Report Writer
Creating a Report

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Chapter 1

IMAGETREND REPORT WRITER

Creating a Report

1.1 Chapter Overview

This chapter explains the capabilities of Report Writer, the types of reports that can be created and how to create and customize reports.

1.2 Summary of Report Writer

The Report Writer allows users to dynamically create, display, and save transactional (formerly called ad hoc) report templates. This gives the user the power to find and display the data required without relying on static reports that may not include current data needs. The Report Writer encompasses a single reporting tool that gives the user complete control of data output and display.

You can choose from multiple ways to display your report, from familiar text-based reports to pie charts and mapping. You can report on multiple fields within several categories and data sets, allowing you to create exactly the report you want. Database search criteria can be selected based on each field allowing users to define exactly what they need. User defined headers, sorting, and grouping give users the ability to display search results using a number of options. Reports can be saved for later review or editing and also as a PDF document and CSV file (which can be opened and manipulated in a spreadsheet program such as Microsoft Excel).

In addition, standard reports and charts are available for quick report creation. All reports are listed in the left menu of Report Writer, organized by category.

1.3 Types of Reports

Report Writer provides several different types of reports for differing needs. Each report listed in the left menu will display an icon to indicate which type of report it is.

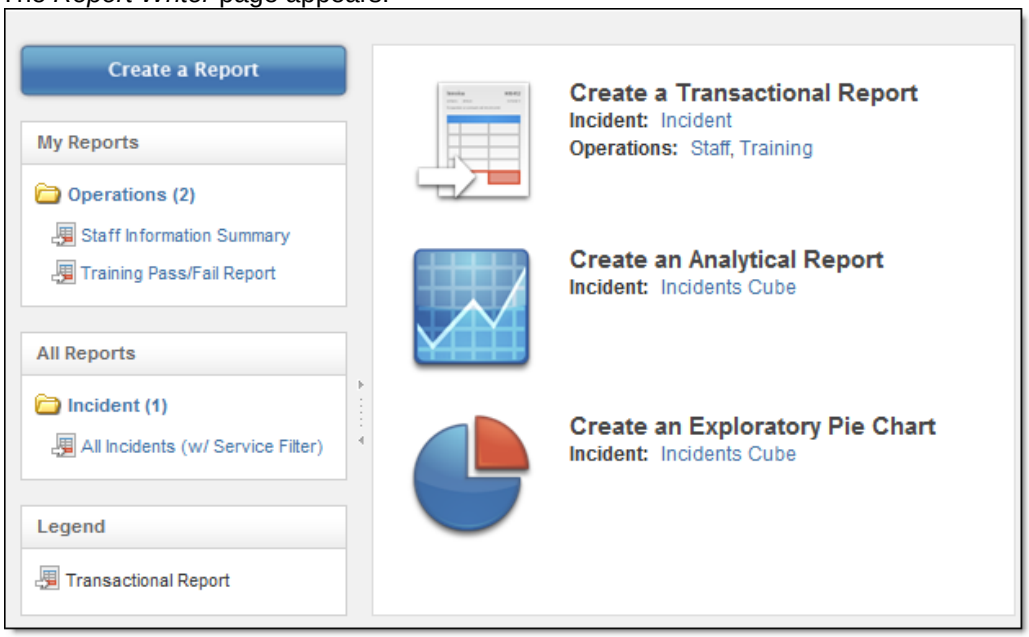
Transactional Reports
While some transactional reports have a default setup of fields to display in a particular order, transactional reports can be entirely configured. Users can change which fields display, define additional criteria for each of those fields (e.g., display only records within a certain postal code) and change the order in which records appear. In addition, users can create transactional reports completely on their own with no pre-defined fields or setup.

Standard Reports
Standard reports are pre-created with all fields and display options defined for the user. Within the fields, users can define additional criteria (e.g., requesting information about a particular unit or type of service). These reports provide fewer configuration options and allow a ready-made report for common data requests.

