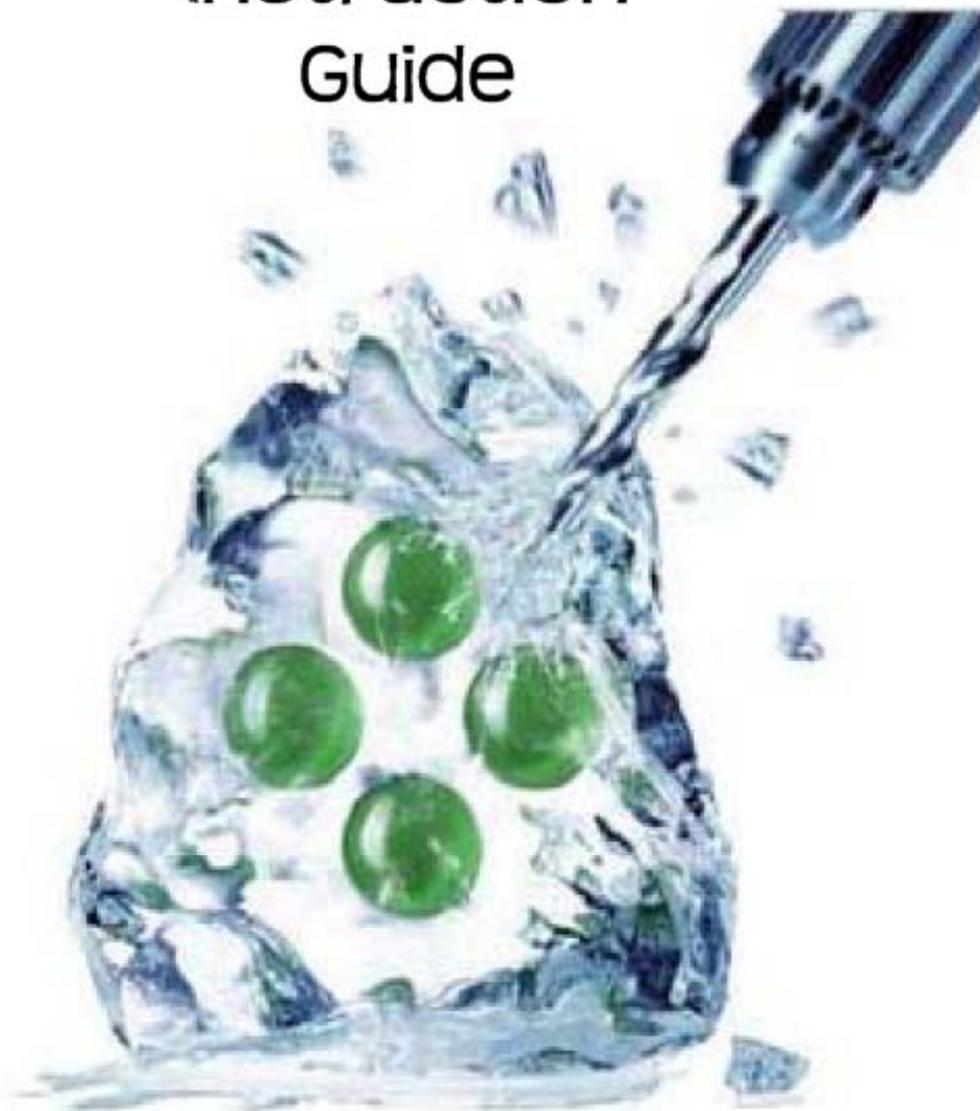


# crystal reports

## Instruction Guide



*Special Health Care Needs  
Department of Health & Senior Services*



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## Internet and MOHSAIC Support page Access

- In order to access Crystal Reports, open an Internet connection, i.e. Internet Explorer Icon.



- Type the following address in the address field of the Internet Explorer page:  
<http://172.17.34.5/mohsaic/>



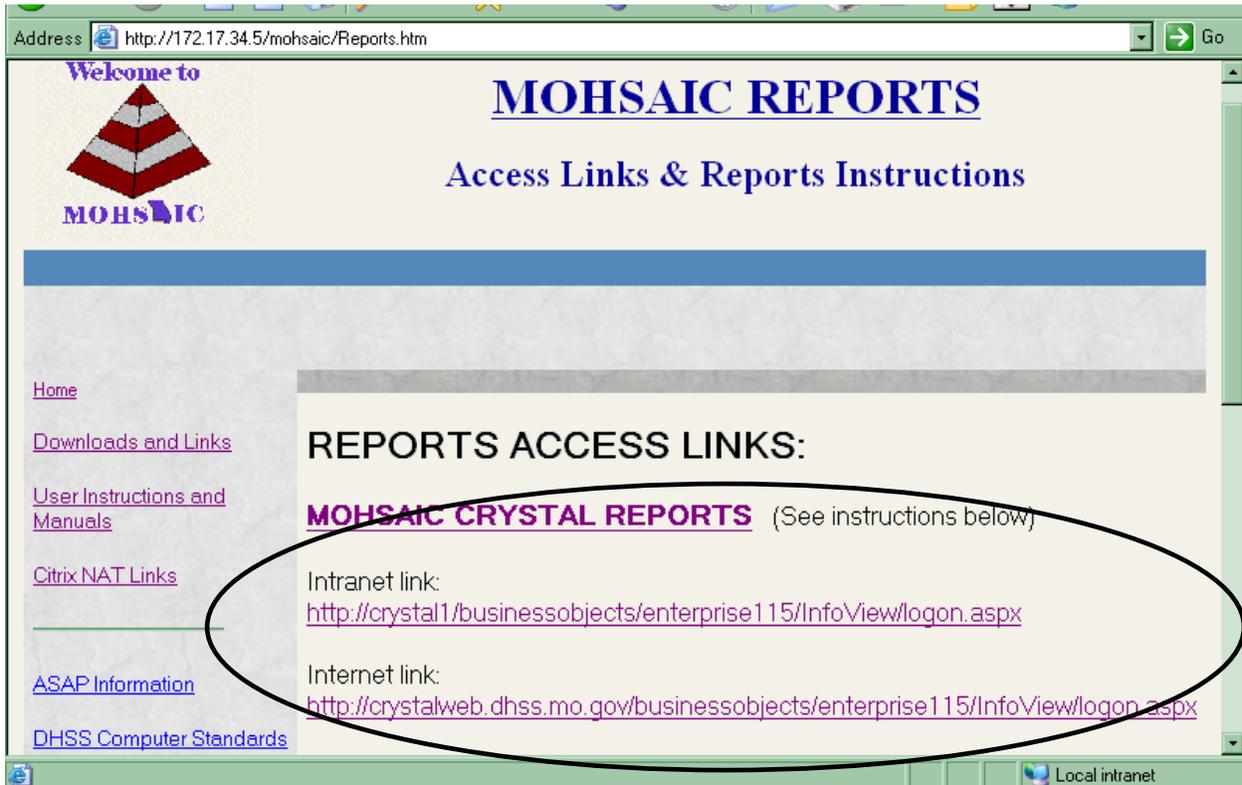
- The MOHSAIC Support page displays, select the Reports link on the left side of the screen.



