2017

Residency Management Suite (RMS) Custom Reports Training

MMCGME
Metro MN Council on Graduate Medical Education

MMCGME Services

Custom Reports Training

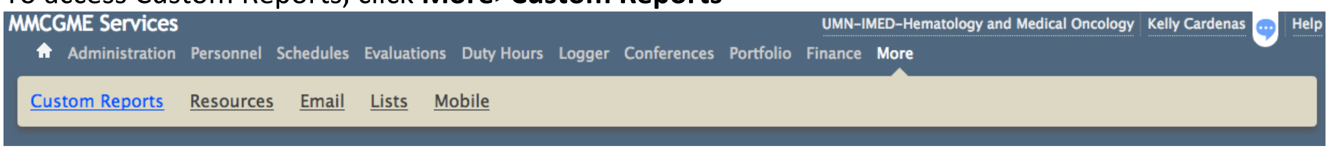
What are Custom Reports?

Custom Reports is a module within Residency Management Suite (RMS) designed to gather data from the software using specified data sources. Custom Reports offers a variety of ways to filter and sort data making Custom Reports more flexible than other reports in the database.

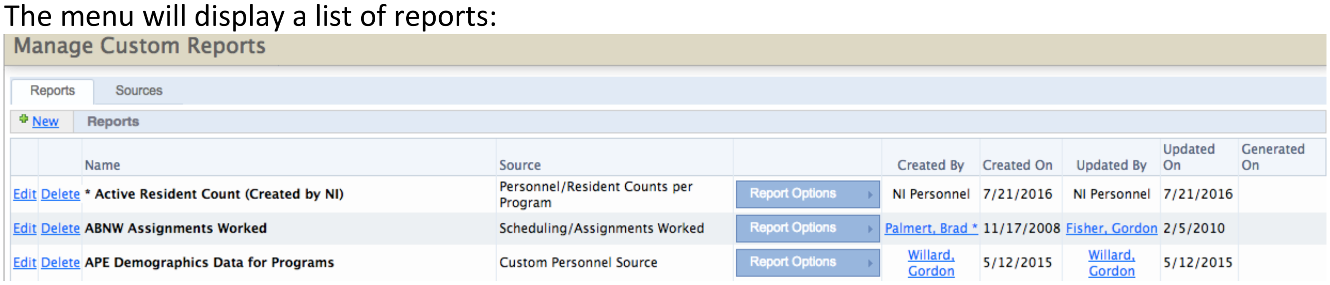
To create Custom Reports, users must have an Administrator Work Role and Coordinator (level 5) access. Should you need to change access to utilize Custom Reports, please contact RMSHelp@umn.edu.

Accessing Custom Reports

To access Custom Reports, click **More>Custom Reports**

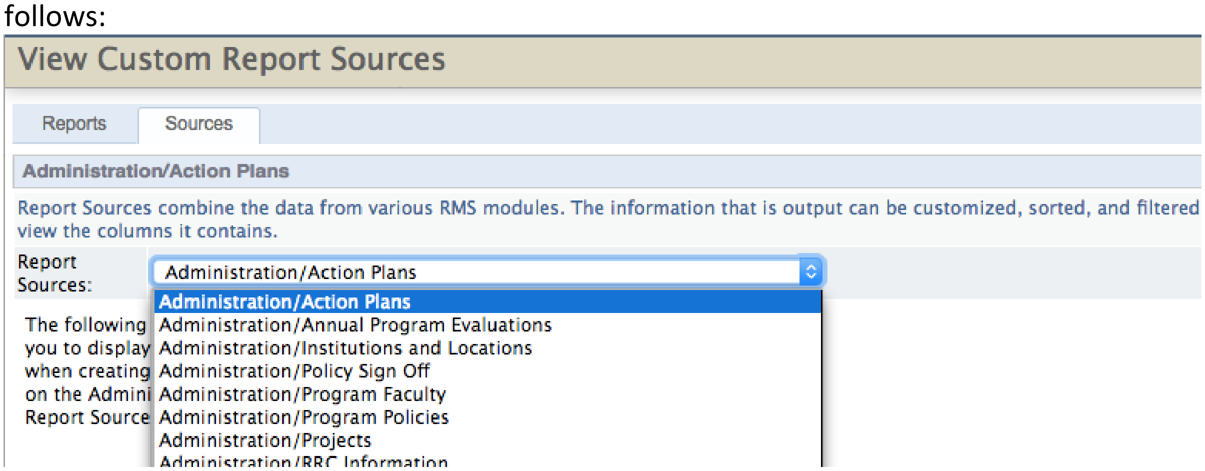


The menu will display a list of reports:



Data Sources

There is a second tab titled Sources. The sources tab displays all available packaged data sources and the fields contained within. There is a drop-down list under Report Sources which appears as follows:



This is the full list of available report sources. The first part of the source title indicates the RMS module from where the data originates.

When a report source is chosen, the list of fields will change. Below the list of fields, are additional field names which may be added to a report. Please note: the best practice is to select a report source which contains all the necessary fields as adding custom columns may adversely affect data integrity.

Clicking the **View List of Sources** link in the upper right corner will display an alternative view of the sources.

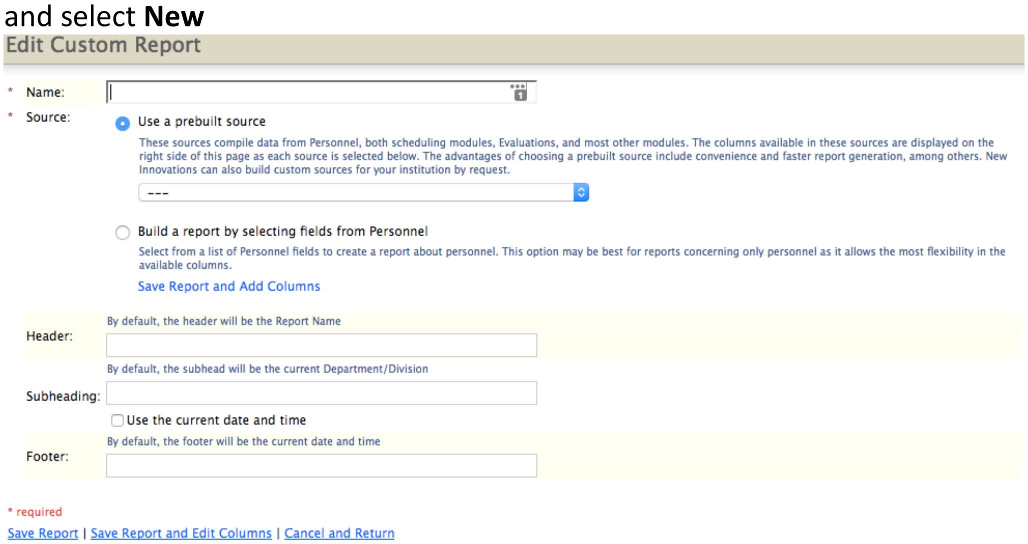
Reports | Sources

Predefined Report Sources

		Category	Contents	Name	Secured
View	Secure	Administration	Action Plans	Administration/Action Plans	
View	Secure	Administration	Annual Program Evaluations	Administration/Annual Program Evaluations	
View	Secure	Administration	Institutions and Locations	Administration/Institutions and Locations	
View	Secure	Administration	Policy Sign Off	Administration/Policy Sign Off	
View	Secure	Administration	Program Faculty	Administration/Program Faculty	
View	Secure	Administration	Program Policies	Administration/Program Policies	
View	Secure	Administration	Projects	Administration/Projects	
View	Secure	Administration	RRC Information	Administration/RRC Information	
View	Secure	Administration	RRC Internal Review Information	Administration/RRC Internal Review Information	
View	Secure	Administration	RRC Site Review Information	Administration/RRC Site Review Information	
View	Secure	Agreements	Institution Agreements	Agreements/Institution Agreements	
View	Secure	Agreements	Program Agreements	Agreements/Program Agreements	
View	Secure	Billing	Billing Allocations	Billing/Billing Allocations	
View	Secure	Checklists	Assigned Checklists	Checklists/Assigned Checklists	
View	Secure	Checklists	Incomplete Steps	Checklists/Incomplete Steps	
View	Secure	Checklists	Step State	Checklists/Step State	
View	Secure	Conferences	Attendance	Conferences/Attendance	
View	Secure	Conferences	Attendance Counts	Conferences/Attendance Counts	
View	Secure	Conferences	Basic Information	Conferences/Basic Information	
View	Secure	Conferences	Conference by Core Competency	Conferences/Conference by Core Competency	
View	Secure	Conferences	Conference List	Conferences/Conference List	
View	Secure	Conferences	Opted Out Surveys	Conferences/Opted Out Surveys	
View	Secure	Conferences	Speakers	Conferences/Speakers	
View	Secure	Continuity Clinics	Logged Visits	Continuity Clinics/Logged Visits	
View	Secure	Curriculum	Rotations In Use for Mmcgme	Curriculum/Rotations In Use for Mmcgme	

