Custom Reports Tips & Tricks

1. Pick the most appropriate report source to get the output you want. Below are some example good report sources

Information Needed	Report Source
Conference Attendance	Conference/Attendance (Revised)
Incomplete checklist steps	Checklists/Incomplete Steps
Completed Evaluation Results	Evaluations/Completed Evaluations
Logged Procedures	Procedures Logger/Logged Items for MMCGME
DEA Information	Personnel/DEA License
ID Numbers	Personnel/Identification Numbers
Personal Information (social security number, date of birth, NPI, address or phone information, emergency contacts, etc.	Personnel/Residency Training Records without Periods for MMCGME
State License and Permit Information	Personnel/License and Permit
Test Scores	Personnel/Test Scores
User Names	Personnel/Security and Privileges
Block Schedule Information	Scheduling/Rotations Worked
Work Hours	Work Hours/Logged Hours
Leave of Absence or Time Away Extends	Scheduling/Rotations worked

2. Hide columns you do not want to see in your report. It might be faster to hide all columns and hand select the ones you want to include. Select the hide all columns link to do this. Then one at a time click show/hide next to the columns to select them. Make sure to give the system time to load your choice.

3. Apply filters as needed. Usually less is more
   Set Filters
   Go to More > Custom Reports
   Beside your report, click Report Options > Edit Columns
   Click Filter beside any column

4. If you have a date field you can suppress the time portion of the field. This way you will only see the date and not the time also.
   Go to More>Custom Reports
   In the Report Options drop down select **Edit Columns**
   To the left of the date field click **Edit**
   Check the box labeled "Suppress the time portion of the date"
   Click **Save Column**

5. You can rename the field after including it your report. Click edit next to field name and adjust as desired. Make sure to hit save column when you are done.

Effective 2024

6. You can add personnel fields into any report source. Click the new link when you are in your custom report and select which fields from personnel data that you want to include and select add/remove columns at the bottom of the page.