Word Module

User Manual

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Disclaimer

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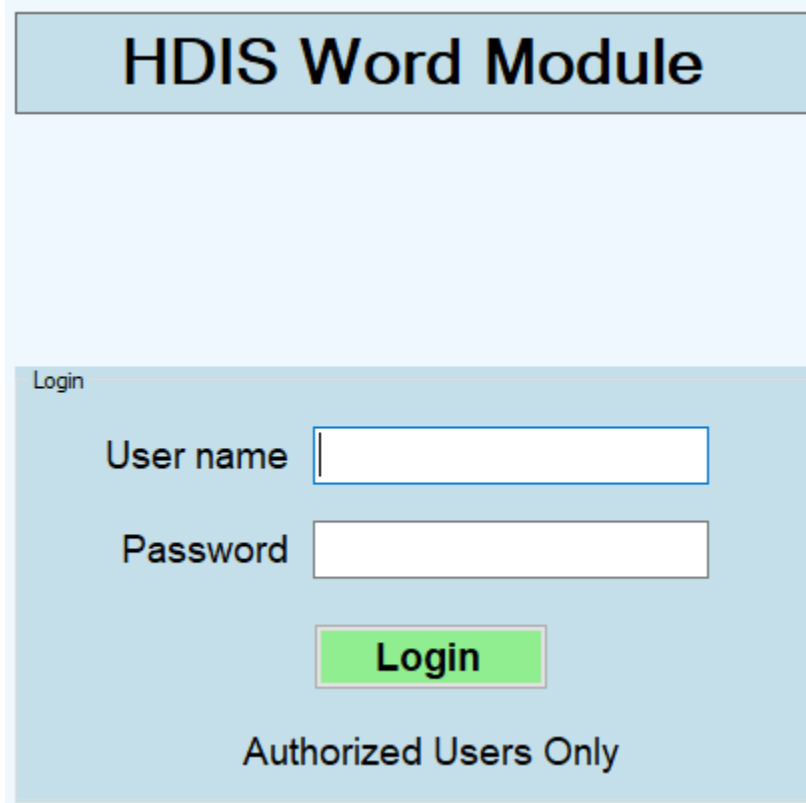
Contents

Overview

Word Module is a program that integrates **Microsoft Word** with **HDIS**, creating a utility to generate letters or other document/PDF files with HDIS data.

User created templates can be used with fieldnames from **HDIS**, resulting in word swapping as the documents are generated.

Each letter generated can be saved directly into the **Associations** module, where it keeps a record of created date and is accessible directly from the record in HDIS.

HDIS Word Module

Login

User name [   ]

Password [   ]

[Login]

Authorized Users Only
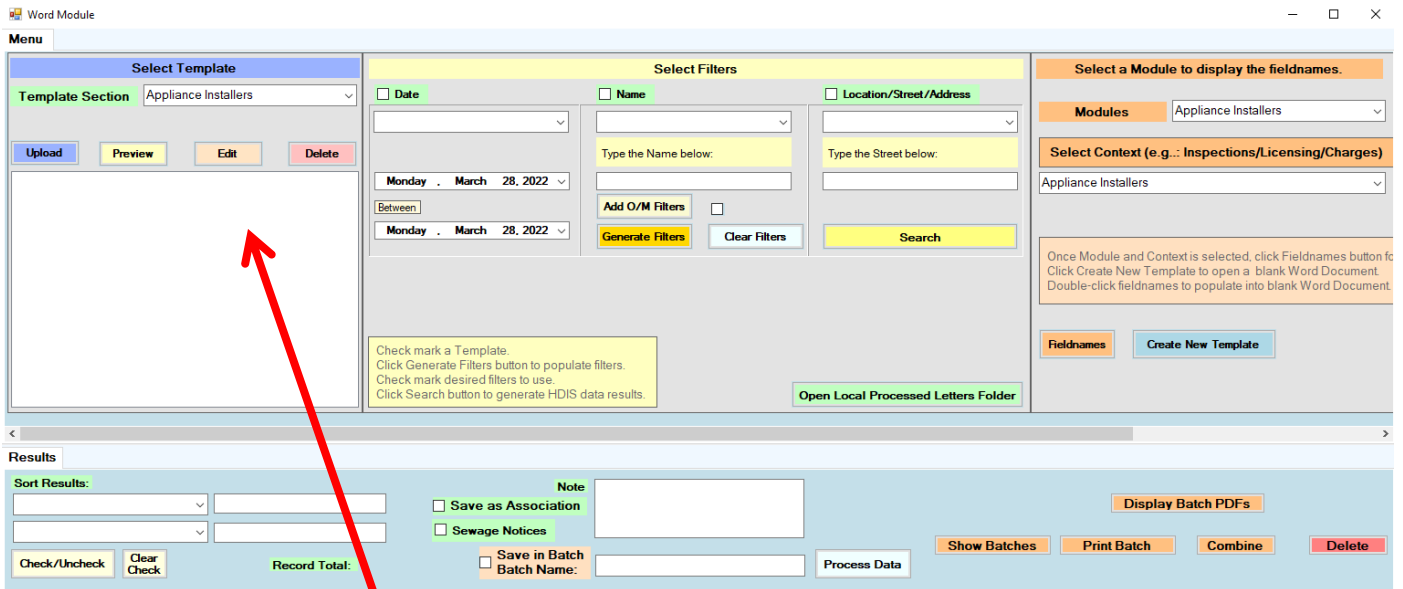
After Installation

