New Innovations (RMS) Custom Report FAQs

MMCGME

Metro MN Council on Graduate Medical Education

Table of Contents

FAQ: How do I save a custom report and keep the data for a specific date range?

The Custom Reports always return 'real-time' data. If you need to save data from a specific date range, generate the report in an Excel or tab-delimited file and save it to your hard drive.

FAQ: I need more information on my report. How can I add more columns?

1. Click on Report Options next to the report and select **Edit Columns**
2. Click **New**
3. Check the box next to the columns to include, then click **Add/Remove Custom Columns** at the bottom of the page.

The new column is added to the bottom of the column list and can be managed like the other columns by filtering and moving up or down.

FAQ: How do I let faculty generate a report?

1. Go to *More > Custom Reports*
2. Find the report
3. Go to **Report Options** and select **Secure**
4. Check the **Faculty** box under the section 'Allow other work roles to view this report'.
5. Click **Save Report Security**

Now all people with the Work Role of Faculty will be able to generate the report.

FAQ: I don't need the time in a date field!

You can edit a date field to suppress the appearance of a time entry by following these steps:

1. Go to More>Custom Reports
2. In the Report Options drop down select **Edit Columns**
3. To the left of the date field click **Edit**
4. Check the box labeled "Suppress the time portion of the date"
5. Click **Save Column**

FAQ: What is the criteria for a person to be able to generate or view custom reports?

Only users with an "Administrator" work role can see Custom Reports and they can only view results for the departments in which they are privileged.

FAQ - Why can't I create a custom report if I have level 5 privileges?

Even though you have level 5 or 6 privileges, you need a work role of administrator to be able to create custom reports. Keep in mind that you can have more than one work role in the software. Therefore, if you have a faculty work role because you supervise and teach residents, you can also have a secondary work role of administrator.

An administrator who has level 5 privileges in Personnel can add a work role to a person's records as long as this action has not been limited by Customized Security:

1. Go to Personnel>Personnel Records
2. Select the name from the drop down box
3. Click the link labeled **Basic Information**
4. Place a check in the box to the left of the additional work role
5. Click **Save and Return**