New Innovations (RMS) Custom Reports

MMCGME

Metro MN Council on Graduate Medical Education

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Overview

Custom Reports can be used to gather data from the software. Choose a pre-determined data source or select specific fields from the Personnel module. Custom Reports offer a variety of ways to filter and sort your data that make reporting more flexible than other the reports provided in the other modules. Custom Reports can be displayed, printed and saved in a variety of ways, including an Excel spreadsheet, text files, and XML formats.

Access to Custom Reports is based upon the Work Role of the user and not a specific privilege level. Custom Reports can only be created by people with the Work Role of 'Administrator.' The Administrator can make a report available to people with other Work Roles, however they will only be able to view the report results for their department, based on their privilege level in the source module used in the report. The Administrator can also set a specific privilege level on a particular column on a report, such as for Social Security Number.

- Filters - Columns can be filtered in a variety of ways to restrict the data that is returned. For example, you can filter the Status Column to display information about first year residents only.

- Prebuilt Source - Prebuilt sources are data sets from information that already exist in the database. The title of the source describes the data fields included. Most sources have common basic information included. The exact items that are contained in a source appear on the right side of the page when the source is selected. All listed items are available to include as columns in the report. The columns can be filtered and more columns can be added.

- Custom Personnel Source - Create your own combination of data elements from the Personnel module. For example, create a report to gather demographic information.

Creating Custom Reports

Help>Tutorial Videos [12.1] Custom Reports

Custom Reports are used to gather data from the software using packaged data sources and by selecting specific fields from the Personnel module. Custom Reports offer a variety of ways to filter and sort your data that make them more flexible than other reports in the database. These Custom Reports can be displayed, printed and saved in a variety of ways, including an Excel spreadsheet, text files, and XML formats.

1. Go to More > Custom Reports
2. Click New
3. Enter name for the report
4. Select a report source

Report Sources

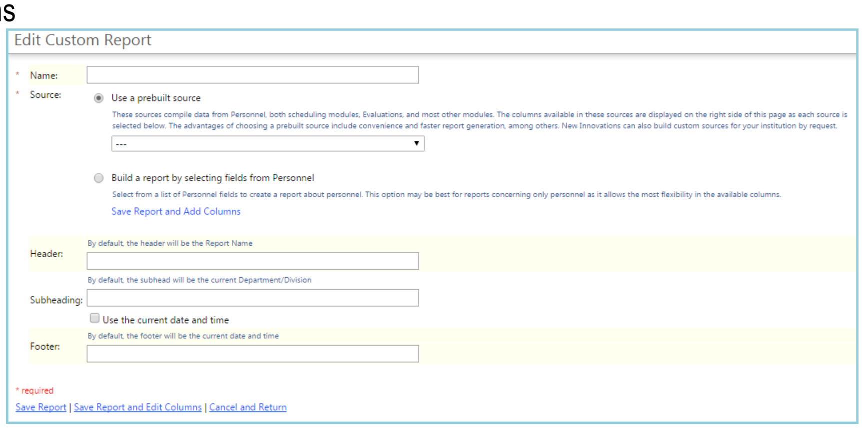
There are two ways to select the source of your data:

A. Prebuilt Sources contain packaged information that can be included in the report. We recommend using this type of report source for better results. When you select a prebuilt source from the list, the columns of the report will be displayed at the right. You can filter out the columns on the next screen. Click Save Report and Add Columns

B. Build a report by selecting fields from Personnel allows you to create your own packaged personnel data information. Select the radio button for 'Build a report by selecting fields from Personnel' and click Save Report and Add Columns.

