

2017

Residency Management Suite (RMS)
Custom Reports Training



Metro MN Council on Graduate Medical Education

Custom Reports Training

What are Custom Reports?	3
Accessing Custom Reports	3
Data Sources	3
Creating a Report	4
Configuring Columns	5
Editing a Column	6
Add Additional Columns to a Report Source	6
Setting Column Filters	6
Generating a Report	8
Custom Reports Security Settings	10
EXERCISE: Create a Custom Report	11

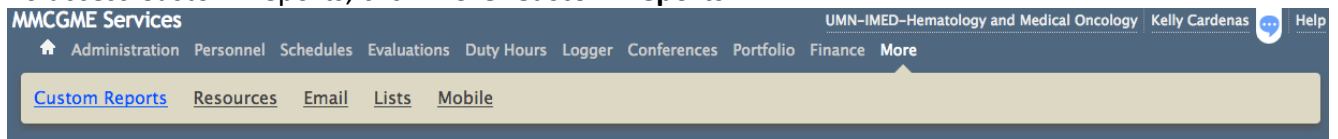
What are Custom Reports?

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**



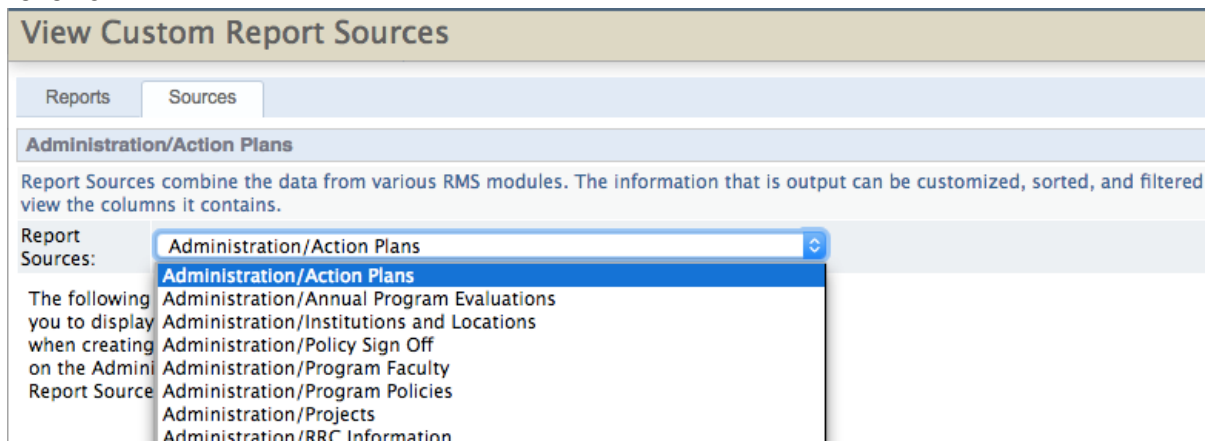
The menu will display a list of reports:

Manage Custom Reports

Reports		Sources				
Name	Source	Created By	Created On	Updated By	Updated On	Generated On
Edit Delete * Active Resident Count (Created by NI)	Personnel/Resident Counts per Program	Report Options	NI Personnel	7/21/2016	NI Personnel	7/21/2016
Edit Delete ABNW Assignments Worked	Scheduling/Assignments Worked	Report Options	Palmert, Brad	11/17/2008	Fisher, Gordon	2/5/2010
Edit Delete APE Demographics Data for Programs	Custom Personnel Source	Report Options	Willard, Gordon	5/12/2015	Willard, Gordon	5/12/2015

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**

Edit Custom Report

* Name:

* Source: Use a prebuilt source
These sources compile data from Personnel, both scheduling modules, Evaluations, and most other modules. The columns available in these sources are displayed on the right side of this page as each source is selected below. The advantages of choosing a prebuilt source include convenience and faster report generation, among others. New innovations can also build custom sources for your institution by request.

Build a report by selecting fields from Personnel
Select from a list of Personnel fields to create a report about personnel. This option may be best for reports concerning only personnel as it allows the most flexibility in the available columns.
[Save Report and Add Columns](#)

By default, the header will be the Report Name
 Header:

By default, the subhead will be the current Department/Division
 Subheading:

Use the current date and time

By default, the footer will be the current date and time
 Footer:

* required
[Save Report](#) | [Save Report and Edit Columns](#) | [Cancel and Return](#)

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.