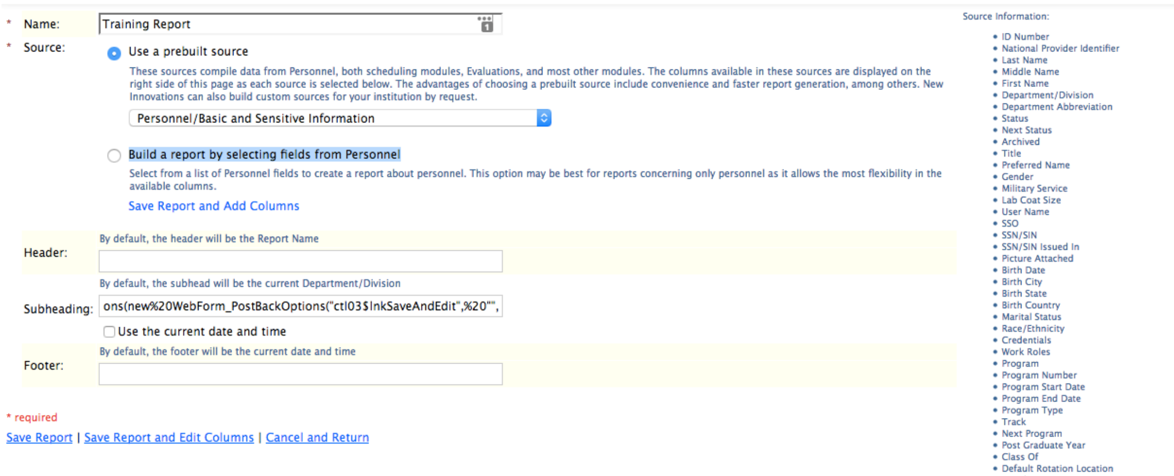
Creating a Report

Upon selecting the appropriate data source, a report may be created. Return to the **Reports** tab and select **New**



Enter a **Report Name** and select the **appropriate data source** to create a report. Again, best practice is to use a prebuilt source.

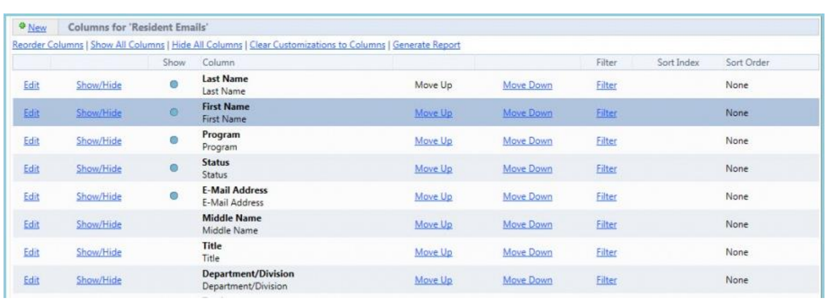
Once a data source is selected, the Source Information, or available fields, are displayed in a column to the right which allows for verification of necessary fields.



Enter a report **Header**, **Subheading**, and **Footer**, if desired.