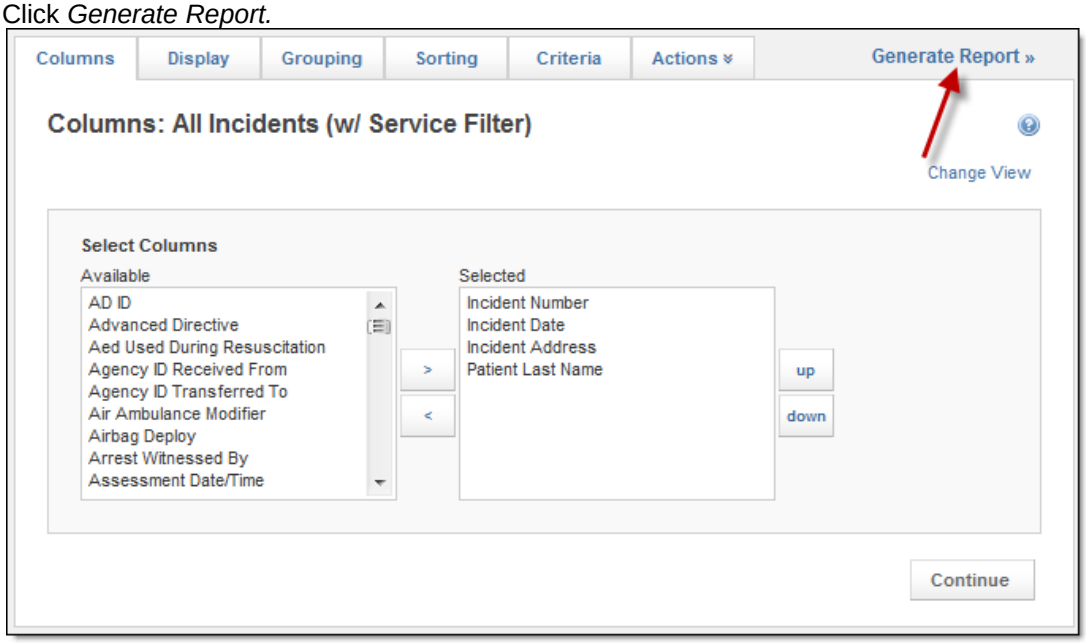
1.4 Requesting Standard Reports and Charts

While several standard reports are available from the *All Reports* section, many additional reports can be found in Report Writer. These reports have pre-defined fields, although users can further define the criteria for each of those fields. For example, if the staff field is set to display, users can display data only for a particular staff member.

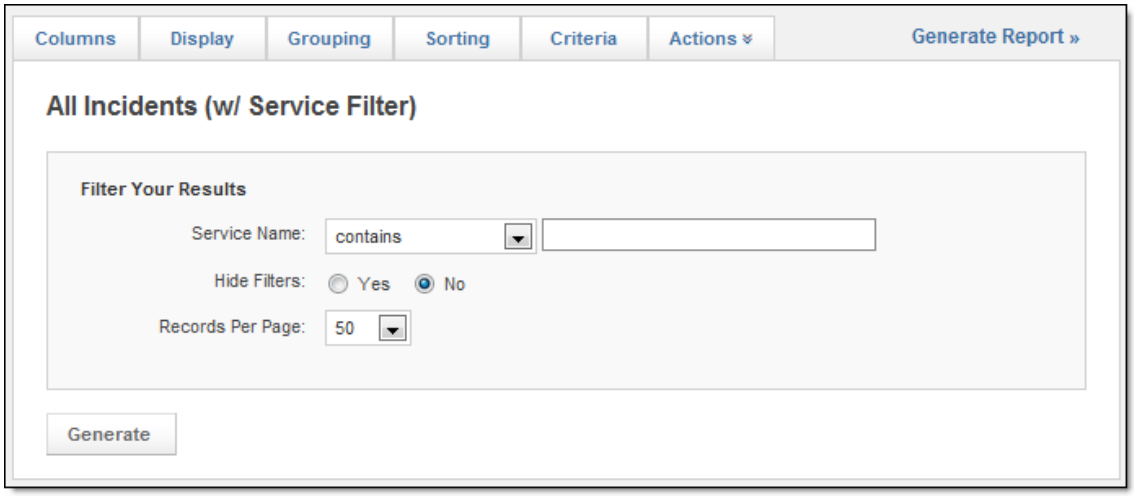
1. From the top toolbar, click *Report Writer.*
   The *Report Writer* page appears.



