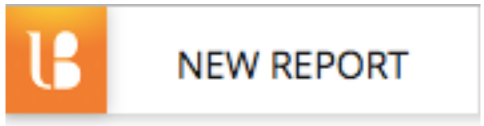
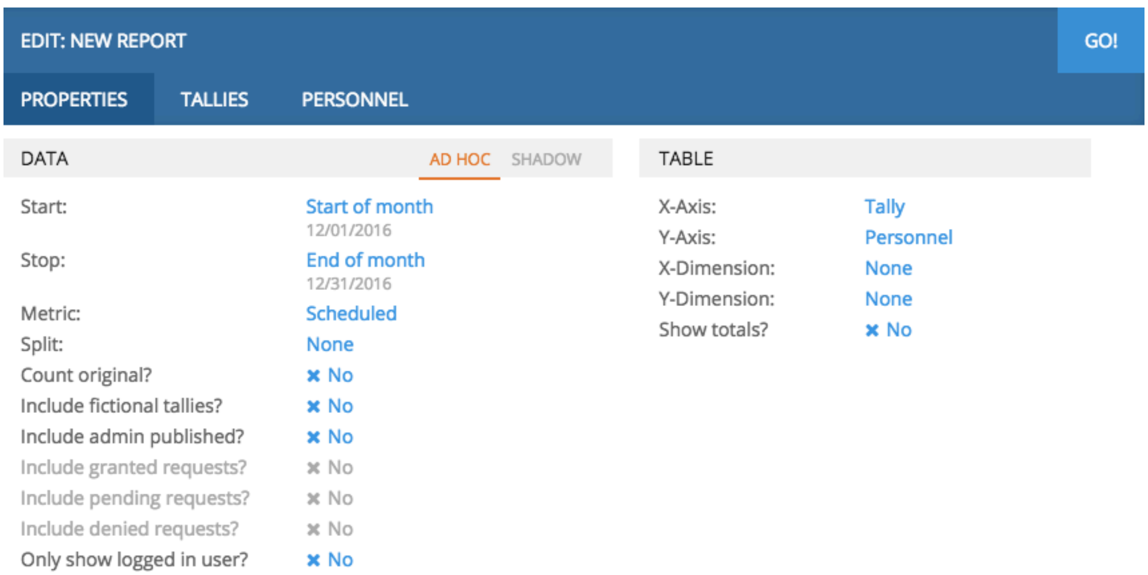
How do I create a Report?

From the report page, you can create a new report by clicking “New Report”.



From there, a new screen will open. The left hand side of the screen will look like this:



The Properties tab is where you can input the details to create your desired report:

Report Start Date - Select from a list of presets based on when the report is being opened (e.g. selecting "Start of Month" begins the report on 4/1 if viewing in the month of April and automatically updates to 5/1 beginning in May) or switch to the "specific" section to choose a fixed date.

Report Stop Date - Select from a list of presets based on when the report is being opened (e.g. selecting "End of Month" begins the report on 4/30 if viewing in the month of April and automatically updates to 5/31 beginning in May) or switch to the "specific" section to choose a fixed date.

Metric - Choose if you would like your tallies to count only scheduled assignments, only requests, or both (Combined).

Split - You have the option to break your report into smaller segments for easier viewing. For example, you may run a report over an entire month but want to split it up to see separate totals for each week. You can switch instantly between segments.

Count Original- If your published schedule undergoes many changes or provider swaps, enable this option to check the numbers at the time the schedule was originally published

Include Fictional Tallies- Within the Administration (Setup) section, there is a Tallies page where you can manually add and subtract credits per provider for each tally. If set to "yes", your report will reflect these manual adjustments. "No" will strictly count from what is on the schedule.

> Note: Fictional tallies are created in the Tally section, by adding a “Catch-Up Tally” totals to a provider. The total will be added to their report total when “Include Fictional Tallies” is set to “Yes.”

Include Admin Published- If set to "No", tallies will only draw from schedules that are finalized (published to everyone). Selecting "Yes" will also include any schedules published to Admins.

Include granted/pending/denied requests- If your report includes request data, these settings provide finer control over which statuses of requests should be counted (note: including pending or denied requests will add to the overall totals, not represent a separate category)

Only show logged in user - will automatically show the selected tallies for only the user opening the report, allowing you to create a "My Call" report for example. This will disable the Personnel tab of report configuration

X Axis - Select between Tally, Personnel, and Date (new!) for which field you wish to appear as the columns (moving from left to right across the report).