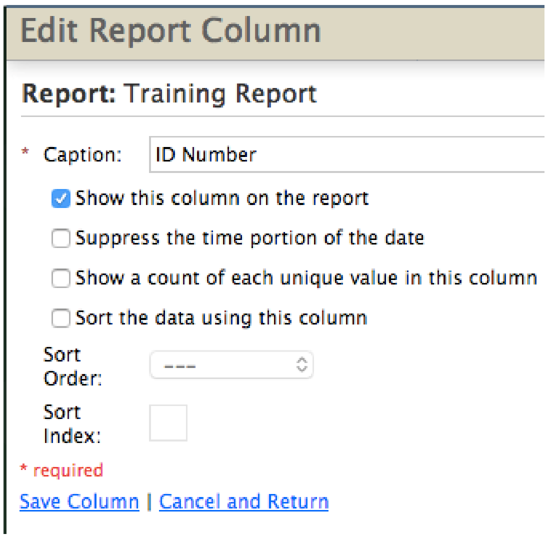
Configuring Columns

1. Columns may be rearranged by using **Reorder Columns**
2. **Show All Columns** displays all columns on the report. **Hide All Columns** removes all columns from the report. If less than half of the fields are necessary for the report, select Hide All Collumns and individually choose the necessary fields.
3. **Clear Customizations to Columns** removes any filters or edits that have been applied to all columns in the report
4. **Generate Report** in new window, Excel or tab delimited file



Editing a Column

1. Go to **Main > Custom Reports**
2. Click **Columns** beside the correct report
3. Click **Edit** beside the column
4. Change the name of a column by entering the new name in the text field
5. Suppress the time portion for any date column by checking the box
6. Show how many of each type for a column is in the report by checking the box
7. Use *Sort the data using the column* for sorting each column when the report is generated. Sort order can be ascending or descending. Sort order is determined numerically starting at zero.



Add Additional Columns to a Report Source

1. Go to *More > Custom Reports*
2. Click **Columns** beside the correct report
3. Click **New** to the left of the name of the report
4. Check the columns to add to the existing report
5. Click **Add/Remove Custom Columns**

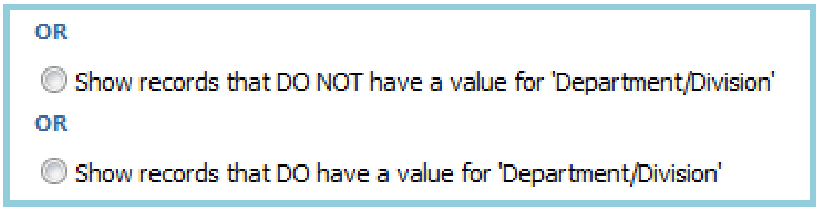
Setting Column Filters

1. To Filter any of the columns click **Filter** to the right of the column
2. There are seven ways to filter columns. Choose the best filter for the column.

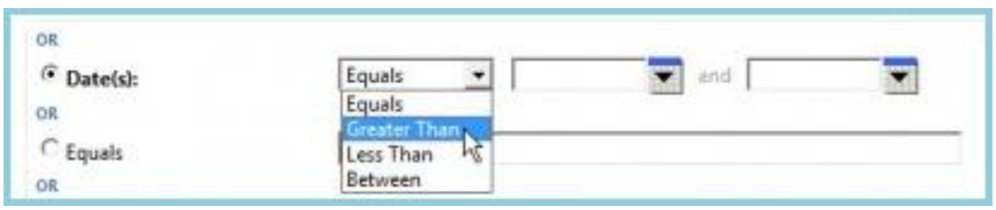
The following filter options are available:

- **No filter** - Select this option to remove a filter setting for the column.

- **Value Validation** - Select the appropriate option to display records that **do or do not** have a value entered in the data field for this column.