1. If necessary, to expand a category of reports, in the *All Reports* section, click the category.
   HINT: Categories have a folder icon to their left. Reports have an icon indicating the type of report.
   NOTE: Clicking the category once will expand it to show all reports. Clicking it again will hide the reports under the category.
2. To begin a report creation, click the name of the desired report.
3. Using the provided fields, select any further defining criteria for each field.
   NOTE: Depending on the permissions set for this report, you may be able to set more or fewer options to further define the information in the report. These options will be available from each of the links at the top of the page (e.g., *Columns, Grouping*) and will work in the same way that these options work when creating a transactional report.
4. Click *Generate Report.*



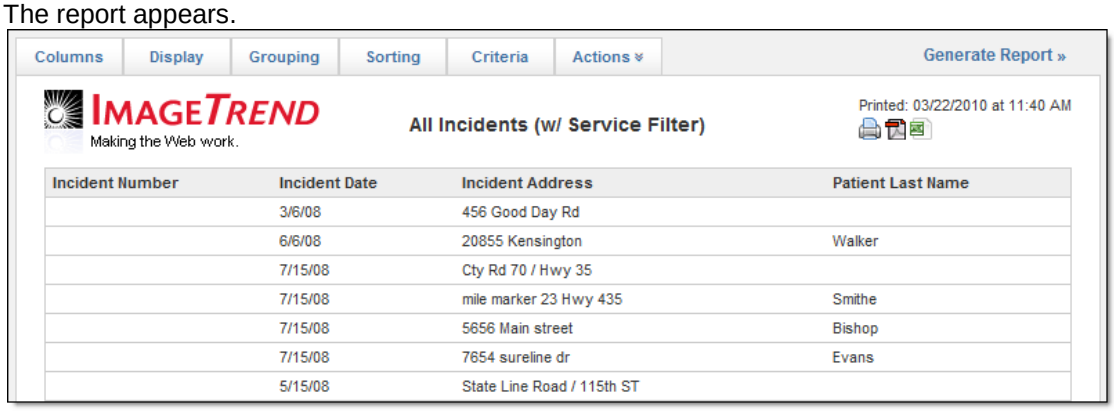
If filters have been selected, the *Filter your results* page appears.



NOTE: These filters are based on the fields selected in the *Filters* options

5. From each of the filters, select the criteria that the results displayed should or should not match.
6. Click *Generate.*

The report appears.



Incident Number	Incident Date	Incident Address	Patient Last Name
	3/6/08	456 Good Day Rd	
	6/6/08	20855 Kensington	Walker
	7/15/08	Cty Rd 70 / Hwy 35	
	7/15/08	mile marker 23 Hwy 435	Smithe
	7/15/08	5656 Main street	Bishop
	7/15/08	7654 sureline dr	Evans
	5/15/08	State Line Road / 115th ST	

1.5 Additional Standard Report Options

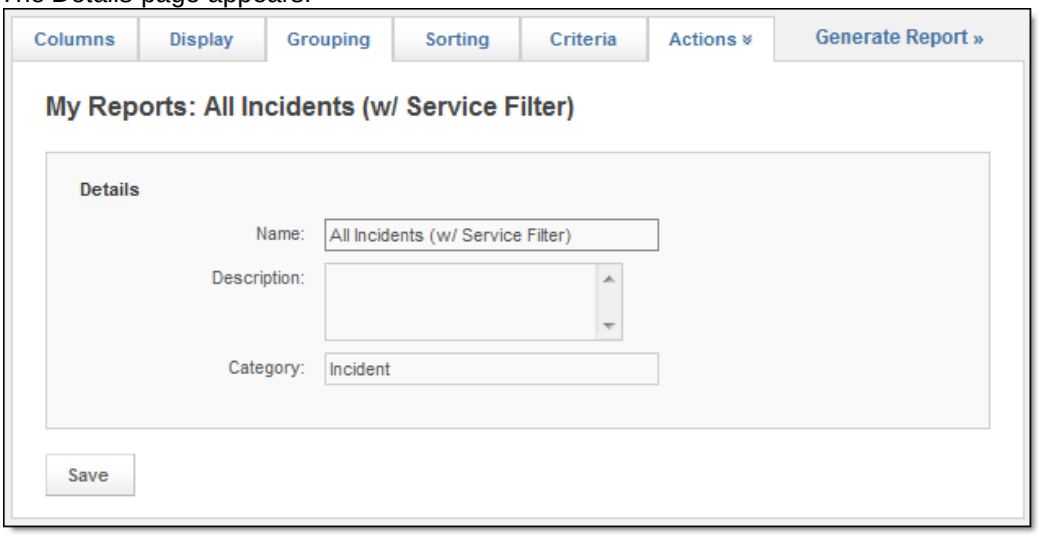
Standard reports allow users to print the report, export the report to a PDF or spreadsheet (.csv) file, or add the report to a *My Reports* category for quick access.

