

# Filters

## Browse/List/Export

## Count/Graph



User's Manual

**Filters**

**Browse/List/Export**

**Count/Graph**

Health District Information System

HDIS (Windows Ver. 4.0 )

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## About This Manual

This manual is designed to assist you in using the Filters, Browse/List/Export and Count/Graph menu selections that the HDIS system provides for you. These functions will help create your own ADHOC reports or export your HDIS data for a third part software, such as Microsoft's EXCEL or ACCESS. All three of these functions are available on all of your HDIS modules.

Note: **For Technical Support, (440) 235-1199**



# Filters

You may limit the information requested by using filters. When you create a filter, only records that match the filter expression are available for preview or print. From any **“Reports, Browse/List/Export”**, or **“Count/Graph”** you can click the **“Filters”** button.

Field Name		Data		Data	1st sort	2nd sort	3rd sort
# OF LICENSES	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2ND LAST INSPECTION	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3RD LAST INSPECTION	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AUDIT	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CITY	=	MENTOR	=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMISSARY H.D.	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMISSARY ID#	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMISSARY LICENSED HERE	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATE ISSUED	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATE PAID	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-MAIL BUSINESS OPERATOR	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-MAIL BUSINESS OWNER	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-MAIL CHAIN OWNER	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-MAIL MANAGER	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-MAIL OTHER	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FAX	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FSO	=		=		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Clear Filter, Open Filter, Save Filter, Close

In the example above we are using the filter options for printing out the vending applications. In this case, we want to limit the report to only print out the Vending Machines that are located in the city of “Mentor”.

Field/Button	Description
Field Name	Name of field
=	equal to
>	greater than
<	less than
=>	equal to or greater than
=<	equal to or less than
<>	not equal to
Data	Data values/descriptions for which you are searching.
=	equal to
>	greater than
<	less than

=>	equal to or greater than
=<	equal to or less than
<>	not equal to
Data	When doing a range, data values/descriptions for which you are searching.
1 <sup>st</sup> sort	First sort for the data selected
2 <sup>nd</sup> sort	Second sort for the data selected
3 <sup>rd</sup> sort	Third sort for the data selected
Save Filter	Saves filter created for later use
Open Filter	Opens a saved filter
Clear Filter	Clears all filters.

**\*\*Other Examples of data:**

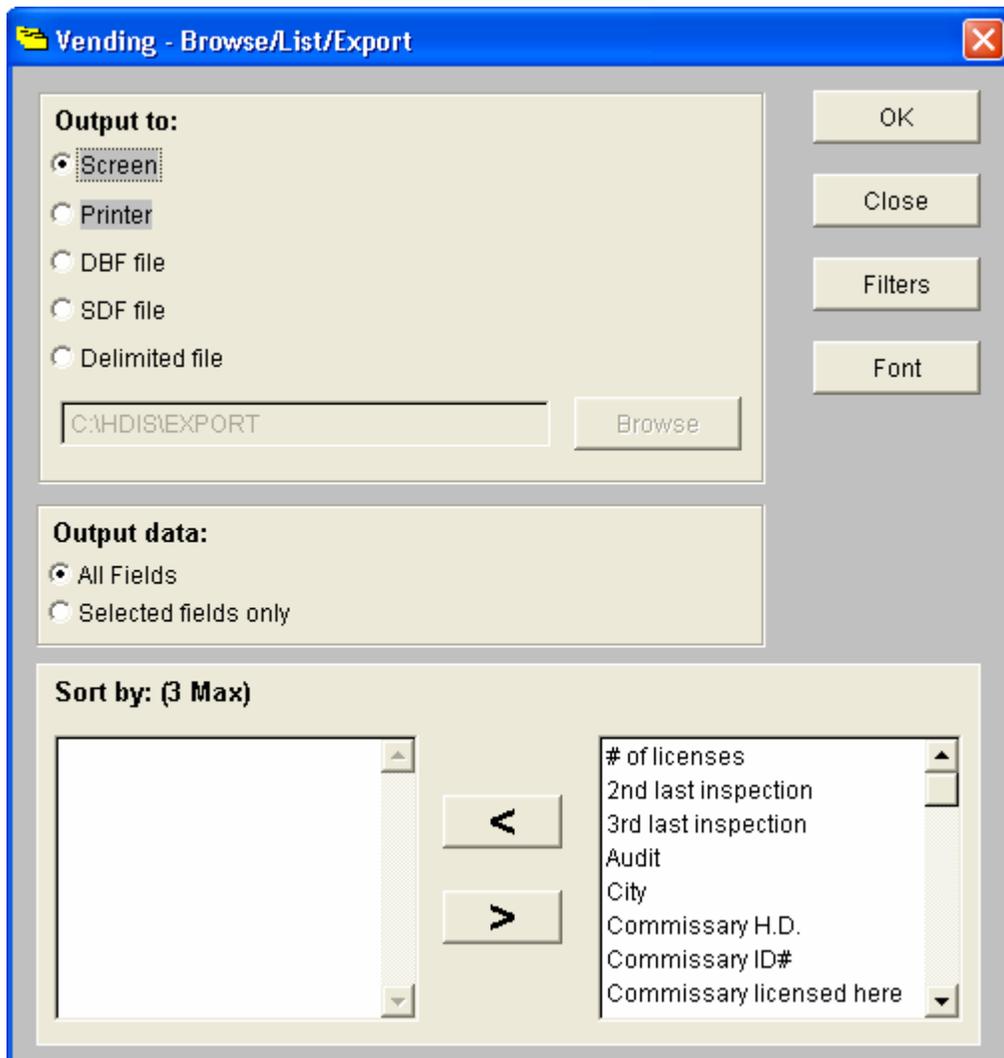
Inspector's Code = 01  
 Political Subdivision Code=03  
 City=Painesville

Some filters might involve a range of data.

