Custom Reports Training

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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

![Image]

The menu will display a list of reports:

<table>
<thead>
<tr>
<th>Name</th>
<th>Source</th>
<th>Created By</th>
<th>Created On</th>
<th>Updated By</th>
<th>Updated On</th>
<th>Generated On</th>
</tr>
</thead>
<tbody>
<tr>
<td>AEP Demographics Data for Programs</td>
<td>Custom Personnel Source</td>
<td>Willard, Gordon</td>
<td>5/12/2015</td>
<td>Willard, Gordon</td>
<td>5/12/2015</td>
<td></td>
</tr>
</tbody>
</table>

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:

![Image]
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.

Creating a Report

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

![Edit Custom Report](image)
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 Columns 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.

  ![Value Validation Image]

  - **Show records that DO NOT have a value for 'Department/Division'**
  - **Show records that DO have a value for 'Department/Division'**

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

  ![Date Filter Image]

• **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.'

  ![Equals Filter Image]

  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 individuals 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** sorttable in a new browser window
Your report should look as follows:

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Birth Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA</td>
<td></td>
<td></td>
<td>3/28/1983</td>
<td>R1</td>
</tr>
<tr>
<td>AAA</td>
<td></td>
<td></td>
<td>10/21/1982</td>
<td>R2</td>
</tr>
<tr>
<td>C</td>
<td></td>
<td></td>
<td>10/22/1985</td>
<td>R1</td>
</tr>
<tr>
<td>Mickey</td>
<td></td>
<td></td>
<td>9/12/1959</td>
<td>R1</td>
</tr>
<tr>
<td>EEE</td>
<td></td>
<td></td>
<td>3/22/1980</td>
<td>R3</td>
</tr>
<tr>
<td>NNN</td>
<td></td>
<td></td>
<td>10/10/1985</td>
<td>R1</td>
</tr>
<tr>
<td>OOO</td>
<td></td>
<td></td>
<td>7/1/1947</td>
<td>R3</td>
</tr>
<tr>
<td>PPP</td>
<td></td>
<td></td>
<td>2/2/1957</td>
<td>R2</td>
</tr>
<tr>
<td>QQW</td>
<td></td>
<td></td>
<td>2/2/1957</td>
<td>R2</td>
</tr>
<tr>
<td>WWW</td>
<td></td>
<td></td>
<td>10/10/1952</td>
<td>R1</td>
</tr>
<tr>
<td>XXX</td>
<td></td>
<td></td>
<td>10/10/1952</td>
<td>R1</td>
</tr>
<tr>
<td>QQQ</td>
<td></td>
<td></td>
<td>2/1/1900</td>
<td>R2</td>
</tr>
<tr>
<td>RRN</td>
<td>Patrick</td>
<td></td>
<td>10/10/1952</td>
<td>R3</td>
</tr>
</tbody>
</table>

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 Resident Management Suite (RMS)