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Web Intelligence (WebI) Reports

The Wisconsin Child Care Regulatory System (WISCCRS) data is loaded into WebI every night, however, there is a 2-day lag between the updates in WISCCRS and the data in the WebI reporting system.

**ATTENTION:** Anybody with access to WISCCRS WebI will be able to run reports on both licensed and certified provider information, however, the agencies should not be releasing information pertaining to another regulatory agency.

**Example 1:**
If County A receives a request from the public to release information about certified providers in County B, please refer the person to County B who is responsible for certifying the providers in County B.

**Example 2:**
Dane County receives a request from a newspaper asking to release violation and enforcement information on all licensed and certified providers in Dane County. Dane County will release the information on the certified providers but the requestor must be referred to the Southern Regional office for the licensed provider information.

Gaining Access to WebI

WebI system is completely separate from the WISCCRS. This means that every user must apply security clearance for both systems separately. The WISCCRS security access process is explained in the Basics user guide.

**Requesting Access to WebI:**
Submit a new WISDOM Applications Access Request found at http://dcf.wisconsin.gov/forms/doc/13916.doc as follows:

**County/tribal staff:**
Give the form to the County/Tribal Security Officer for processing. NOTE: If you have a CARES ID, please make sure to give the User ID.

**Other staff (SFTA, CACFP, etc):**
Fax the form to Pirkko Moilanen at 608-267-7252.

**DCF Staff**
Contact Pirkko.moilanen@wisconsin.gov or 608-261-4595 for further information.

**MECA Staff**
Contact tiffany.wilson@wisconsin.gov for further details.

Once WebI access has been granted, the applicant will receive an email from DCF Security with the User ID and login link.
Passwords

Similar to WISCCRS and other child care web application, the system locks the password after 3\textsuperscript{rd} incorrect try. If you cannot log in after the 2\textsuperscript{nd} try, close your browser and open a new session and try again.

If the account is locked, you must contact DCF Helpdesk at 608-264-6323 to have the password reset.

Password Expiration

DCF Security will send an email once the WebI security is granted. The email includes your user ID and a temporary password. The WebI password expires after 90 days. It is important that you set yourself a reminder to reset the passwords. Below is the process how you can change it.

1. While logged in WebI, click on Preferences on the top-right of the screen.

2. Scroll down to Change Password section.

3. Enter your old password, then new one and confirm.
4. Create yourself a reminder to change it again in 90 days.

If the password has expired, you must contact DCF Helpdesk at 608-264-6323 to have it reset.

Login Process

The users can log into WebI multiple ways:

1. Users who have WISCCRS access (either update or inquiry), can access the WebI Login page by clicking on the Reports link in the top navigation bar in WISCCRS.
2. The users can access the Login link at [https://webi.dwd.state.wi.us/InfoViewApp/logon.jsp](https://webi.dwd.state.wi.us/InfoViewApp/logon.jsp)

3. DCF Users can click on the Applications link on the Intranet page. Scroll down to WebIntelligence.

**Login Screen:**
The links listed above will take the user to the Webl Login page. Below are instructions on the login screen for various users:

1. **DCF Staff:**
   Use your DCF Network Login and password. Choose ‘Windows AD’ in the Authentication field.
2. **County/Tribal, CCRR, CACFP and other non-DCF staff:**
   Use the User ID and password you received from DCF Security. Choose ‘Enterprise’ in the Authentication field.

**Logging into Webl for the First Time**
When you log into Webl for the very first time, you will see the screen below:
1. Click on the Document List Link. The following page will display:

![SAP BusinessObjects InfoView](image)

2. Click on the Plus sign next to the Public Folders. This will open the folders you have access to.

![SAP BusinessObjects InfoView](image)

3. Then click on the Plus sign next to the WISDOM folder. The next folder you are able to see should be Child Care.
4. Click on the Plus sign next to the Child Care folder. This will finally open the WISCCRS folder. Note: If you have access to the Subsidy reports, you will also see the Subsidy folder under the Child Care.

**Setting Preferences**

WebI allows you to change the way the folders and reports are generated and displayed. Below are steps on how to modify your preferences.

**Mapping to the folder of your choice:**
1. Click on the Preferences link on upper-right corner.

2. Click on the ‘Browse Folder’ button. The list of folders will appear. Choose the folder that you want to be displayed every time you log in. Click OK.
The following page will display various settings on how the data is displayed. You can set the number of objects to your liking. Also, if you want each report to open in a separate window, click on the last option under "Document Viewing".

