

SSIS Template and Document Redesign

SSIS Versions 5.3 and 5.5

Background

- SSIS Version 5.3 will prepare you to convert custom templates. Workers will still be able to use the templates in their current state in Version 5.3 while conversion related work is taking place. There will be two template editors.
- SSIS Version 5.5 will have redesigned
 - Templates
 - Documents
 - Service plans
 - Case Notes

Questions

1. Why redesign templates and documents?
2. What are the opportunities?
3. How do things work now?
4. How will things work?
5. What are the implications to agency workers?
6. What is the schedule?

Why Redesign Templates And Documents?

1. Federal SACWIS review findings require it.
2. SSIS development platform (Architecture) update requires it.

ACF SACWIS Review Findings

- Recommendation:
Minnesota must develop a plan to ensure that data entered on templates, such as court reports and case plans, is consistent with discrete data fields in SSIS.

What the SACWIS Review Findings Mean

- Social workers can no longer type over data in SSIS documents when the data originates in the SSIS database, such as:
 - Names
 - Addresses
 - Phone numbers
 - Social worker name/title

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What Are The Opportunities?

- Make service plans and documents work in a consistent manner
- Create a data cleanup function for documents that is easy and practical to use
- Expand the list of merge fields and standardize their use
- Use industry-standard technology for document templates and documents

Make Service Plans And Documents Work In A Consistent Manner

- Data set-up is different between service plans and documents
- Editor operates differently between service plans and documents
- Lists of merge fields are different between service plans and documents

Create A Data Cleanup Function For Documents That Is Easy And Practical To Use

- Documents do not show missing information or errors
- Out-of-Home Placement Plan shows errors
 - Only when first created
 - Can print the grid of errors, but cannot navigate to correct data
- No other plans show errors

Standardize The Use And Expand The List Of Merge Fields

- Merge fields are used inconsistently
 - For instance, the author field can appear in several places, as both author and social worker
 - Unless the author was never assigned as a worker in the workgroup
 - In that case, social worker is the first primary worker found (which may be a previous primary worker)
 - But, the author remains as the value the worker picked
- Clear?

Standardize The Use And Expand The List Of Merge Fields (Cont.)

- Merge fields will no longer be picked randomly by the system; workers will be able to pick them
- For example, the address used on service plans is picked randomly by the system
- Address on documents may be picked by the user
- Other merge fields are also picked randomly
 - phone number, school, etc.

Use Industry-standard Technology For Document Templates - HTML

- HTML is an industry-standard scripting language
- It is used to describe forms and data to be displayed in a web browser

Page 13

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11/18/09

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Page 14

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Document History in SSIS

- Documents and mail merge were SSIS Phase 1 – (1997)
- Many developers have since “contributed” very good ideas
- We now have documents and templates full of “good ideas”



(or a strange brew)

Page 15

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Current Document Template Features

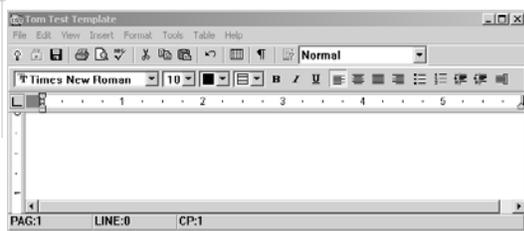
- State- and county-created templates
- All common font functions – font selection, bold, underline, etc.
- Merge fields
- Tables
- Check boxes, dates
- Hyperlinks
- Spell check

Page 16

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Existing Template Editor

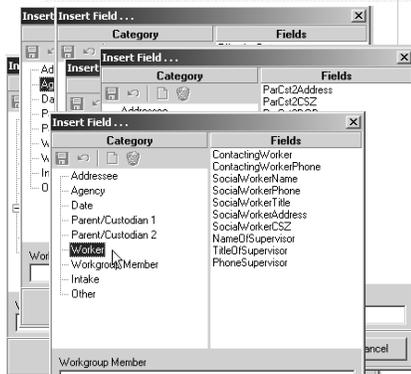


Page 17

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Adding Database Fields to a Template



Page 18

Current Document Setup

Document: New
Bear Yancy, SR 39679090 Bear Yolanda CP Assessment 01/14/2005
Author: **SSIS/OHS ZZ-Help Desk**
Professional Title:
Date: 08/11/2009 02:48 PM
Document Category:
Document Name:
Comments/description:
Document Information