Date Issued           =>   01/01/2005           =<   12/31/2005  
 Or  
 License               =>   9001200           =<   9001300

## Browse/List/Export

Browse/List/Export allows you to create reports and lists, which may be previewed, printed, or exported.

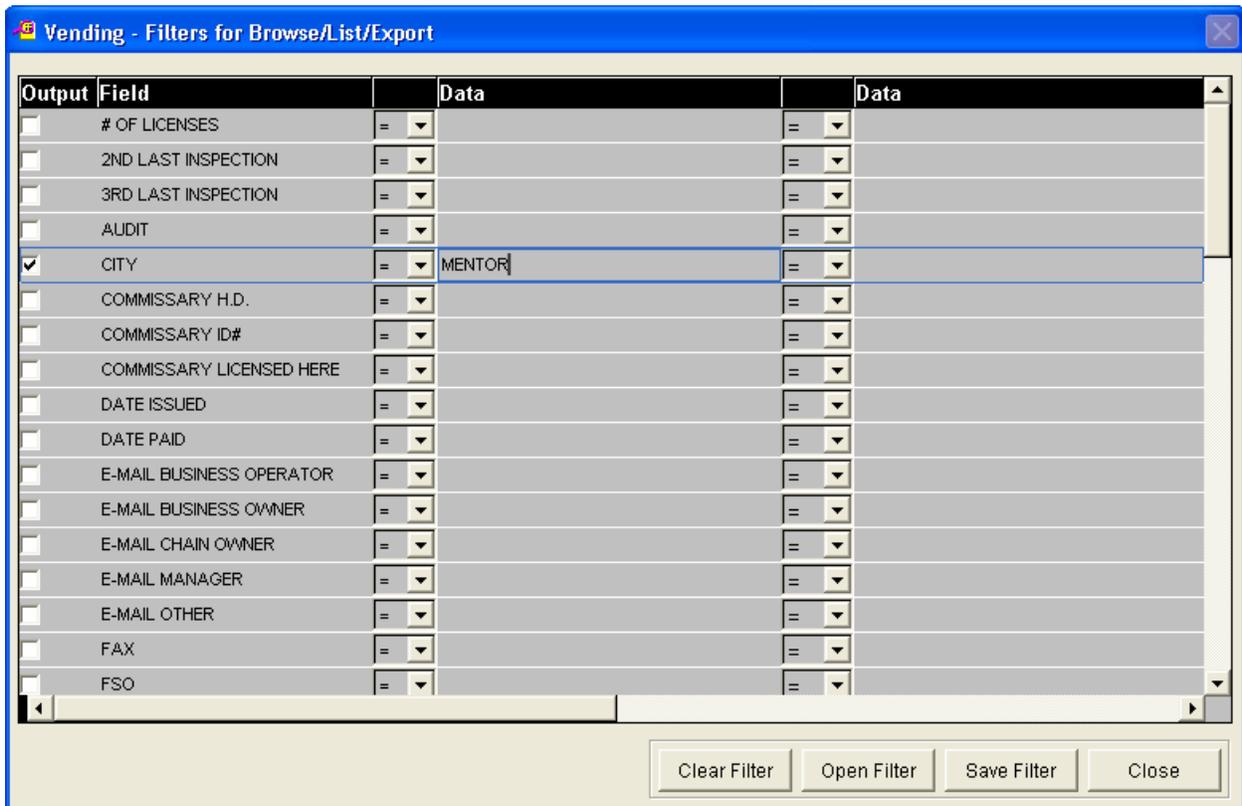


Field/Button	Description
Screen	Outputs the data to the screen
Printer	Outputs the data to the printer
DBF file	Outputs the data as a .dbf file
SDF file	Outputs the data as a .sdf file (COBOL column oriented - disregard)
Delimited file	Outputs the data as a delimited file
Browse	Browse to the location you wish to export the data
All Fields	Outputs all data fields
Selected fields only	Outputs the selected fields only
Sort by: (3 Max)	Sorts the data by the field(s) chosen
OK	Starts the report
Close	Closes the report

Filters	See Filters
Font	Select font for report

The “**Browse/List/Export**” Filters window has an additional column on the far left named “**Output**”. By putting a check in the box to the left of selected fields, you will limit your output to just those fields.

## **Browse/List/Export - Creating a Report**

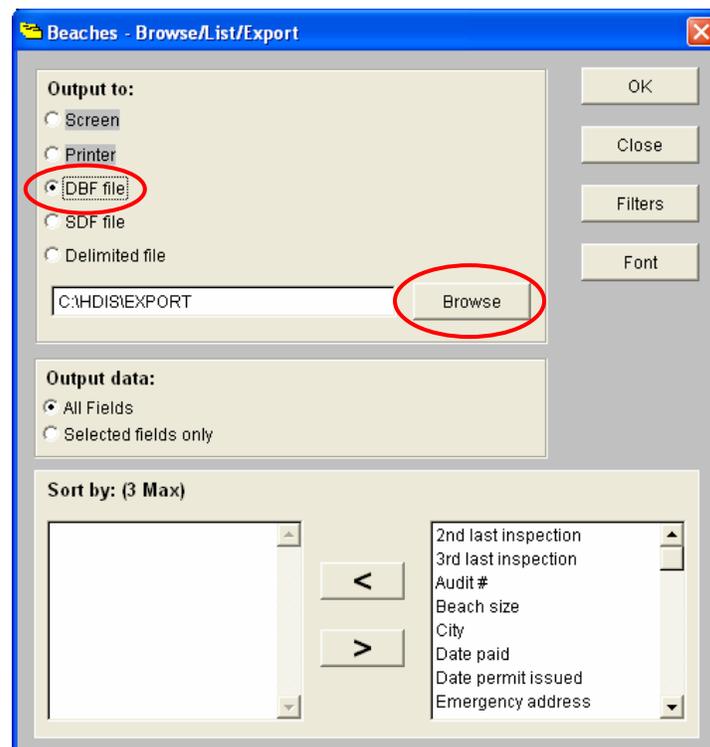


In the example above, we are using the filters function to produce a report that brings up all of the Vending Machines that are located in the city of "Mentor".