### Document Navigation View:
- **Folder**
- **Category**

<table>
<thead>
<tr>
<th>Set the number of objects (max.) per page: 100</th>
</tr>
</thead>
</table>

### Document List Display:
- description
- owner
- date
- instance count

### Document Viewing:
- In the InfoView portal
- In a single fullscreen browser window, one document at a time
- In multiple fullscreen browser windows, one window for each document

## Webl WISCCRS Reports

Once you have navigated to the WISCCRS folder, the following reports will display:
Below are explanations of each report/folder. NOTE: Many reports have date fields. If there is no date in WISCCRS for the date fields, the date fields in Webl reports display 'high dates' 12/31/9999.

**Administration Folder**
This folder will be used to store various statistical reports. Currently, there is only one report in this folder:

**Work Load Counts by Specialist**
This report is used by licensing to display number of facilities assigned to a licensing specialist. If no name is displayed, those facilities are unassigned.

**Applicant/Provider Location (Facility) Folder**
This folder includes various reports pertaining to a provider location/facility. The reports included in this folders are explained below:

1. **Active Providers**
   This report lists active providers/facilities by regulatory type (category). The word "active" indicates that the current date of the report falls within the category begin date and category end date (license/certification period). This report also allows the user to view the following information pertaining to active providers:
   - By Language: The report is defaulted to English but if the agency has entered language information on the Applicant page in WISCCRS, the report can be sorted by language.
   - By Category (type of regulatory approval)
   - Listing by Provider (in alphabetical order by Facility/Location Name).
   - Mailing Labels: When the user chooses this view, the providers/facilities on the report are inserted into mailing labels. The labels fit on Avery 5160 sheets. Note: Licensing
mailing labels have region and facility number listed on the first row and the labels includes the name of the contact person listed on the Alternate Address screen in WISCCRS. Certification labels use the provider's first and last name.

2. **Capacity Report**
   This report also allows the user to view the following information pertaining to capacity:
   - Capacity by Region
   - Capacity by County
   - Capacity Range by Region
   - Capacity Range by Category

3. **Certification/Licensing Mailing List**
   This is the same report as the Label report under Active Providers report. This report can easily be saved as an Excel spreadsheet for mail merging.

4. **Child Care Directory**
   This report is identical to the Active Providers report but also lists information on capacity, Operational Hours, Ages Served, etc.

5. **Discontinued Providers**
   This report identifies providers whose regulatory has an end date. Providers/facilities will be listed on this report if their category end date (closed date) falls within the selected time period.

   Derived Category Status is used to filter providers as follows:
   - **Active**: If this is used, the report will include providers whose category status is active but there is an end date that falls within the time-frame given.
   - **Discontinued**: when this value is chosen, providers who have category end date within the time frame specified and whose category status is not 'approved'. Note: This report includes providers whose category status is 'relocation'.
   - **Expired**: includes providers whose category ended within the specified time frame and that category is in approved status (usually renewal/continuation).

6. **Expiring Providers**
   This report lists certified/licensed provider locations/facilities that expire within a selected period of time. Providers appear on this report when the license/certification category end date falls within this period. The user can also choose the mailing labels option and insert providers listed on the report onto mailing labels. The report is designed to use Avery 5160 labels. Note: Licensing mailing labels have region and facility number listed on the first row and the labels includes the name of the contact person listed on the Alternate Address screen in WISCCRS. Certification labels use the provider's first and last name.

7. **New Providers**
   This report lists new provider locations/facilities for a selected period of time. The word "new" indicates a first time certification/license for a provider location/facility as well as renewals and relocation applications. This report includes all providers whose regulatory (category) begin date falls within the selected time period.

   By using the ‘Application Mode’ prompt, the user can filter those who were approved initial, continuation or relocation application.
The user can also choose the mailing labels option and insert providers listed on the report onto mailing labels. The report is designed to use Avery 5160 labels.

8. **Provider Categories Ending in 30 Days**
   This report replaced CCPC alerts that were generated to alert the certification worker about a provider’s certification ending within the next 30 days.

9. **Pets Rabies Vaccination Due Date**
   This report identifies provider locations that have pets and if their rabies vaccination date falls within the time frame specified. This report replaced the CCPC alerts on rabies vaccinations.

10. **Revoked Certified Providers in Appeal Status**
    This report lists all certified providers whose certification has been revoked but who have submitted an appeal. The appeal is in pending status. NOTE: These providers must be reported to the YS program to be marked 1-star by emailing the provider number to david.sorenson@wisconsin.gov.

**Applications Folder**
This folder includes reports that pertain to initial, continuation and relocation applications for provider sites/facilities.

1. **Applications Not Approved 90 days After Application Begin Date**
   This report replaced the system-generated informational CCPC alerts that were sent to the certifying agencies to inform the agencies about certification applications that have not been approved within 90 days from the application date. The report lists pending applications that have been pending 90 or more days.