* Name:

* Source: Use a prebuilt source
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 Select from a list of Personnel fields to create a report about personnel. This option may be best for reports concerning only personnel as it allows the most flexibility in the available columns.
[Save Report and Add Columns](#)

Header:

Subheading:

 Use the current date and time

Footer:

* required
[Save Report](#) | [Save Report and Edit Columns](#) | [Cancel and Return](#)

Source Information:

- ID Number
- National Provider Identifier
- Last Name
- Middle Name
- First Name
- Department/Division
- Department Abbreviation
- Status
- Next Status
- Archived
- Title
- Preferred Name
- Gender
- Military Service
- Lab Coat Size
- User Name
- SSO
- SSN/SIN
- SSN/SIN Issued In
- Picture Attached
- Birth Date
- Birth City
- Birth State
- Birth Country
- Marital Status
- Race/Ethnicity
- Credentials
- Work Roles
- Program
- Program Number
- Program Start Date
- Program End Date
- Program Type
- Track
- Next Program
- Post Graduate Year
- Class Of
- Default Rotation Location
- Initial Program

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

Configuring Columns

- Columns may be rearranged by using **Reorder Columns**
- 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.
- Clear Customizations to Columns** removes any filters or edits that have been applied to all columns in the report
- Generate Report** in new window, Excel or tab delimited file

Columns for 'Resident Emails'							
Reorder Columns Show All Columns Hide All Columns Clear Customizations to Columns Generate Report							
	Show	Column		Filter	Sort Index	Sort Order	
Edit	Show/Hide	<input checked="" type="radio"/> Last Name Last Name	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> First Name First Name	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> Program Program	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> Status Status	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> E-Mail Address E-Mail Address	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> Middle Name Middle Name	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> Title Title	Move Up	Move Down	Filter	None	
Edit	Show/Hide	<input checked="" type="radio"/> Department/Division Department/Division	Move Up	Move Down	Filter	None	

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.

Edit Report Column

Report: Training Report

* Caption:

Show this column on the report

Suppress the time portion of the date

Show a count of each unique value in this column

Sort the data using this column

Sort Order:

Sort Index:

* required

[Save Column](#) | [Cancel and Return](#)

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.

Edit Column Filter

Report: Resident Emails
Column: Last Name

No filter should be applied to this 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.

OR

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

OR

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.

OR

Date(s):

OR

Equals:

OR

Equals
 Equals
 Greater Than
 Less Than
 Between

and

- **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.'

OR

Equals

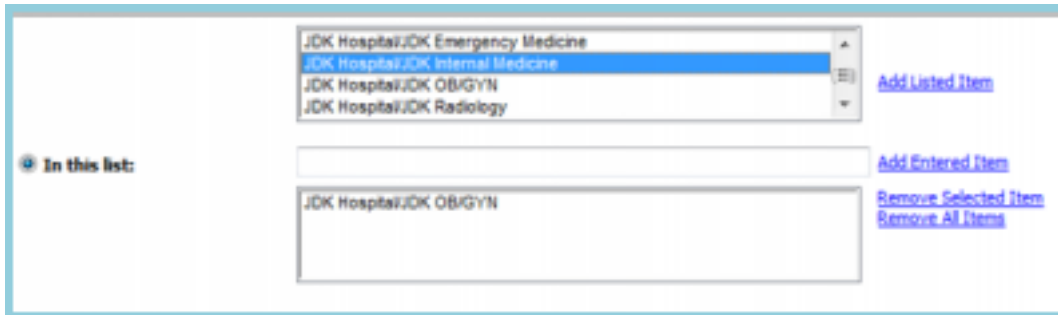
OR

Does Not Equal

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.

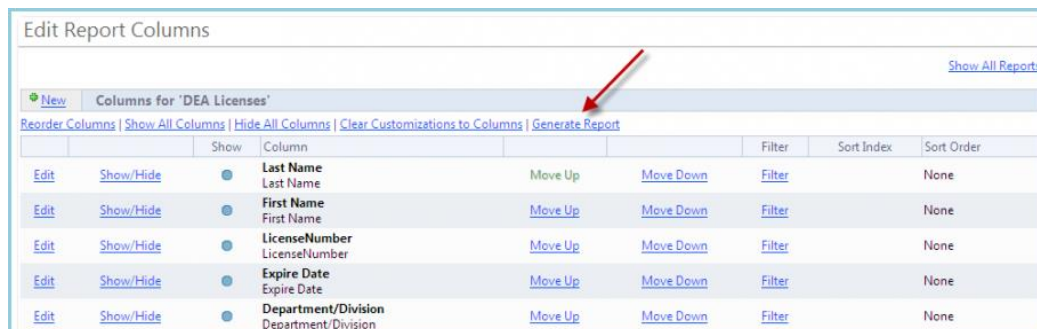
Note

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

Manage Custom Reports								
Reports				Sources				
New Reports								
	Name	Source		Created By	Created On	Updated By	Updated On	Generated On
Edit	Delete	All Licenses	Personnel/DEA Licenses	Report Options	View Report		2012	3/12/2013
Edit	Delete	Copy of Advisors	Personnel/Basic and Sensitive Information	Report Options	Edit Columns		2010	
Edit	Delete	DEA Licenses	Personnel/DEA Licenses	Report Options	Copy		/2010	2/22/2010
Edit	Delete	Email report for Faculty	Custom Personnel Source	Report Options	Secure		/2010	4/23/2010
Edit	Delete	Faculty Info	Personnel/Addresses	Report Options	Export to Microsoft Excel®		/2010	2/22/2010
Edit	Delete	New report	Conferences/Attendance	Report Options	Export to Other Formats		/2010	2/22/2010
					Personnel 3/12/2013	NI Personnel 3/12/2013		

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.

