

NNCI Monthly User Reporting Workflow

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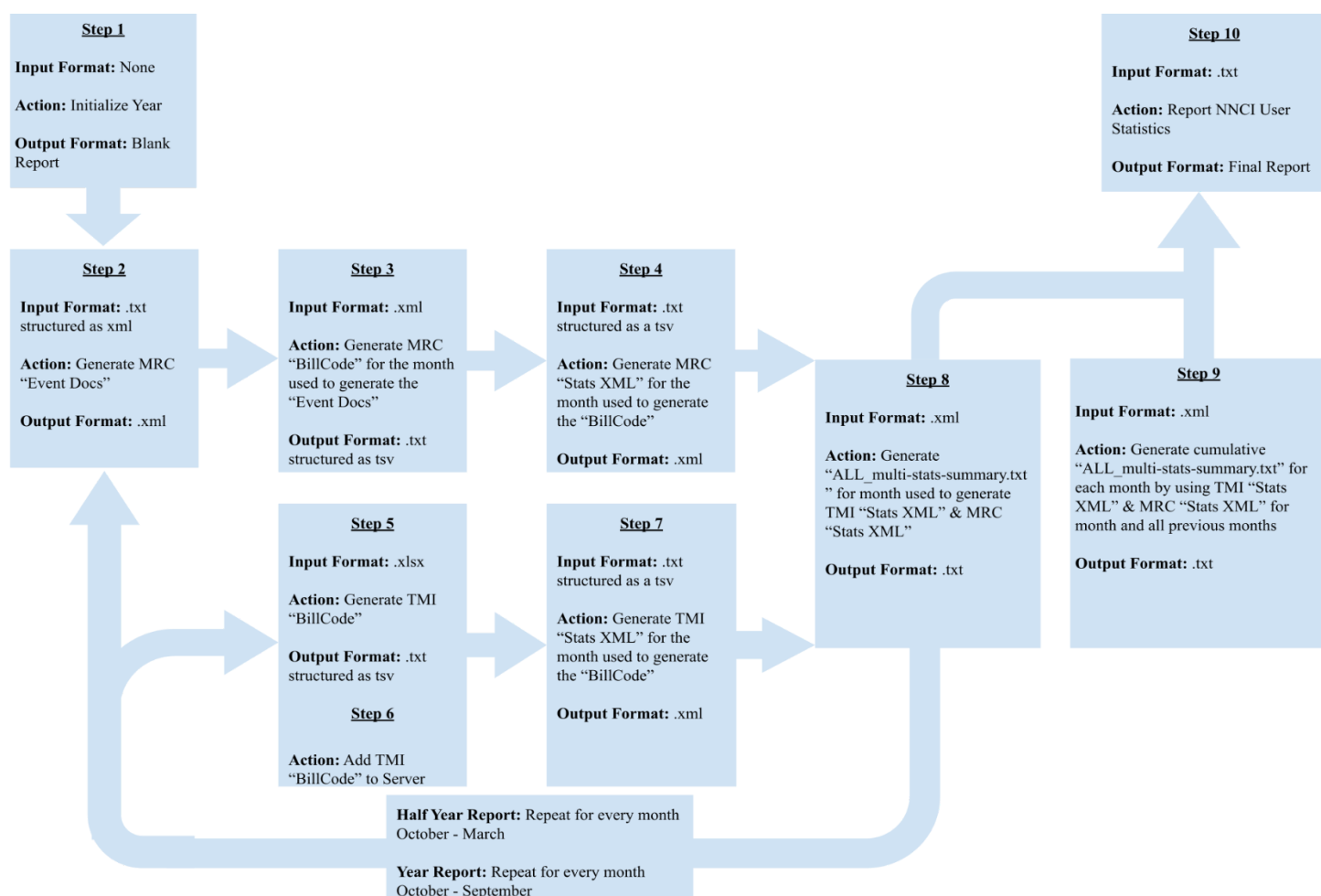
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Workflow Overview



1. **Initialize New Year**

- a. Click: "Financial Report" Toolbar Menu in word document "Workflow"
- b. Click: "Create New Report"
- c. Input: The year the new report starts on
 - *ex. 2022 for the 10/22 - 9/23 report*

2. **Generate MRC Event Docs**

- a. Open: "Reports" menu on the "Sedona LabSentry Server"
- b. Click: "select ..." *"Select Event Files" window opens*
- c. Select: All event files for the desired month by holding down the shift key to select multiple files.
 - *ex. For January select Sentry2022-01-01.txt through Sentry2022-01-31.txt (31 files in total)*
- d. Click: "OK" *"Select Event Files" window closes*

"Creating Event Docs (misc days) for ut-labsentry(03)" will appear on screen while the the "Event Docs" are being generated