    1. Select the fields to include on your report from the list
    2. Click the + sign to expand fields with additional fields
    3. Click Save when all choices have been made

Optional: Enter a custom Header, Subheading or Footer if different from the defaults. Click Save Report and Edit Columns

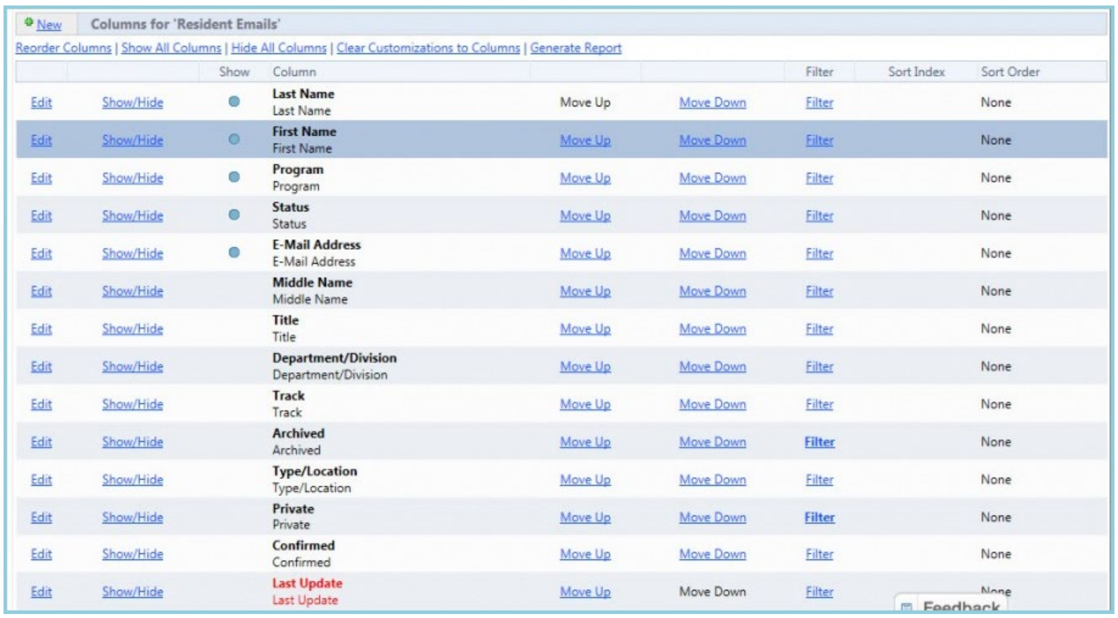


Configure Columns

1. Columns can 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.
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

For each column:

1. Edit allows you to rename the column header, suppress the time portion for any dates, show how many of each type for a column is in the report, sorting each column when the report is generated
2. Clicking Show/Hide displays or removes an individual column



New 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	●	**Last Name** Last Name	Move Up	Move Down	Filter		None
Edit	Show/Hide	●	**First Name** First Name	Move Up	Move Down	Filter		None
Edit	Show/Hide	●	**Program** Program	Move Up	Move Down	Filter		None
Edit	Show/Hide	●	**Status** Status	Move Up	Move Down	Filter		None
Edit	Show/Hide	●	**E-Mail Address** E-Mail Address	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Middle Name** Middle Name	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Title** Title	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Department/Division** Department/Division	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Track** Track	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Archived** Archived	Move Up	Move Down	**Filter**		None
Edit	Show/Hide		**Type/Location** Type/Location	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Private** Private	Move Up	Move Down	**Filter**		None
Edit	Show/Hide		**Confirmed** Confirmed	Move Up	Move Down	Filter		None
Edit	Show/Hide		**Last Update** Last Update	Move Up	Move Down	Filter		None