Page 19

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11/18/09

Current Document Setup

Document: New
Bear Yancy, SR 39679090 Bear Yolanda CP Assessment 01/14/2005
Author: **SSIS/OHS ZZ-Help Desk**
Professional Title: **State Employee**
Date:
Document Category:
Document Name:
Comments/description:
Document Information

Page 20

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Current Document Setup

SSIS Administration 5.3.0.13 - [User Search]
File Lists Create Tools Window Help
Name Employee Type County Ent
ZZ-Help Desk, S State employee Social Serv
SSIS/OHS ZZ-Help Desk Program restrictions Dep
Identification
Prefix:
First: **SSIS/OHS**
Middle:
Last: **ZZ-Help Desk**
Suffix:
Title
E-mail:
Phone: 651972-5555

We don't use title from the Staff setup screen

...unless you're a supervisor

Page 21

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Current Document Setup

Highlighted - what does this mean?

Dad does nothing...

Page 22

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Frankenstein



- With some work in the set-up screens, you can mix a street from one address with the city, state, and zip from another address
- You can pick a title that's not entered on a person – for some people under some circumstances

Page 23

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Current Direct Entry of Missing Data

- You can enter an address directly in the drop-down on the Setup screen, although it doesn't save back to the database
- There may be other similar situations
- You can enter anything anywhere in a document, changing any data from the database

Page 24

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Current Issues

- Inconsistent use of merge fields
- Illogical prompting
- Randomly selected values
- Frankenstein
- Direct entry of missing data
- No data cleanup
- Formatting problems
- Smooshing!

Page 28

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Page 29

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New Template & Document Features

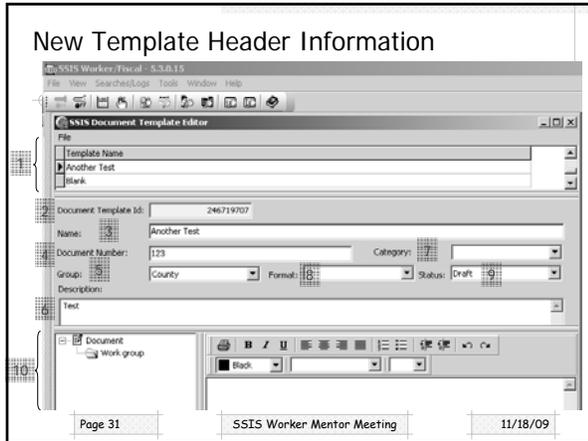
- Merge fields
- Tables with merge fields
- Font Styles
- Formatting – justification, bullets, indent, etc.
- Standard SSIS printing including email functionality and envelope printing
- Spell checking
- Protect document sections Combo boxes, radio buttons, check boxes, etc.
- Help text
- Style sheets
- County logos/letterhead
- Intelligent document creation

Page 30

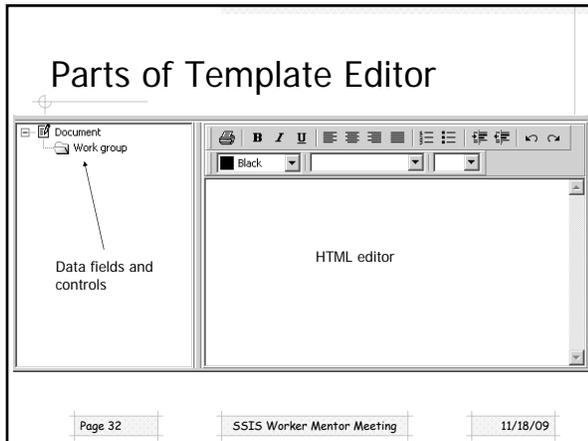
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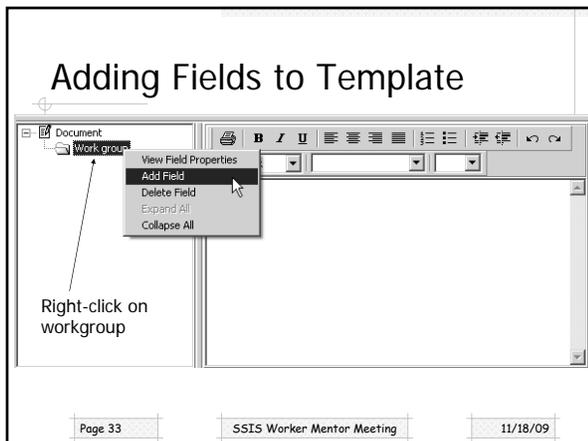
New Template Header Information



