

Department of Health Services

Control-D User Guide

(Transitioning from EOS to Control-D)

Date Last Updated: May 2015

Table of Contents

| | | |
|---|--|----|
| 1 | Step 1: Introduction – What is Control-D | 2 |
| 2 | Step 2: Logging On | 3 |
| 3 | Step 3: Find the Report You Want | 4 |
| 4 | Step 4: Searching for a Report | 6 |
| 5 | Step 5: Picking the Correct Report and Version | 8 |
| 6 | Step 6: Opening the Report | 9 |
| 7 | Step 7: Printing the Report | 10 |
| 8 | Step 8: Using Notes | 11 |
| 9 | Step 9: Exiting Control-D | 13 |

This User Guide is intended for Enterprise Output Solution (EOS) Consortia users that will be transitioning from EOS to Control-D. The purpose of this guide is to provide a quick reference for using Control-D. It provides instructions on basic use of the Control-D system, as well as some of the key features.

If you are having trouble with logging in, contact the Security Help Desk. For all other issues call: 608-261-6317.

If you see a prompt pop-up that asks you to install a file called ActiveX (such as when you try to print), contact your Consortia IT representative for help with installing the file.

Step 1: Introduction – What is Control-D

Control-D is a new online tool for accessing reports that is replacing EOSP. Control-D will contain all of the same reports that were available to you in EOSP. You no longer need to log in to Mainframe to see them. You can access Control-D directly from your web browser by typing in the URL or by clicking on the link from the Income Maintenance/Workforce Development Systems Gateway page.

All reports in Control-D will have the same content and format that they had in EOSP.

Step 2: Logging On

Here is the URL that you can type into your Internet Explorer (IE) browser to log into Control-D: <https://controld.wisconsin.gov/wa>.

You can also click on the Control-D link on the Income Maintenance/Workforce Development Systems Gateway page.

You will be brought directly to the login screen. Your user name and password will be the same as your CWW and Mainframe user name and your Mainframe password.

The Host field should always be the same. If it does not default to CTDP, you should select that option from the dropdown list.

The Filter checkbox will always be checked by default. If you uncheck the box, the full Report List will open. This may result in it taking more time for you to find your report.

Hint: If you choose to change your password using the "Change Password" link in the middle of the page, it will also change your Mainframe password.

Step 3: Finding the Report You Want

After logging in, you will first be brought to the "Filter" screen. This screen is used to select the report you would like to view. The easiest way to look up reports is to use the "Category" field in the middle of the screen. The Category is the same as the Form Name was in EOSP. This is a four-character ID. You will use the same four-character ID in Control-D as you used in EOSP to retrieve the same report. All of the reports for the CARES system begin with the letter "C." If you do not know the whole four-character ID, you can use the "*" symbol as a wildcard to retrieve more than one report using C*** (using <*> to fill out the characters.)

bmcsoftware Report List Logout Help

Filter

Select the criteria for filtering the report list:

Filter name:

Include filtered reports from: Apply to all folders

Report Parameters Date&Time Report Type Index

Report Name:

Job Name:

Remark:

Category:

Index Name:

Index Value:

Recipient:

Report Status:

Active

History

Migrated

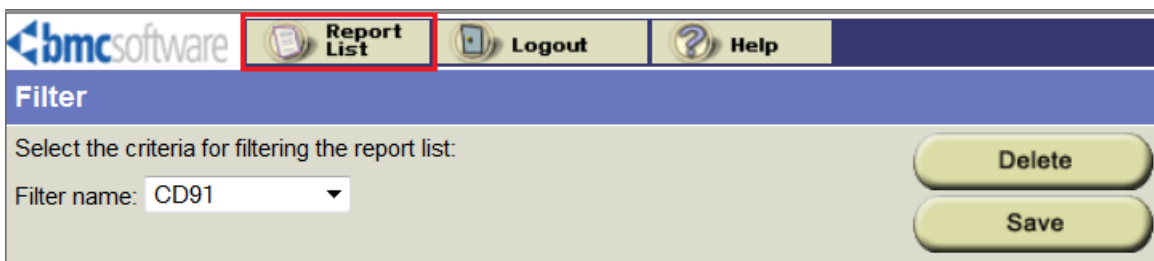
If you know the full report name, you can enter that in the "Report Name" field. This is a 16-character name. For CARES users, the report name will use the format "CARES-*****_***". You can use the wildcard symbol <*> in this field as well.

If you notice yourself using a filter regularly, you may find it convenient to save this filter using the Save button at the top right of the window. Simply enter the filter criteria, and then click Save. When you click Save, a new window will open asking you to name the filter. This filter can then be applied at any time by selecting it from the Filter name dropdown. Filters are not shared between users. Any filter you save will only be viewable by you.

On the right side of the screen there are three checkboxes under the heading "Report Status." The "Active" checkbox is checked by default. This will let you see all of the current versions of reports. The "History" checkbox will let you see any archived reports that were requested. You will not see any of these reports by default. The "Migrated" checkbox will let you see older versions of reports that had been already archived but are now available again.

