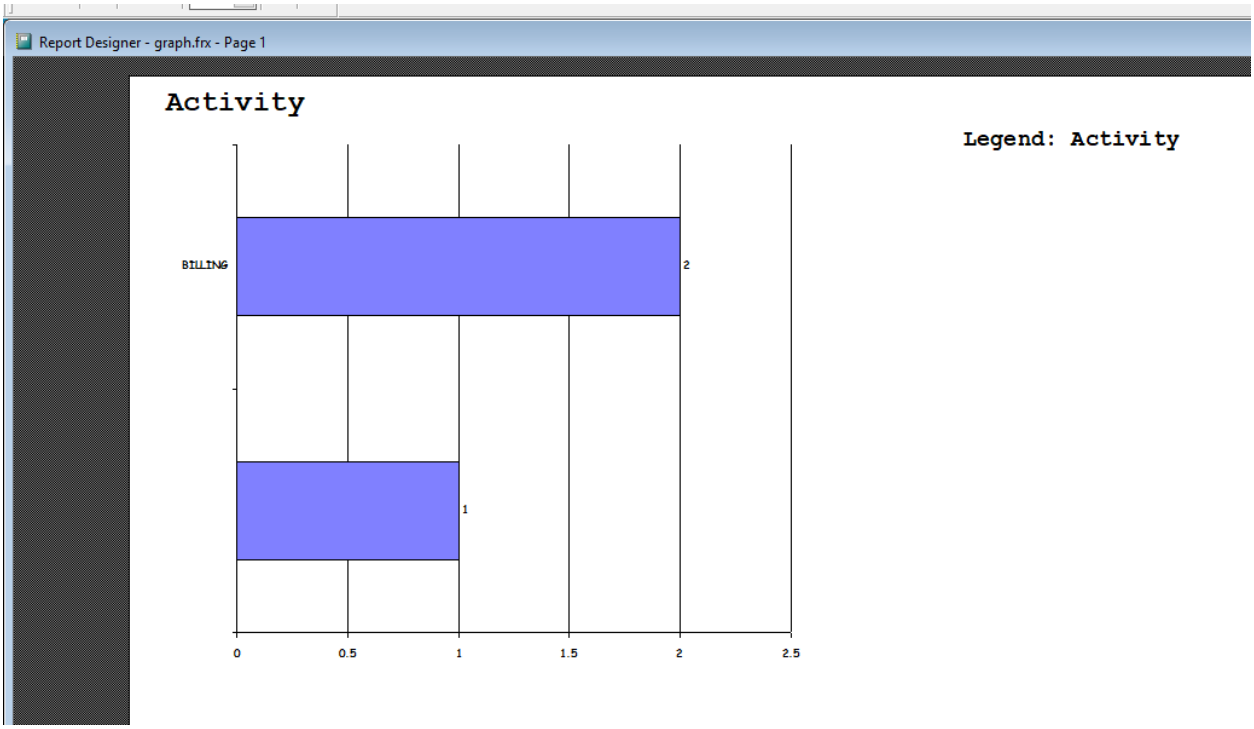
Click on the door icon next to the percent to return to the menu: 

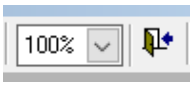


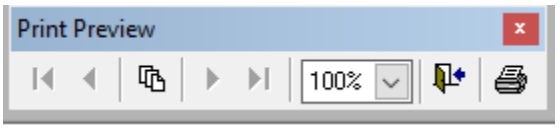
Bar Graph

Here is an example of what the **Bar Graph** type would look like.

Depending on the information requested, there will be a specific color to represent each data element.



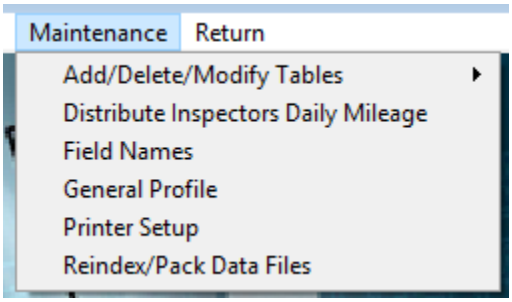
Click on the door icon next to the percent to return to the menu: 