[Show all reports](#)

New		Columns for 'Training Report'		Filter	Sort Index	Sort Order	
Reorder Columns	Show All Columns	Hide All Columns	Clear Customizations to Columns	Generate Report			
Column	Show	Column					
Edit	Show/Hide	<input checked="" type="checkbox"/>	ID Number ID Number	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	National Provider Identifier National Provider Identifier	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Last Name Last Name	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Middle Name Middle Name	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	First Name First Name	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Department/Division Department/Division	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Department Abbreviation Department Abbreviation	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Status Status	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Next Status Next Status	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Archived Archived	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Title Title	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Preferred Name Preferred Name	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Gender Gender	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Military Service Military Service	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	Lab Coat Size Lab Coat Size	Move Up	Move Down	Filter	None
Edit	Show/Hide	<input checked="" type="checkbox"/>	User Name User Name	Move Up	Move Down	Filter	None

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**

Custom Report Security

Report: Resident Emails

Reports created in Custom Reports are only viewable by personnel with the "Administrator" Work Role. Since you have the Administrator Work Role indicated, you are able to allow other Work Roles to view this report.

In addition to any filters applied to this report's columns, most (if not all) reports filter the data returned based on Department or Division. For instance, a report created listing personnel data will ultimately filter the results to only personnel that belong to Departments or Divisions to which the viewer can access.

Allow other Work Roles to view this report

- The Work Roles selected below will be granted access to view this report.
- The report will only contain data from Departments/Divisions in which the report viewer has privileges.

Faculty
 Resident
 Nurse
 Medical Student
 Physician's Assistant
 Other

[Save Report Security](#) | [Edit Report](#) | [Generate Report](#) | [View All Reports](#)

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**

Secure Report Source 'Administration/Institutions and Locations'	
Minimum Level Module/Function	
N/A	Agreements
N/A	Assignment Scheduling
N/A	Billing
N/A	Block Schedule
N/A	Conferences
Level 4	Demographics
N/A	Duty Hours
Level 5	Evaluations
N/A	Immunizations
N/A	Procedure Logger/Continuity Clinics/Log Books

[Save Changes](#) | [View All Report Sources](#)

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

Edit Custom Report

Name:

Source: Use a prebuilt source

These sources compile data from Personnel, both scheduling modules, Evaluations, and most other modules. The columns available in these sources are displayed on the right side of this page as each source is selected below. The advantages of choosing a prebuilt source include convenience and faster report generation, among others. New Innovations can also build custom sources for your institution by request.

Build a report by selecting fields from Personnel

Select from a list of Personnel fields to create a report about personnel. This option may be best for reports concerning only personnel as it allows the most flexibility in the available columns.

[Save Report and Add Columns](#)

Header:

Subheading:

Use the current date and time

Footer:

* required

[Save Report](#) | [Save Report and Edit Columns](#) | [Cancel and Return](#)

Notes:

- Reports belong to and can only be seen by this Department/Division
- Only personnel with an 'Administrator' Work Role can create Custom Reports; Administrators determine which Work Roles can generate and view each report
- Anyone with any Work Role specified can view the structure of a report
- Only those with the specified roles in MMCGME-Coordinator Training Department can view data

IMPORTANT: Changing the Report Source or changing the report type on an existing report will clear any customizations to the columns of the report and return

Source Information:

- ID Number
- National Provider Identifier
- Last Name
- Middle Name
- First Name
- Department/Division
- Department Abbreviation
- Status
- Next Status
- Archived
- Title
- Preferred Name
- Gender
- Military Service
- Lab Coat Size
- User Name
- SSQ
- SSN/SIN
- SSN/SIN Issued In
- Picture Attached
- Birth Date
- Birth City
- Birth State
- Birth Country
- Marital Status
- Race/Ethnicity
- Credentials
- Work Roles
- Program
- Program Number
- Program Start Date
- Program End Date
- Program Type
- Track
- Next Program
- Post Graduate Year
- Class Of
- Default Rotation Location
- Initial Program
- Personnel IRP
- Initial Program IRP
- Workload/FTE
- Compensation Status
- Employer
- Employer Short Name
- Employer Street Address
- Employer City

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

Count: 21 [Export to Excel](#)
 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)
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