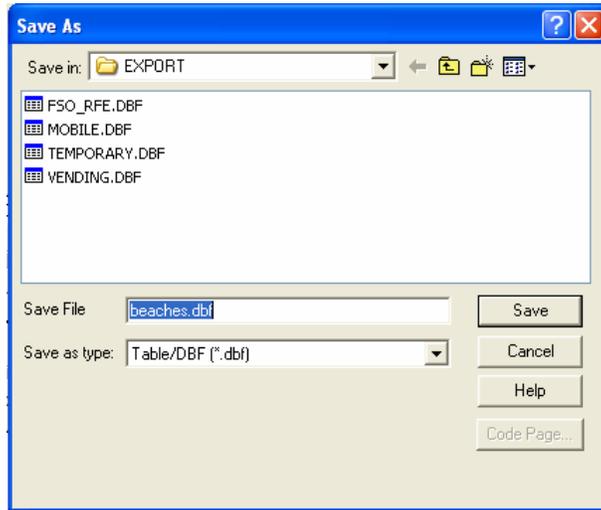
\*\* Remember to check the "Output" checkbox for the field you wish to limit your data to.

## Browse/List/Export - Exporting DBF File to Excel

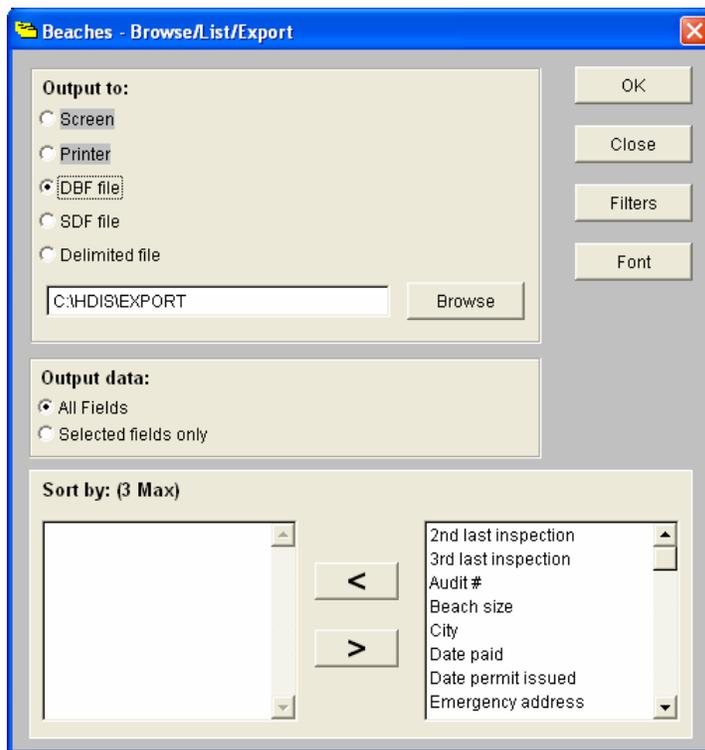
In this case, we are using the “**Browse/List/Export**” function to export the “**Beaches**” .dbf file to Excel.



In the “**Browse/List/Export**” window, under “**Output to:**” select “**DBF**” file. Next, click the “**Browse**” button to indicate where the export file will be saved. You also have the option to use filters to select specific fields you wish to export. Otherwise, all fields will be exported.

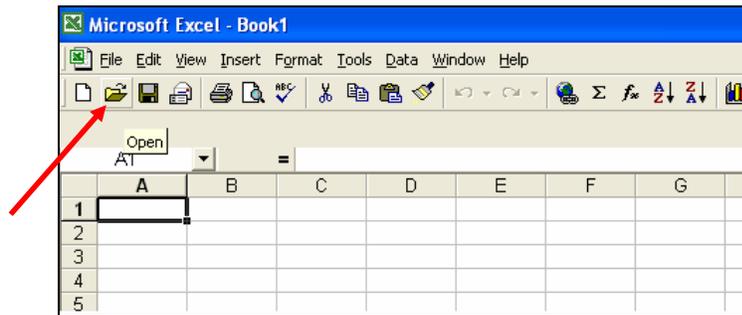


The **“Save As”** window will open and your file will already be given a name. In this case, the program named the file **“beaches.dbf”**. If you wish, you are able to change the name of the file. All files will be saved in the **“C:\HDIS\EXPORT”** folder as a default unless you change the destination folder. When you are finished, click the **“Save”** button. This will take you back to the **“Browse/List/Export”** window.