## MOHSAIC Reports page:

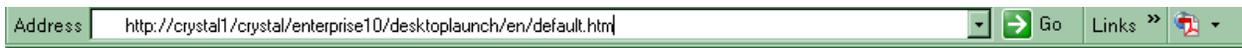
The MOHSAIC Reports screen displays; scroll down on the page to select the appropriate link:

- If the user is a DHSS Intranet user, select the Crystal Reports **Intranet** link.
- If the user is an Internet user, select the Crystal Reports **Internet** link.



## TIP:

- If the user types the link, in its entirety and exactly as listed, in a Web Address field the user will be linked to the Crystal Reports website.



## CRYSTAL REPORTS – SECURITY LOG ON:

The BusinessObjects security logon screen will display.

Business Objects

Log On to InfoView

Welcome to BusinessObjects

Enter your user information and click Log On.  
(if you are unsure of your account information, contact your system administrator)

System: crystal1

User name: [REDACTED]

Password: [REDACTED]

Authentication: Enterprise

Log On

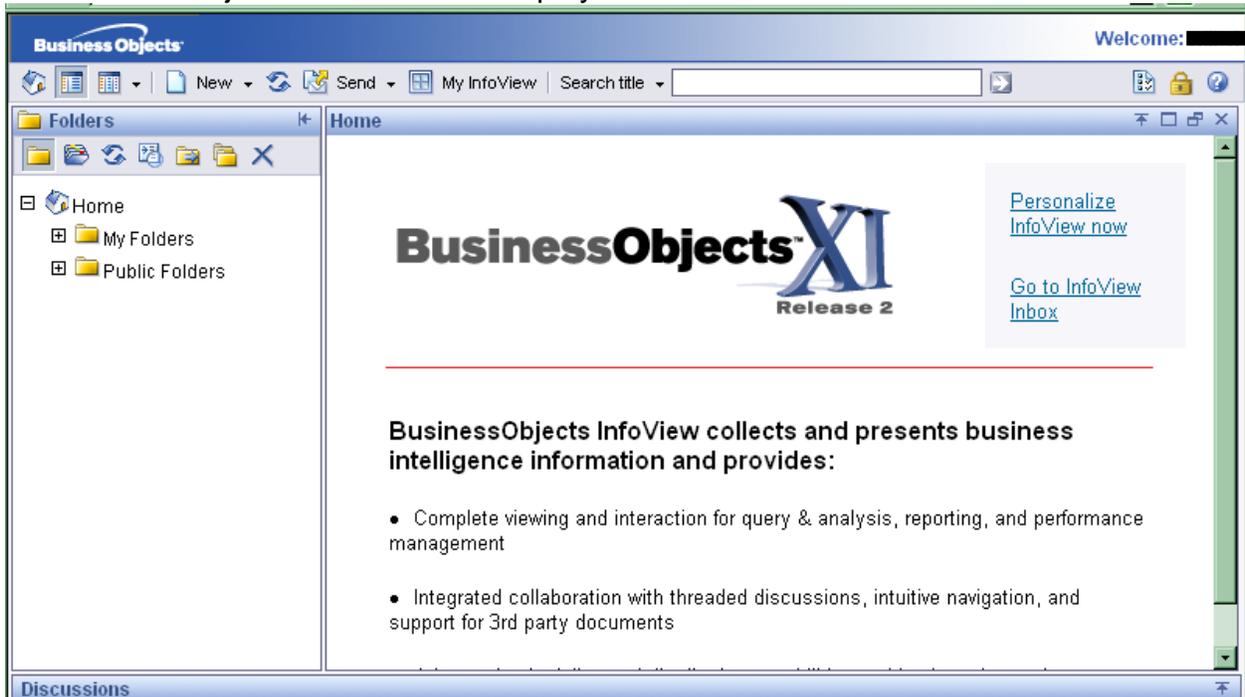
Done Internet

- User ID field is the same ID as your MOHSAIC login, the first five (5) digits of your last name and the first initial of your first name. (When a user's last name is less than five (5) letters the ID is usually the entire last name, first letter of the first name, followed by number(s) to make a six (6) digit User ID.)
- Password is the first and last name initials with the last four (4) digits of the social security number.