Step 4: Searching for a Report

If you do not want to use the "Filter" screen to find a specific report, you can use the full "Report List" screen to search through all of the reports you have access to. You can navigate to the "Report List" screen by clicking on the button in the upper left-hand of your current screen.



This brings you to a full list of reports. You can find the report by either the Report Name or the Category. You may see a lot of different items in the list, so use the "Sort" feature to make it easier to find the report you are looking for. The button for the "Sort" feature is located at the top of your screen next to the "Logout button." The "Sort" button will open up a pop-up window. From here you can choose how to sort your report list (for example: Category or Date). You can choose to sort in ascending or descending order.

Hint: The Decollation Date is the date when the report was generated. You can use this field to find the newest version or a particular version of the report you are looking for.

You can choose up to three fields to sort by at once. If you know the four-character category code you are looking for, you can always navigate back to the "Filter" screen to enter that code at any time. Then you will only see that one report in the report list. The "Filter" button is located at the top of the screen.

CONTROL-D/WebAccess Server - Sort Report List - Windows ...

Sort Report List

Sort by Decollation Date & Time Ascending Descending

Sort by Category Ascending Descending

Sort by Ascending Descending

Reset Default Apply

Step 5: Picking the Correct Report

For some reports, you may be able to see multiple versions. For example, if the report you are looking for is a monthly report, you may see several lines for the same Category where each line has a different date. Use the Decollation Date column to find the version you are looking for when there are multiple reports available.

Step 6: Opening the Report

There are several options available to view the report. You can easily view the contents of your report by clicking on the Report Name. That will bring up the Report Details. The details should look the same or similar to how they looked in EOSP.

If you hover over the Report Name, you will see a menu appear. From the menu you can choose "Open Report." This will bring up the same view as if you clicked directly on the Report Name.

The screenshot shows the Control-D WebAccess interface. At the top, there is a navigation bar with buttons for Filter, Cancel Filter, Sort, Logout, and Help. Below this, a status bar indicates the user is connected to CTDD as pwrj1. The main content area displays a table of reports with columns for Report Name, Category, Job Name, and Recipient. The third row is highlighted, and a context menu is open over it, with 'Open Report' selected. The menu options include Report >, Logical View >, View As >, Notes, Print, Print as >, Host Print, Prepare to Print, Save, and Properties. The text 'CONTROL-D/WebAccess Server Version 3.7.01.200' is visible in the background.

| | Report Name | Category | Job Name | Recipient |
|-------------------------------------|----------------------------------|----------|----------|-----------|
| <input type="checkbox"/> | CARES-IN350B-INX | ...CI04 | PWCINP13 | @CARES08 |
| <input type="checkbox"/> | CARES-IN350B-INX | ...CI04 | PWCINP13 | @CARES08 |
| <input checked="" type="checkbox"/> | CARES-IN350B-INX | ...CI04 | PWCINP13 | @CARES08 |

- Open Report
- Report >
- Logical View >
- View As >
- Notes
- Print
- Print as >
- Host Print
- Prepare to Print
- Save
- Properties

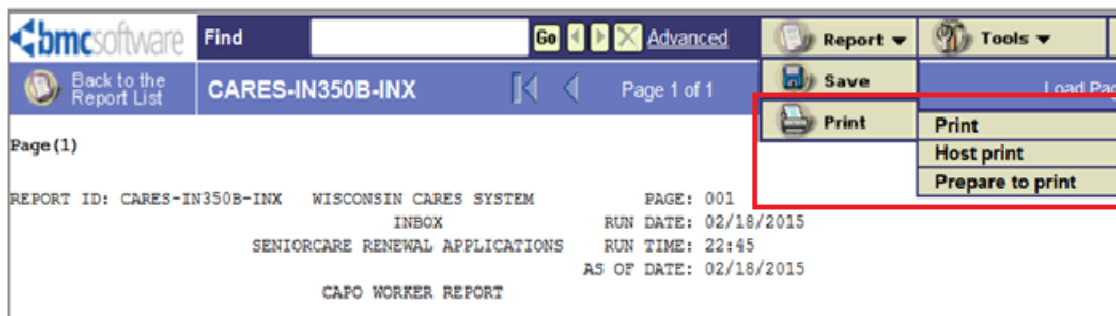
You can also open the report as a PDF document. From the same pop-up menu mentioned above, you can choose the "View As" option. From there, select the red icon with "pdf" next to it. You can also select the checkbox next to the report name. In the upper right-hand side of your screen, a red PDF icon will become enabled. You can select the icon to open the report as a PDF.

Step 7: Printing the Report

You can print a report from either the Report List or from the details view of the report.

From the Report List you can hover over the Report Name to bring up the pop-up menu. From there, you can select the "Print" option.

From the Report Details, you can hover over the "Report" button at the top of the screen. Move your mouse to "Print." This will bring up more options. Select the "Print" option again.