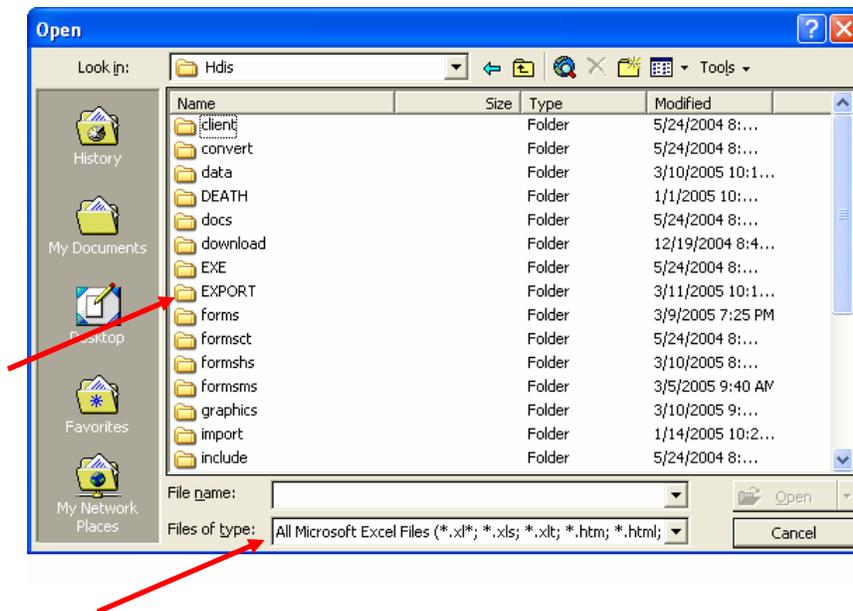


Click the **“OK”** button to save the data selected to your export file.

Next, we will open the exported file in “Excel”.  
Open Microsoft’s “Excel”.

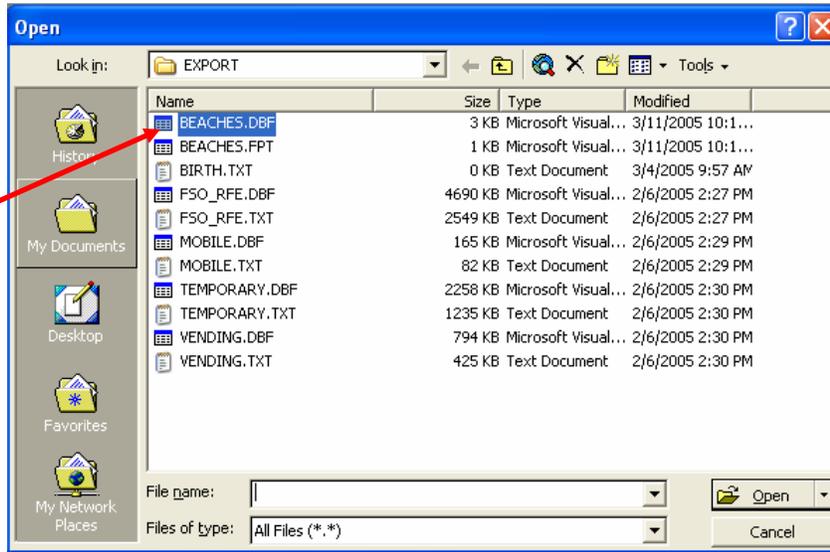


In Excel, click the yellow “Open” folder.



In the “OPEN” dialog window, change the “Files of Type” to “dBase files (\*.dbf)”.  
Locate the “HDIS” folder and then choose the “EXPORT” folder and click the “Open”  
button.

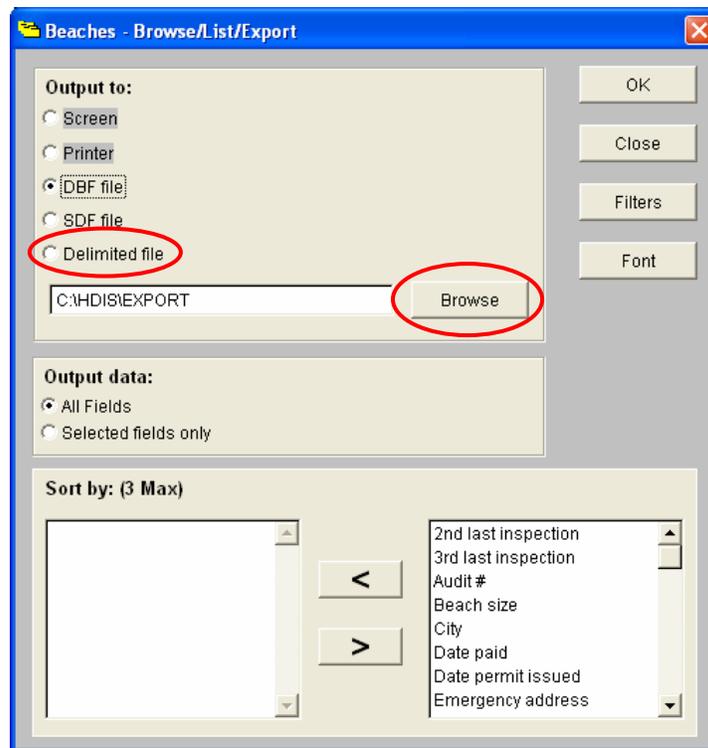
Remember, all exported data in “HDIS” will be sent to the “EXPORT” folder unless you  
specified a different destination folder.



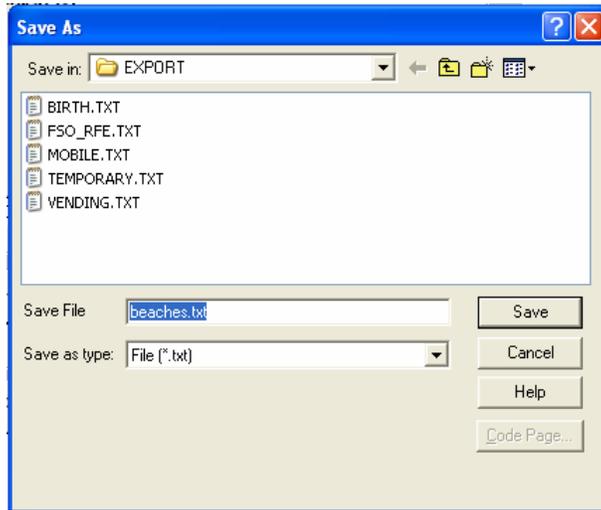
In the **“Open Window”**, find your file and click the **“Open”** button to open the file in Excel.