Once Word Module has been successful installed, double click on the WordApp.exe or executable file to launch the program.
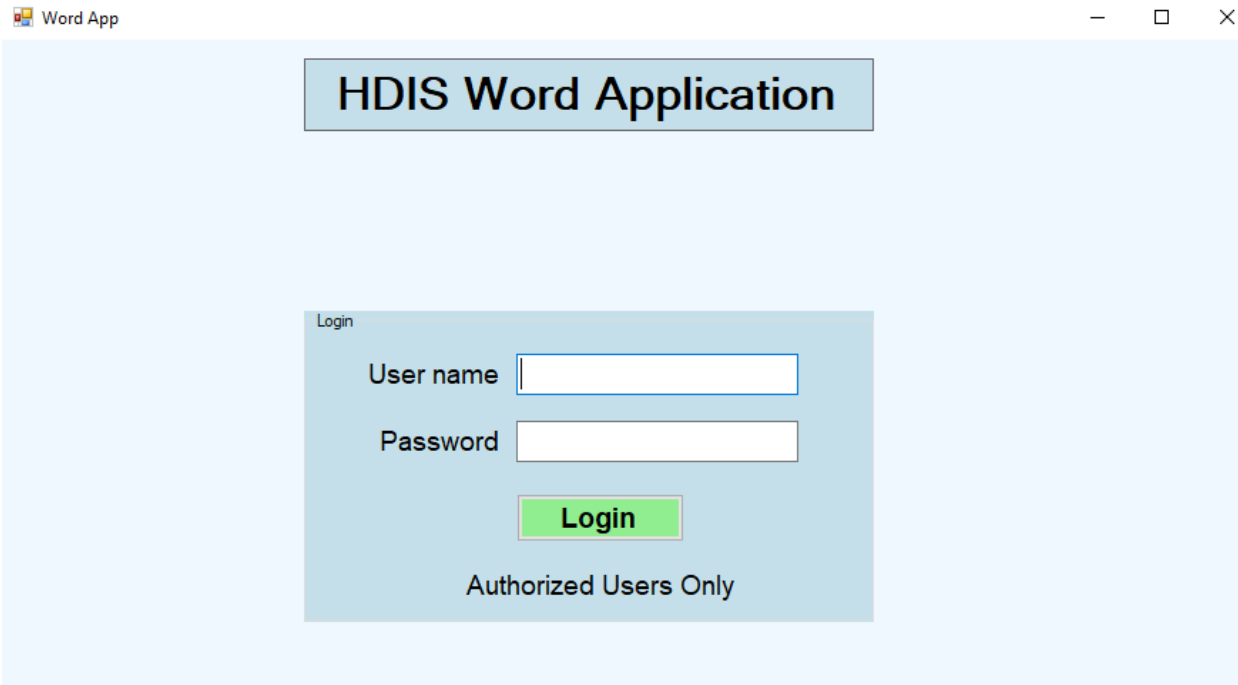
*Login using **HDIS** login credentials.*

After typing **User name** and **Password**, either hit the Enter key or press the **Login** button.

Below shows an image of the current state of Word Module, directly after a successful login.

The Template section where templates are uploaded might appear blank at first. If this is the case, that means Word Module does not see any templates uploaded. Find section **Templates** in the manual for more details.
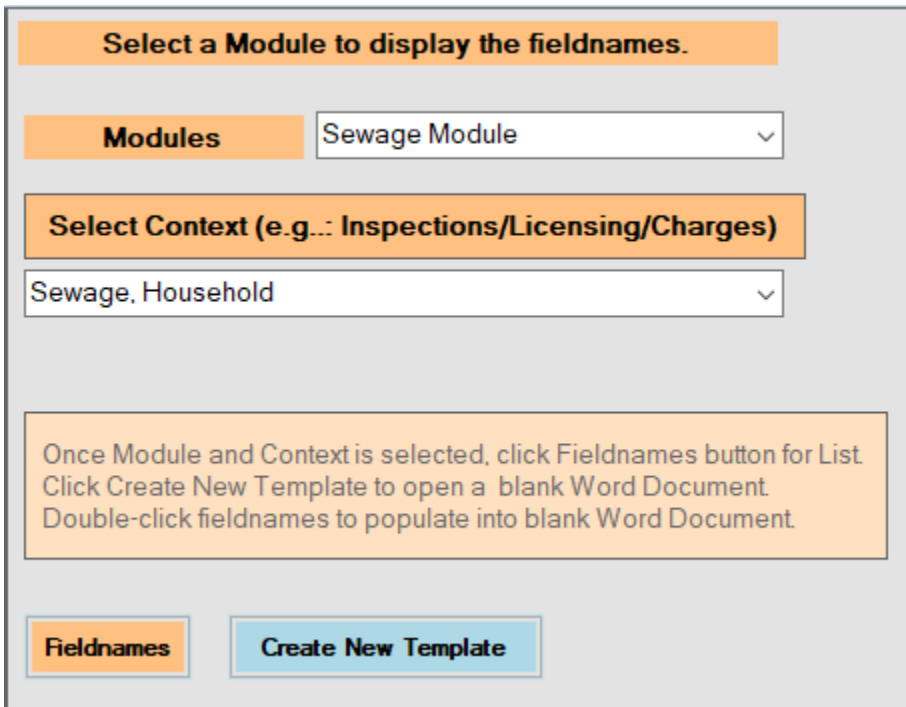
Create Template