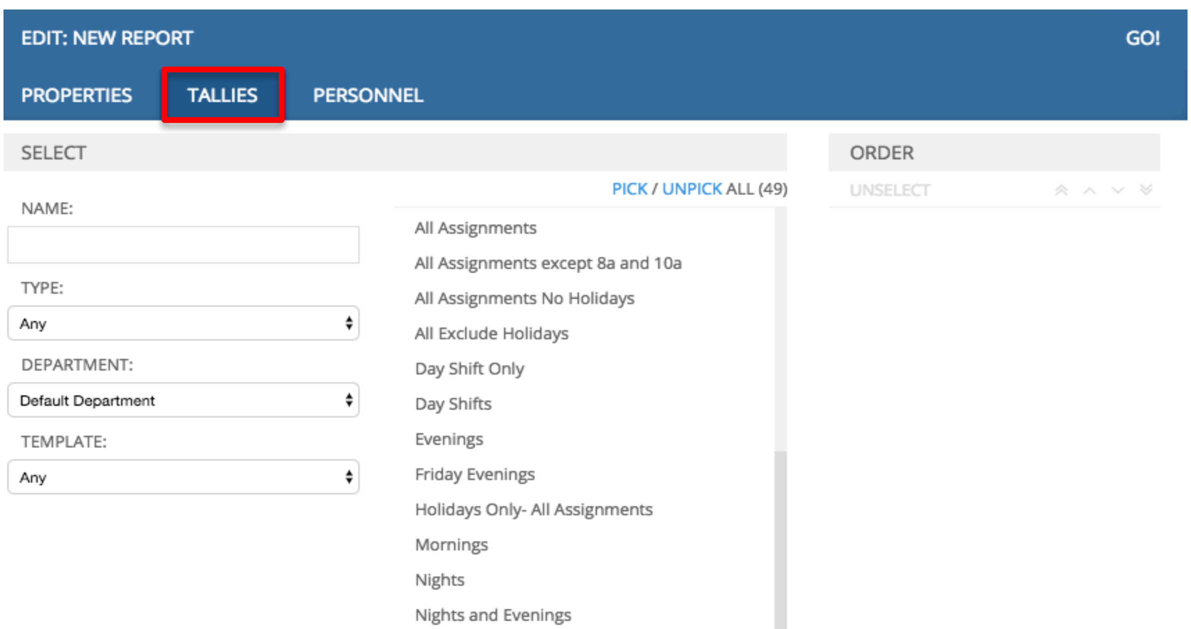
Y Axis - Select between Tally, Personnel, and Date (new!) for which field you wish to appear as the rows (moving from top to bottom down the report).

X Dimension - Breakdown each column by day of the week without needing to make separate tallies! (Shown below)

Y Dimension - Breakdown each row by day of the week without needing to make separate tallies!

Show totals - Add a new row and column to show totals for each tally and provider.

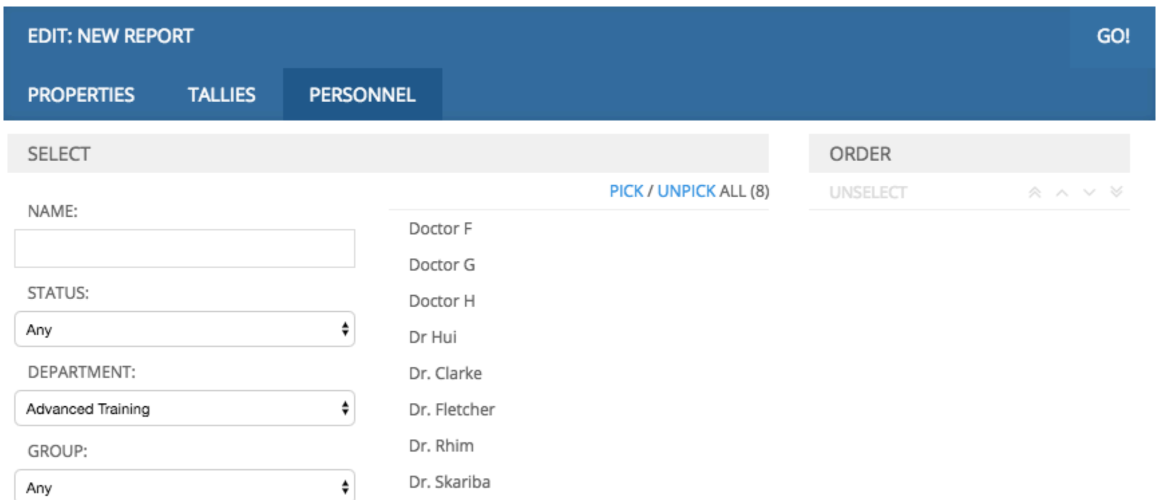
The Tallies tab will allow you to select the tallies that you wish to include in your report:



You will see a list of all the system-defined and administrator-defined tallies that were made in the Tally section. You can also use the filters on the right to search through all the tallies.

