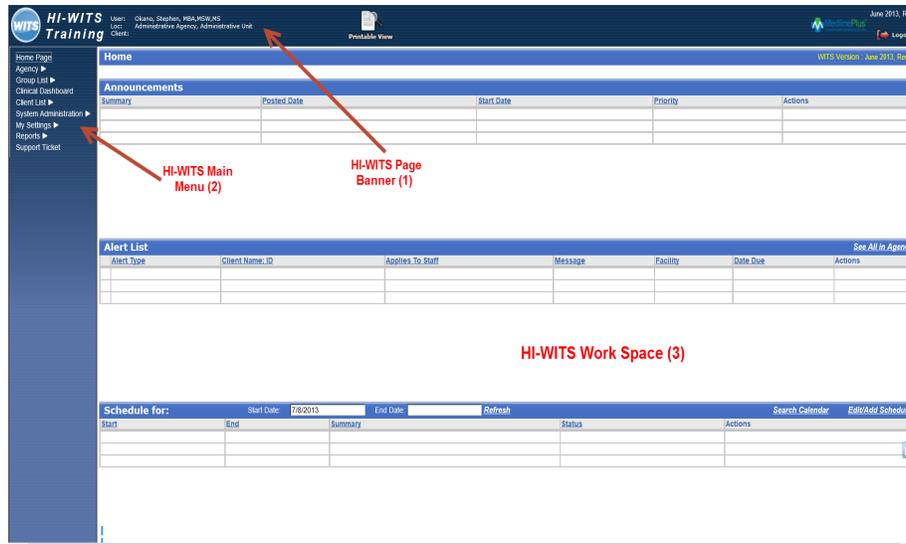


## Chapter 15 –WITS Conventions

HI-WITS uses the following conventions.

### *HI-WITS Screen*

All HI-WITS screens have a fixed layout that is divided into three (3) areas –the Toolbar, the Menu, and the Work Space (see Figure 14.1 – The HI-WITS Screen).



**Figure 14.1 – The HI-WITS Screen**

1. The HI-WITS Page Banner – This area contains from left to right the:
  - a. WITS logo 
  - b. System name . Click on the System Name will always return you to your Home Page.
  - c. User name and credentials, agency-facility and last client accessed
 

User: Okano, Stephen, MBA,MSW,MS  
 Loc: Administrative Agency, Administrative Unit  
 Client:
  - d. Print icon ;
  - e. WITS Version number  located in uppermost right hand corner of the Page Banner; and
  - f. Logout link .
  
2. The HI-WITS Main Menu – This area contains all the links to functions within HI-WITS. Clicking on one of the items will display a page in the Page Work Area or expand the menu item into sub-menu items. A menu item has sub-menu items when there is a right arrow head symbol (▶) at the end of the menu item. If there is a arrow head symbol pointing downward (▼) next to a menu item, then all sub-menu items are displayed.

3. The HI-WITS Work Space – This is the area where all data will be collected and displayed.

### *Menus*

1. **Menu:** The HI-WITS Main Menu appears in the far left column of the screen. First level menu items are left-most aligned, and may include **Home Page, Agency, Client List, My Settings, and Reports**. However, depending on the user's access level, some or all may be visible.

There are over 200 screens in HI-WITS. For ease of navigation, they are organized by function. Therefore, **Client List** will have a complement of screens which relate to the management of clients. These screens are accessed and organized through a second level sub-menu.

2. **Sub-menus:** Once the user has selected a high level function using the First level menu, such as **Client List**, the menu expands to display the second level sub-menu. The sub-menus allow the user to navigate to specific screens without having to use next and back keys. If a menu item has a sub-menu, you will see a small triangle to the right of the label. The triangle points down when the sub-menu is displayed (menu expands) and points to the right when the sub-menu is not displayed.
3. **Highlighting Selections:** When you place your cursor over a menu item, it is outlined with a dotted box. Use a single, left-click of your mouse to select the menu item and display the associated screen. When selected, the menu item will be outlined with a box.