2. **Applications Not Approved 60 days After Application Begin Date**
   This report replaced the system-generated informational CCPC alerts that were sent to the certifying agencies to inform the agencies about certification applications that have not been approved within 60 days from the application date. The report lists pending applications that have been pending 60 or more days.

3. **Pending Applications**
   This report lists all pending applications for a county, tribe or region. The report includes pending applications in all three modes (initial, continuation and relocation).

   Mailing Labels: When the user chooses this view, the providers/facilities on the report are inserted into mailing labels. The labels fit on Avery 5160 sheets. Note: Licensing mailing labels have region and facility number listed on the first row and the labels include the name of the contact person listed on the Alternate Address screen in WISCCRS. Certification labels use the provider’s first and last name.

**Background Checks Folder**
These reports are primarily used by certification agencies to identify providers, household members and other persons subject to the Caregiver Background Checks.

1. **Background Checks Due Report**
   This report lists individuals whose background check is due within the time period
specified by the user. The dates are retrieved from the Next Check Date field in WISCCRS.

2. **Background Checks for Minor Household Member**
   This report is not working as expected at this time. It only identifies minors who have had background checks conducted for them. The report will be fixed.

### Complaints Folder

The following reports are available on complaint information:

1. **Complaints – Detail**
   This report includes information on complaints received by the agency within a given time frame. The report includes both active (pending, assigned, and in progress status) and closed complaints. This report can also retrieve complaint information by licensing/certification specialist assigned to the home/facility and/or provider name.

2. **Complaints – Summary**
   This report is very similar to the one above but also includes alleged violations.

### Enforcements (Licensing only) Folder

These reports are very similar to the complaint reports above. The following reports are available on enforcements:

1. **Enforcement Actions – Detail**
   This report includes information on enforcement actions issued by licensing within a given time period. The report includes both open and closed enforcement actions. Information included in this report is:
   - a. Type of enforcement action
   - b. Mailing date
   - c. Appeal information
   - d. Closed date
   - e. Violation(s) that resulted to the enforcement action
   - f. Site visit associated with the action (if applicable)

2. **Enforcement Actions – Summary**
   This report is very similar to the one above but includes only basic summary of the enforcement action.

### Forfeitures (Licensing only) Folder

These reports include information on forfeitures issued by licensing. The following reports are available in this folder:

1. **All Forfeitures with Outstanding Balance**
   This report includes information on facilities that have forfeitures with a balance due. The report also includes the original assessed amount and the current balance.

2. **Forfeitures by Rule Number**
   This report is identical to the one above but is organized by the rule number. The user can also search on forfeiture history by rule number.

3. **Forfeitures with Licensing Specialist**
   This report is identical to #1 but also includes forfeitures without an outstanding balance.
**Monitoring Plans (Licensing only) Folder**

The Monitoring Plan report includes information on monitoring plans on licensed facilities. The user can search by region, county, type of plan, licensing specialist and/or facility name. The report also includes dates for the next visit, next visit reason if those are entered into WISCCRS.

**Violations Folder**

These reports include information on violations for both certified and licensed provider sites. The following reports are available:

1. **List of all Provider Violations**
   This report includes information on violations entered into WISCCRS within the specified time period. The report includes the rule numbers, detection date, when the correction plan is due, correction verification date and rule description.

2. **Rule Violations with Description**
   This report includes information on all violations within a county/region by rule number and description.

**Visits Folder**

NOTE: The site visit reports only list providers/facilities that are assigned to a certification/licensing specialist.

1. **Certification/Licensing Monthly Visits Done:**
   This report lists visits conducted to homes/facilities within the time frame specified. The difference between the two reports is sorting.

2. **Monthly Visits Done with Monitoring Plan**
   This report is used by licensing only. This report is identical to the Licensing Monthly Visits Done except this report also include the current monitoring plan with a begin date.

3. **Violations Per Visit:**
   The user can filter site visits with x number of cited violations. Example: Find all certification site visits within 1/1/12 and 11/1/12 that had 5 or more violations. The results display non-serious and serious violations at the specific visit for licensed providers. NOTE: At this time, DCF 202 certification rules do not display which rules are considered ‘serious’. The ‘serious’ column will always have a zero displayed for certified providers.

4. **Visits Due – All Facilities by Date of Visit Due (used by licensing only)**
   This report calculated the next visit due date based on facility type, type of license and monitoring plan. The report uses a formula based on the facility type when calculating the visit due date.

5. **Visits Due by County/Specialist**
   includes information on upcoming site visits within the specified time period. The sites that have a date entered in the Next Visit Date field in WISCCRS will appear on the report. The report can be sorted by either county or licensing/certification specialist.