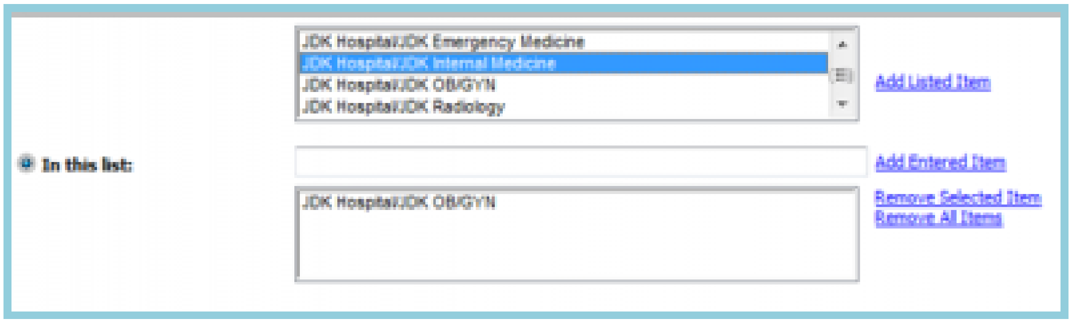
- **Date** - This column filter is used for date sensitive columns. Select an action from the dropdown list and enter appropriate date parameters.



- **Equals or Does Not Equal** - Enter a value or use a wild card character (*). The example shown below would return any item that starts with the letter 'N.'

When filtering using department or program names, work roles, RL or FL levels, “In this list” is your best filter option.

- **In this list** - Highlight the items you want to include in the filter and click **Add Selected Item**. The item(s) will then appear in the bottom box. This is the best option to use to see if the report has all the necessary data as it usually runs quickly and does not require downloading of data.



Click **Save Filter.** The Filter link will now appear in bold on the Edit Report Columns page.

Note

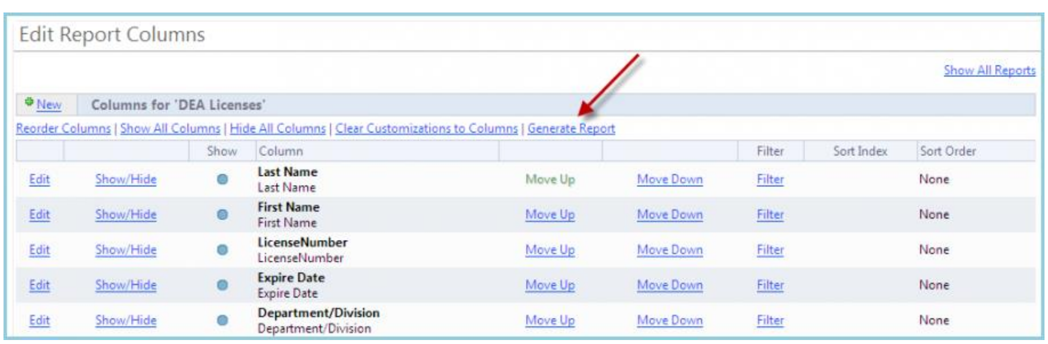
Filters can be added to columns that are not going to be shown on the report. For example, an Administrator may create a Custom Report on the Home Address and Cell Number of faculty members. A filter can be applied to the column of Status Type to gather data about Faculty, but the column for Status Type does not have to be shown on the report.

Generating a Report

Generate a report from the Edit Report Columns page:

1. Click **Generate Report** from the top of the column filtering page
2. Choose the method for generating a custom report

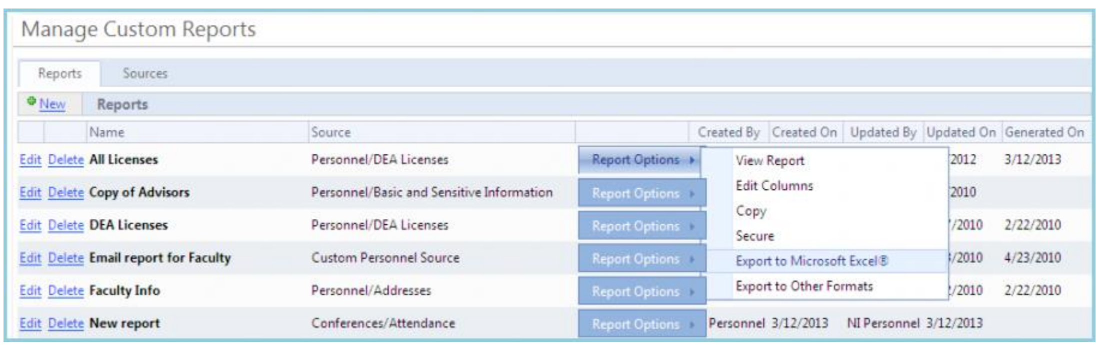
- **Microsoft Excel spreadsheet**
- **Sortable table in a new browser window** displays the report in a popup window* This is the best option to use to see if the report has all the necessary data as it usually runs quickly and does not require downloading of data.
- **Tab-delimited text file** allows the report to be opened with another program