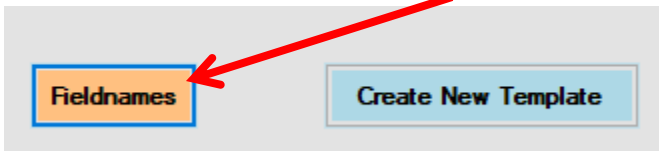After login, look to the right of the application for the **Filter Section.**
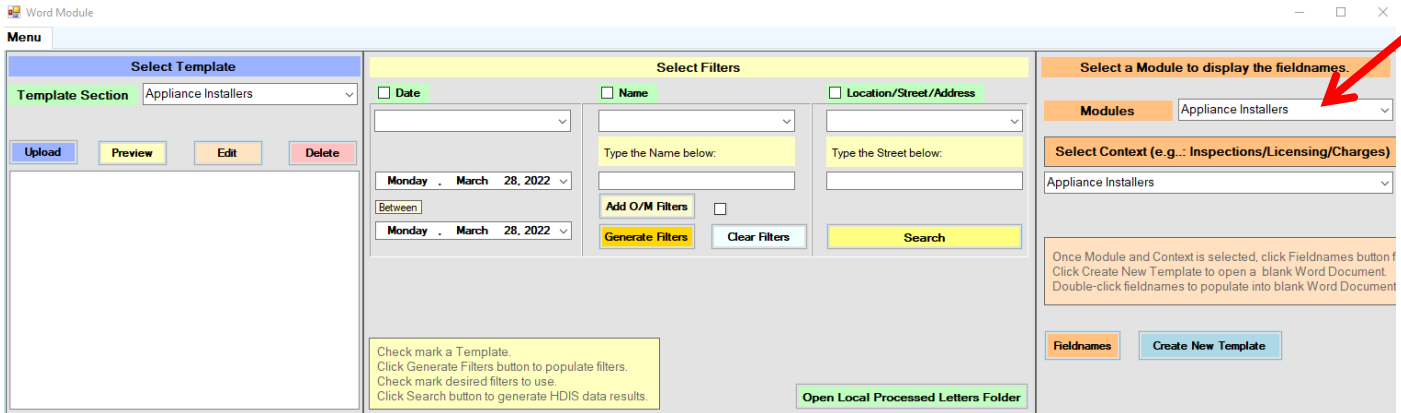
Click the drop-down list for **Modules**. Select a module to work in.

Under **Select Context**, choose which area of the module to work in.

After choosing a Context, click the **Fieldnames** button.

A new window should appear as a table grid. This window will display all fieldnames and descriptions relating to the **Context** selected.

TABLENAME	FIELDNAMEALIAS	FIELDNAME	DESCRIPTION	CAPTION
SESIR	SESIR__IR_DATE	IR_DATE	Sewage, Househ...	Date
SESIR	SESIR__IR_SP	IR_SP	Sewage, Househ...	Provider
SESIR	SESIR__IR_INSP	IR_INSP	Sewage, Househ...	Inspectors name
SESIR	SESIR__IR_REAS	IR_REAS	Sewage, Househ...	Reason
SESIR	SESIR__IR_STA...	IR_STATUS	Sewage, Househ...	Status
SESIR	SESIR__IR_REF...	IR_REF_NO	Sewage, Househ...	Reference #
SESIR	SESIR__SAM_D...	SAM_DATE	Sewage, Househ...	Sample date
SESIR	SESIR__IR_ST	IR_ST	Sewage, Househ...	Sample Taken
SESIR	SESIR__SS	SS	Sewage, Househ...	Suspend Solid <>
SESIR	SESIR__IR_SS	IR_SS	Sewage, Househ...	Suspend Solid
SESIR	SESIR__BOD	BOD	Sewage, Househ...	BOD <>
SESIR	SESIR__IR_BOD	IR_BOD	Sewage, Househ...	BOD
SESIR	SESIR__AMO	AMO	Sewage, Househ...	Ammonia <>
SESIR	SESIR__IR_AMO	IR_AMO	Sewage, Househ...	Ammonia
SESIR	SESIR__FEC	FEC	Sewage, Househ...	Fecal Coliform <>

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After looking over fieldnames, click the **Create New Template** button.
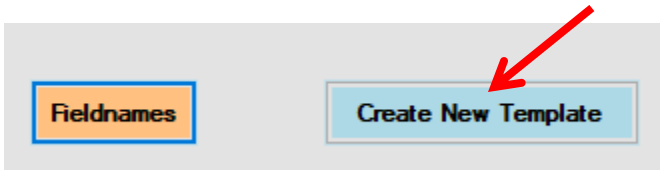
Clicking **Create New Template** opens a blank Microsoft Word document.

