# HDIS
## Health Department Information System

## Helping You...Help Others

# School Inspections
# User Manual

**BG**

Disclaimer

All data examples containing personal names, company names (or companies), vehicle information, or locations that appear in this guide are fictitious in nature and do not refer to, or portray, in name or substance, any actual names, organizations, entities, or institutions.  Any resemblance to any real person (living or dead), organization, entity, or institution is purely coincidental.

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# Chapter 1: Getting Started

Once the Mosquito Control module has been installed, it can be accessed by going to:

**Environmental Health > School Inspections**
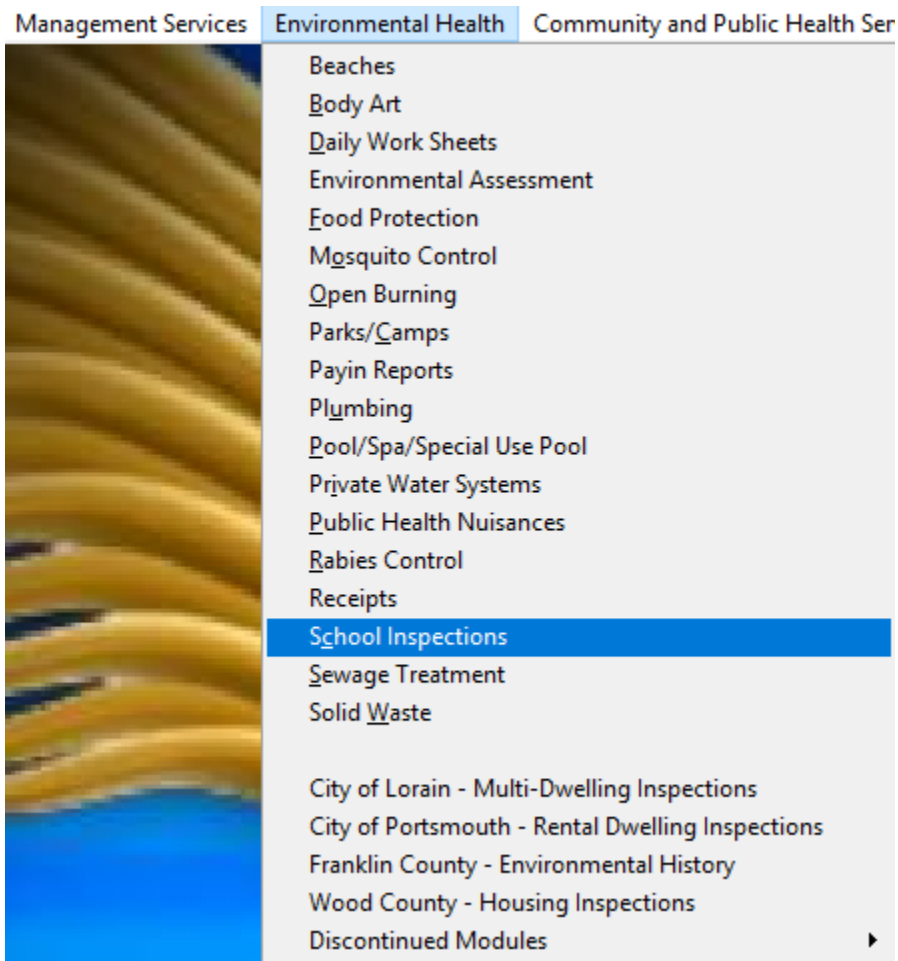
Once inside **School  Inspections**, navigate to:

**Maintenance > Master Table – Playground Inspection**

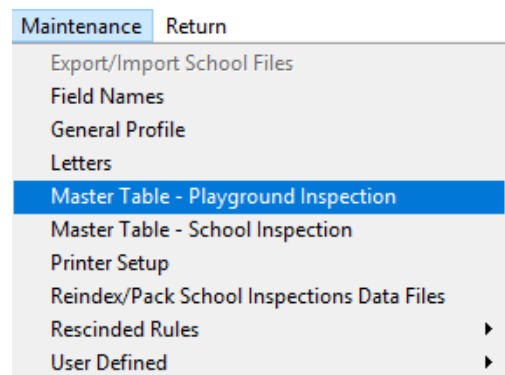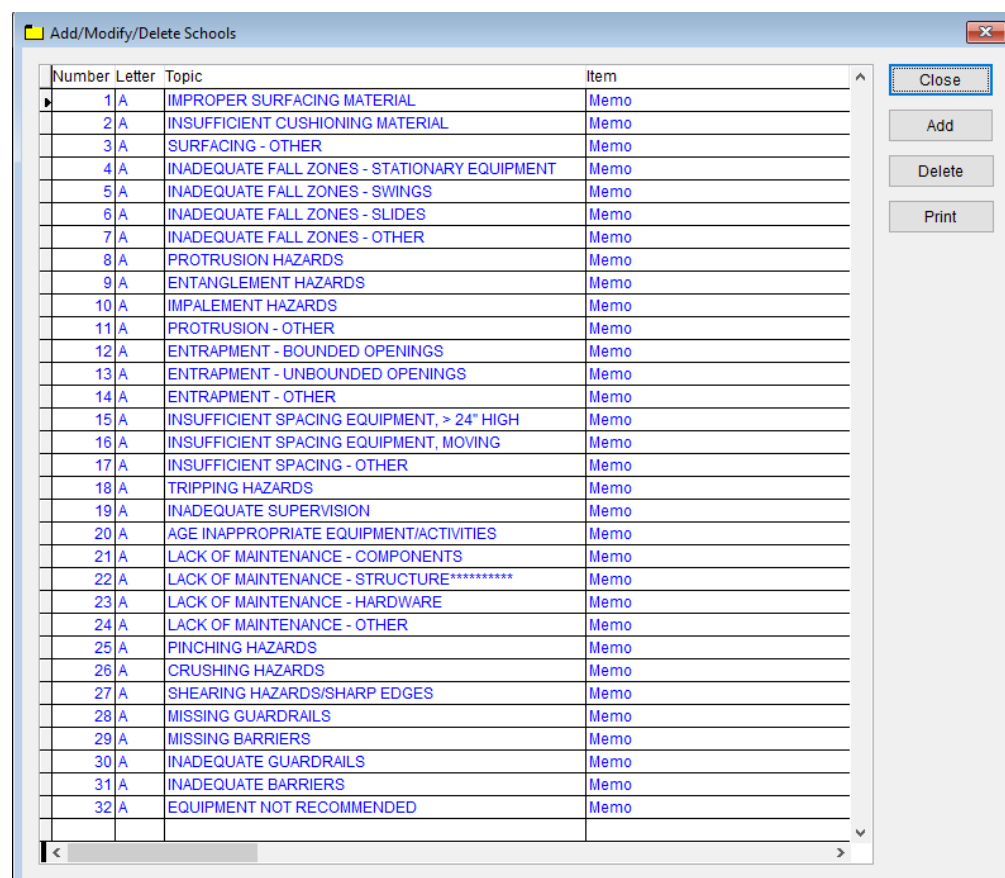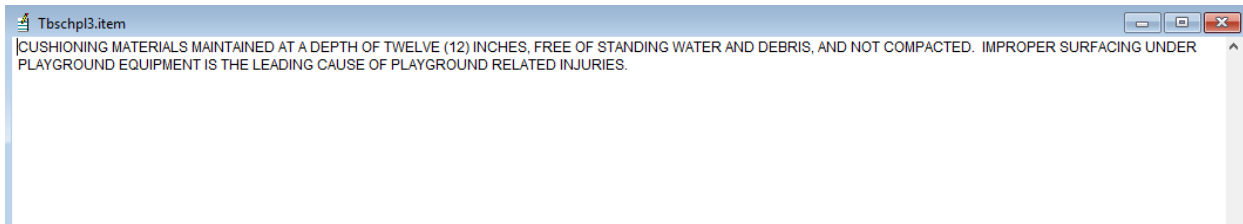| Maintenance | Return |
|---|---|
| Export/Import School Files | |
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| Master Table - Playground Inspection | |
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This section holds the **Playground Inspection** topics.

Click **Add** to enter a new topic.  Under the Item column **double-click on Memo** to enter or view the information inside.  Select a topic and click **Delete** to remove a topic.