You can also generate a custom report from the list of custom reports:

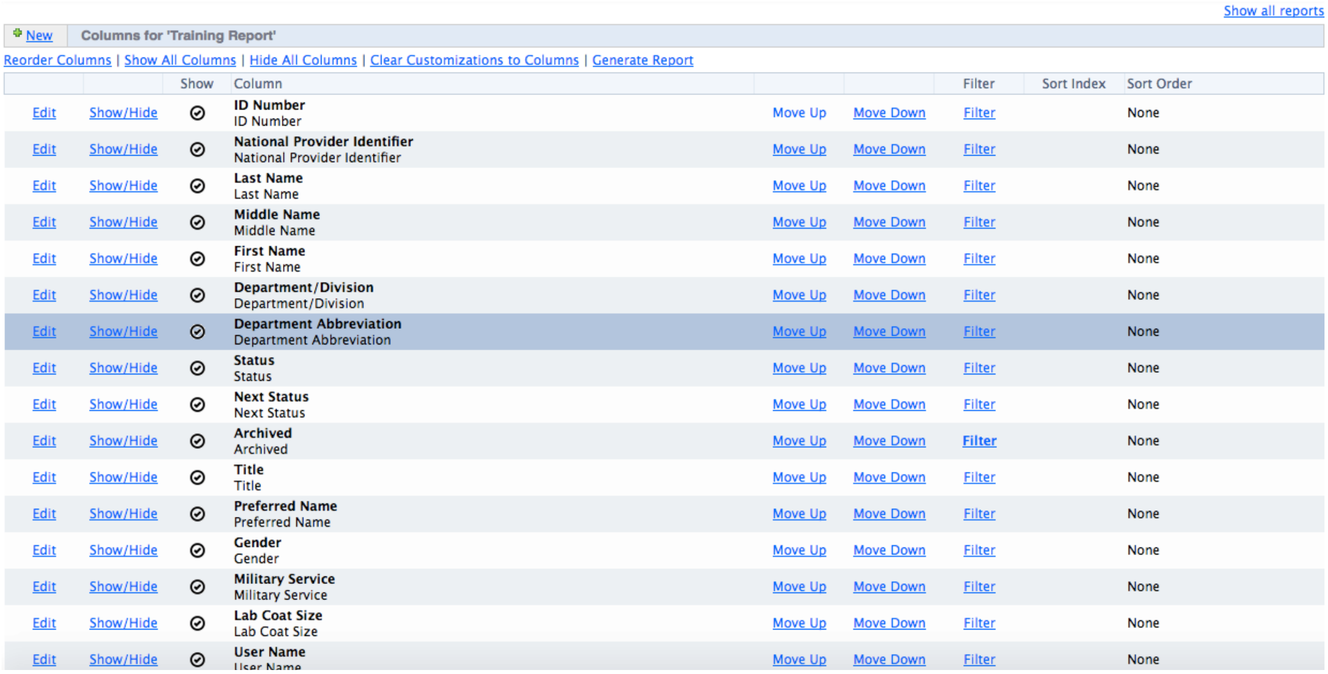
1. Go to *More > Custom Reports*
2. Find your report in the list and click **Report Options**
3. Select one of the following:

- View Report - Generates the report
- Edit Columns - Allows you to edit the filters and columns of your report
- Copy - Copy the report
- Secure - Configure the security for this report
- Export to Microsoft Excel - Export to Excel file
- Export to Other Formats - Export to Excel, sortable table or tab-delimited text file



Click **Save Report and Edit Columns**.