With the **fieldnames** window open, look for the variables of the fields to populate the template. Double-click the needed row and the program will automatically populate with the appropriate variable into the word document.
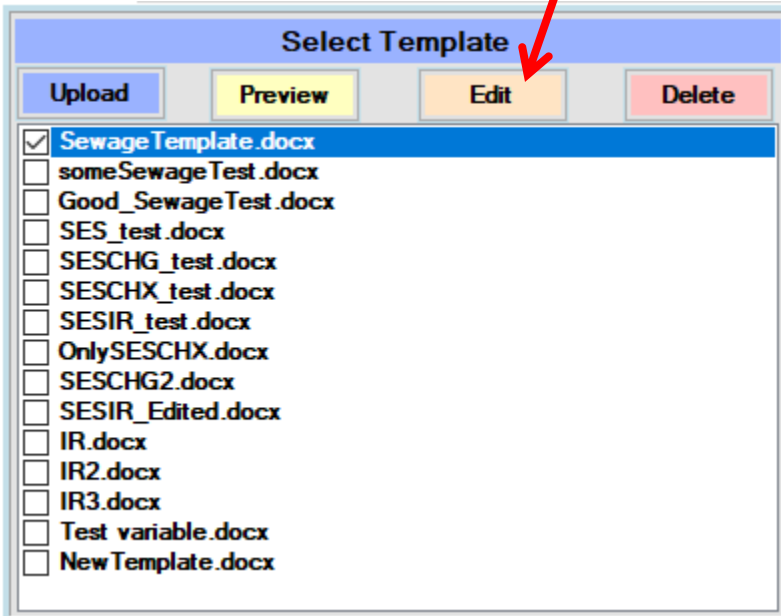
This column is what the program looks for during word replacement.
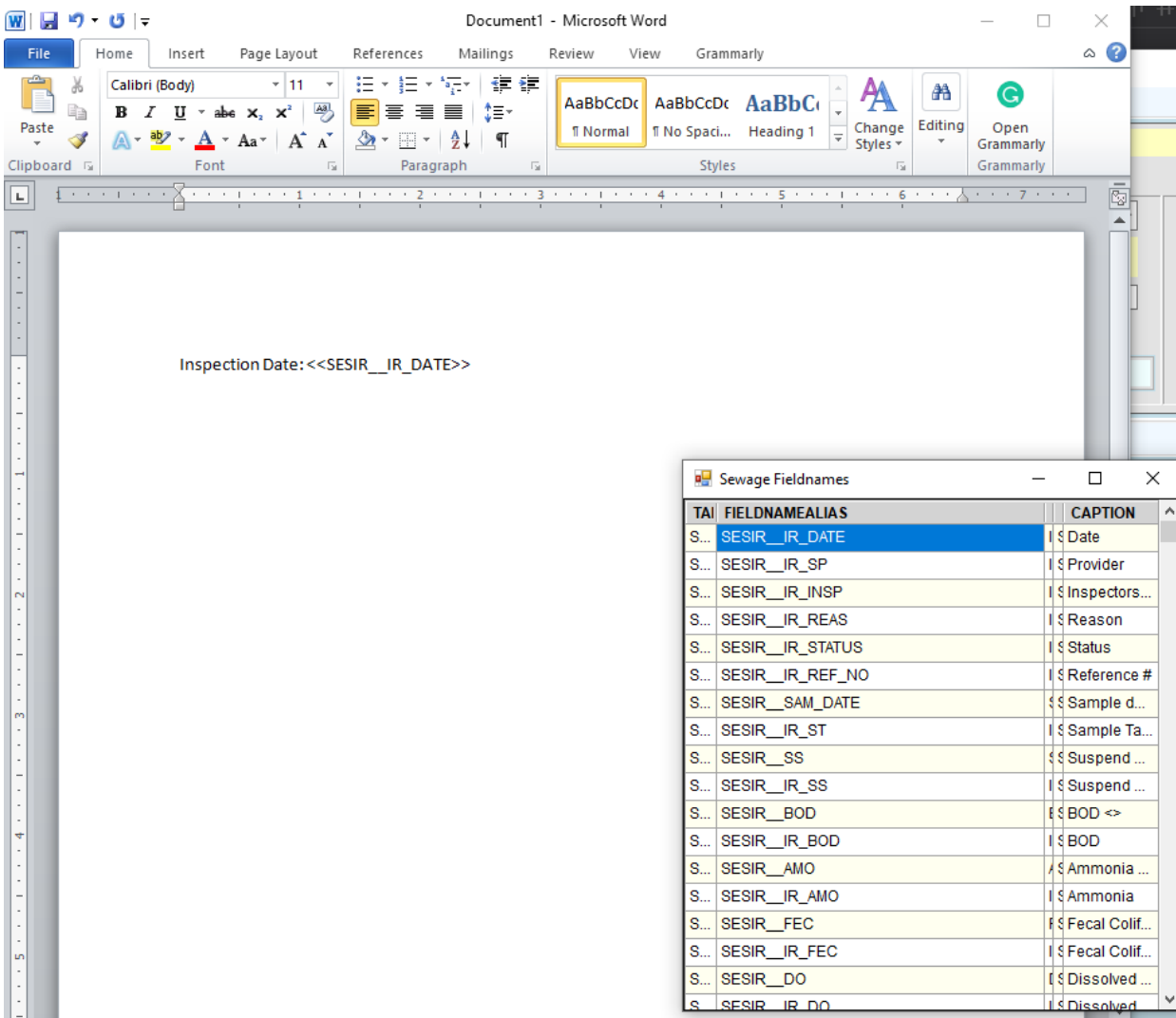
Once the template is finished, click save and save the template file in an easy to access location.

For now, new templates that are created will still need to be uploaded to **Word Module** after creation.

Edit Template

Check-mark the template to edit and click the **Edit** button.

A word document should open with the original contents of the check-marked template.

When finished, close out of the word document by clicking the **X** at the top right corner of the page.

The newly added contents will automatically save and upload to the database.

No further actions are needed when editing.