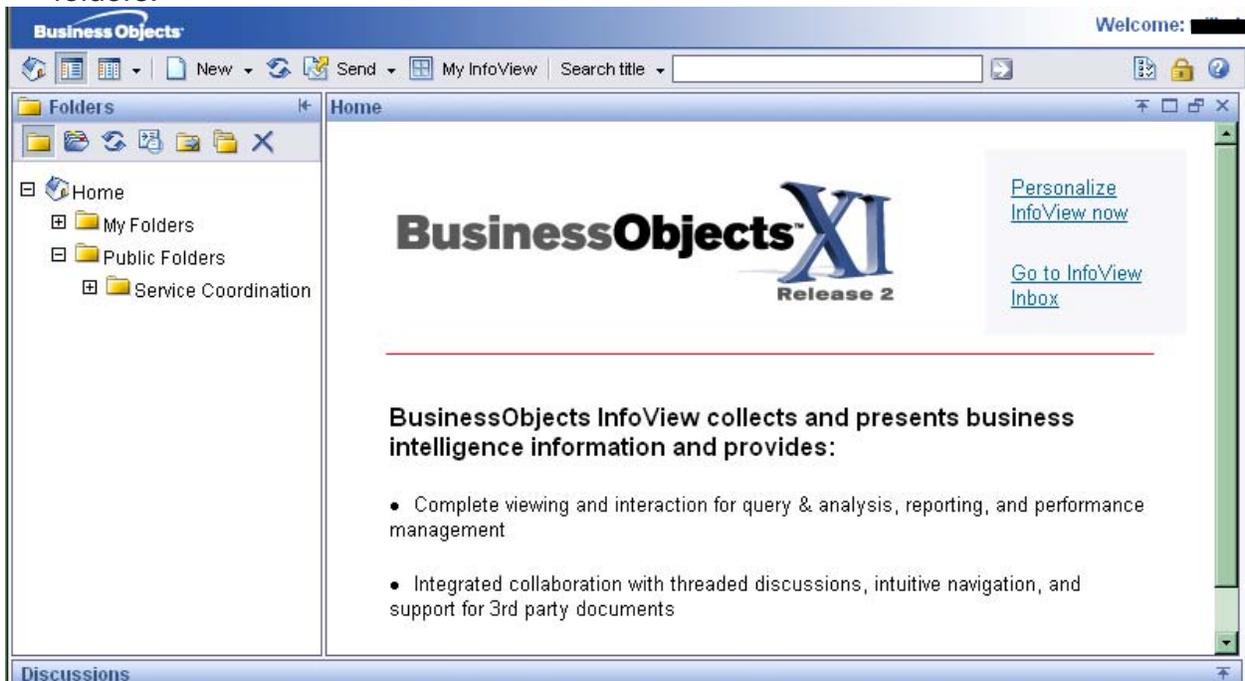
Example: John Smith would be JS1234.

## CRYSTAL Reports – Service Coordination Report Folder Access:

- BusinessObjects XI screen will display.

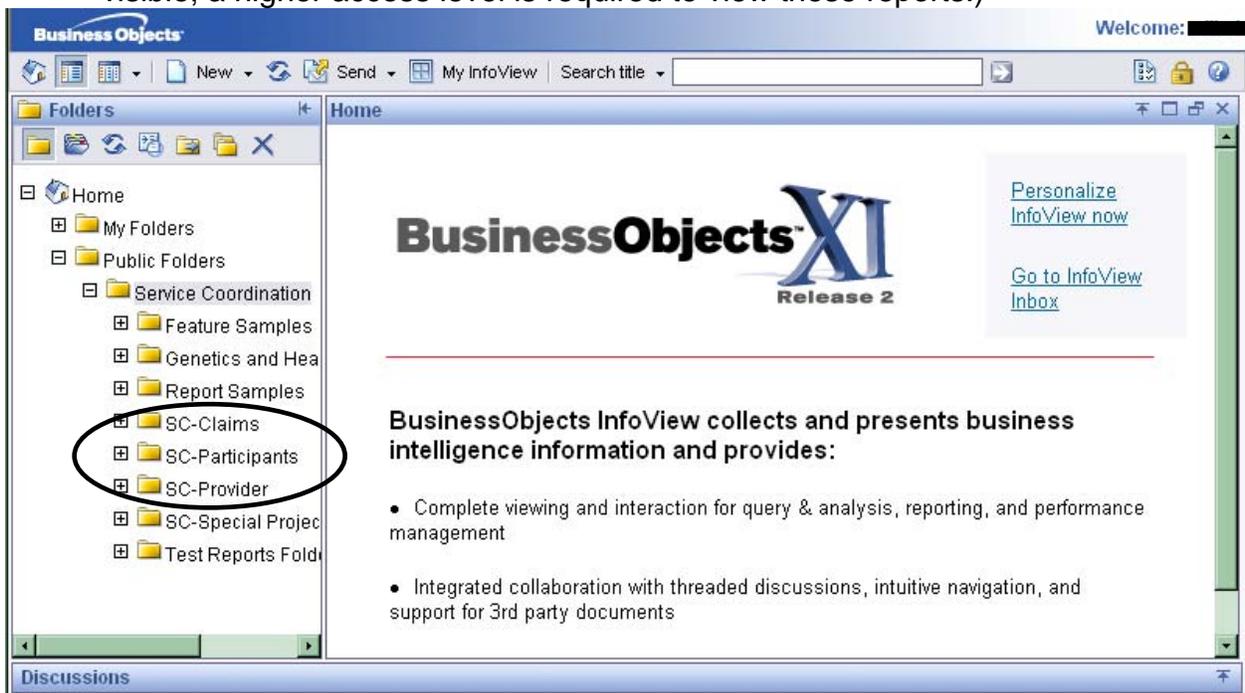


- To access all SHCN reports, select the + next to the Public Folder to open the folder.
- Select the + next to the Service Coordination folder to reveal all SHCN report folders.