Chapter 6: Maintenance

Navigate to: **Environmental Health > Daily Work Sheets > Maintenance**

The Maintenance section holds a lot of the mechanics behind the module. This area is where you can **Add/Delete/Modify t**ables that you use in the **Daily Work Sheets tab.**



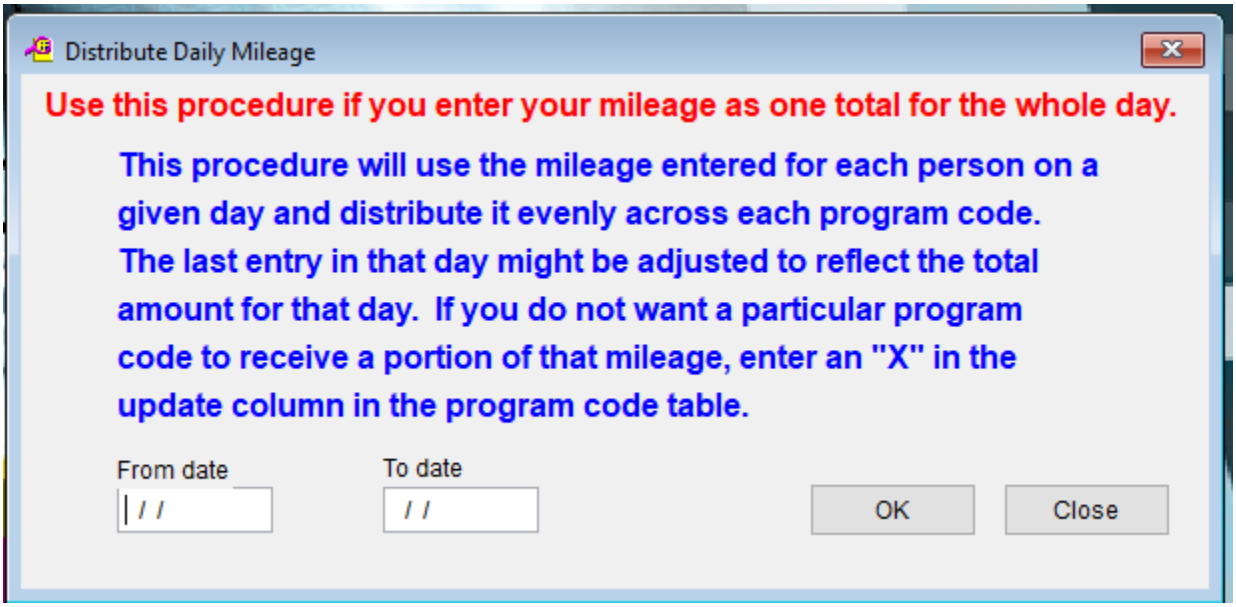
Distribute Inspectors Daily Mileage

If you want to use this procedure make sure to type in the **From** date and **To** date.

The procedure in this window is for if you enter your mileage as one total for an entire day.

It uses the mileage entered for each person on a given day and distributes it evenly across each program code. The last entry in that day might be adjusted to reflect the total amount for that day.

If you do not want a particular program code to receive a portion of that mileage, enter an **X** in the update column in the program code table.



Field Names

The field names listing can be very useful in determining what fields you wish to utilize when creating ad hoc reports and in other modules, letters. The field name column is used to merge data into letters.

Enter the field name in capital letters in the body of the letter surrounded by asterisks (no spaces between asterisks and field name).

Example: *FIELDNAME*

Data Base Field Names for Daily Work Sheets

Field Name	Data Base Field Name
ACTIVITY	DW.ACT
COMP TIME	DW.COMP
DATE	DW.DATE
EH DIVISION	DW.DIV
ENTRY # (ASCII)	DW.C_ENTRY
ENTRY # (NUMERIC)	DW.ENTRY
FLEX TIME	DW.FLEX
FROM ODOMETER READING	DW.F_ODOM
FROM TIME	DW.FROM
ID#	DW.ID
INSPECTOR'S CODE	DW.INSPEC
LOCATION ADDRESS	DW.LOC_ADDR
LOCATION NAME	DW.LOC_NAME
LOCATION NOTES	DW.LOC_NOTE
LODGING FEE	DW.LODGE
MEAL COST	DW.MEALS
MEETING NAME	DW.MEETING
MEETING PLACE	DW.PLACE
MILES	DW.MILES
OTHER COSTS	DW.OTHER_EXP
OVERTIME	DW.OVERTIME
POLITICAL SUB. CODE	DW.PS
POLITICAL SUB. NAME	DW.PS_CITY
PROGRAM CODE	DW.PRGM
REASON	DW.F
REGISTRATION FEE	DW.REG_FEE
RETURN VISIT	DW.RV_DATE
TIME	DW.TIME
TO ODOMETER READING	DW.T_ODOM
TO TIME	DW.TO
VEHICAL #	DW.VEHICAL