Upload Template
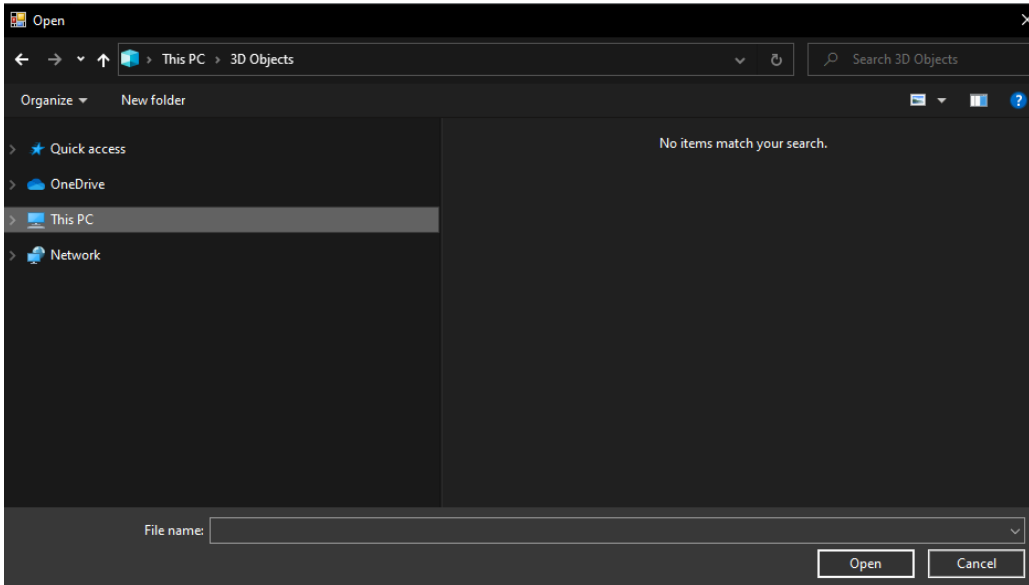
Select the appropriate module section where the new template belongs.
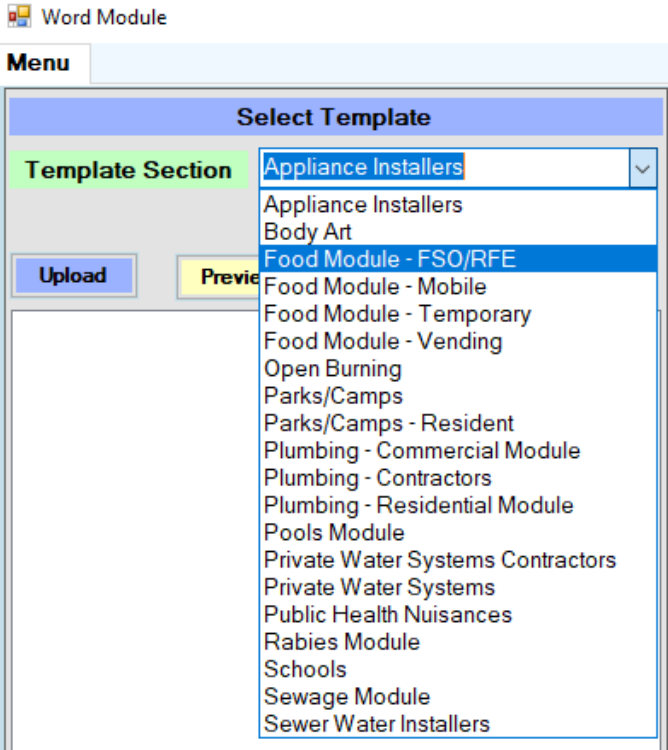
To upload a template into Word Module, click the **Upload** button.
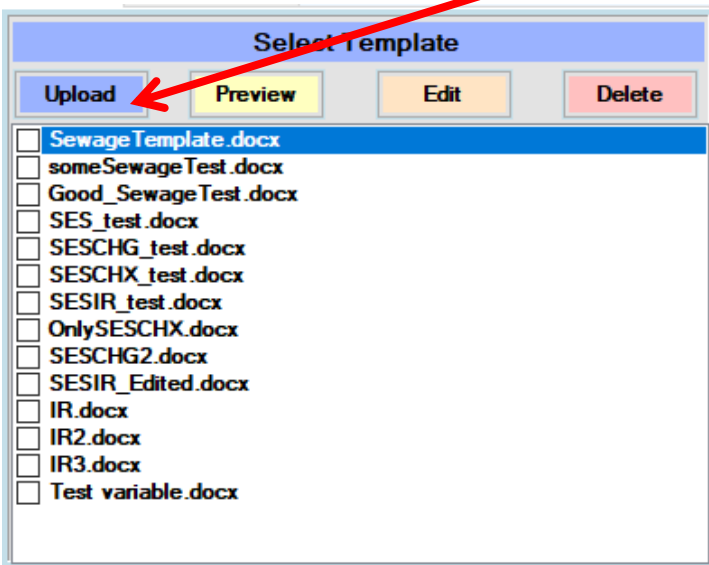
A File Explorer should appear.

Select the Template, then click Open.

After clicking **Open**, the template will automatically upload to the database.

Then, you should quickly see the newly added template in the Template's list.
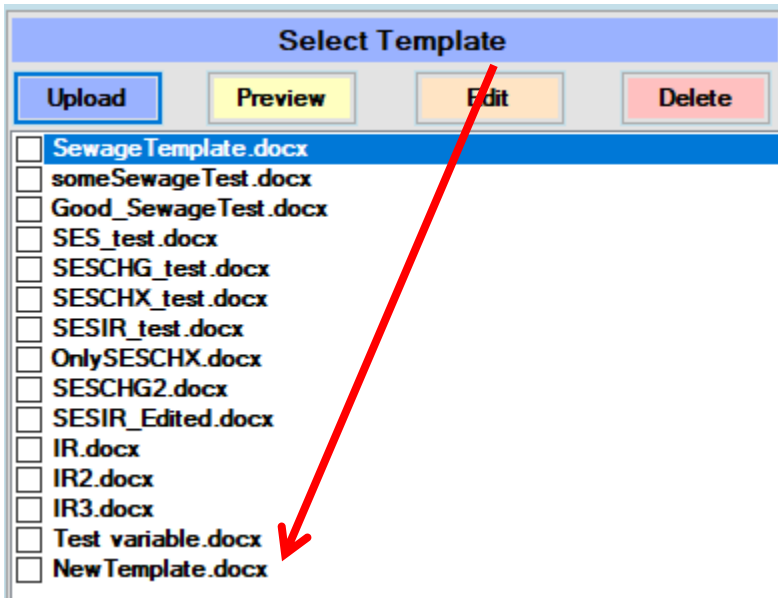
Preview

To **Preview** a Template, check mark the template and click the **Preview** button.