## Browse/List/Export - Exporting a Delimited File to Excel

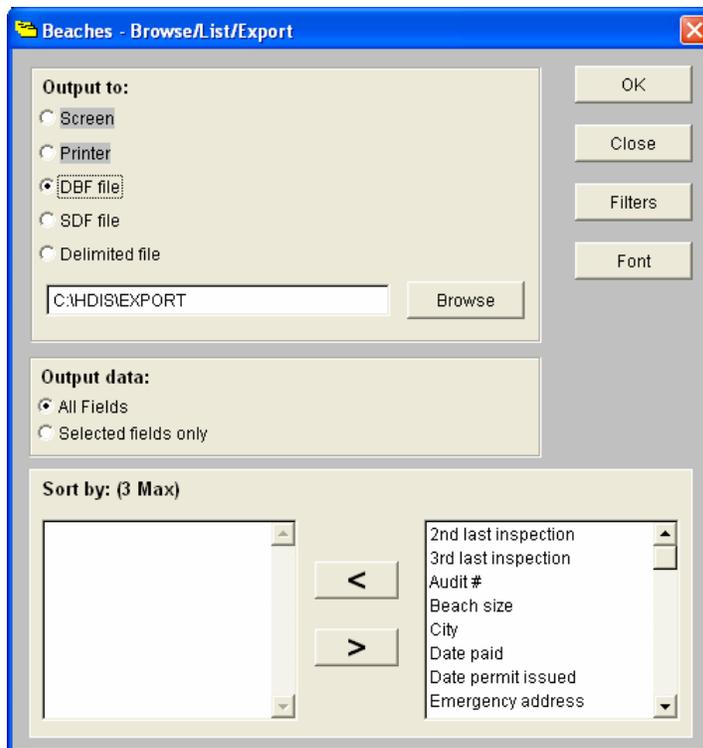
Now we are going to use the **“Browse/List/Export”** function to export the **“Beaches”** .delimited file to Excel.



In the **“Browse/List/Export”** window, under **“Output to:”** select **“Delimited file”**. Next, click the **“Browse”** button to indicate where the export file will be saved. You also have the option to use filters to select specific fields you wish to export. Otherwise, all fields will be exported

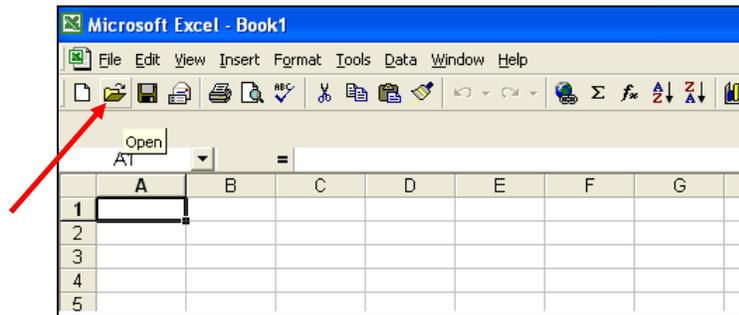


The **“Save As”** window will open and your file will already be given a name. In this case, the program named the file **“beaches.txt”**. If you wish, you are able to change the name of the file. All files will be saved in the **“C:\HDIS\EXPORT”** folder as a default unless you change the destination folder. When you are finished, click the **“Save”** button. This will take you back to the **“Browse/List/Export”** window.

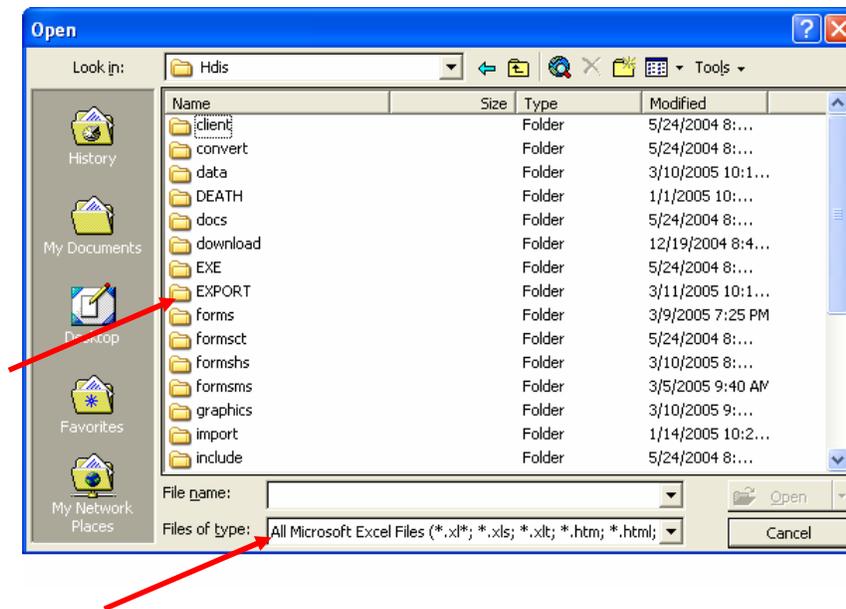


Click the **“OK”** button to save the data selected to your export file.

Next, we will open the exported file in “Excel”.  
Open Microsoft’s “Excel”.