Close

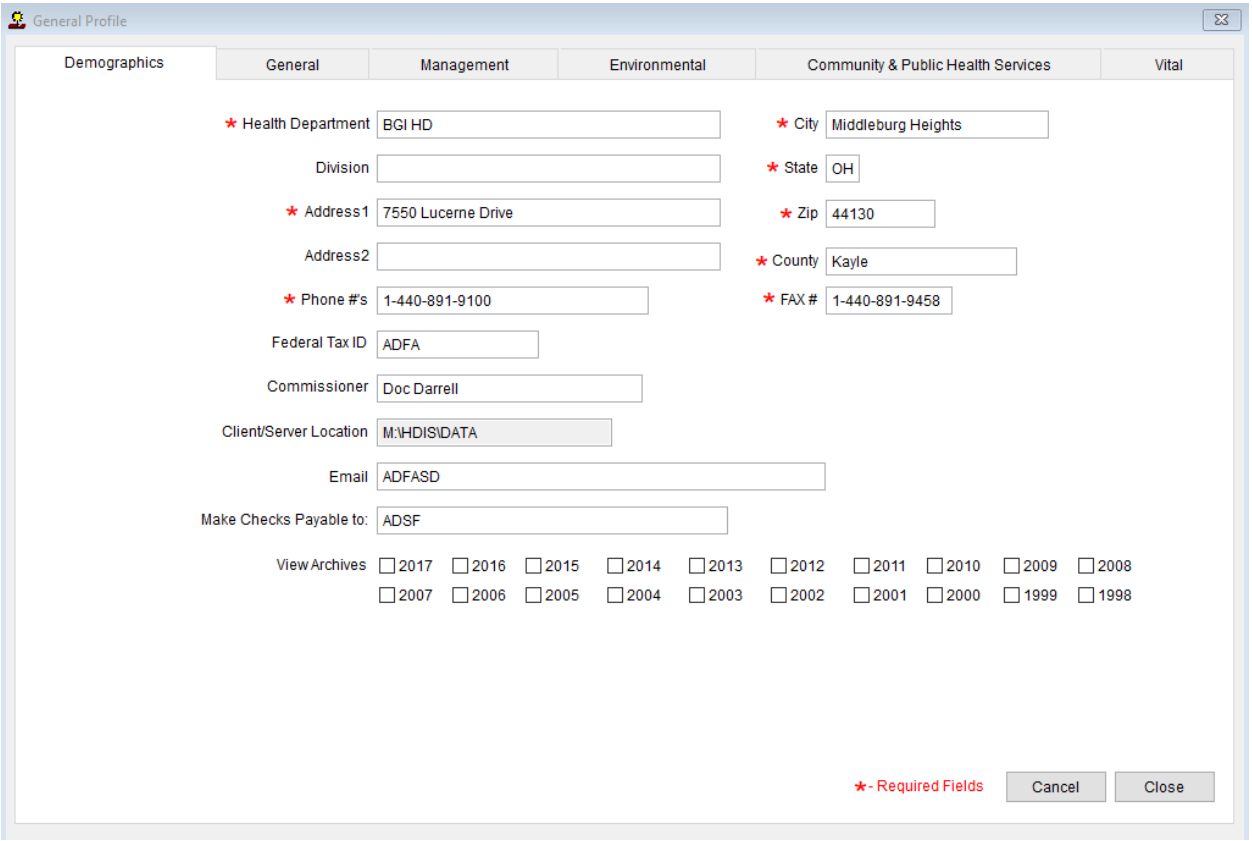
Print

General Profile

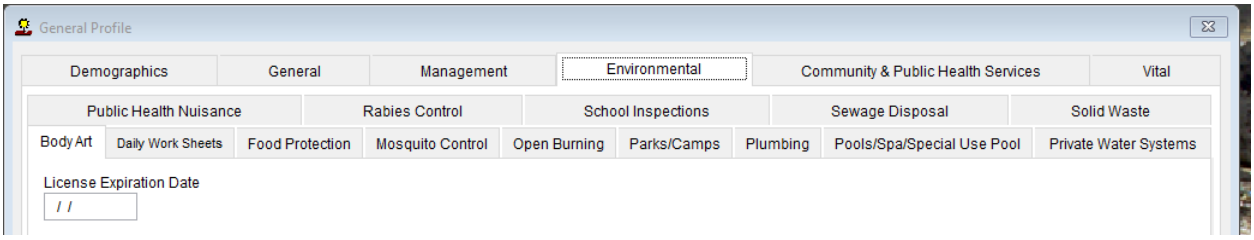
The **General** Profile **allows** you to fill out the basic information regarding **Daily Work Sheets.**