This action opens up the selected template as a word document in 'Read-Only' mode.
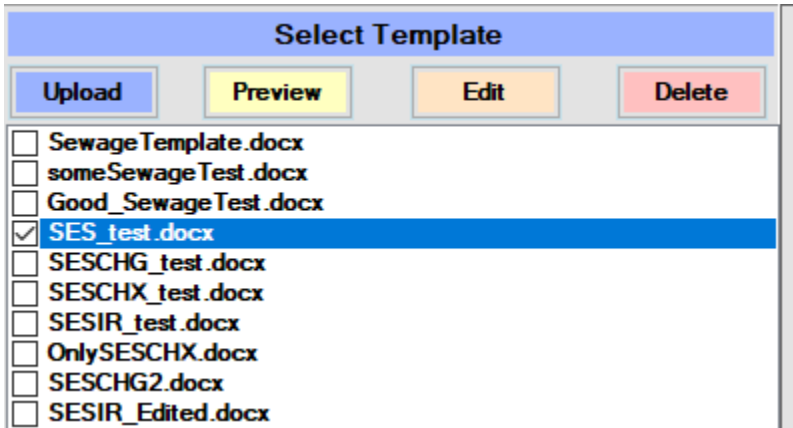
To get out of Preview, just close the document.

Filter Generation and Use

Word Module has been designed to use **Filters** in a unique way.

Instead of having pre-populated Filters, Word Module looks at the templates for instructions.

Select the Template of desired use by check marking the box next to the name.

Once a template is selected, click the **Generate Filters** button in the Filters section.

After **Generate Filters** runs, the **Date**, **Name**, and **Location/Street/Address** sections should be populated with filter choices.

The fields generated in these sections are based off of the fieldnames found in the selected template.

For blank searches, leave the text boxes blank and check-mark the filter type.

To use the Filters, make sure to check mark the sections of desired use. If no sections are check marked it will run a default search.

Search for Data

Once the Filters section is set, click the **Search** button.

Data should now appear at the bottom of the window.

If nothing appears, refine the search to display more results.

Sort Data Results and Process

The first sort drop down box is for **Location/Street/Address** filters and the second drop down box is for **Name** filters.

This area with the empty text boxes is for quick and instant data display sorting.

As soon as the text typed is deleted, the data should default back to the initial search results.

Check mark rows to process.

Click the Check/Uncheck or Clear Check buttons for quick selections.

To save the letters generated as a **Batch**, check mark the "**Save in Batch**" button and create a name for the Batch. This step must be done <u>before</u> **Processing** the data. All Batch items will be saved as an **Association**.

To save the letters into HDIS **Associations**, check-mark "**Save as Association**," with the option of typing a "**Note**" in the note field. This step must also be done <u>before</u> **Processing** the data.

To view the saved PDF as an **Association**, open HDIS and navigate to the Module > Record, and press **Alt-N** to open Associations. The generated word letter should be seen in the list.

Once rows are selected, click the **Process Data** button.

As the data is actively processing, the color of the button will change. This color will revert back to the original state when the process is complete.
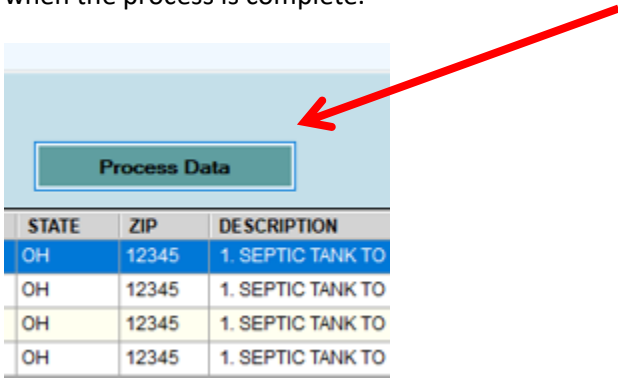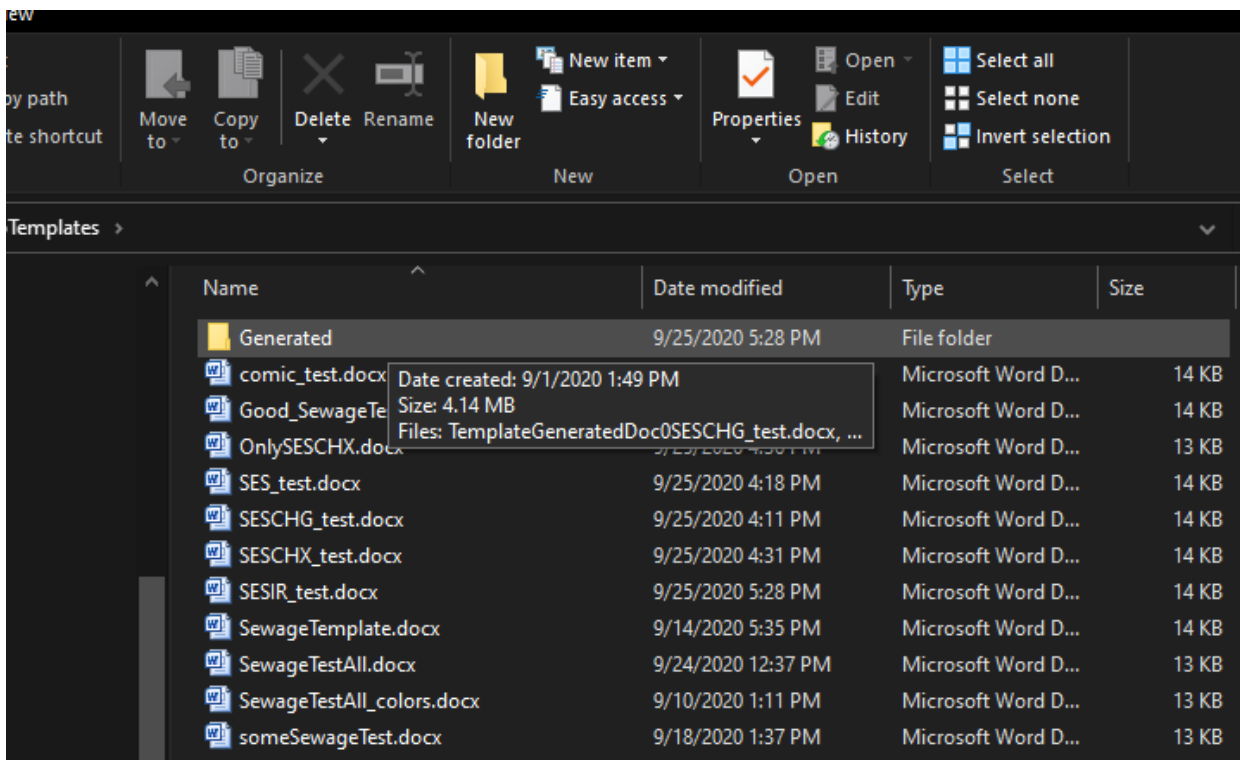