## CRYSTAL Reports – Service Coordination Report folders:

- All SHCN folders display under the Service Coordination folder.
- The User Name defines which reports can be accessed.
- To open a report folder, select the name of the report folder (do not use the +).
  - SC-Claims contain reports pertaining to participant claims
  - SC-Participants contain reports pertaining to participants.
  - SC-Providers contain reports pertaining to SHCN providers
  - SC-Special Projects contain reports developed by SHCN for special requests. (Report titles are only visible; a higher access level is required to view these reports.)
  - Test Reports contain reports being developed by SHCN. (Report titles are only visible; a higher access level is required to view these reports.)



### TIP:

Example: Select SC – Participants (the folder title, not the +)

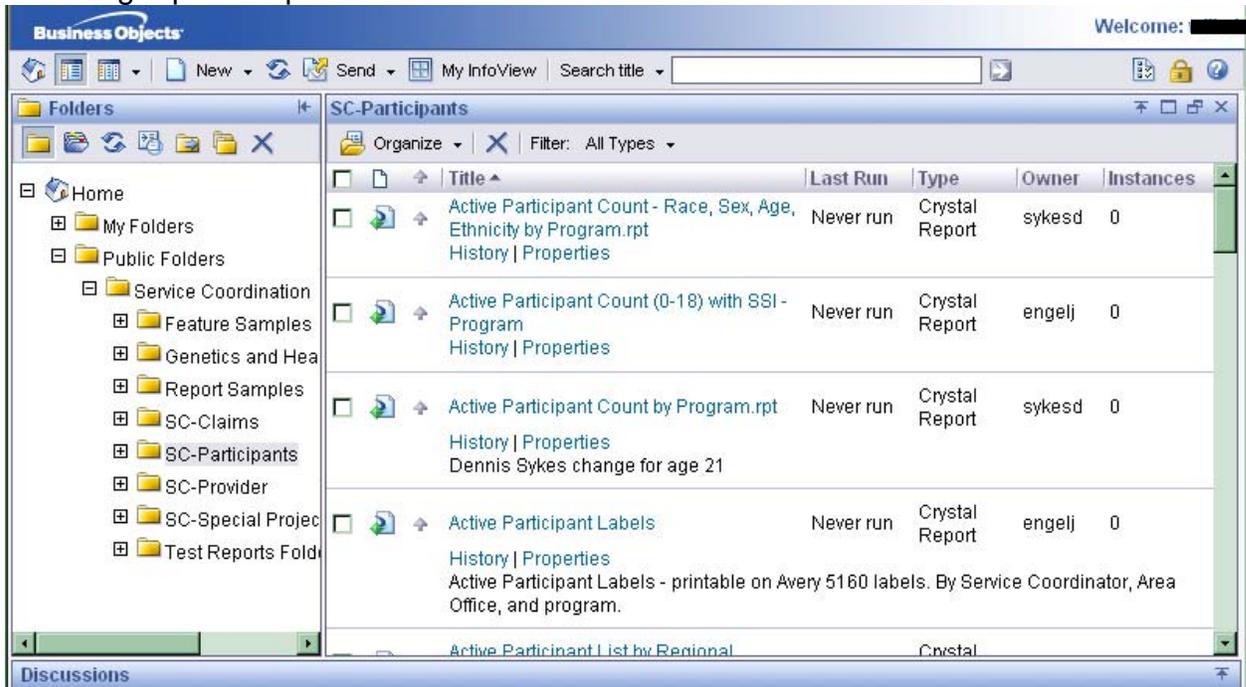
- The reports will display in alphabetical order on the right side of the screen.

## VIEWING REPORTS:

- To view a report, select the name of a desired report by placing the mouse over the report title on the right side of the screen (cursor will change to a hand ) and select the report.

### TIP:

- Note the type of report requested, count vs. listing. The significance between the two choices occurs in exporting, count reports export into Word documents and listing reports export into Excel documents.

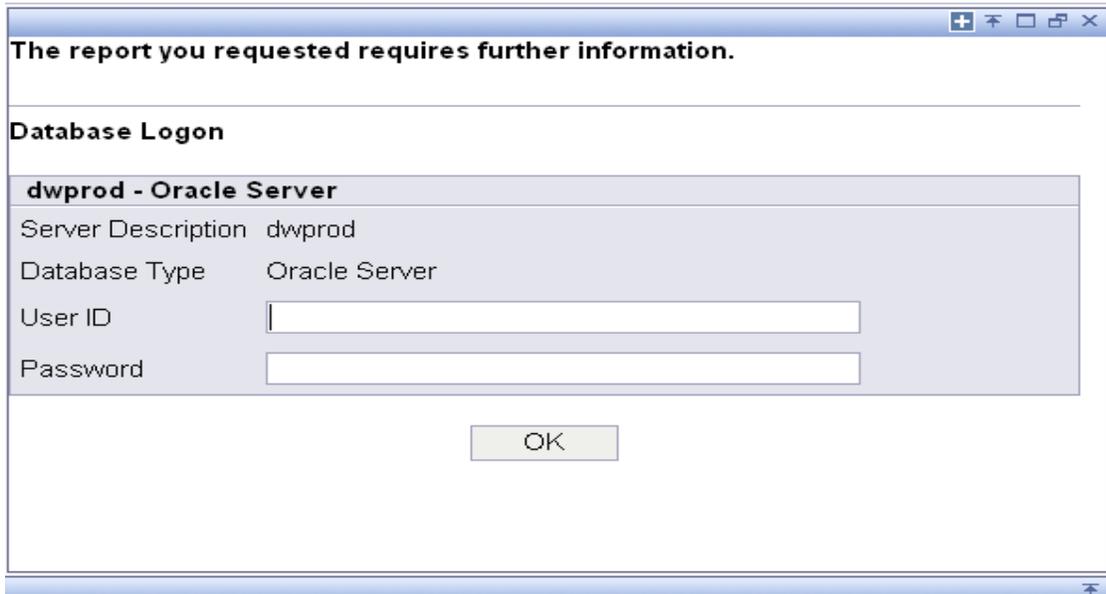


### TIP:

- Button Functions are:
-  - The panel will be shown in a new window
-  - Will hide the header panel
-  - Maximizes the panel
-  - Restores the panel to a previous view
-  - Returns to the last main workspace page view.