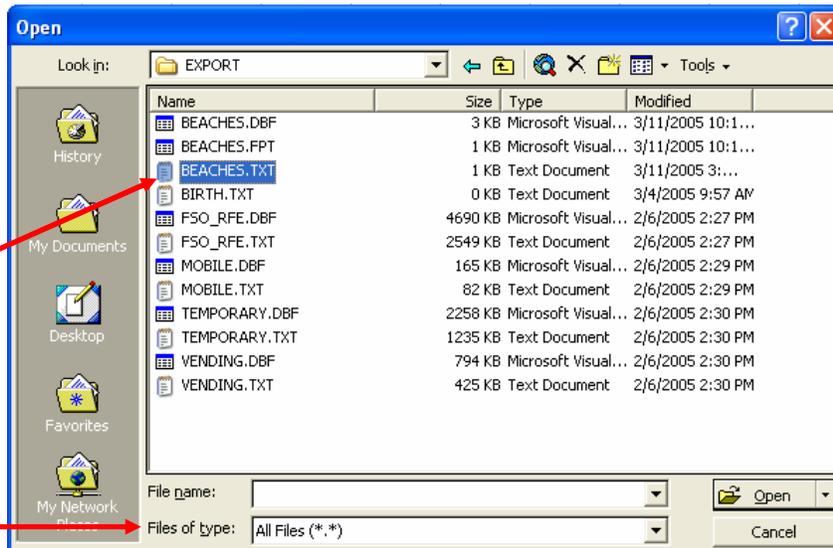


In Excel, click the yellow “Open” folder.

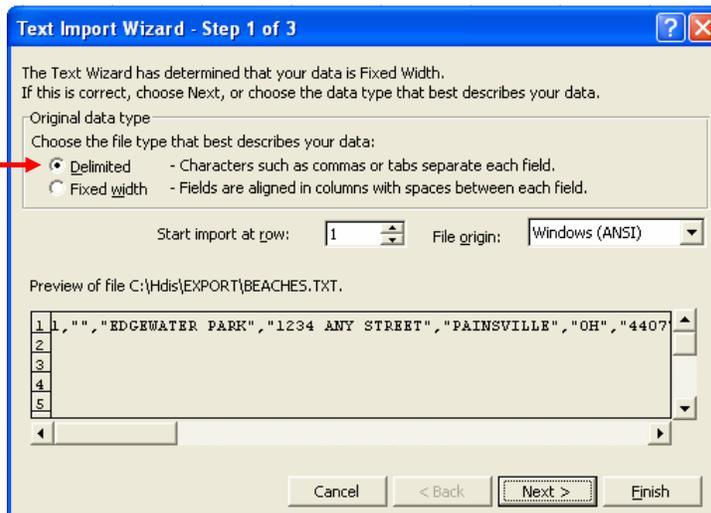


In the “OPEN” dialog window, change the “Files of Type” to “Text Files (\*.prn; \*.txt; \*.csv)”. Locate the “HDIS” folder and then choose the “EXPORT” folder and click the “Open” button.

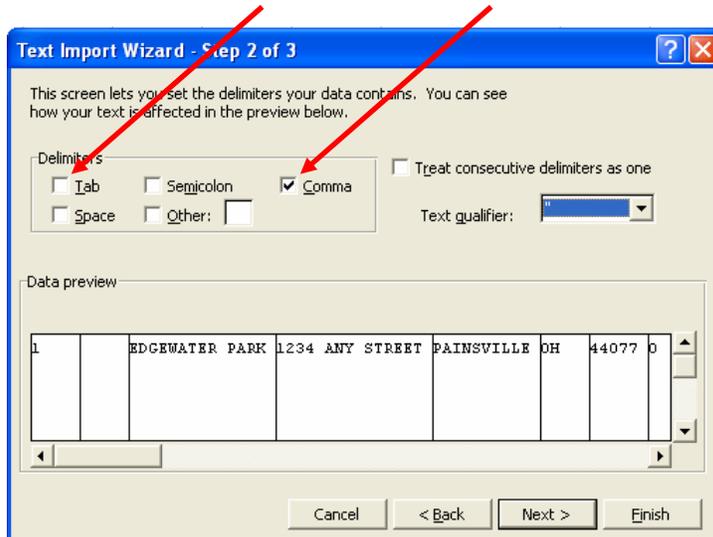
Remember, all exported data in “HDIS” will be sent to the “EXPORT” folder unless you specified a different destination folder.



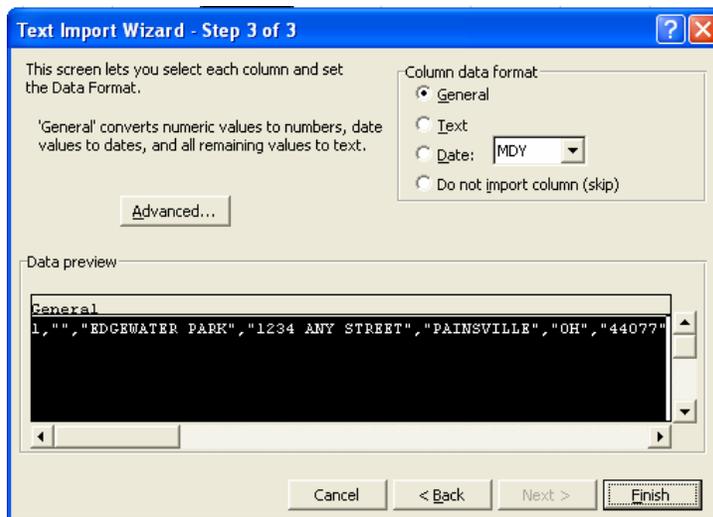
In the “**Open Window**”, find your file and click the “**Open**” button to open the file in Excel.