Adding Favorite Reports

Report Writer provides a *My Reports* category that can be configured for each user. Users may add reports to this category for easy access. Reports added to *My Reports* will also remain in their original categories.

1. Open and view the desired standard report.

2. Click the *Actions* tab and select *Add to My Reports.*
   The *Details* page appears.



3. **OPTIONAL:** In the *Name* text box, type a new name for this saved report.
   HINT: The new name will only appear on the report in your *My Reports* section, and will not affect the standard report for any other user.
4. **OPTIONAL:** In the *Description* text box, type any additional information about this report.
   HINT: The new description will only appear on the report in your *My Reports* section, and will not affect the standard report for any other user.
5. To add the report to the *My Reports* category, click *Save.*
   The report appears in the *My Reports* section.

Exporting Reports

You can export a copy of this report to a PDF or Microsoft Excel file if necessary. This allows you to save a copy of this report with the current data or to print the report in one of these formats. For a professional looking report, it is recommended to export the report to PDF before printing.

1. Open and view the desired standard report.
2. To export this report to PDF, from the report, in the upper right, click the *Export to PDF* icon .
   OR
   To export this report to a Microsoft Excel file, in the upper right, click the *Export to .xls* icon .
   The file opens a new window.

1.6 Working with Transactional Reports

Creating a transactional report can be a simple or a detailed procedure, depending on the complexity of the report you want to create. Before beginning a transactional report, you should begin by considering each of the elements you will need to work with to create the report.

Category

Each report must belong to a category. This will help with organization and will determine the type of information contained within the report. Selecting a category will determine what fields are available for your use in this report.

Columns
Within a category, you can select pieces of information to be included in each column of the report. These pieces of information are based on the fields filled out throughout the application (e.g., the fields within a run report or a staff record). Each piece of information that should be examined or used as a criterion should be included for the report.

Display
On this page, users can set the display order of fields, select numeric fields to display averages, totals (previously called sums), the minimum value, maximum value and total number of records, determine the alignment of the field display and pre-define a date range for date fields.
HINT: To change the order of a field, only change the field you want moved; Report Writer will automatically update the order of the rest of the fields.

Grouping
If the records should be clustered according to a certain type of information (e.g., all run reports by service), you will need to set up grouping rules. You have the option to group multiple times (e.g., within each service, you could group all run reports by the chief complaint) for further organization. Each group can be sorted in ascending or descending order (e.g., if all run reports are organized by service, the services can be sorted alphabetically).

Sorting
If the records should be sorted alphabetically or numerically, you can choose to sort the records based on the results in each column (e.g., sorting staff alphabetically by last name). When used with grouping, you can only sort fields that have not been grouped. If grouping is also used, sorting will be applied after grouping. In this case, after all grouping has been performed and each group has been sorted according to their criteria, the records within each group will be sorted according to the criteria selected here.

Criteria and Filtering
Both criteria and filtering options are included in the *Criteria* tab. Criteria will allow you to determine limits on the data that will be displayed every time this report is displayed. For example, in a report that displayed all incidents for a certain service, criteria would be used to dictate that only records where the *Service* field contained the desired service name should be included.

Filters allow you to specify a new value for a criterion each time the report is run. For example, you could use filters to specify the dates that the report examines, so that each time the report is run, users can specify which dates they want to look at.