## VIEWING REPORTS – Secondary Security Log On:

- A second Database Logon screen will require the same information as the first security logon.
- Complete the User Name and Password fields.
- Select the 'OK' button.



The screenshot shows a Windows-style dialog box titled "The report you requested requires further information." Below the title bar, the text "Database Logon" is displayed. The main content area is titled "dwprod - Oracle Server" and contains the following fields:

Server Description	dwprod
Database Type	Oracle Server
User ID	<input type="text"/>
Password	<input type="password"/>

At the bottom center of the dialog box is an "OK" button.

### TIP:

- User ID field is the same ID as your MOHSAIC login, the first five (5) digits of your last name and the first initial of your first name. (When a user's last name is less than five (5) letters the ID is usually the entire last name, first letter of the first name, followed by number(s) to make a six (6) digit User ID.)
- Password is your first and last name initials with the last four (4) digits of your social security number. Example: John Smith would be JS1234.

## VIEWING REPORTS –Parameter Field(s):

- For reports with multiple Parameter fields, the user may need to scroll down the page to view all required parameter fields.

Enter prompt values.

---

**Select one or many Programs for this report**

Available Values:

- ALL
- HEAD INJURY SERVICES
- HEALTHY CHILDREN AND YOUTH
- HOPE
- MONITORED CASELOAD
- PHYSICAL DISABILITIES WAIVER
- SERVICE COORDINATION

Selected Values:

Enter a Value:

---

**Enter the report's Begin Date** BeginDate

Please enter Date in format "yyyy-mm-dd".

...

Enter a Value:

---

**Enter the report's End Date** EndDate

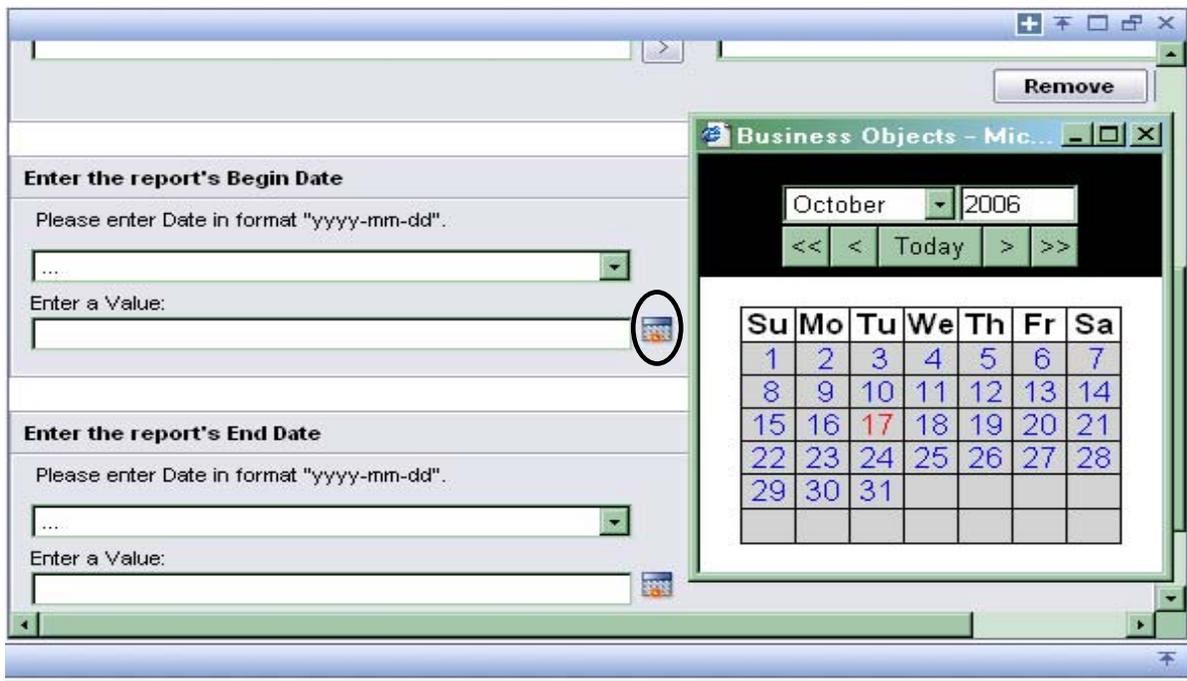
Please enter Date in format "yyyy-mm-dd".

...

Enter a Value:

## VIEWING REPORTS – Date Parameter Fields:

- A Crystal Parameter Field(s) requiring a Date has a Calendar icon to the right of the Value field.
  - A calendar will display when the calendar icon is selected. Choose the appropriate month and year **before** selecting the appropriate day.
- Additional drop down fields will allow user to select the specific entries needed.



## VIEWING REPORTS – Add button:

- Some fields require a selection to be chosen and then added to the 'Selected Values' section to have multiple choices combined in one report.
  - Example: Both programs (Hope Program, & Adult Head Injury Program) vs. just one program report for Hope Program or AHI Program.

Enter prompt values.