Check marking a year next to **View Archives** will give you access to previous data from the selected years.

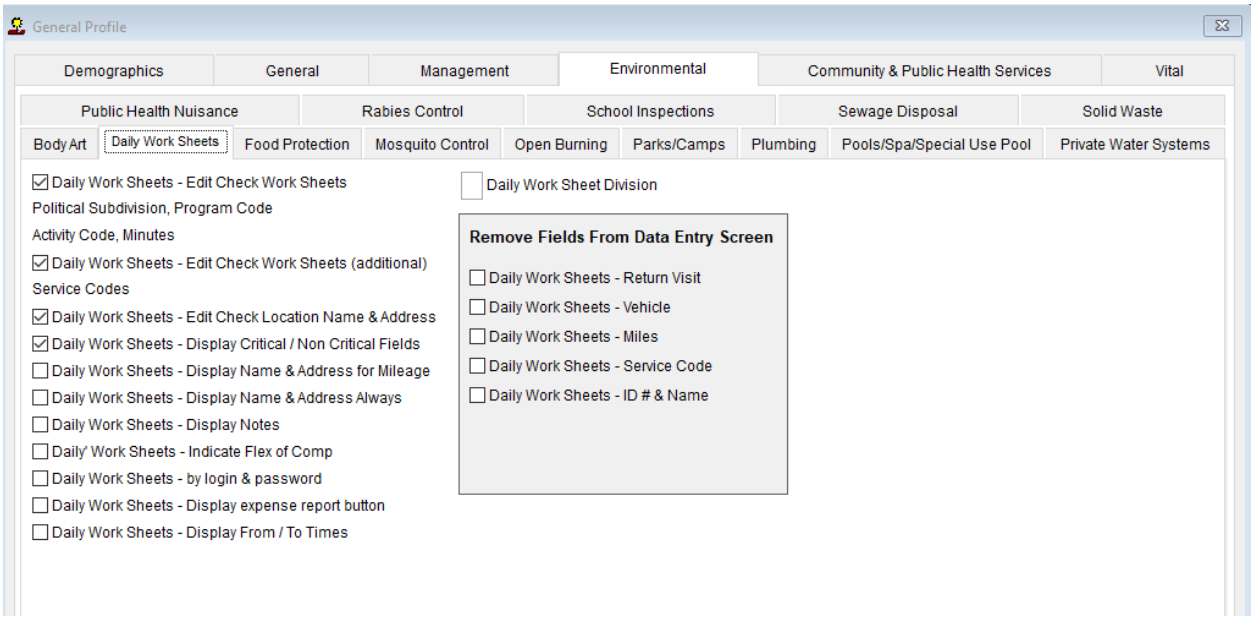
On the **General** Tab there are options to edit the margins in letters and letter heads.



Navigate to **Environmental Tab**.