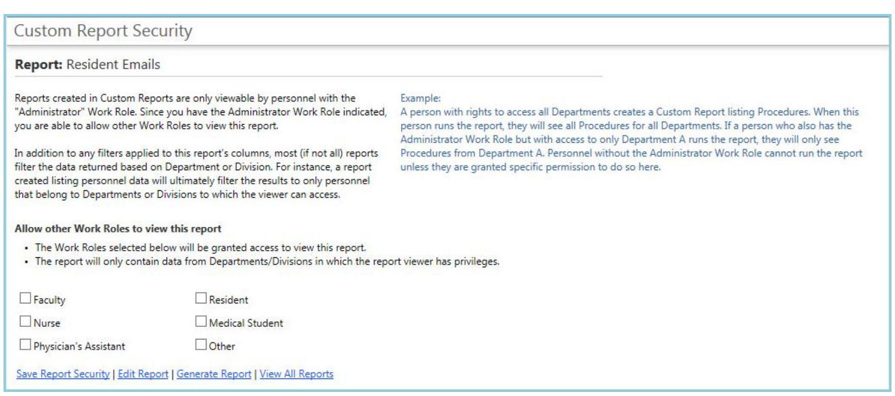
Within the Edit Report Columns area are a list of fields. All fields are initially included in the report. Best practice for sources with a large number of fields is to Hide All Columns and select only necessary columns in the order in which they will appear on the report.



Custom Reports Security Settings

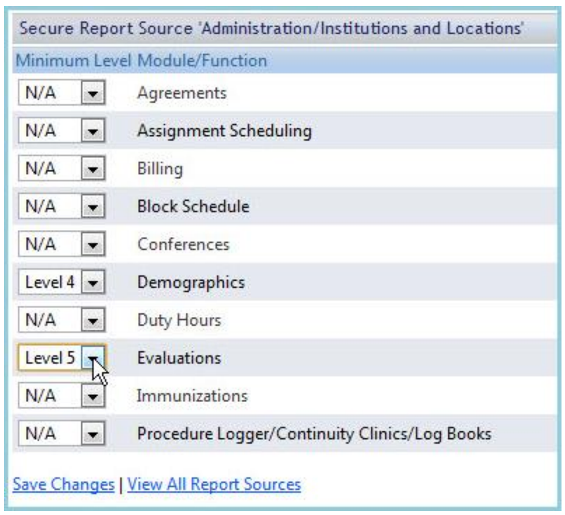
Limit Report Viewing

1) Go to *More > Custom Reports*
2) Find your Custom Report and click **Report Options**, then **Secure**
3) Check the Work Roles for people who can view the report
   a) Indicated indviduals will then be able to view data for all of departments in which they have access
   b) This access can be limited (see below)
4) Click **Save Report Security**



Limit the Data in a Report Source

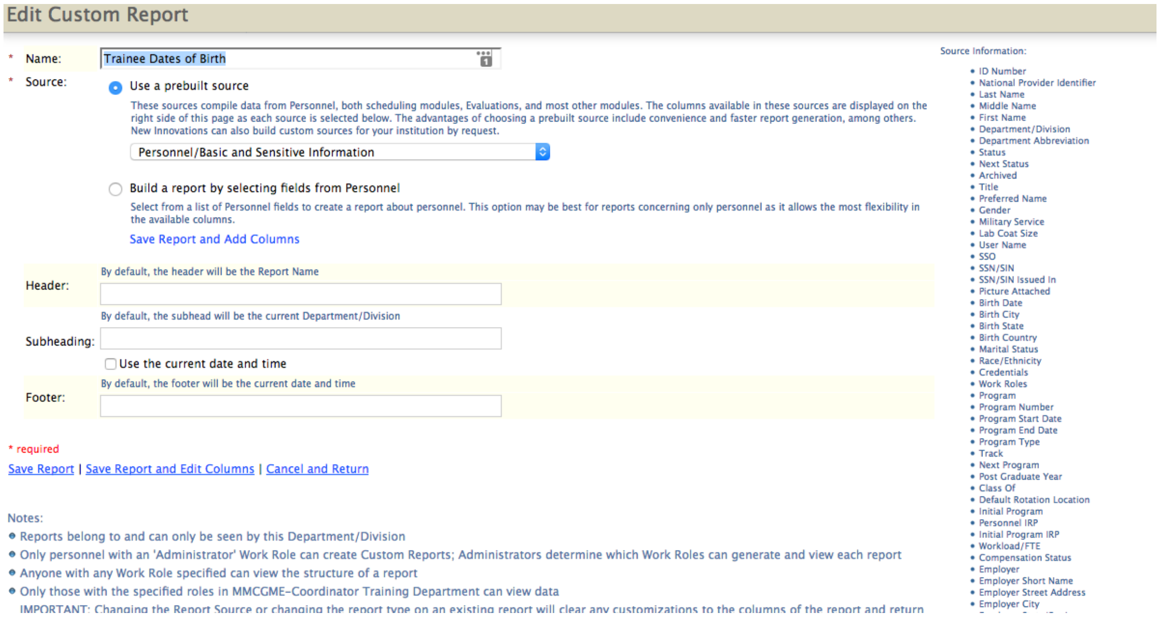
1) Go to **More > Custom Reports > Sources tab**
2) Click **View List of Sources** (upper right corner)
3) Click **View** to view all fields in a report source
4) Click **Secure** to change settings
5) For each Module/Function, select your Minimum Level of security.
   a) Select the privilege level a person must have to view the information in the source
   b) All *Personnel Data* sources default to Level, 4 which prevents viewing by anyone with a lower privilege level
6) Click **Save Changes**