To view local letters that have been processed is to click the **Open Local Processed Letters Folder**.
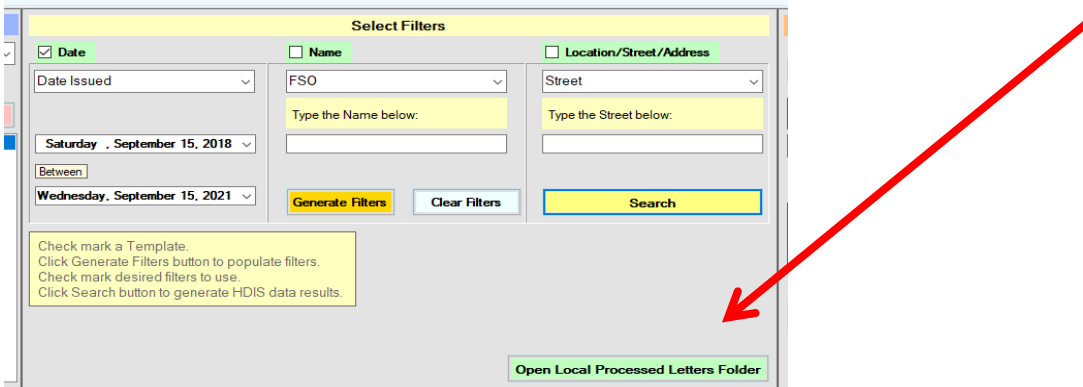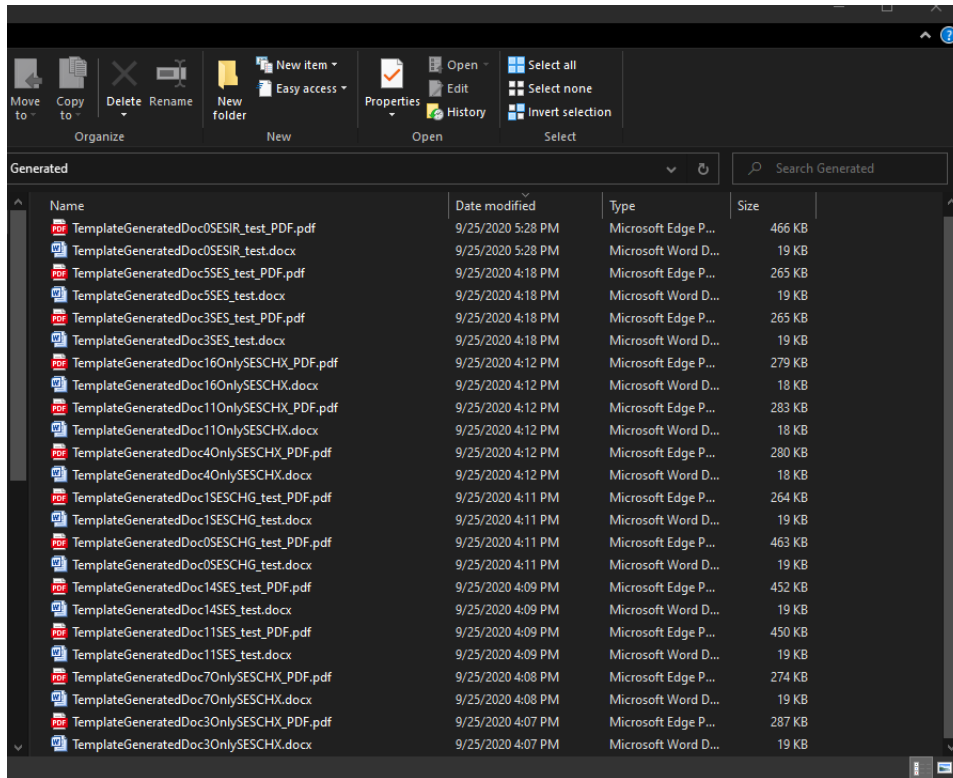
Another way to find a local copy of recently generated documents, look for the **WordAppTemplates** folder in C:\HDIS\WordAppTemplates
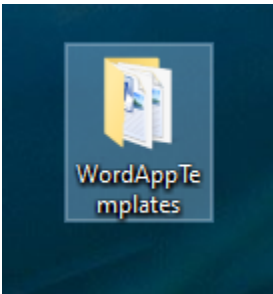
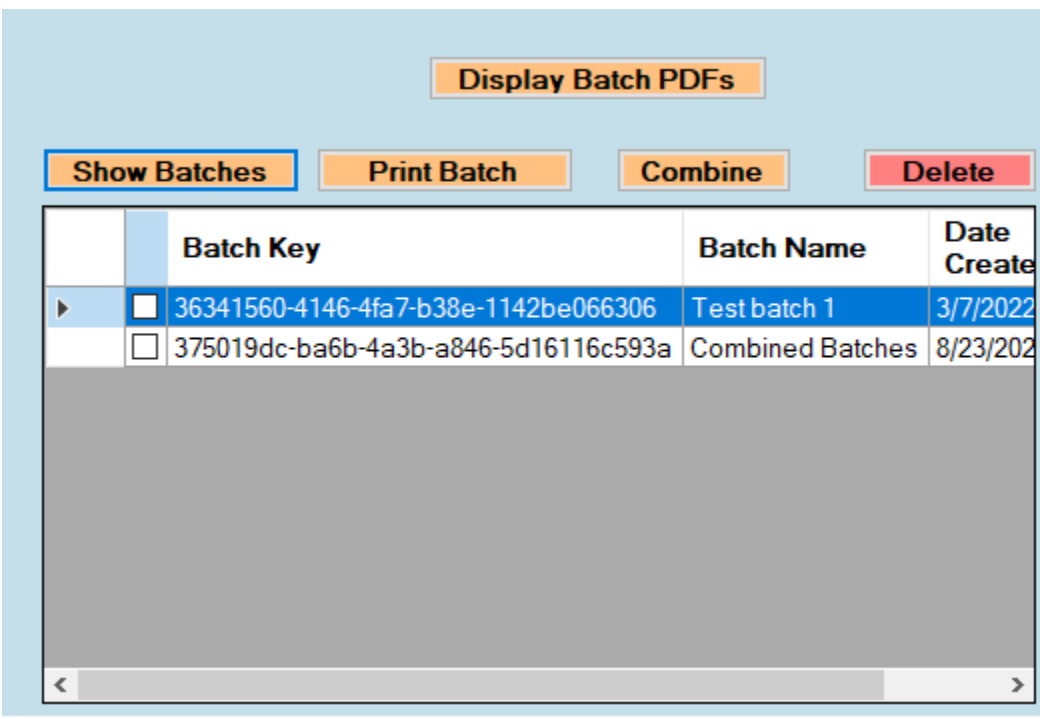Inside **WordAppTemplates** folder, select the **Generated** folder.
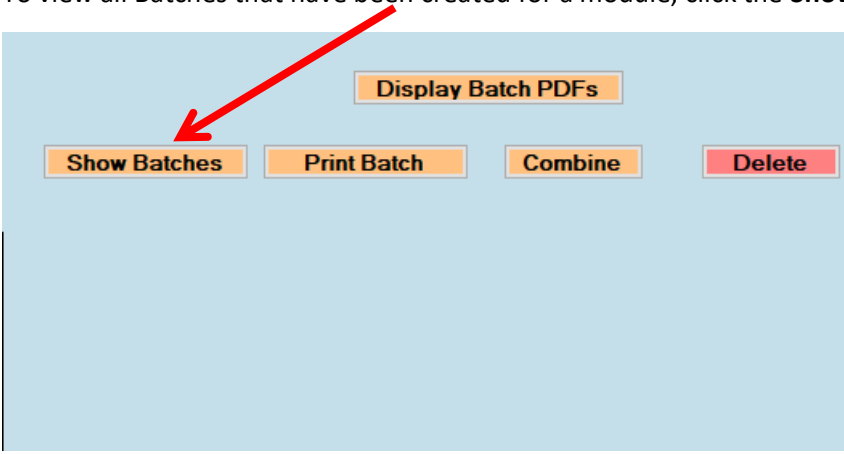
All **PDFs** and **Word** documents created will be stored in **WordAppTemplates** > **Generated**.