As you pick tallies, they will appear on the right. You can choose the order that you'd like them to appear on the report by using the up and down arrows.

The Personnel tab will allow you to select the personnel that you'd like to include in the report:

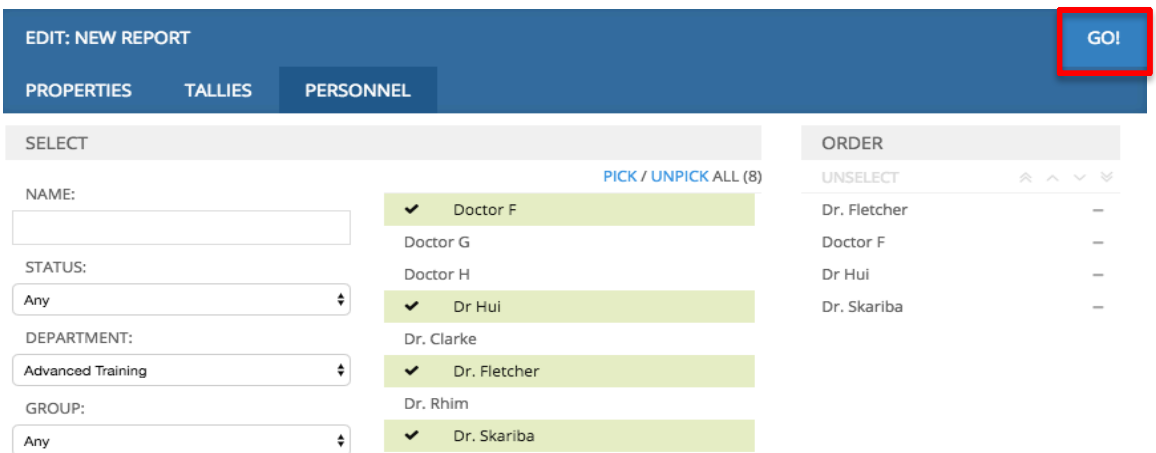


You will see a list of all the personnel for your department and template. You can use the filters on the right to search through the personnel faster.

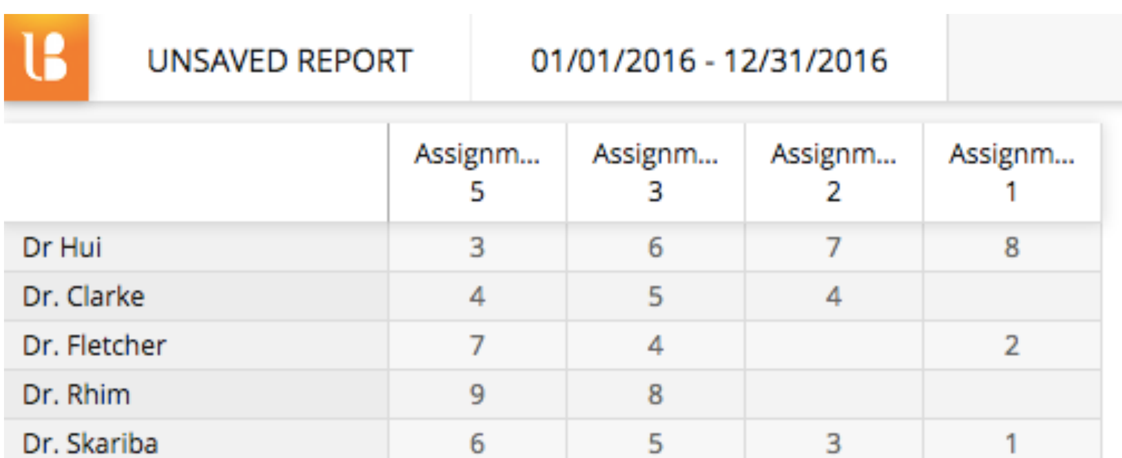
Tip: The "Group" drop-down: This will give you a list of the personnel groups, and will display any person who belongs to the group you select.
Note: if a new provider is added to a personnel group, they will need to be added manually to the report as well. Being a part of group will not automatically include the new provider in the report.