Select one or many Programs for this report

Available Values:

- ALL
- HEAD INJURY SERVICES
- HEALTHY CHILDREN AND YOUTH
- HOPE
- MONITORED CASELOAD
- PHYSICAL DISABILITIES WAIVER
- SERVICE COORDINATION

Selected Values:

- HOPE
- HEAD INJURY SERVICES

Enter a Value:

Remove

Enter the report's Begin Date

BeginDate

- Select 'OK' when all the Crystal Parameter Field(s) is entered.
- Crystal Reports will display the report when the entire report can be viewed or downloaded. Be patient, some reports may take a couple of minutes to load.

## VIEWING REPORTS – Remove button:

- If the user made an incorrect selection, highlight the incorrect addition from the Selected Values list and select the Remove button.
  - Example: Service Coordination Program should not be included in the report. Service Coordination Program is highlighted in the 'Selected Values Listing' field, select the Remove button and the Service Coordination program will be removed from the listing (and not included in the report).
- Select 'OK' when all the Crystal Parameter Field(s) is entered.

The screenshot shows a software window titled "Enter prompt values." with a standard Windows-style title bar. Below the title bar, there is a section titled "Select one or many Programs for this report". This section is divided into two main areas: "Available Values:" and "Selected Values:".

The "Available Values:" list contains the following items: ALL, HEAD INJURY SERVICES, HEALTHY CHILDREN AND YOUTH, HOPE, MONITORED CASELOAD, PHYSICAL DISABILITIES WAIVER, and SERVICE COORDINATION. The "Selected Values:" list contains: HEAD INJURY SERVICES, HOPE, and SERVICE COORDINATION. The "SERVICE COORDINATION" item in the "Selected Values:" list is highlighted in green. Between the two lists are three arrow buttons: a single right-pointing arrow (>), a double right-pointing arrow (>>), and a single right-pointing arrow (>). Below the "Available Values:" list is a text input field labeled "Enter a Value:" with a single right-pointing arrow (>) button to its right.

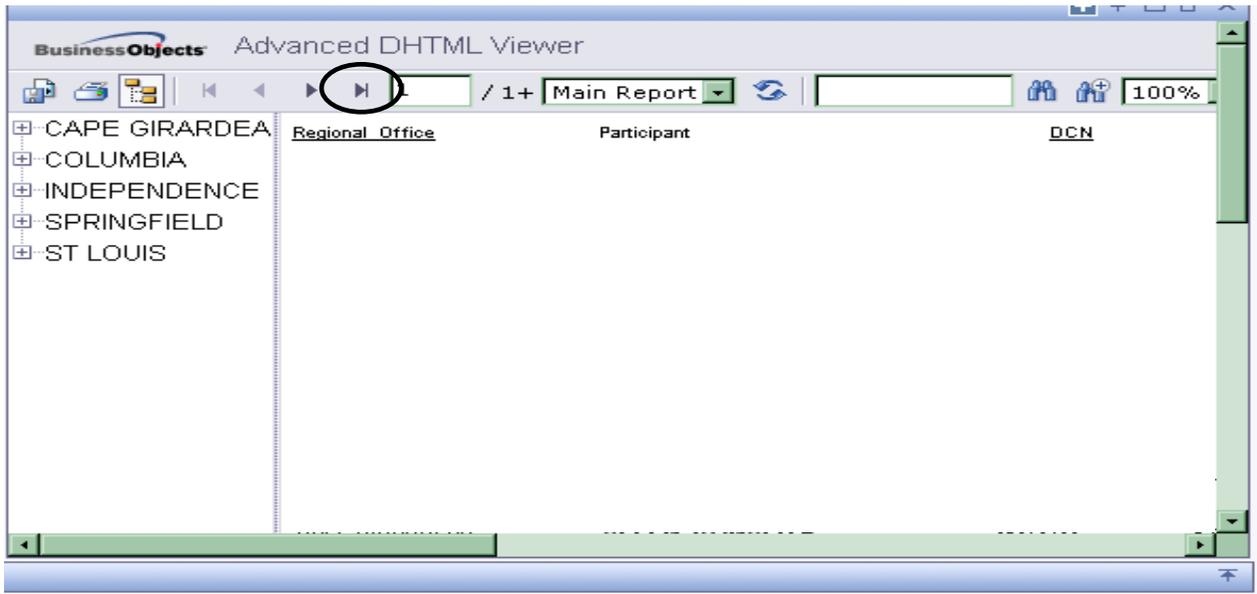
At the bottom right of the "Selected Values:" list, there is a button labeled "Remove" which is circled in red. Below the "Selected Values:" list is a section titled "Enter the report's Begin Date" with a "BeginDate" dropdown menu and a date selection area.

### TIP:

- Crystal Reports will display the report with only two programs, Hope Program and Head Injury Program.
- The Service Coordination Program will not be included in the report because it was removed from the request before submitting the report.

## VIEWING REPORTS – Report Screen:

- When the screen first loads, the number of pages in the report field indicates if the report is only one page or multiple pages. If a report contains more than one page, a 1/1+ will be posted indicating additional pages in the report.
- To load the entire report, select the 'Go to Last Page' (  ) button.