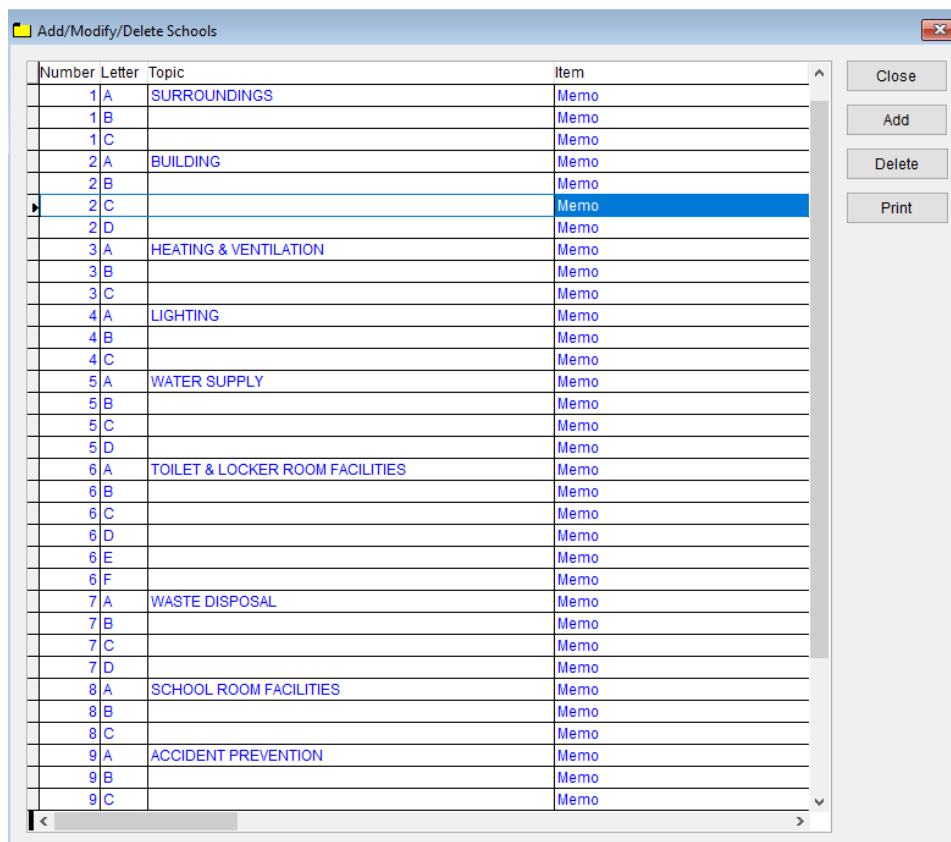| Number | Letter | Topic | Item | |
|---|---|---|---|---|
| 1 | A | IMPROPER SURFACING MATERIAL | Memo | Close |
| 2 | A | INSUFFICIENT CUSHIONING MATERIAL | Memo | |
| 3 | A | SURFACING - OTHER | Memo | Add |
| 4 | A | INADEQUATE FALL ZONES - STATIONARY EQUIPMENT | Memo | |
| 5 | A | INADEQUATE FALL ZONES - SWINGS | Memo | Delete |
| 6 | A | INADEQUATE FALL ZONES - SLIDES | Memo | |
| 7 | A | INADEQUATE FALL ZONES - OTHER | Memo | Print |
| 8 | A | PROTRUSION HAZARDS | Memo | |
| 9 | A | ENTANGLEMENT HAZARDS | Memo | |
| 10 | A | IMPALEMENT HAZARDS | Memo | |
| 11 | A | PROTRUSION - OTHER | Memo | |
| 12 | A | ENTRAPMENT - BOUNDED OPENINGS | Memo | |
| 13 | A | ENTRAPMENT - UNBOUNDED OPENINGS | Memo | |
| 14 | A | ENTRAPMENT - OTHER | Memo | |
| 15 | A | INSUFFICIENT SPACING EQUIPMENT, > 24" HIGH | Memo | |
| 16 | A | INSUFFICIENT SPACING EQUIPMENT, MOVING | Memo | |
| 17 | A | INSUFFICIENT SPACING - OTHER | Memo | |
| 18 | A | TRIPPING HAZARDS | Memo | |
| 19 | A | INADEQUATE SUPERVISION | Memo | |
| 20 | A | AGE INAPPROPRIATE EQUIPMENT/ACTIVITIES | Memo | |
| 21 | A | LACK OF MAINTENANCE - COMPONENTS | Memo | |
| 22 | A | LACK OF MAINTENANCE - STRUCTURE********** | Memo | |
| 23 | A | LACK OF MAINTENANCE - HARDWARE | Memo | |
| 24 | A | LACK OF MAINTENANCE - OTHER | Memo | |
| 25 | A | PINCHING HAZARDS | Memo | |
| 26 | A | CRUSHING HAZARDS | Memo | |
| 27 | A | SHEARING HAZARDS/SHARP EDGES | Memo | |
| 28 | A | MISSING GUARDRAILS | Memo | |
| 29 | A | MISSING BARRIERS | Memo | |
| 30 | A | INADEQUATE GUARDRAILS | Memo | |
| 31 | A | INADEQUATE BARRIERS | Memo | |
| 32 | A | EQUIPMENT NOT RECOMMENDED | Memo | |

Example of Memo field:



Navigate to:

**Maintenance > Master Table – School Inspection**

This section holds the **School Inspection** topics.