As you pick personnel, they will appear on the right. You can choose the order that you'd like them to appear on the report by using the up and down arrows.

To view the report with the details you just selected, press GO! at the top of the page.

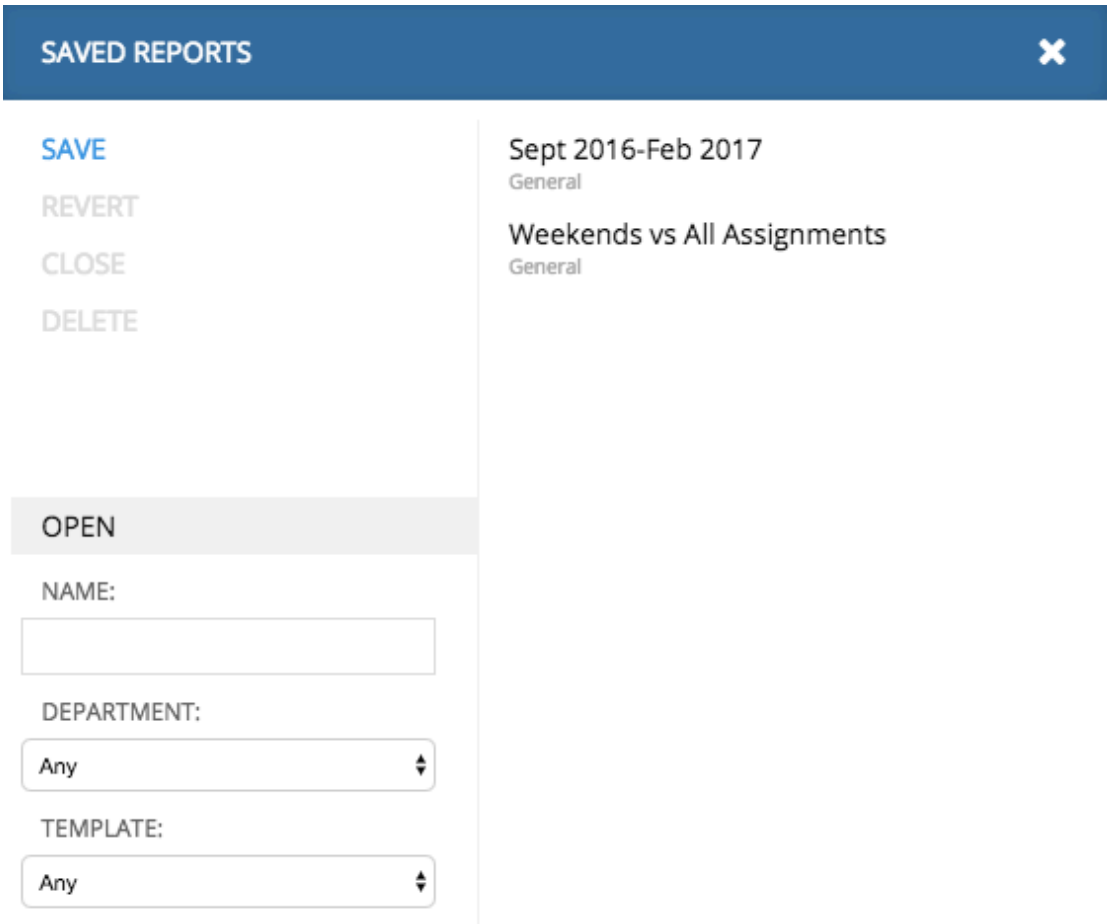


Once you select ‘GO!”, you will be taken to your report. Here’s an example:


UNSAVED REPORT 01/01/2016 - 12/31/2016

	Assignm... 5	Assignm... 3	Assignm... 2	Assignm... 1
Dr Hui	3	6	7	8
Dr. Clarke	4	5	4	
Dr. Fletcher	7	4		2
Dr. Rhim	9	8		
Dr. Skariba	6	5	3	1

To go back into the report settings, click "Unsaved Report". (If you've opened a saved report, the title will appear instead of 'Unsaved Report'). If you'd like to save your report, or open a previously saved report, use the tools on the right panel of the report details page. You will see a window that will allow you to save your current report, or view previously saved reports:



The left panel will allow you to save your current report, revert to blank settings, close the report, or delete it. On the right is a list of your previously saved reports that you can access.