3. **Generate MRC BillCodes Files**

- a. Open: "Reports" menu on the "Sedona LabSentry Server"
- b. Click: "Invoice" *"Invoice Controller" window opens*
- c. Click: "Create UserProfile Docs"
- d. Click: "Create TableCode Docs"
- e. Click: "Update System Config"
- f. Click: "Update User Config"
- g. Click: "Create Contacts Docs"
- h. Click: "Update Contacts Config"
- i. Click: "Save UserStats Docs"
- j. Click: "Export BillCode" *"Invoice Docs - Export.vi ToolboxXML Save Data.vi" window opens*
- k. Name File: File name must start with "MRC_"
- l. Click: "Save" *"Invoice Docs - Export.vi ToolboxXML Save Data.vi" window closes*
- m. Click: "OK" *"Invoice Controller" window closes*

4. **Generate MRC Stats XML Files**

- a. Open "Reports" menu on the "Sedona LabSentry Server"
- b. Click: "UserStats - MRC" *"BillCode Controller" window opens*
- c. Click: "Create UserProfile Docs"
- d. Click: "Select BillCode ..." *"Select Files" window opens*
- e. Select: BillCode for the desired month

- f. Click: "OK" *"Select Files" window closes*
- g. Click: "User Statistics" A popup window saying "No new users have been added." may appear.
Click "OK" if it appears
- h. Click: "Save UserStats Docs"
- i. Click: "Export Stats XML" *"Invoice Docs - Export.vi ToolboxXML Save Data.vi" window opens*
- j. Name File: File name must start with "MRC_"
- k. Click: "Save" *"Invoice Docs - Export.vi ToolboxXML Save Data.vi" window closes*
- l. Click: "OK" *"BillCode Controller" window closes*

5. **Generate TMI BillCodes Files from Raw TMI Data Files**

- a. Click: "Financial Report Data" Toolbar Menu in the google sheet containing the Newly Created Report
- b. Click: "Open"
- c. Click: "Open Raw Data Folder"
- d. Upload: TMI .xlsx files provided by the TMI admin
- e. Click: "Sanitize Raw Data"
- f. Click: "Digest Data"

If an error popup window appears, fix all the data rows listed in the error report then click "Digest Data" again

- g. Click: "Download Digest"

6. **Add TMI BillCodes Files to LabAccess Server**

- a. Import: TMI BillCodes produced from raw TMI data use a flash-drive to transfer file
- b. Open Folder: "BillCodes" located in LabSentry(E:)
- c. Move: Imported TMI BillCode to "BillCodes" folder

7. **Generate TMI Stats XML Files**

- a. Open: "Reports" menu on the "Sedona LabSentry Server"
- b. Click: "UserStats - TMI" *"BillCode Controller" window opens*
- c. Click: "Create UserProfile Docs"
- d. Click: "Select BillCode ..." *"Select Files" window opens*
- e. Select: BillCode for the desired month
- f. Click: "OK" *"Select Files" window closes*
- g. Click: "User Statistics" A popup window saying "No new users have been added." may appear.
Click "OK" if it appears

- h. Click: "Save UserStats Docs"
- i. Click: "Export Stats XML" *"Invoice Docs - Export.vi ToolboxXML Save Data.vi" window opens*
- j. Name File: File name must start with "TMI_"
- k. Click: "Save" *"Invoice Docs - Export.vi ToolboxXML Save Data.vi" window closes*
- l. Click: "OK" *"BillCode Controller" window closes*

8. **Generate "ALL_multi-stats-summary" Files**

- a. Open "Reports" menu on the "Sedona LabSentry Server"
- b. Click: "MultiStats - All" *"MultiStats Controller" window opens*
- c. Click: "Select Stats XML ..." *"Select Files" window opens*
- d. Select: TMI user stats xml file & MRC user stats xml file for the desired month hold down on shift key to select multiple files
- e. Click: "OK" *"Select Files" window closes*
- f. Click: "Save UserStats Docs"
- g. Click: "Export Stats Results"
- h. Click: "Stats Results Folder" *"StatsResults folder window will open"*
- i. Rename File: "ALL_multi-stats-summary.txt" to year-month-stats-summary.txt
 - *ex. 2022-10-stats-summary.txt*

9. **Generate Cumulative "ALL_multi-stats-summary" Files**

- a. Open "Reports" menu on the "Sedona LabSentry Server"
- b. Click: "MultiStats - All" *"MultiStats Controller" window opens*
- c. Click: "Select Stats XML ..." *"Select Files" window opens*
- d. Select: All TMI & MRC user stats xml files from October to the desired month; hold down shift key to select multiple files
 - *ex. For January select October MRC, October TMI, November MRC, November TMI, December MRC, December TMI, January MRC, and January TMI user stats xml files*
- e. Click: "OK" *"Select Files" window closes*
- f. Click: "Save UserStats Docs"
- g. Click: "Export Stats Results"
- h. Click: "Stats Results Folder" *"StatsResults" folder window will open*
- i. Rename File: "ALL_multi-stats-summary.txt" to year-month_previous year-10_cumulative-stats-summary.txt
 - *ex. For January 2022-01_2021-10_cumulative-stats-summary.txt*

10. Report NNCI User Statistics

- a. Click Tab: “Financial Report Data” in the google sheet containing the Newly Created Report
- b. Click: “Open”
- c. Click: “Open Stats Summary Folder”
- d. Upload the generated Cumulative and Monthly Stats Summaries to the monthly and cumulative folders
- e. Click “Insert User Stat Summary Data