Click **Add** to enter a new topic.  Under the Item column **double-click on Memo** to enter or view the information inside. Select a topic and click **Delete** to remove a topic.

# Chapter 2: Entering in School Inspections



## Schools – Find Tab

Navigate to: **School Inspections > Schools**



Enter the name of **School or ID#** to find a school record.  Click on the record you are searching for and navigate to the next tab.

If you want to enter a new record just click the **Add** button and it will take you to the **School** tab.

## School Tab

From the **Find tab**, go to **the School tab.**



Checkmark, type the appropriate information, or use the drop down boxes to accurately fill in the record.

Actions capable of being performed on this screen:

- **Previous** button will take you to the previous record

- **Next** button will take you to the next record

- **Add** button will open up a blank page where you can fill in a record.

- **Modify** will allow you to edit an existing record, and **Print** will open up a print menu.

## Print Button:



You can choose to print envelopes, forms, inspections, rescinded inspections, and custom letters. There are 4 types of addresses you can choose from relating to School Inspection data.

Either select **Preview** or **Print**.

Pressing the **OK** button the print window will generate your selection.

**Close** button will exit from this window.

## Board of Ed tab

### Board of Education Sub Tab:



- Click **Modify** button to edit an existing record.

- Enter/Checkmark/Select appropriate information.

- Click **Contact/Items** sub tab to continue entering in data.

- **Print** button will open printing options window.

## Contact/Items Sub Tab:



- Click **Modify** button to edit an existing record.

- Enter/Checkmark/Select appropriate information.

- Click **Inspections/Political Subdivision sub tab** to continue entering in data.

- **Print** button will open printing options window.

**Inspections/Political Subdivision:**



- Click **Modify** button to edit an existing record.
- Enter/Checkmark/Select appropriate information.
- Click **School Insp Tab** to continue entering in data.
- **Print** button will open printing options window.

## School Insp Tab

### Inspection Info Sub Tab:



- Enter/Checkmark/Select appropriate information.

- **Add Inspection** button allows you to enter a new inspection

- **Right-click Delete Inspection** to remove current inspection displayed on screen

- **Next Inspection** takes you to next inspection

- **Previous Inspection** takes you to a previous inspection

- **Print button** opens a printing options window

- **Modify button** allows you to edit current record

## Areas of Deficiency Sub Tab:



*Check mark Areas of Deficiency to add to current record.*

## Observations and Recommendations



- **Add Observation** button allows you to enter a new observation

- **Right-click Delete Observation** to remove selected observation

- **Print button** opens a printing options window

- **Modify button** allows you to edit current record

## Env. Measures Tab



- **Add Room** button allows you to enter a new record.

- **Right-click Delete Env. Measure*** to remove selected entry

- **Print button** opens a printing options window

- **Modify** button allows you to edit current record

## School Tab



- **Add Inspection** button allows you to enter a new Inspection [Enter Inspection date]

- **Right-click Delete Inspection\*** to remove selected entry

- **Print button** opens a printing options window

- **Modify** button allows you to edit current record

- **For NIC** click the checkbox

## Playground Tab



- **Add Inspection** button allows you to enter a new Inspection [Enter Inspection date]

- **Right-click Delete Inspection\*** to remove selected entry

- **Print button** opens a printing options window

- **Modify** button allows you to edit current record

- **For NIC** click the checkbox

## Comments Tab



This tab is where you can post comments relating to the record.

- **Print button** opens a printing options window

- **Modify** button allows you to edit current comment

- **Spell Check** will look for spelling errors in the comments

## School Insp – Rescinded Tab



This section holds the rescinded school inspections.

## Roof Insp – Rescinded Tab



This section holds the rescinded roof inspections.