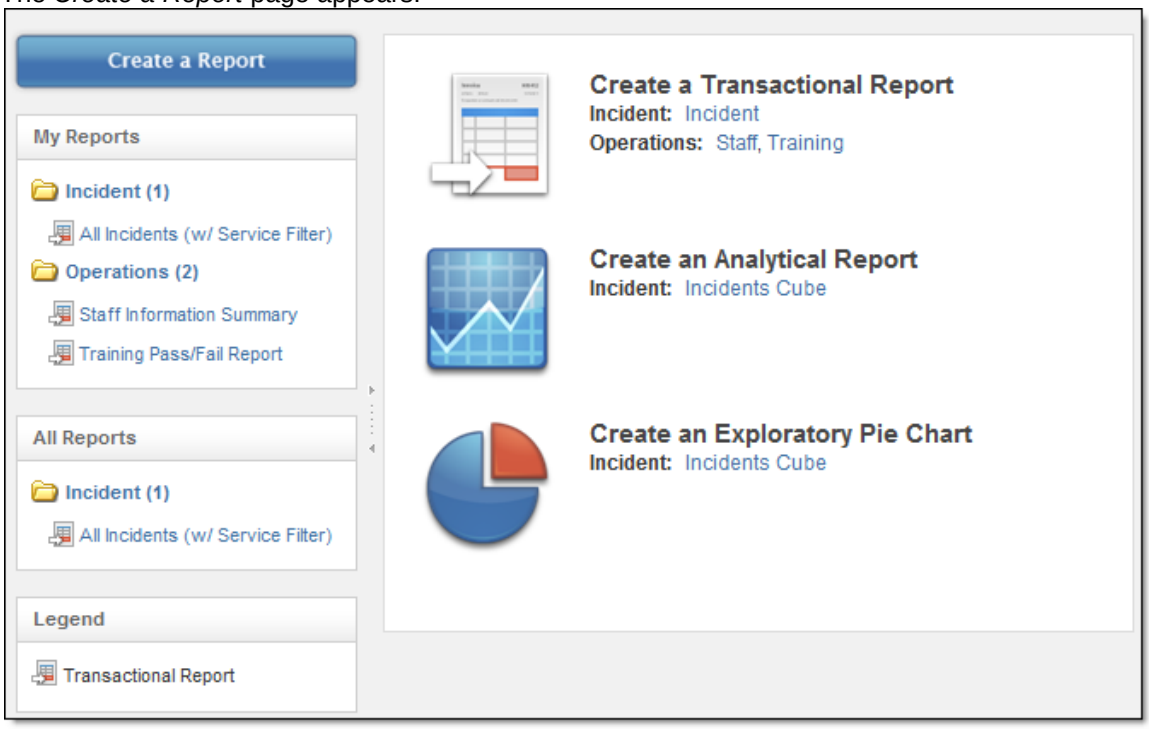
Criteria and filters are important for narrowing the number of results displayed. If your organization has hundreds or thousands of records in the system, this is very important to limit the length of the report and prevent the system from timing out when trying to retrieve a large number of records.

Preferences and Formatting
If you want to create a report with a custom look, you can change the headers and footers, as well as the colors for the text, each row, and the rows beginning each group of data. These options are available from the *Actions* tab, as well as many other report options.

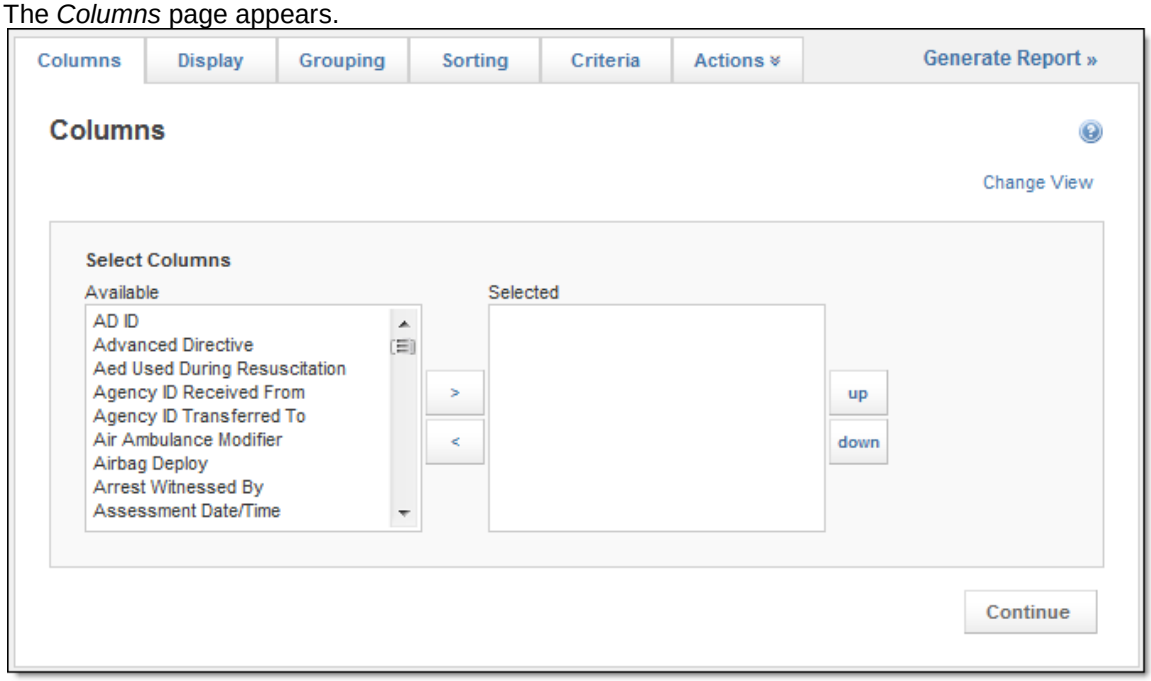
Report Access
You can manage access to a report you create if desired. This can include saving the report, setting who can view or edit it, scheduling the report to run at a specific interval or exporting the report. These options are available from the *Actions* tab, as well as many other report options.