6. **Visits Overdue (11 months)**
   This report is only used by licensing. The report identifies programs that are visited annually and 11 months has passed from the last visit.
7. **Visits Overdue (3, 6, 9 months)**

This report is used by licensing. This report shows a licensing specialist’s caseload broken down into the following time frames: 0-3 months, 3-6 months, 6-9 months, 9-12 months, and greater than 12 months.

**Generating the Reports**

When the user double-clicks the report, a Web Intelligence window will open with another window with Prompts. Below are instructions on how to generate one of the reports (Active Providers). Most of them follow the same pattern but the prompts can vary slightly.

The prompts are either mandatory (indicated with a red arrow) or non-mandatory. The first prompt in the screen print below (Provider Type) is a mandatory prompt while the rest are not.

The top portion of the Window lists the prompts (search criteria) that you can use for the report. If a red arrow is posted next to the prompt, the prompt is mandatory. If (optional) is displayed, it is not mandatory but is helpful to filter information.
The above screen is for the Active Provider report. Below are steps how to create an Active Provider report for Milwaukee county.

1. If the user wants to include only certified providers into the report, the user must move the ‘certified’ value from the left-side box to the right-hand box by using the little arrow.

2. The next prompt is Region. This is used by licensing when they want to run a report for one of their 5 regions. This is skipped when generating reports on certified providers.

3. Move your cursor to County. In order to view all the counties/tribes, click on the ‘Refresh Values button. A list of counties will appear in the left side box.

4. In order to move the county name to the right side box, click on the arrow.
5. Next move your cursor to the Category prompt and click ‘Refresh Values’.

6. Choose the provider types you want to include into the report.

7. Next prompt is Language. The language information is retrieved from the Applicant page. If the agency has indicated that the provider speaks another language a report can be generated listing providers by language.

8. Since the certification category was already chosen under #7, there is no need for Application Type.

9. In order to generate the report, click on Run Query button on the bottom-right corner of the Prompt window.

10. A new window will open and display the results.
This section shows how a user with an Editor privilege can sort/filter the reports. After generating a report, do the following:

1. Click on the ‘Filter’ icon on the upper right corner of the screen.

2. This will add a new bar above the report screen:
3. Click on the ‘Filter’ icon. A list of various sorting options will display in the pull down menu.

If you have run a report that is not automatically sorted (example: mailing labels, list, etc), you easily sort by category, city, etc. Example: A report listing all providers in Dane county has been run. If the user wants to view only provisionally certified provider records, the filter can be set at ‘Provider’ and then the Category. Now the system allows sorting by the category of choice.

4. If ‘provisional’ category is chosen as the sort option, the report will only show those providers who are provisional. Also, the count on the bottom of the report displays the total number of provisional providers in that county.
5. To remove a filter, choose ‘remove’ from the pull-down menu.

**Save a Report**

There are many ways to save a report in WebI. To save it, click on the Document link.

1. **Save as…**
   This option allows you to save the report under your favorites. The system allows you to organize your favorite reports by creating new folders.

   ![Save As Dialog](image)

   Once you have saved the report in your favorites, you can email it or send it to another WebI users Inbox.

2. **Save to my Computer as…**
   This option will save the entire report, including all tabs. The options are excel, pdf and CSV. The CSV converts the report into separate columns for each field making it easy to use for...
mail-merges or other sorting.

3. **Save Report to My Computer as…**
   This option is similar to the above but will only save the screen/tab you are currently on. This option is handy if you want to email one page of the report (example: mailing labels) to another person. Access the report, click on the tab you want to convert and the save the report as an pdf or Excel.

**Printing a Report**
Click on the print icon on the top navigation bar. This will open the report in PDF format.

The following page will show the report in pdf format. If you want to print the report in one or 4 of the available modes for this report, click on the mode in the left-side menu.

**Reports with Multiple Pages**
Some reports are organized so that one provider category is displayed on page 1, another category on page 2, etc. Also, if multiple counties/regions are included in the report, each county/region will be listed on its individual page. To view other pages, click on the blue arrow in the top menu. The page counter also indicates if there is more than one page to the report.

**Refresh Data on a Report**
If the user wants to change the search criteria and start the report over, the prompts can be re-entered by clicking the Refresh icon on the top navigation menu.

The prompts for the report will display and you can modify the search criteria.
Problems with Printing or Converting Reports

Some users experience problems when printing or converting Webl reports into PDF, Excel or CSV. The system forces them to re-enter the search criteria. The problem can be corrected by changing the browser settings as follows (Internet Explorer):

1. Click on the Tools link in your browser and then choose “Internet Options”.

2. On the following page, click on the Security Tab and then Custom Level.

3. On the following screen, scroll down to Downloads. Check ‘Enable’ under ‘Automatic prompting for file downloads’. Click ‘OK’.
4. Click ‘Apply’ on the following page and then ‘OK’.

You might have to repeat these steps every time the browser software is upgraded.