## GIS/GPS Tab



This tab allows you to enter your **GPS** coordinates for mapping purposes.

| Field/Button | Description |
|---|---|
| Street # | (automatically filled out when you enter the address) |
| Prefix Direction | (automatically filled out when you enter the address) |
| Prefix Type | (automatically filled out when you enter the address) |
| Street Name | (automatically filled out when you enter the address) |
| Street Suffix | (automatically filled out when you enter the address) |
| Prefix Direction | (automatically filled out when you enter the address) |
| Latitude Decimal Value | Enter the latitude DECIMAL value of the location. |
| Longitude Decimal Value | Enter the longitude DECIMAL value of the location. |
| Modify | Click to modify the information on the page. |

# Chapter 3: Reports

Navigate to: **Environmental Health> School Inspections> Reports**.

There will be a drop down menu for different types of reports you can create/modify.

| Schools | Reports | Browse/List/Export | Count/Graph | Maintenance | Return |

Envelopes-Board of Education
Envelopes-Schools
Filing Labels
Labels-Board of Education
Labels-School
Letters
List
List of Schools With Inspection Dates
User Defined Report ▶ School Inspections Compliant Report
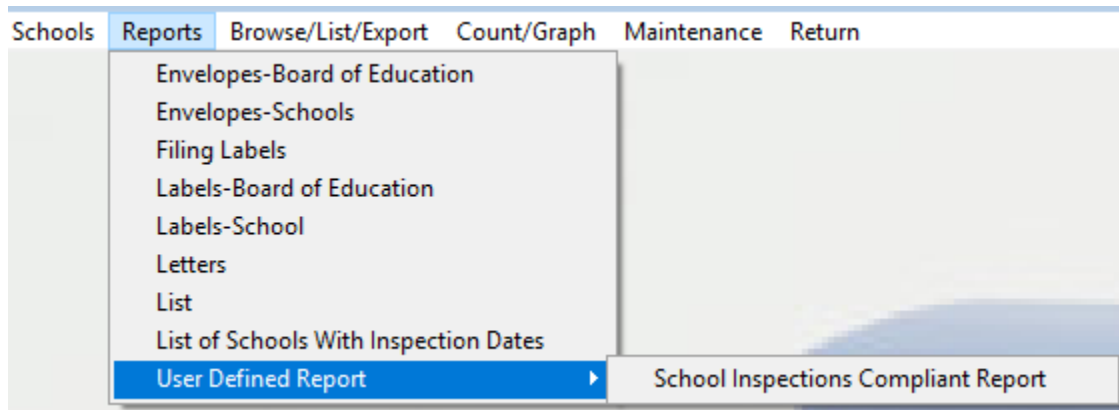
*Reports can be filtered.* See Page on Filters for more detail (Click this link).

Click on the type of report you want to create and an options window will pop-up.

Some options windows are different than others but are simple to use.

You can always preview a report before printing.

**Report Options Window For:**

- **Envelopes -Board of Education**
- **Envelopes – Schools**
- **Filing Labels**
- **List**
- **List of Schools With Inspection Dates**

**The list above is what the options window will look like for those selections.**
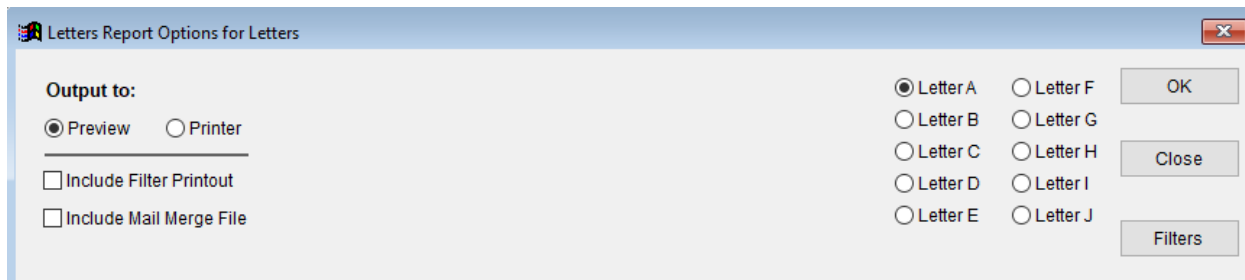


**Report Options Window For:**

- **Labels – School**
- **Labels – Board of Education**

**The list above is what the options window will look like for those selections.**

**Letters:**



**The only report with a date range is User Defined Report > School Inspections Compliant Report:**

# Chapter 4: Browse/List/Export

Inside the **School Inspections** 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.