Step One: Selecting a Category

1. From the left menu, click *Create a Report*.
   The *Create a Report* page appears.



2. In the *Create a Transactional Report* section, click the desired category.
   The *Columns* page appears.



Step Two: Selecting Columns

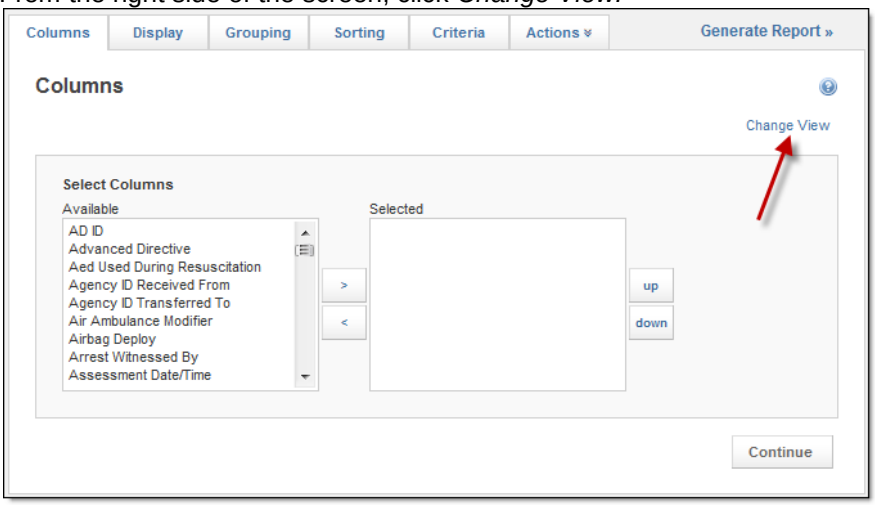
Each column represents a piece of information that will be displayed on the report. For most transactional reports, these pieces of information will be displayed in a column in a text-based report.

1. From the *Available* scroll box, select the fields to be displayed on the report.
   NOTE: To select multiple fields, press and hold the *Ctrl* key while clicking the name of each field.
2. Click *Add* [>].
3. To change the order in which the columns appear, highlight each field to move and use the *Up* and *Down* buttons.
4. When finished, click *Continue.*

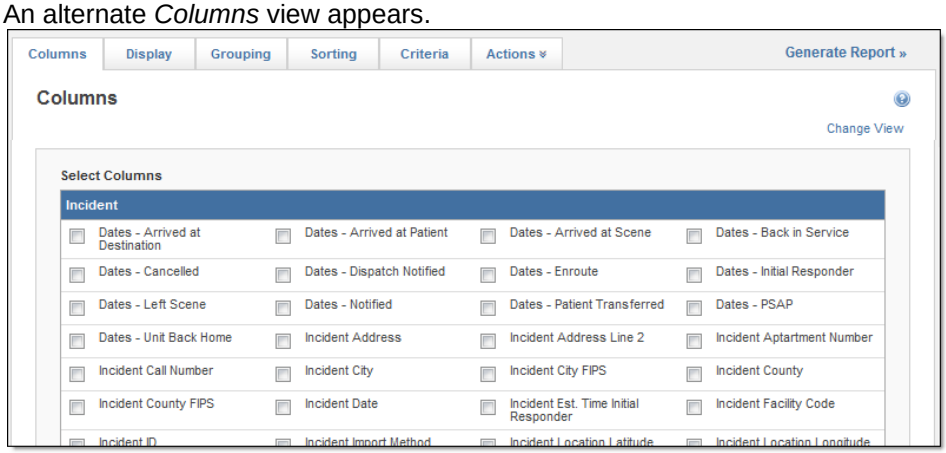
Changing the Column View (Optional)

If desired, you can select the pieces of information to be displayed from a different list of fields, sorted by the type of field. This view may be more familiar to you if you used the Report Writer in previous versions of Resource Bridge.