EXERCISE: Create a Custom Report

1. Log into MMCGME-Coordinator Training Department.
2. Create a custom report to make a list of trainee names (last, first, middle), birth dates and status. Sort list by trainee last name, then by trainee first name.
3. Filter list using program MMCGME-Coordinator Training. Remember, filtered columns do not need to be shown on your report.

Instructions to Create Date of Birth Custom Report



1. Click **Save Report and Edit Columns**
2. Select **Hide All Columns**
3. Show **Last Name**, **First Name**, **Middle Name**, **Date of Birth**, **Status**
4. Filter on **Program**
   (In this list, select MMCGME-Coordinator Training, **Add selected item**, **Save Filter**)
5. **Filter** on Status
   (**In this list**, select Chief Resident, Chief Resident – Add'l Year, Chief Resident – No Add'l Year, FL1, FL2, FL3, FL4, Non-Accredited Year, Non-Accredited Year-FL1, Non-Accredited Year-FL2, Non-Accredited Year-FL3, Non-Accredited Year-FL4, Non-Accredited Year-RL1, Non-Accredited Year-RL2, RL1, RL2, RL3, RL4, RL5, RL6, RL7, RL8, RL9, Training Grant-FL1, Training Grant-FL2, Training Grant-FL3, Training Grant-FL4, Training Grant-RL1, Training Grant-RL2, Training Grant-RL3, Training Grant-RL4, Training Grant-RL5, Training Grant-RL6, **Add Selected Item**, **Save Filter**)
6. **Edit** Last Name Column, select **Sort the data using this column**, **Save Column**
7. **Edit** First Name Column, select **Sort the data using this column**, **Save Column**
8. Click **Generate Report>sortable table in a new browser window**

Your report should look as follows:

Trainee Dates of Birth

MMCGME/MMCGME-Coordinator Training Department

Last Name	First Name	Middle Name	Birth Date	Status
Resident	AA		3/28/1983	RL3
Resident	AAA		10/21/1982	RL2
Resident	C		10/10/1985	RL1
Mouse	Mickey		9/12/1959	RL1
Resident	EEE		3/22/1986	RL1
Resident	NNN			RL3
Resident	OOO			RL1
Resident	YYY			RL1
Resident	ZZZ			RL1
Resident	FFF		7/1/1987	RL3
Resident	III		2/2/1987	RL2
Resident	TTT			RL2
Resident	UUU			RL3
Resident	VVV			RL1
Resident	WWW			RL1
Resident	XXX			RL2
Resident	PPP			RL2
Resident	Q			RL1
Resident	QQQ		2/1/1990	RL2
Resident	RRR			RL1
Dempsey	Patrick		10/10/1962	RL3

Export to Excel

Count: 21

Wednesday, February 15, 2017 9:42:22 AM

Notes:

- Data being returned is limited by the filters that have been selected. If no data is returned please check your filters.
- Custom Reports automatically filters most reports to departments in which the report viewer has access.

This report was produced using the New Innovations Residency Management Suite (RMS)