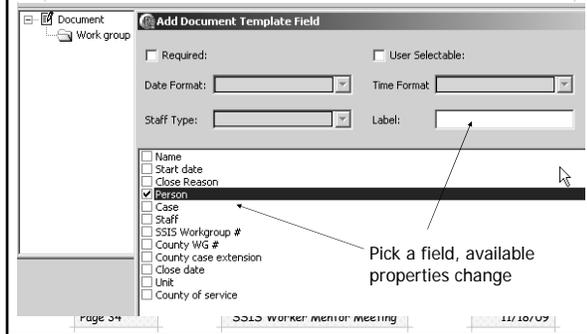
Parts of Template Editor



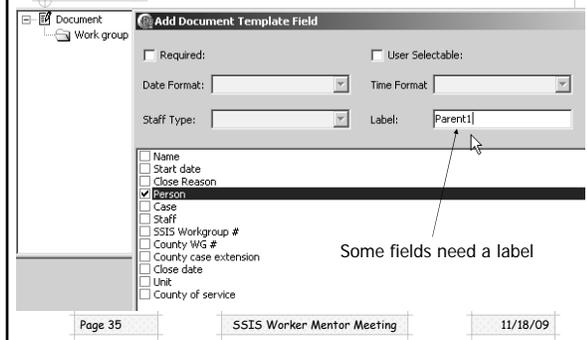
Adding Fields to Template



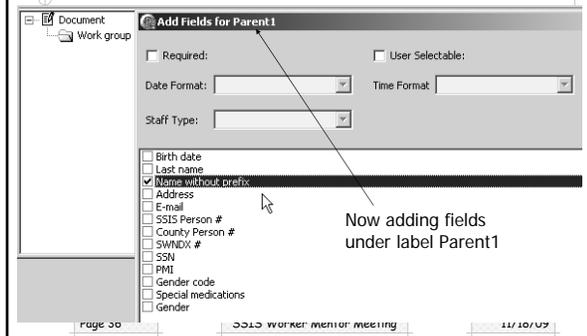
Specifying Field Properties



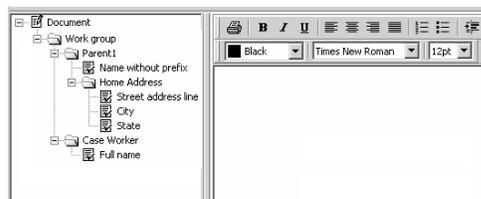
Label Property



Adding Fields Under a Label



Template Editor with Fields Selected

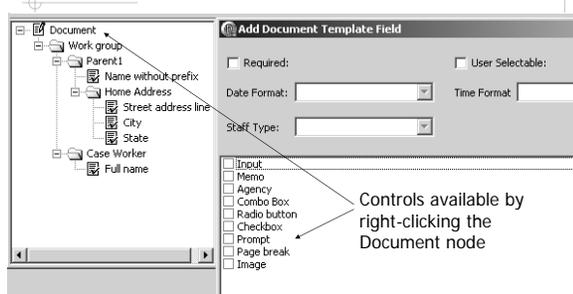


Page 37

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Adding Controls to a Template