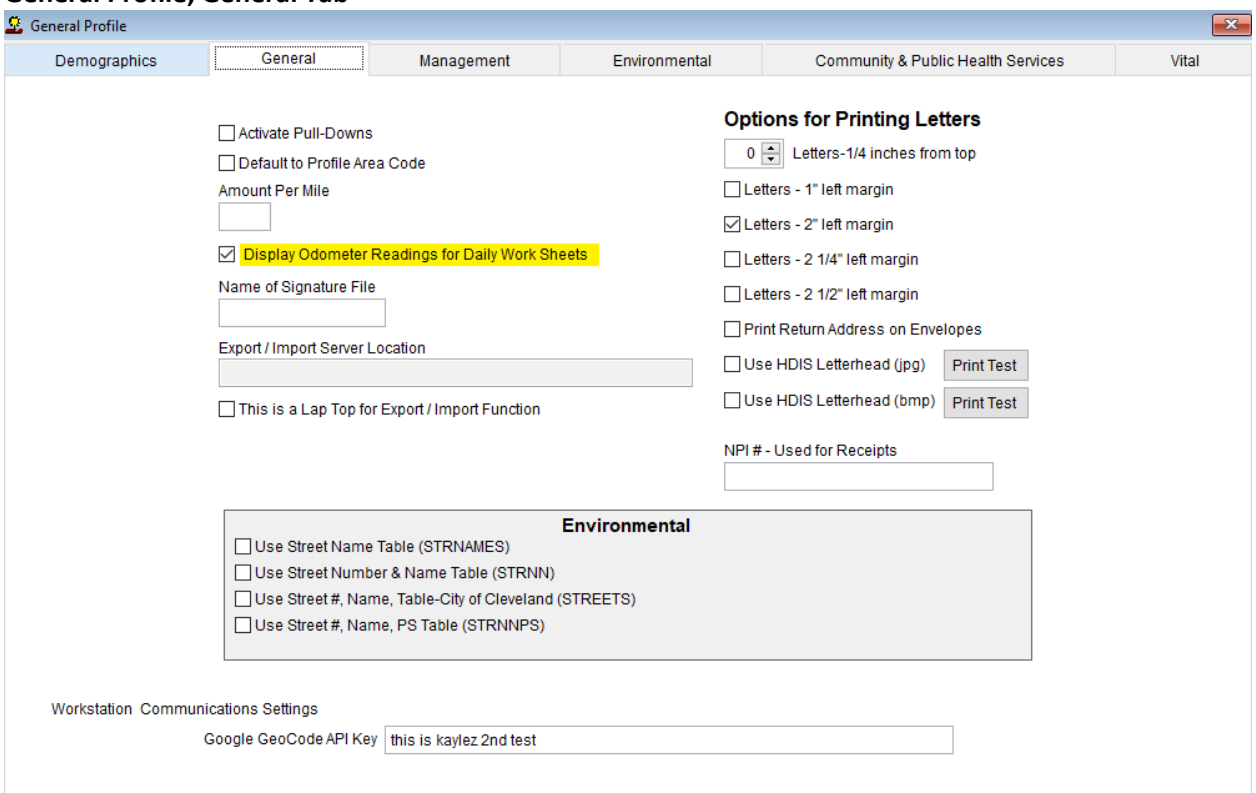
Select **Daily Work Sheets**



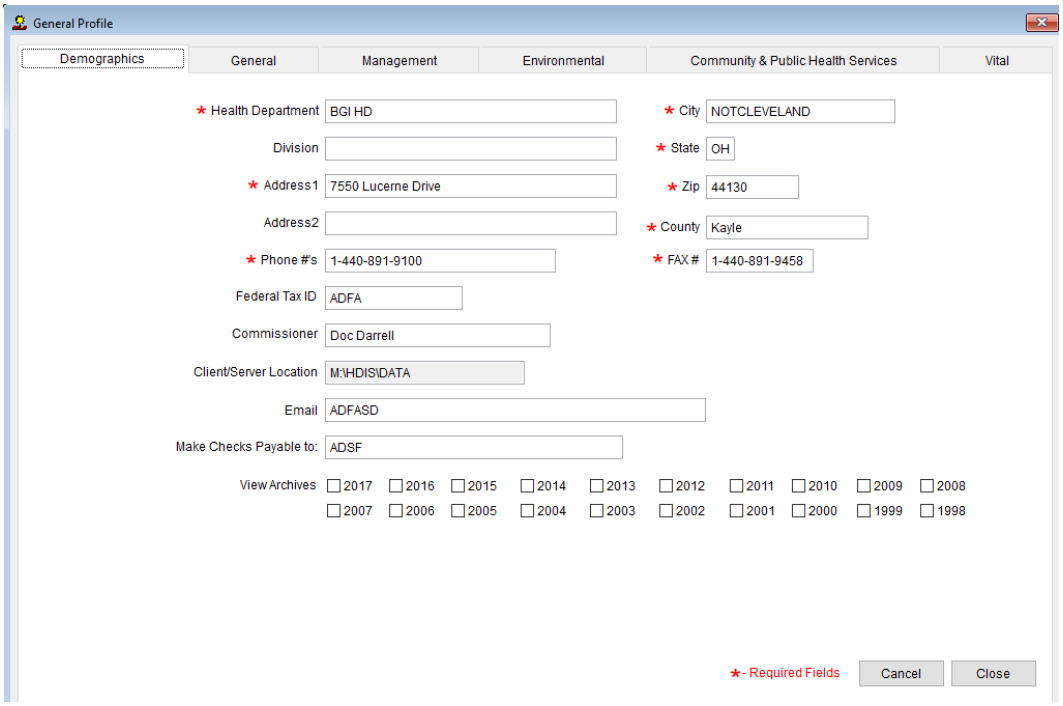
The checkboxes capable of selection are related to activating additional options in Daily Work Sheets.