### *Toolbar Icons and Hyperlinks*

4. **Browser Label:** The browser label will depict the name of the screen and the browser vendor. In this example, the user is in the **Home** screen, and the browser vendor is Microsoft Internet Explorer.
5. **HI-WITS Toolbar:** This is the uppermost portion of the screen, and contains the: HI-WITS icon, system name, the current logged-on user, the agency and facility, the name of the last client accesses, print icon, the WITS version number, and logout link.
6. **HI-WITS Icon:** Wherever you are in the application, you may click the HI-WITS icon to return to the homepage. The HI-WITS icon is located on the left side of the page banner.
7. **User Identity and Context:** Three lines are reserved in the toolbar to identify the user's name, their Agency, and the Facility selected in the context screen. The Agency Nickname may be used to reduce the label length since some agency

- names are too long for the toolbar. The name of the last client accessed is also displayed.
8. **Print View Icon** : Allows you to print the current screen. The print view icon is located on right half of the page banner.
  9. **Print Report Icon** : Allows the user to print a formatted report of the current module. The print report icon is visible only there is report that can be printed. The icon will be located next to the Print View Icon.
  10. **Logout:** Use the **Logout** link  rather than closing the browser window (by clicking of the red ) to ensure that you will not be locked out upon trying to start a new session. You will be asked if you are certain you wish to end the session. Click **Yes**. The **Logout** link is located on the right side of HI-WITS Toolbar.

### *Navigation Buttons*

11. : The **Go** button is used to initiate a query. When used in the login process, it is querying the database to determine if the user is an authorized user. When used in list views, it launches a search for a record based on the data entered in the upper portion of the screen.
12. : The **Clear** button is used to clear all search parameters.
13. : The **Save** button is used in two ways. First, it allows the user to commit data to the database after completing the required fields, without having to complete the entire form. **Save** may also be used to add multiple records to a list without having to leave the screen. Examples of this function are found on screens such as **Alternate Name**, **Address** and **Phone**.
14. : **Cancel** returns the user to the previous screen or mode without storing the data entered on the screen. In this example, the user was returned to previous *mode (view only)*. They must select **Add Alternate Name** to add more names. Notice the “C” was not stored in the table. In many cases, **Cancel** will take you to the previous screen.
15. : The **Finish** button saves any unsaved data, and returns the user to the previous screen.
16. : The revoke button is used to revoke consent which were previously authorized. Revoking the consent, time stamps the revocation so that information

passed prior to the revocation is not subject to the constraint. Revocations are not retroactive.

17. : Takes the user to the **Next** screen in a series of screens which compose a dataset.
18. : Takes the user to the **Previous** screen in a series of screens which compose a dataset.

### *Table Actions*

19. **Review:** This hyperlink allows the user to either review record details or edit them, depending on their permissions and case status.
20. **Delete:** The **Delete** hyperlink allows users to delete records without requiring them to go to the detailed view. To reduce inadvertent deletes of important data, this feature is only used in tables where most of the critical record information is displayed in the table. In addition, a warning screen asks the user if they want to delete the record, or return to the table.

### *Controls*

21. **Textbox:** Text boxes are designed to allow the user to enter data in manually. Some text fields have specific formats which must be used:

DOB

**DOB/Date:** mm/dd/yy or mm/dd/yyyy

**SSN:** 9 digit number, dashes do not need to be entered by user.

**Phone Number:** 7 or 10 digit number, dashes do not need to be entered by user.

22. **Scrolling Textbox:** Scrolling textboxes are used to capture notes and descriptions. A scrolling textbox allows the user to enter at least 500 characters. Some have no character limits. An example of a scrolling textbox is a **Comment** field.

Comments

23. **Drop-down box:** A drop down box is used where only one entry may be selected from a list of values.

Walk-in

- By Appointment
- Community service patrol
- Other
- Phone
- Walk-in

24. **Mover Box:** A mover box is used where more than one entry may be selected from a list of values. Some may scroll.