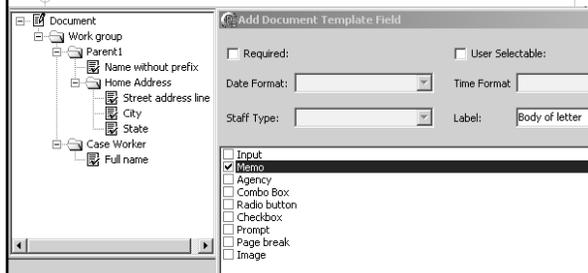


Page 38

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Properties for Controls

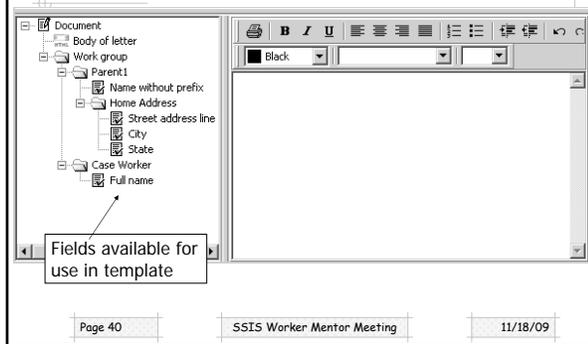


Page 39

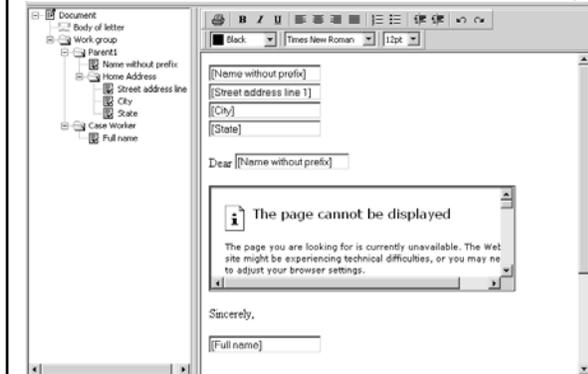
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Completed List of Fields for a Template