To Display Odometer Readings Navigate to:

General Profile, General Tab



To view previous archives you must back out of this module and access General Profile from the main screen.

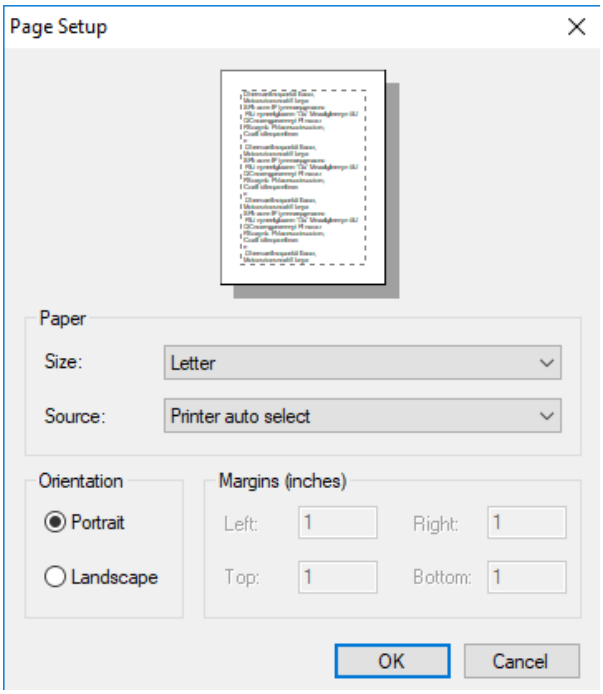


To view a previously archived year, select the year and close out of this menu.

Printer Setup

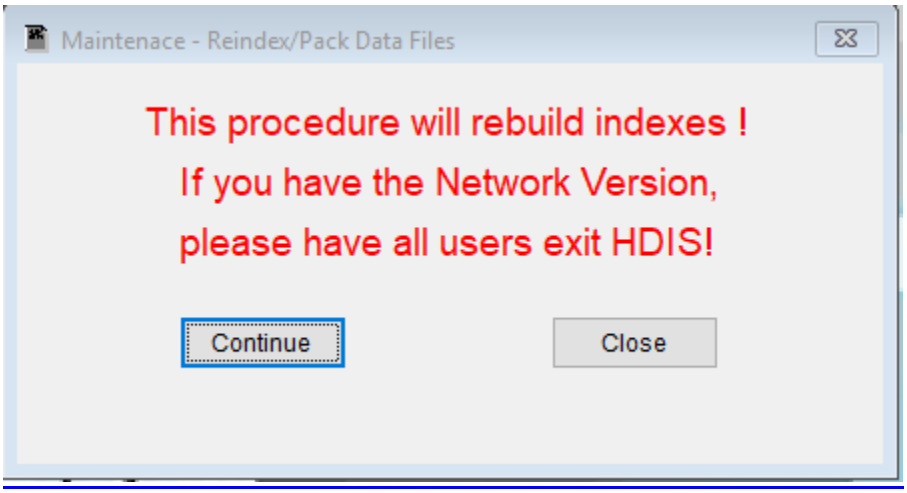
The print setup allows you to choose from what printer you would like to print.

Select the printer in the name dropdown and click **OK**.



Reindex/Pack Data Files

Before executing, make sure every machine logged into HDIS is out of the system completely.

This function is only needed should your data be corrupt due to a power failure.

Please contact BGI if you have any questions or concerns.