Sort by: (3 Max)

|  |  |
|--|--|
| | # of classrooms |
| | 2nd last inspection |
| | 3rd last inspection |
| | Acid tank |
| | Bleachers |
| | Board City |
| | Board Phone |
| | Board State |
| | Board Street |
| | Board Zip |
| | Charter |
| | Chemical inventory |
| | Chief admin. |
| | City |
| | Closed |
| | Contact email |
| | Contact fax |

## Filters

From the **Browse/List/Export or Reports** click on the **Filters** button.

This section allows you to set filters based on the **Output Field**.



** 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 **School Inspections** module navigate to the **Count/Graph.**

Create the title you would like as the **Report Title**.

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.

### # of classrooms - Count/Percentage

| Number | Percent | # of classrooms |
|--------|---------|-----------------|
| 19 | 26 % | 0 |
| 5 | 7 % | 2 |
| 3 | 4 % | 15 |
| 3 | 4 % | 24 |
| 3 | 4 % | 28 |
| 2 | 3 % | 4 |
| 2 | 3 % | 8 |
| 2 | 3 % | 10 |
| 2 | 3 % | 11 |
| 31 | 43 % | OTHER |
| 72 | 100 % | Totals |

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



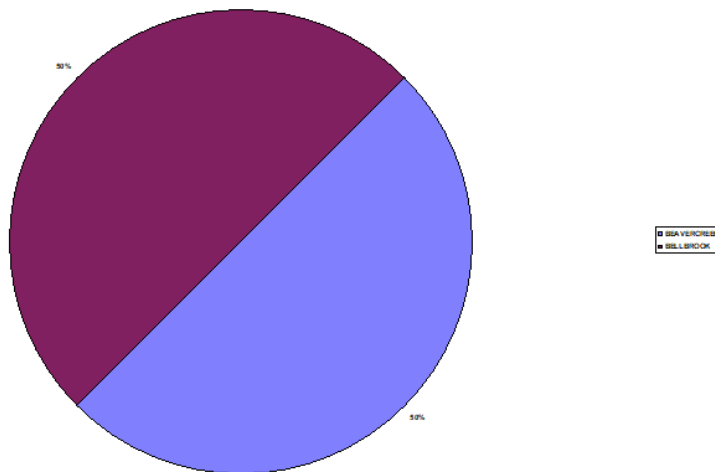Click on the door icon next to the percent to return to the menu:
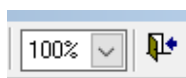
## Pie Graph

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



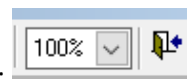| Filters |
| --- |
| Contact's City=B |

BGI HD                                                                                    11/30/2017
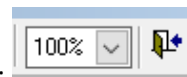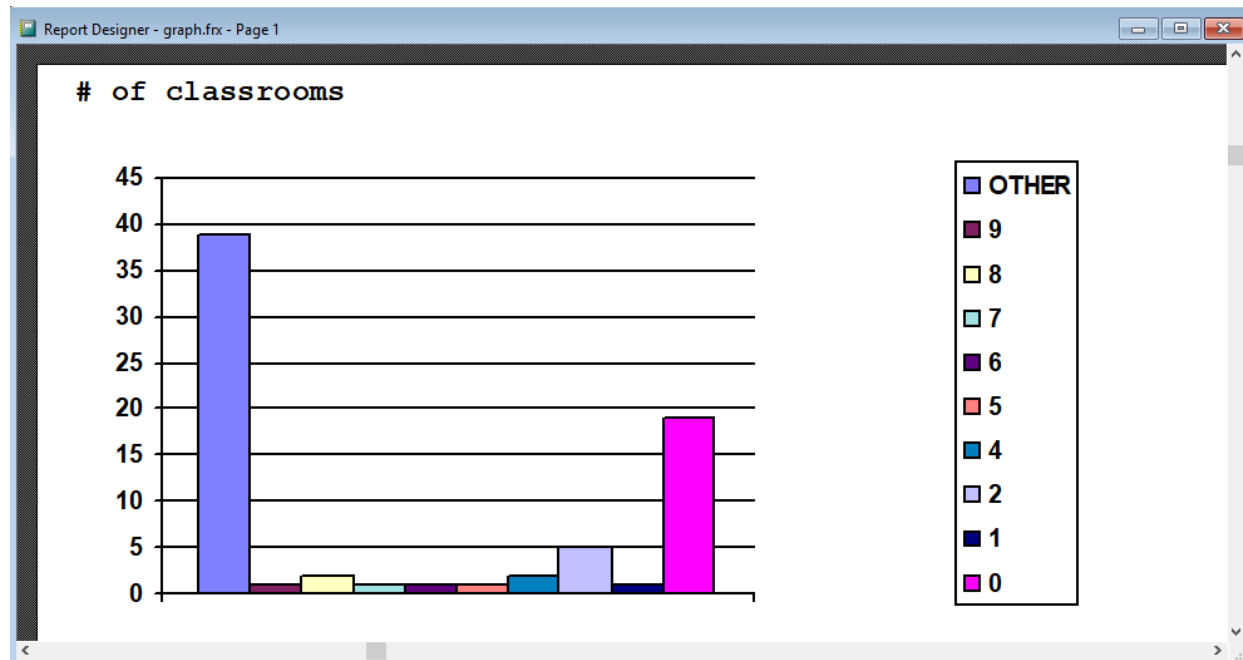
Click on the door icon next to the percent to return to the menu:

## Bar Graph

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

Depending on the data chosen, there will be a specific color to represent the data's bar.



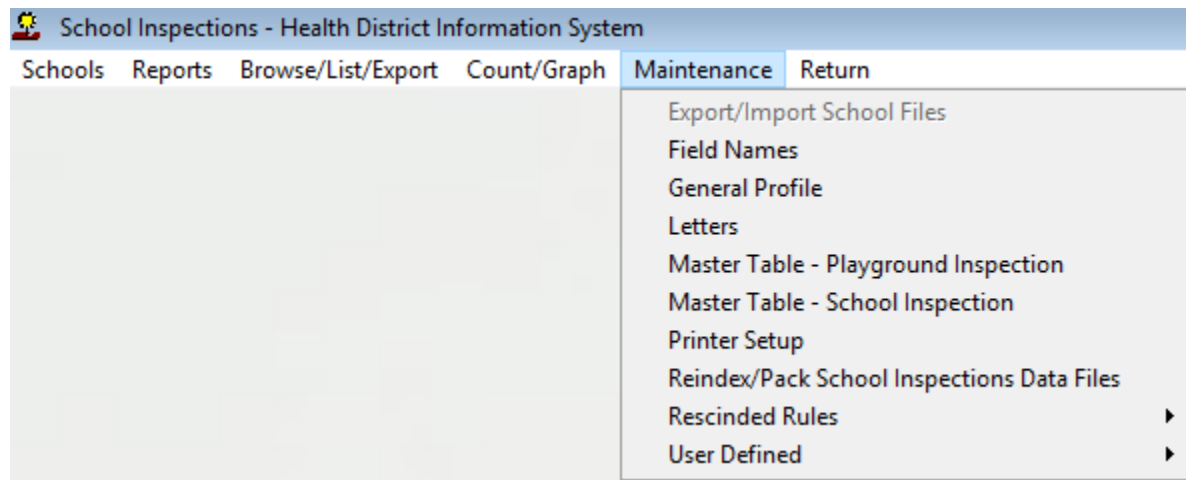Click on the door icon next to the percent to return to the menu:

# Chapter 6: Maintenance

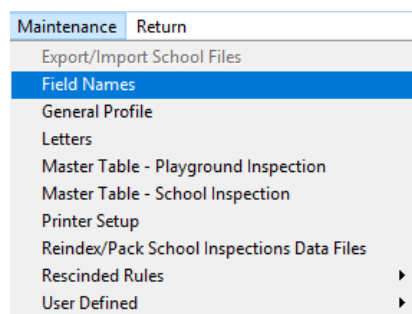Navigate to: **Environmental Health > School Inspection > Maintenance**

The Maintenance section holds a lot of the mechanics behind the module.