1. From the right side of the screen, click *Change View.*

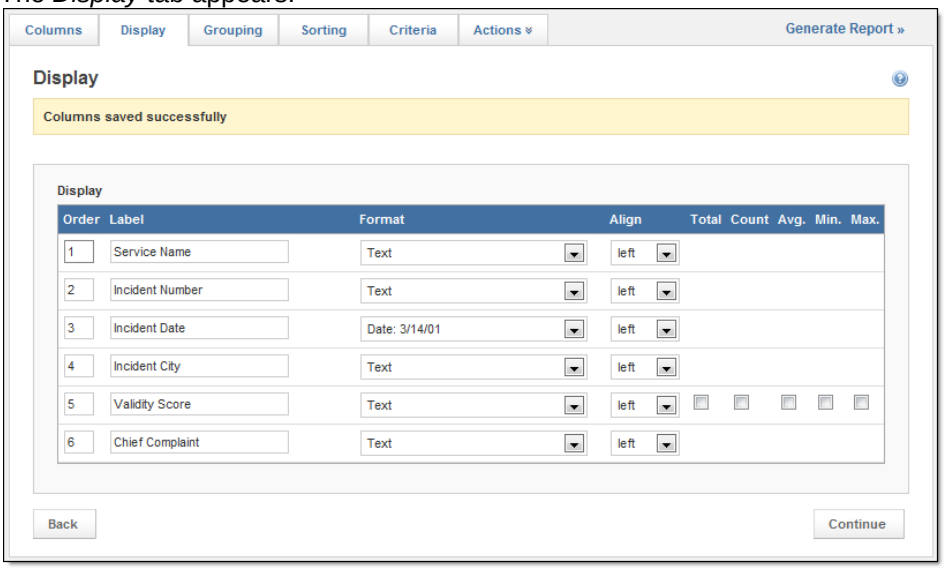


An alternate *Columns* view appears.



2. Select the checkbox(es) for each piece of information to display.

3. When finished, click *Continue.*
   The *Display* tab appears.



Step Three: Setting Display Options (Optional)

If you would like to change the order of the fields or the labels, alignment or format of the information, you will need to set up display options.

1. To change the order of the fields, in the *Order* text boxes, type the numbers corresponding to the order in which the fields should appear.
   HINT: You need to change only the numbers for the fields you want moved; all other fields will be updated automatically.
2. To change the header that will appear for this information on the report, in the *Label* text boxes, type the text to appear.
3. To change the way that the data will be displayed (if possible), from the *Format* drop down menus, select the desired format.
4. To change the alignment of the information within its column on the report, from the *Alignment* drop down menus, select the desired alignment.
5. For certain numeric values, to display mathematical information (e.g., the total number of records or the average value), select the desired checkbox(es).

   Min.
   This will display the minimum numeric value within the grouped results.

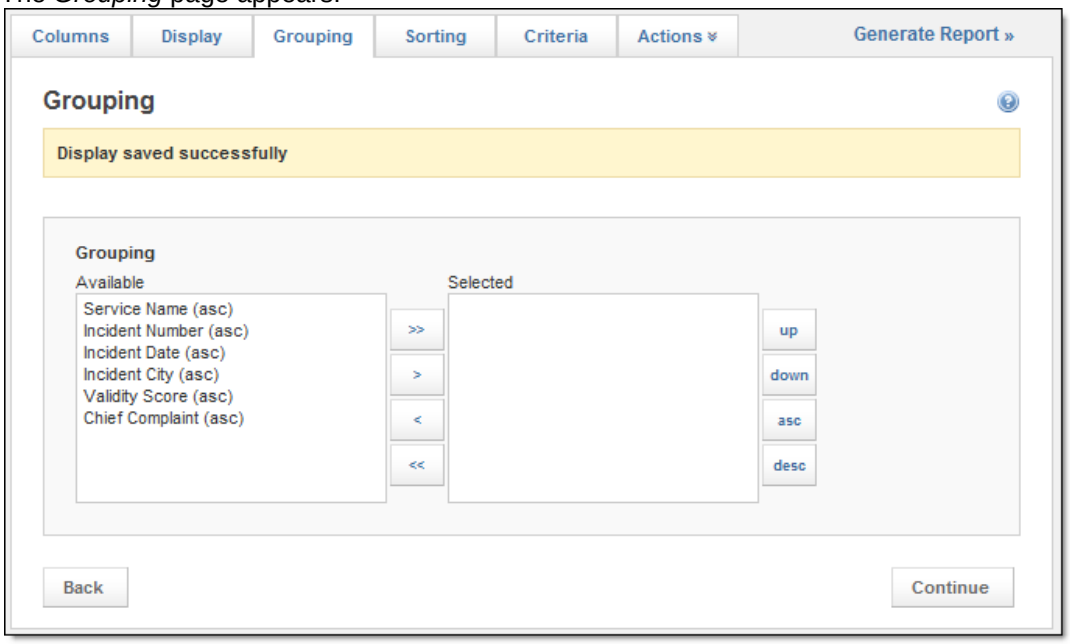
   Max.
   This will display the maximum numeric value within the grouped results.