Filter Columns

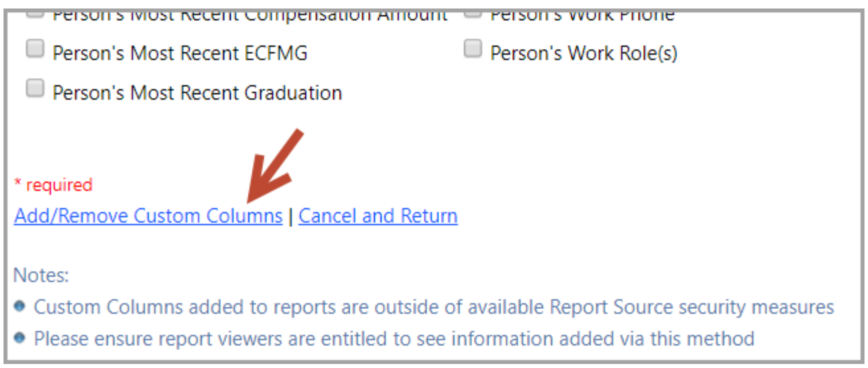
1. To Filter any of the columns click Filter to the right of the column
2. There are seven ways to filter columns. Choose the best filter for the column.
3. Click Save Filter
4. The Filter link is bold when filters have been applied

Edit 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

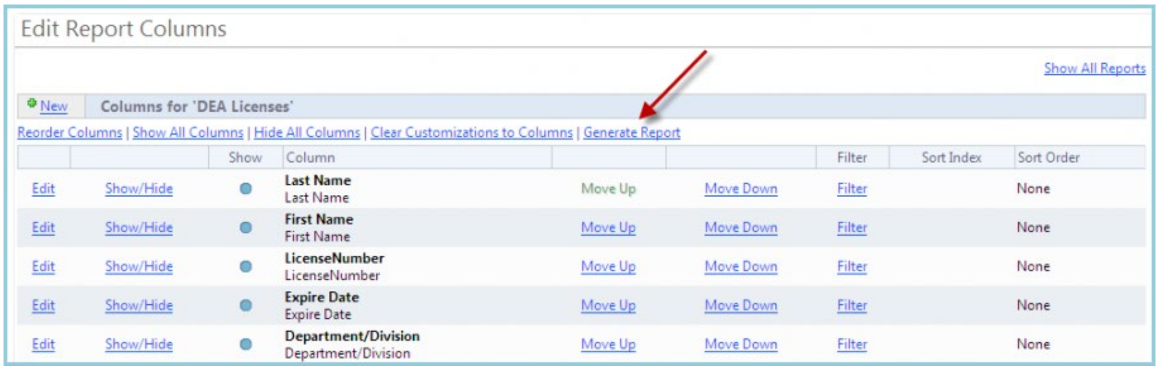
Add More Columns to a Report Source

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



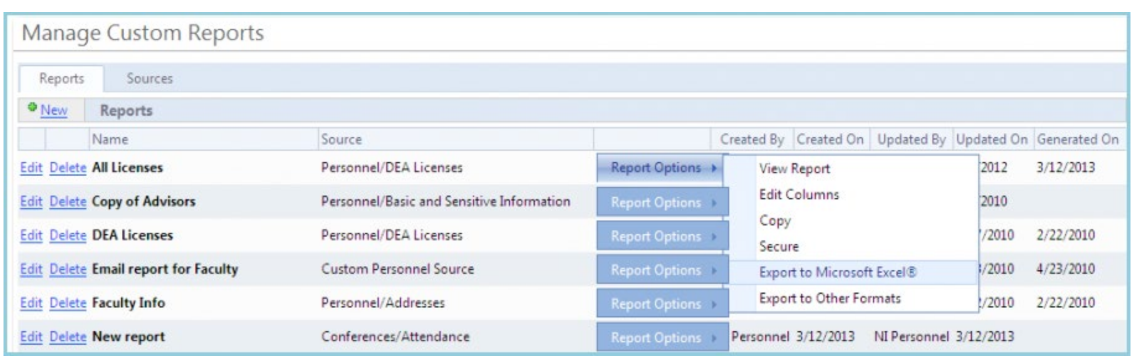
Generate a Report

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
    - Tab-delimited text file allows the report to be opened with another program



You can also generate a custom report from the list of 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



Running Multiple Reports and Exporting to Excel

You cannot request to view/export a report if another report is still processing. If you try to run another report, the system will prompt you that another report is processing and ask you to wait for it to complete.