This area is still in development and may change.

Batches

To view all Batches that have been created for a module, click the **Show Batches** button.

To **print** a Batch, check-mark the appropriate Batch and click the **Print Batch** Button.

To **delete** a Batch, check-mark the appropriate Batch and click the **Delete** Button.
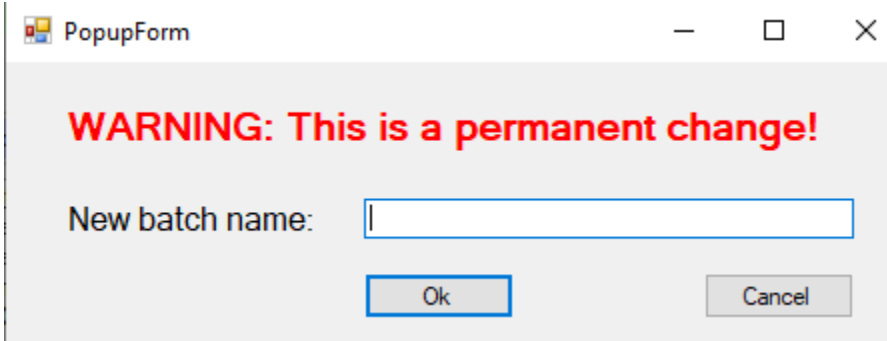
To **display** PDF versions of all the letters in a batch, check-mark the appropriate Batch and click the **Display Batch PDFs** button.

To rename or combine batches, check-mark one or multiple batches from the list.

Then, click the **Combine** button.

A pop-up will appear:

If you click the **Cancel** button the pop-up will close and **no** changes will be made.

To proceed, type the name of the new batch and click the **Ok** button.

Sewage O/M Details

For Sewage O/M, there are a couple section specific filters to help pull up O/M details.

After selecting a Sewage O/M letter and clicking **Generate Filters**, click the **Add O/M Filters** button.

This will bring up more filters for O/Ms.

The **O/M Fee Code** check box, when marked, make sure to type the O/M Fee Code in the text box to filter the data specifically by the O/M Fee Code.

The **Records Past Due** check box will filter the data to show only the records that have not paid between the specific date range entered.

Check marking the **Sewage Notices** check box will automatically update the Notices box in Sewage O/M.

For example, if a record currently has Notice 1 set, this function will mark Notice 2 after the current letter is generated.

This process happens once the **Process Data** button has been pressed.