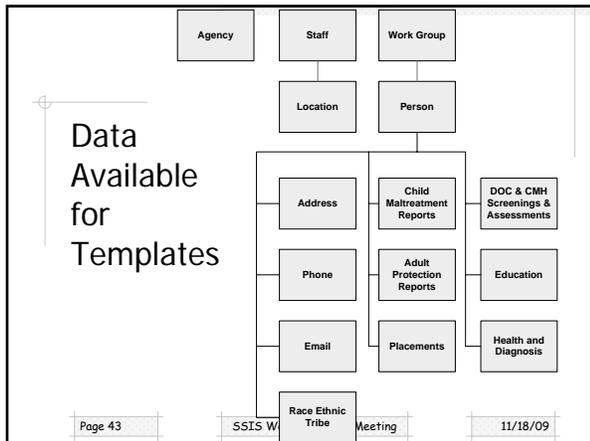


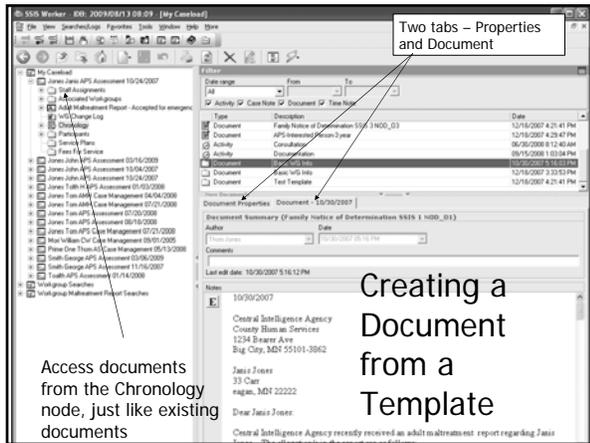
Completed Template

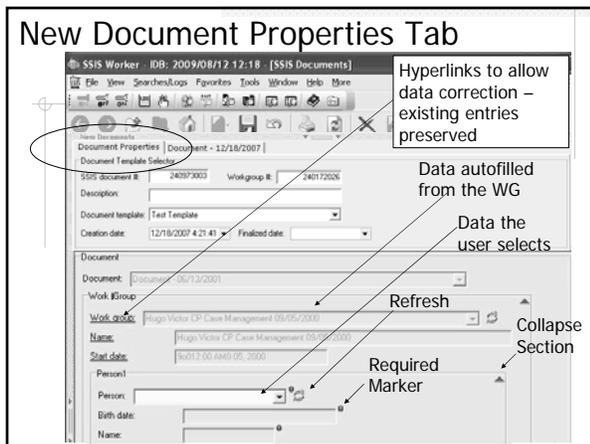


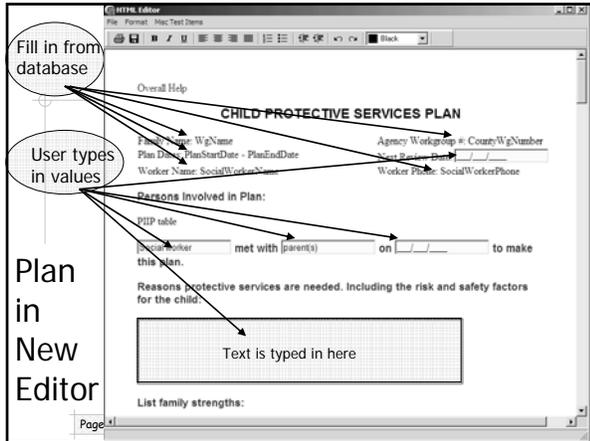
Other Template Features

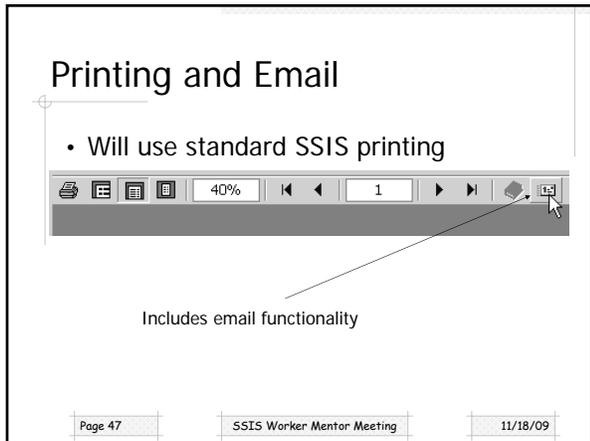
- Ability to copy other custom templates as a base
- Flexible tables of data
- Ability to paste in text or HTML
- Barcodes

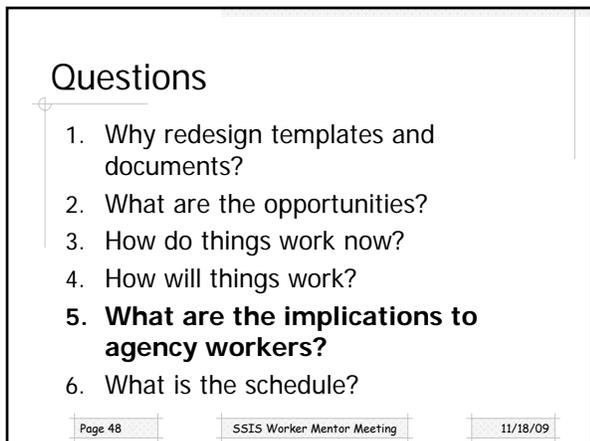












Implications

- Data should be as clean as possible
- All custom templates will need to be converted in SSIS Version 5.3
 - Partially automated

Implications (Cont.)

- Documents and Service Plans should be finalized prior to SSIS Version 5.5 if at all possible. New service plans will need to be created when due for review. Workers will be able to copy/paste text from an old plan to a new plan.
- The redesign is not intended to be an electronic document management system. SSIS is investigating document sharing options.

Template Conversion - Example

Existing Template

Template Description: [Cy 55.00000 Dimsted95 - Intervention Target Areas ABMU (12/02/05)]	
INTERVENTION TARGET AREAS [Unde	
Name: [Client_Name]	Date: / /
Individual characteristics:	
<input type="checkbox"/>	Favorable attitudes toward problem behaviors/Anti-social/pro-crim
<input type="checkbox"/>	Psychiatric symptomatology/Psychopathy, weak socialization, imp
<input type="checkbox"/>	taking, weak problem-solving skills
<input type="checkbox"/>	Cognitive bias to attribute hostile intent to others
<input type="checkbox"/>	Substance abuse
<input type="checkbox"/>	Limited leisure/recreational involvement

Template Conversion - Example

Placeholders need to be deleted and manually added through editor

Converted Template

The screenshot shows a document with the following content:

Address [E] M:\Developers\Lee\Template Conversion\Can Connect\ACTY_5500000_0UMTED05_INTERVENTI...

INTERVENTION TARGET AREAS (Under

Name {Client1_Name} Date {Client1_Start}

Individual characteristics

	Favorable attitudes toward problem behaviors/Anti-social/pro-criminal attit
	Psychiatric symptomatology/Psychopathy, weak socialization, impulsivity, r
	problem-solving skills
	Cognitive bias to attribute hostile intent to others

Spacing between lines is off

Page 52

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11/18/09

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Page 53

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Schedule

- SSIS 5.3 for template conversion: January-February 2010
- SSIS Version 5.5 with the new document system: Spring 2010

Page 54

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