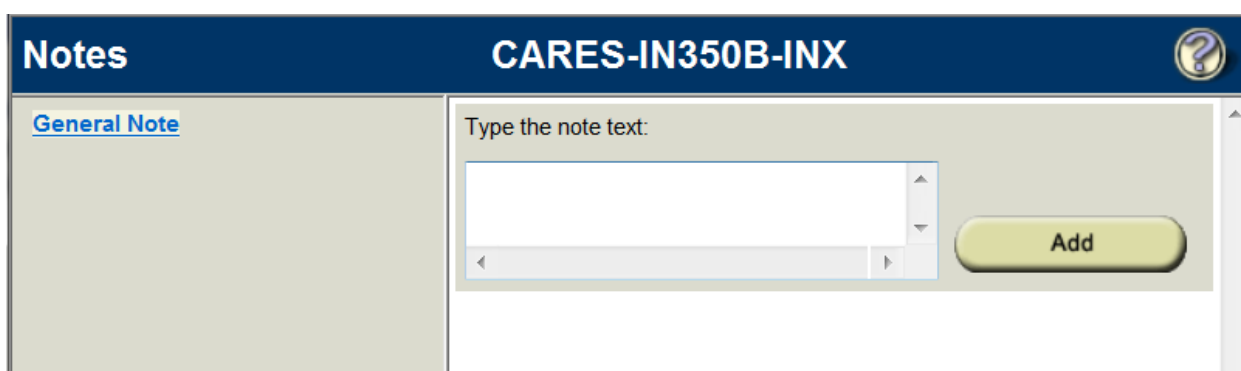


Hint: If you are having trouble printing the report directly from the menus, try opening the report as a PDF and printing it that way instead.

Step 8: Using Notes

You can save notes directly onto the report. There are two ways to add a new note to a report. The first way is from the Report List view. You can hover over the Report Name to bring up a menu and select the "Notes" option. A "Notes" pop-up window will appear. From here you can add a new General note or see all of the notes that have previously been added to a report. You can also delete notes. Be careful deleting notes because there is no notes history.

Hint: Notes ARE shared between users. Everyone that has access to the same report as you will be able to see the notes you are adding.



The screenshot shows a web interface for adding notes to a report. The window title is "Notes" and the report name is "CARES-IN350B-INX". On the left side, there is a section labeled "General Note". On the right side, there is a text input field with the label "Type the note text:" and a yellow "Add" button.

You can get to the "Notes" pop-up from the Report Details view as well. At the top of the screen, there is a button called "Tools." Hover over "Tools" to bring up a menu. One of the menu options is "Notes." This brings up the same "Notes" pop-up mentioned above.

You can also use something called "Notes Mode." This allows you to create Tag Notes. This lets you add a note for a particular item in a report. The Tag Notes can only be edited in "Notes Mode" but they can be viewed from the "Notes" pop-up underneath the General Notes anytime you access that pop-up.

To add a Tag Note, Select "Notes Mode" from the top of the report detail view. Click on the icon above the report that says "text." Highlight the part of the report you would like to tag. Note that you can only tag one line of a report. After you have highlighted a section of the report, a pop-up called "New Tag Note" appears. Note that each Note Name must be unique. You cannot create two Tag Notes with the same name. Next, enter the appropriate text for your note and click "Add."

CAPO WORKER REPORT

| SOURCE | CASE | RENEWAL | ERROR |
|--------|------|---------|-------|
| 1 | | | |

New Tag Note

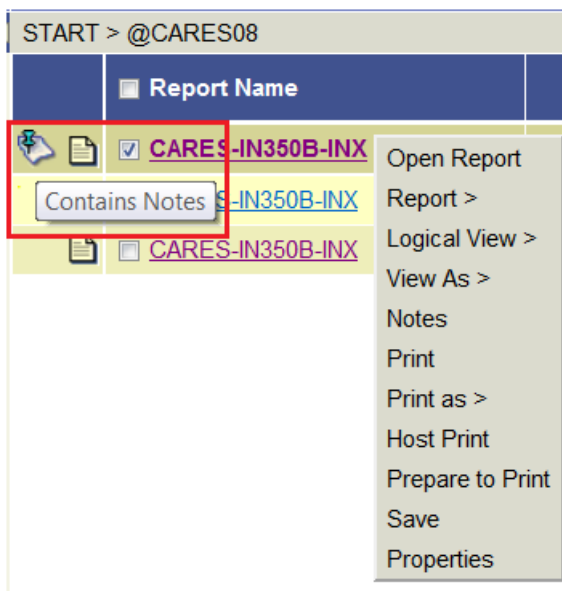
Note Name: SOURCE

Note Text: Research needed

Add Cancel

Hint: Each Tag Note Name has to be unique. Make sure you check to see if there are other tag notes with the name you want to use before you start creating your Tag Note. You will not be able to save your Tag if the name is already in use.

You can see whether a report has any notes from the Report List view. The report will have a "Notes" icon in the first column. To view the notes, hover over the report name and select the "Notes" option.



Step 9: Exiting Control-D

To exit Control-D, you can use the "Logout" button on the top of the screen. Then you can close your internet browser.