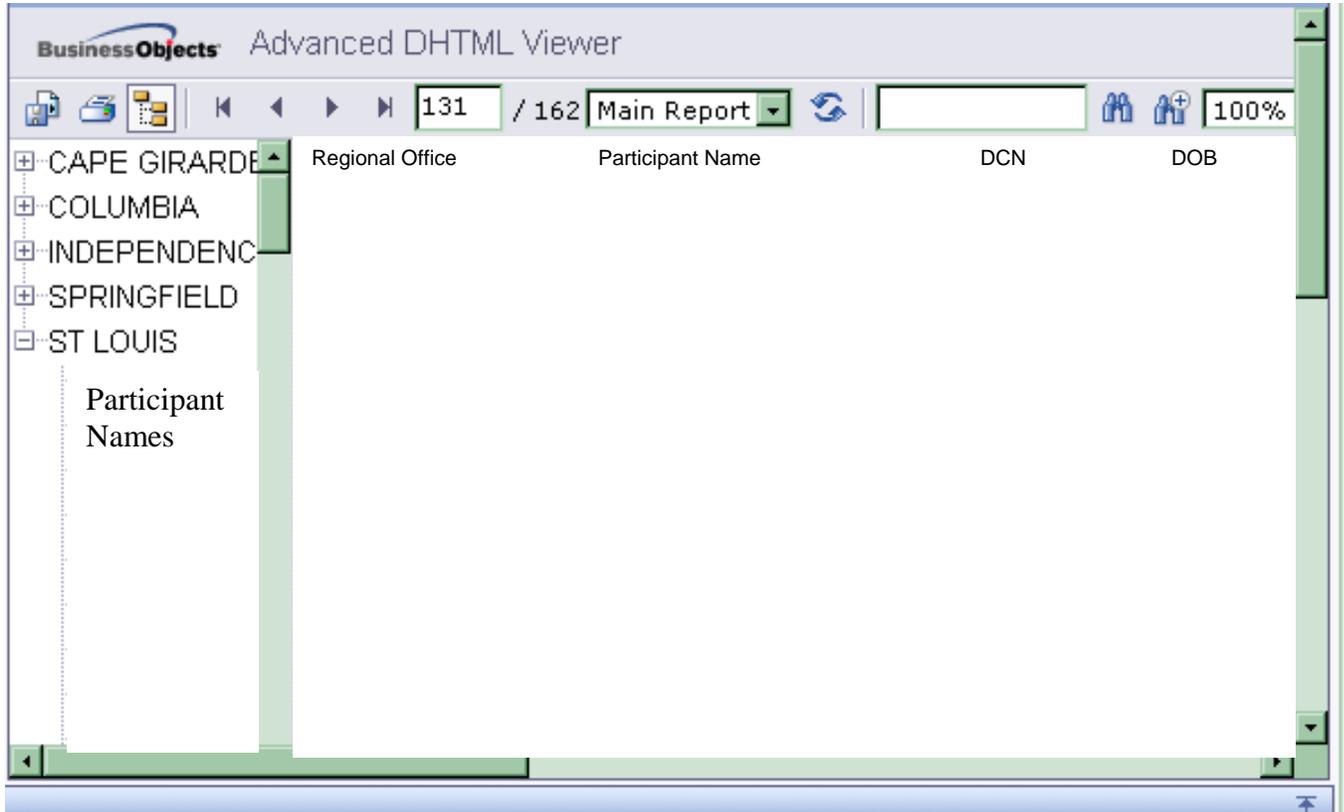


- After selecting the 'Go to Last Page' button, the screen will display the total number of pages in the report field indicating the entire report has been loaded, i.e. 162/162.



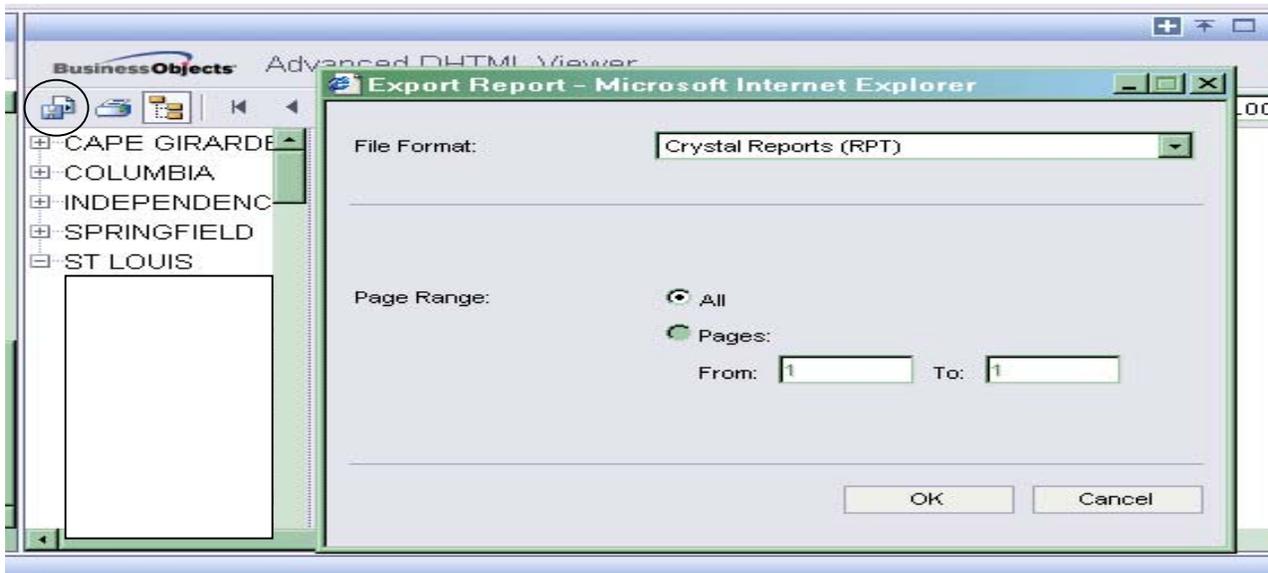
## VIEWING REPORTS – Report Screen - Filter:

- The left side of the report screen lists all the Parameters requested in the Discrete Value field.
- If the user wants to 'filter' within the Crystal Enterprise report screen, select a specific Parameter. Example: St. Louis parameter was selected. The left side of the report screen will list an alphabetical listing of participants. The right side of the report screen will also list participants alphabetically, along with the other report information.