Filtering Custom Reports

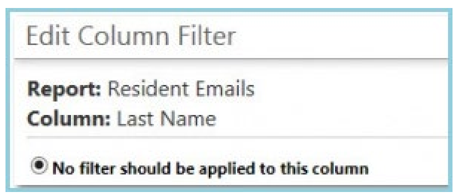
Columns can be filtered in a variety of ways to restrict the data that is returned. For example, you can filter the Status column to display information about first year residents only.

Set Filters

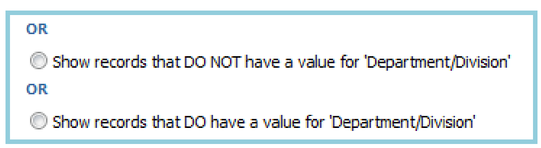
1. Go to More > Custom Reports
2. Beside your report, click Report Options > Edit Columns
3. Click Filter beside any column

The following filter options are available:

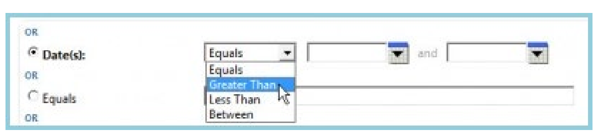
- No filter - Select this option to remove a filter setting for the column.



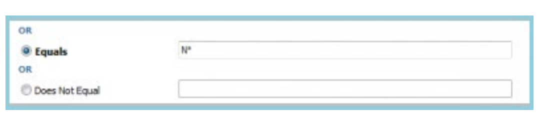
- Value Validation - Select the appropriate option to display records that do or do not have a value entered in the data field for this column.



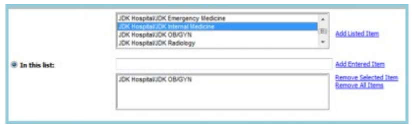
- Date - This column filter is used for date sensitive columns. Select an action from the dropdown list and enter appropriate date parameters.



- 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.'



- 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. For something to appear in the 'In this list' filter, it has to be in use.



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

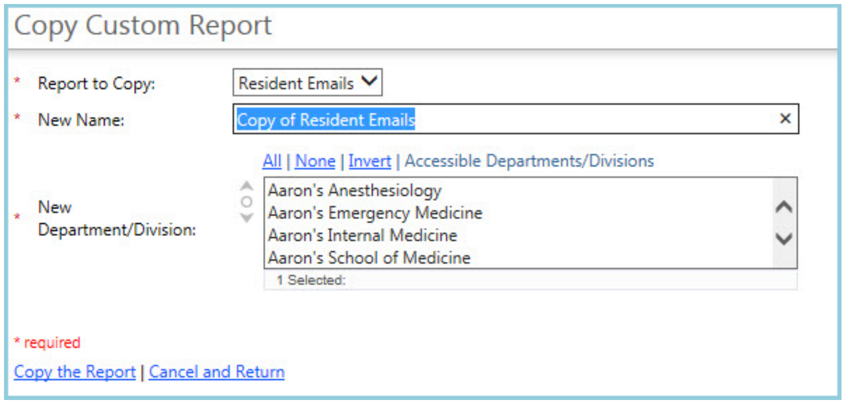
Note

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 faculty data but the column for Status Type does not have to be shown on the report.

Copying Custom Reports

Copy a report to your own department or another department. The copy can be edited by the other department as needed.

1. Go to More > Custom Reports
2. Click Report Options beside your specific report
3. Click Copy
4. Verify that the correct report is selected
    - Optional: Rename the report
5. Select the departments you want to copy the report to. Select your department if you just want a copy of the report in your own department.
6. Click Copy the Report



Custom Reports Security

Limit Who Can View the Report

1. Go to *More* > *Custom Reports*
2. Find the report and click Report Options > Secure
3. Check the Work Roles for people who can view the report
    1. These people will then be able to see data for all people in departments they have access to
    2. This access can be limited
4. Click Save Report Security