25. **Mover Box with Radio Buttons:** The user selects an option with a single left click. Before selecting the mover arrow, they must select an option, using the radio buttons located between the boxes. In this example, if the user selects # of **Days**, they click the **Radio Button**, and put the number of days in the textbox using the keyboard. The user then moves the options to the select box using the right pointing arrow adjacent to the **Selected** box.

### *Messaging*

26. **Messages:** HI-WITS displays messages and warnings at the top of the screen, just below the toolbar, when required.
27. **Error:** A red circle with an X indicates the failure to provide **required** data. This means that the record cannot be saved until the data is completed. Warnings may be used for incorrect formats, if the incorrect format is for a required field. In addition to the error message, the field in error is colored red. The user may type directly over the red box to correct the data so that it may be saved to the database.
28. **Information Messages:** Information messages direct the user to complete the appropriate steps to continue most tasks in HI-WITS. In most cases with information messages, you will not lose data, and you may proceed if you choose to ignore the message.

### *Insert, View and Search*

29. **General:** There are three modes in HI-WITS: Insert, View, and Search. Each mode allows the user to perform a pre-determined set of functions.
30. **Insert:** In most cases, when you first enter a screen, you will be in insert mode. This mode allows you to make entries into most fields in the screen, and save them to the database. When you select a screen from a menu, click next, or use a hyperlink to navigate to a screen, you are usually in this mode.
31. **View:** Sometimes HI-WITS will not allow the user to modify any information in the screen. This is usually done to protect data integrity. When you enter a screen in this mode, all fields will be read-only, and grayed out. An example of this is the Announcement screen.

However, this view mode is also used in some cases where the user is adding data to a table on the same screen. Examples of this include the addition of addresses

and alternate names. In these cases, the Add hyperlinks are used to move the user from view to insert mode.

32. **Search:** Some list screens will allow the user to perform searches based on criteria. When in **Search** mode, you will usually see a **Cancel** and a **Go** button, rather than Save, Cancel, Finish. The Client List is an example of this feature.

### *Search*

33. **Exact Match:** This type of search is to find records which match the search criteria exactly. Therefore, if you type First Name = Jane, you will only get Clients who have the first name of Jane. You may constrain the search results by adding other parameters such as **First Name**, **DOB**, and **Facility** to reduce the number of erroneous results.
34. **Wild Card:** Wild card searches are very useful in cases where you do not have the exact value or spelling of a parameter. It allows you to search with just two characters. To use the wildcard search, place an asterisk (\*) after, before, or on both sides of the known characters of the parameter. Click the **Go** button. The Search will return all values with a string of characters which match the characters provided by you.

J\*- will return any string starting with J or j.

\*s- will return anything ending in s.

35. **Range Expression:** This search allows you to search a range of values when given two specific values. To do a range search, enter a colon (:) between your range parameters.

01/01/2000 : 12/31/2000 – returns any record with a date in the year 2000.

### *Conventions*

36. **Required Fields:** There are two types of **Required** fields - a dark yellow field  which requires a valid entry to proceed to the next screen or to be saved and a light yellow  field which is required by the State
37. **Incomplete Required Fields:** An blank dark yellow required field will generate a warning or error, and will be indicated by a red background.
38. **Reporting:** If a field is not required for data integrity, but is required to support reporting requirements for the State or Agency, the background is light yellow 

### *Help*

39. **Mouse-over tips:** Some fields will display a description of the accepted value.

### *Creating a Shortcut*

40. Some browsers allow you to create a shortcut which will save time in completing the login process. To create a shortcut, go to the login page.

41. Right-click in the open area. Select **Create Shortcut** from the menu.

42. You will be told that the shortcut will be added to your desktop. Click **OK**.

43. You will see it on your desktop.

44. Optional. Right click on the icon. Select **Rename**. You may rename the icon to HI-WITS.

45. The above can be done before logging into HI-WITS.