The “**Text Import Wizard**” window will open.  
 Make sure that you have selected “**Delimited**”.  
 Click “**Next**”.



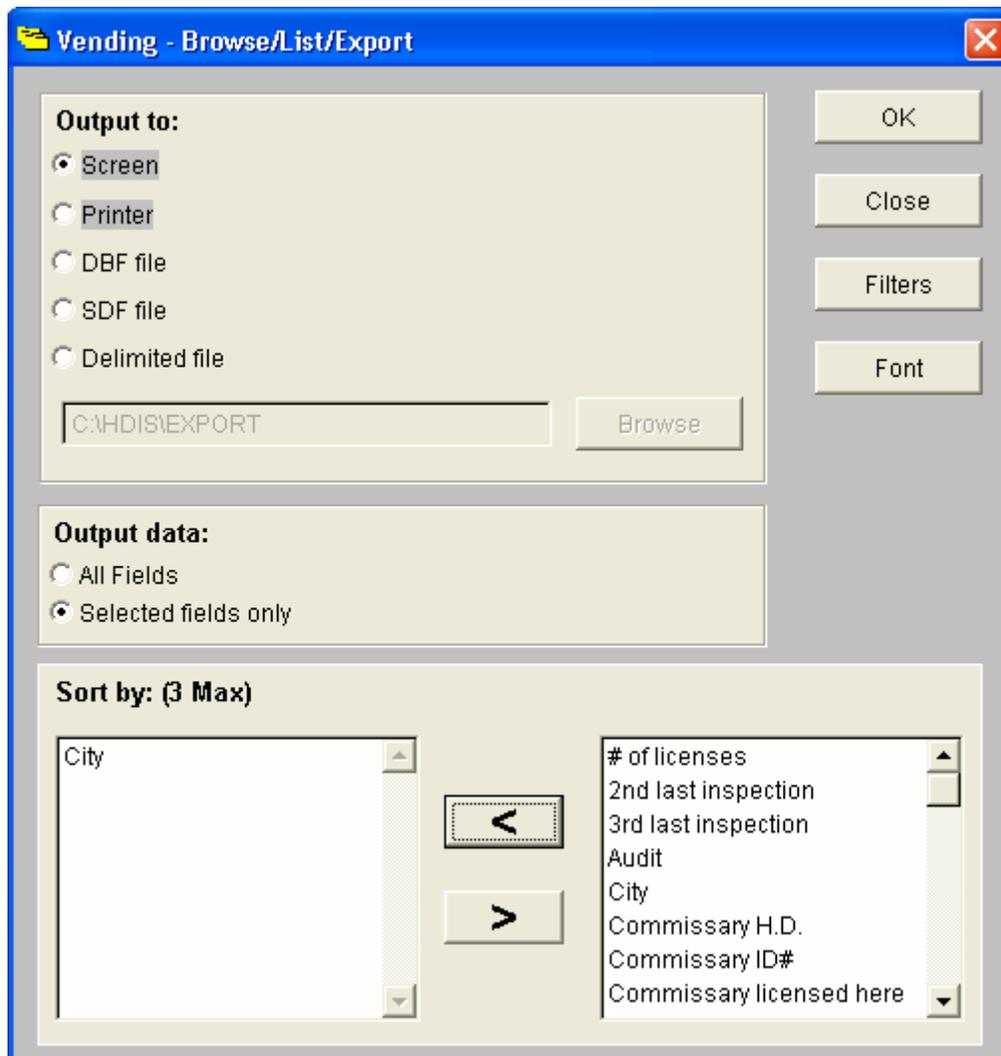
In the “**Delimiters Box**” uncheck “**Tab**”.  
Click “**Comma**”.  
Click “**Next**”.



You may indicate the type of data in each column by selecting the column and then selecting the “**Column Data Format**”.

Click “**Finish**” button when done.

## Browse/List/Export - Using the Sort Function



Information is presented by name in alphabetical order. **To change this sort, highlight the field name on the right window and click the < button to remove this item from the sort. Then, highlight the item wanted in the left window and click the > button.**

The sort function allows you to sort the data in the report. In the example above, the data in the report will be sorted by "City".

# Count/Graph

You can create reports that generate aggregate data that may be presented as a Count, **pie graph or bar graph**. In the following examples we are going to use the count/graph function to count the number of Vendors in each city.

Field/Button	Description
Report Title	Enter a report title (optional)
Legend Title	Enter the legend title (optional)
Footer	Describes graph (optional)
Output to	Select location of output
Output	<b>Top ten</b> - distributes for the top ten and groups the remaining data collectively under other. Select <b>All</b> - all data is displayed
Count	Prints count and percentage report
Pie Graph	Pie graph format with a legend
Bar Graph	Bar graph format with a legend
Pie Graph (full page)	Pie graph format on a full page
Bar Graph (full page)	Bar graph format on a full page
High to Low	Sorts data from highest count to lowest
Low to High	Sorts data from lowest count to highest
Data	Sorts alpha or numeric based on the selected data