This area is where you can edit tables and adjust settings, along with other actions you use in the **School Inspections data entry windows.**

# Field Names

Navigate to: **Maintenance > Field Names**



The field names listing can be very useful in determining what fields you wish to utilize to merge data for letters or when creating ad hoc reports.  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*

See Letters for more information on Letters.
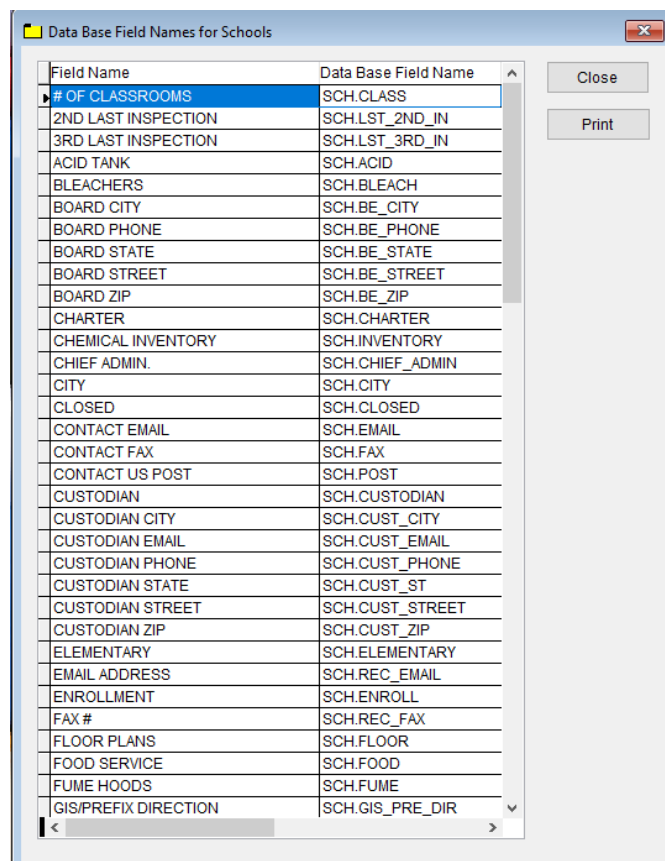
# General Profile

Navigate to: **Maintenance > General Profile**

The **General** Profile **allows** you to fill out the basic information regarding **School Inspections.**

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.

## Letters

Navigate to: **Maintenance > Notification Letters**

If you click on **Letters** under the **Maintenance** tab, a window will pop up.  Here you can create letters relating to a specific area under **School Inspections**.  <u>After reading this page, click this link to see more information on field names.</u>



The HDIS system provides you the flexibility to write standard letters that can be sent to clients. These letters will pull data through use of the *.  The * is placed on each end of the field name that you want to pull into the letter.

Merge fields:

|  |  |  |
|---|---|---|
| All upper case: | *OWNER* | JOHN DOE |
| Only first letter uppercase | *Owner* | John Doe |
| All lower case | *type of animal* | dog |

Examples: *OWNER*        = JOHN DOE

*Owner*        = John Doe

*type of animal*   = dog

## Printer Setup

Navigate to: **Maintenance > Printer Setup**

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

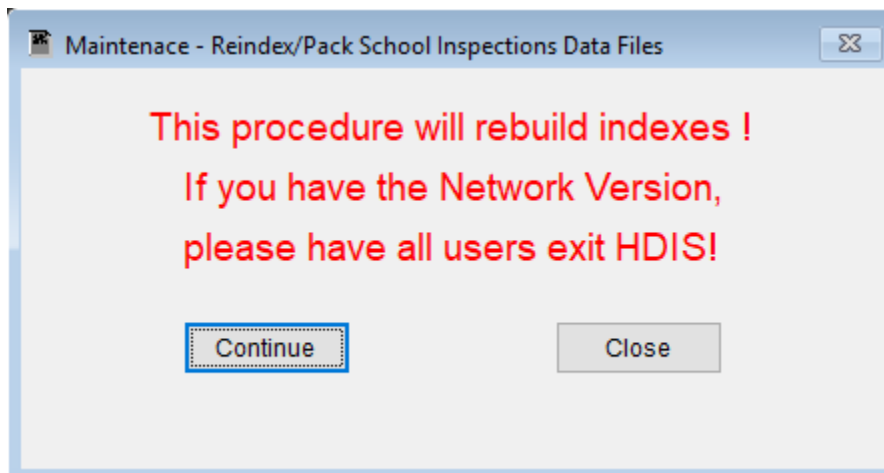Select the printer in the name dropdown and click **OK**.

# Reindex/Pack School Inspections Data Files

Navigate to: **Maintenance > Reindex/Pack School Inspections Data Files**

**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.**

## Rescinded Rules

### School Inspection Rules



This table holds all of the **School Inspection Rescinded Rules**:

- To permanently **delete** a rule, select the rule and **right-click**.

- Click **Print** button to print a copy of the rules.

- Click **Add** button to add a new rule.