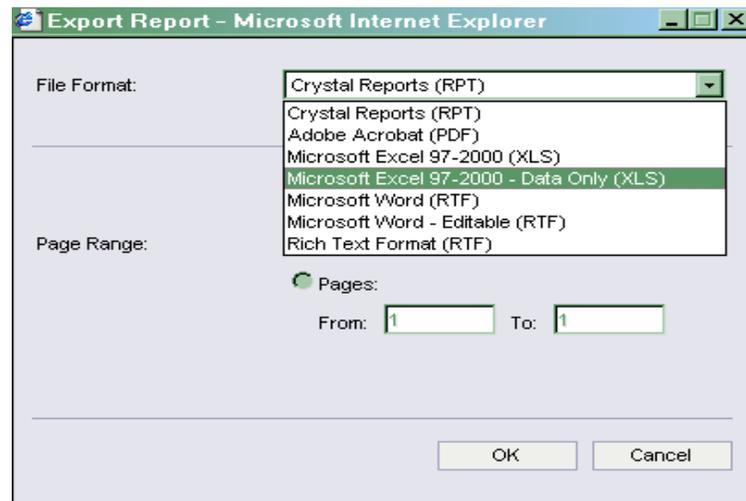


## EXPORTING (SAVING) A REPORT:

- To save a report, select the 'Export this Report' (  ) button to display the Export Report screen.
- Select the File Format drop down and choose the most appropriate format for the report. SHCN reports are only available in two choices:
  - Report titles containing 'count' use 'Microsoft Word (RTF)' format. (Address Label is a Word document.)
  - Report title containing 'listing' use 'Microsoft Excel 97-2000-Data Only (XLS)' format. (Master Spreadsheet is an Excel document.)
  - Not all reports are titled in this fashion, export using both choices to determine which format is the more appropriate.
- Select the appropriate Page Range 'All' for all report pages or choose a range.
- Select 'OK' to start the export/download process.

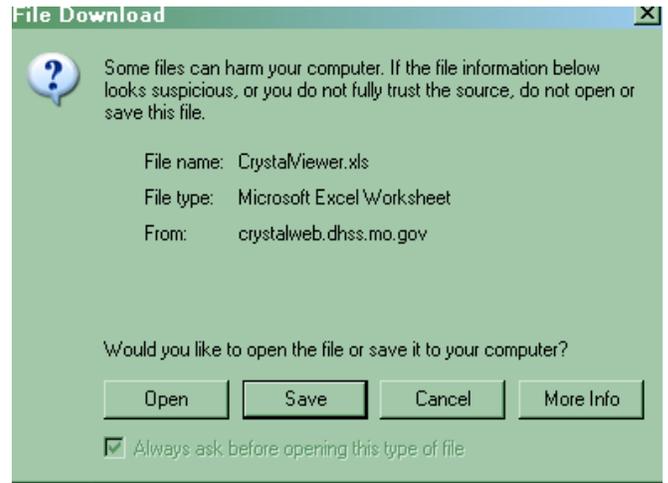


Example: Excel download selection.

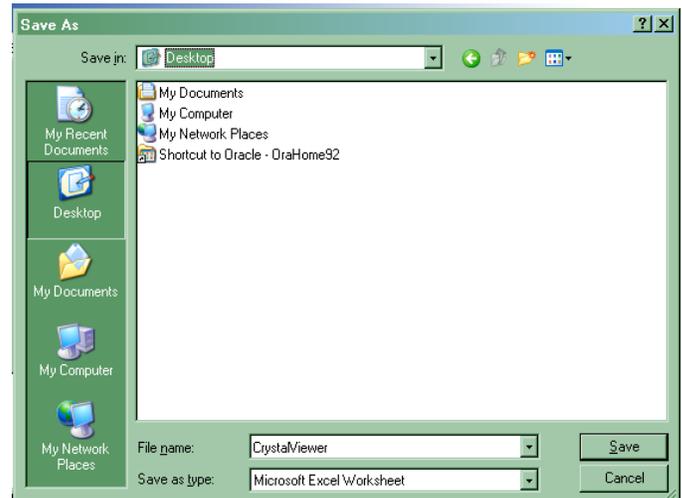


## EXPORTING (SAVING) A REPORT – File Download:

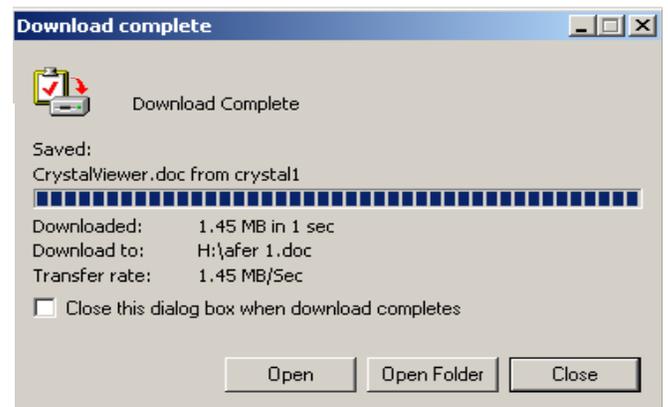
- A File Download screen will display; select the 'Save' button.



- A 'Save As' screen will display
  - Select a location to save the report.
  - Rename the report by using the 'File Name' field.
  - Select the 'Save' button.



- If a Download complete screen displays, select the 'Close' button to complete the download.



### **CRYSTAL REPORT CLOSURE/LOGOFF:**

- Log out of Crystal Reports by selecting the 'gold lock' (🔒) in the upper right hand corner of the screen.



### **CRYSTAL REPORT – Session Expired:**

- Failure to logoff the system will result in a 'Session Expired' message after an allotted time period has been exceeded.
- Close the right side of the screen (using the 'x') and select the report folder from the left side of the screen to display the report options again.