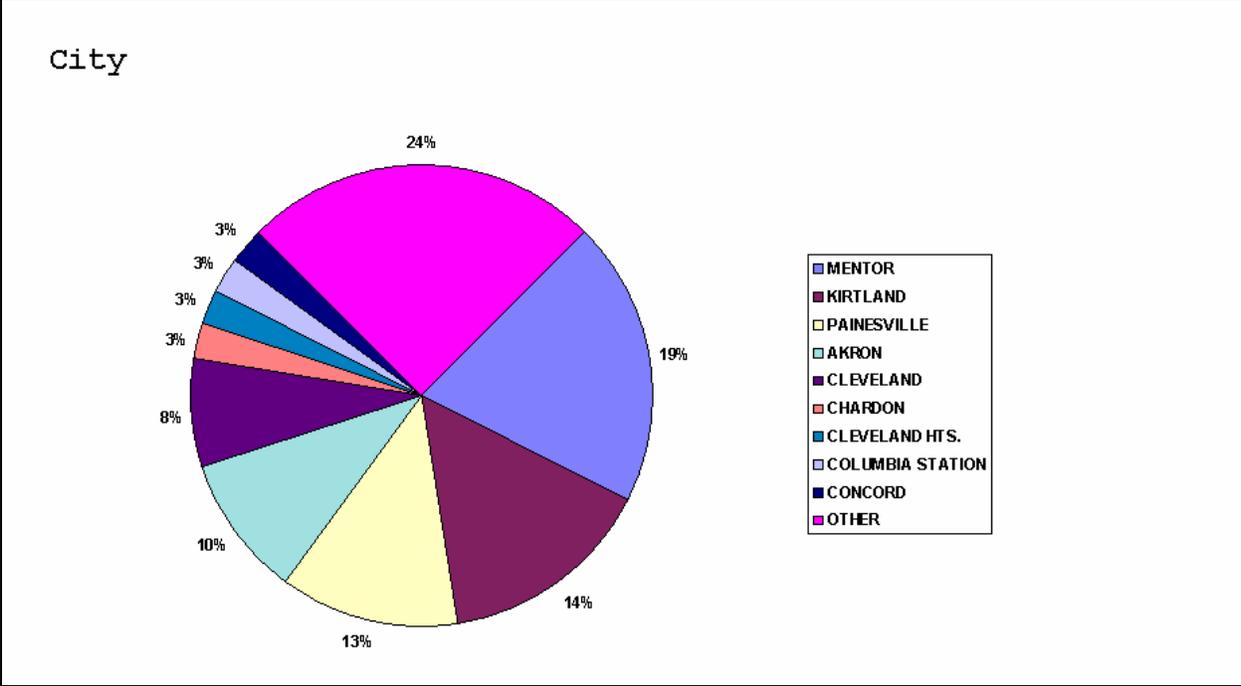
Filters	Create filters for data
Close	Closes the table
OK	Runs the report
Browse	Browse to the location you wish to export the data to

## Count Report

<b>City - Count/Percentage</b>		
<b>Number</b>	<b>Percent</b>	<b>City</b>
8	20 %	MENTOR
6	15 %	KIRTLAND
5	13 %	PAINESVILLE
4	10 %	AKRON
3	8 %	CLEVELAND
1	3 %	CHARDON
1	3 %	CLEVELAND HTS.
1	3 %	COLUMBIA STATION
1	3 %	CONCORD
10	25 %	OTHER
40	100 %	<b>Totals</b>

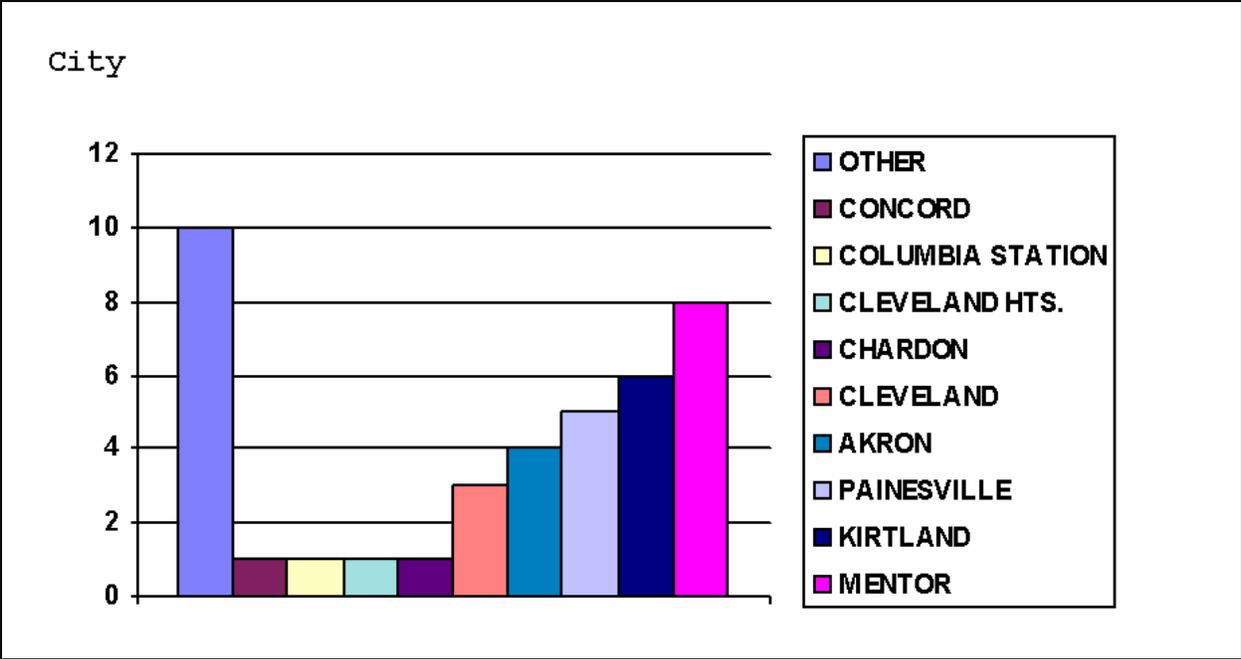
The **Count Report** shows how many Vending Machines are in each city together with a percentage.

## Pie Graph



The pie graph shows how many Vending Machines are in each city.

**Bar Graph**



The bar graph shows how many Vending Machines are in each city.

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