   Average
   This will display the mean value of the numbers in all rows within the grouping.

   Count
   This will count the total number of rows listed within the grouping.

   Total
   This is the *Sum* field that was in the previous Report Writer and will display the sum of the numbers in all rows within the grouping.

6. When all changes are made, click *Continue.*
   The *Grouping* page appears.

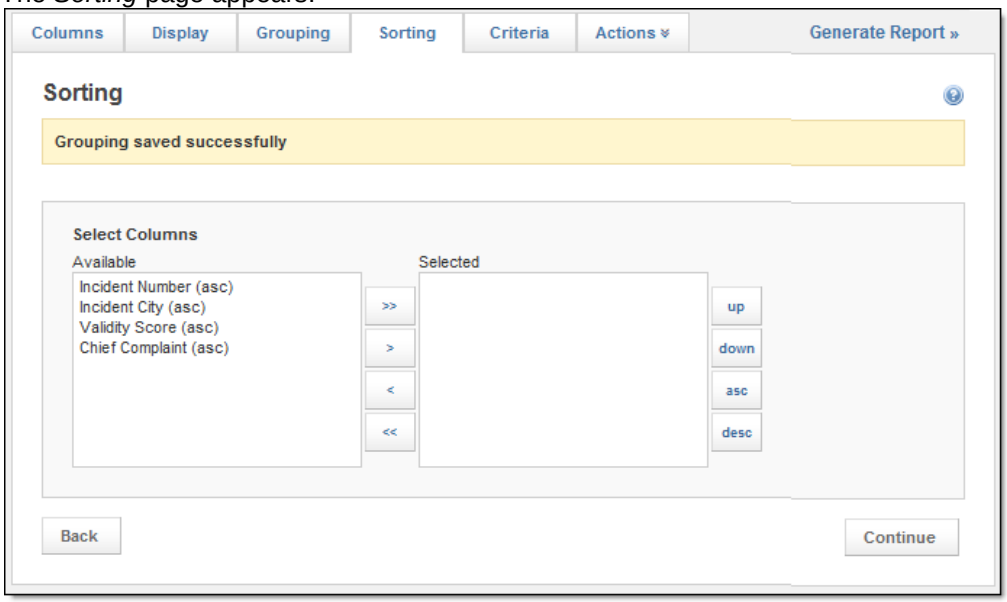


Step Four: Setting Grouping Rules (Optional)

If you would like to place all records with similar values in a specific column together (e.g., all runs from each service listed together), you will need to set grouping rules. In addition, all calculations will be performed on groups. For instance, if you choose to display a minimum value or an average from a column, the report will display a minimum value and average for each group.

1. To indicate which field to group by (e.g., if grouping all runs from each service, the *Service Name* field), from the *Available* scroll box, select the field.
2. Click *Add* [>].
3. If you would like to group by multiple fields, repeat steps 1–2 until all desired fields are added.
4. **OPTIONAL:** If multiple fields are selected for grouping, select the fields and use the *Up* and *Down* buttons to indicate which grouping should be done first.
   HINT: Fields that are listed first will be the primary grouping rules. Each field following will be grouped within the first field.
   EXAMPLE: If the first field groups runs by zip code, the second field could group runs by the service. Run reports would be clustered into a zip code group, inside of which they would be listed by service.
5. To select whether the groups will be listed in ascending (e.g., 1–10 or a–z) order or descending (e.g., 10–1 or z–a) order, select each group and click the *Asc* or *Desc* buttons.

6. When finished, click *Continue.*
   The *Sorting* page appears.

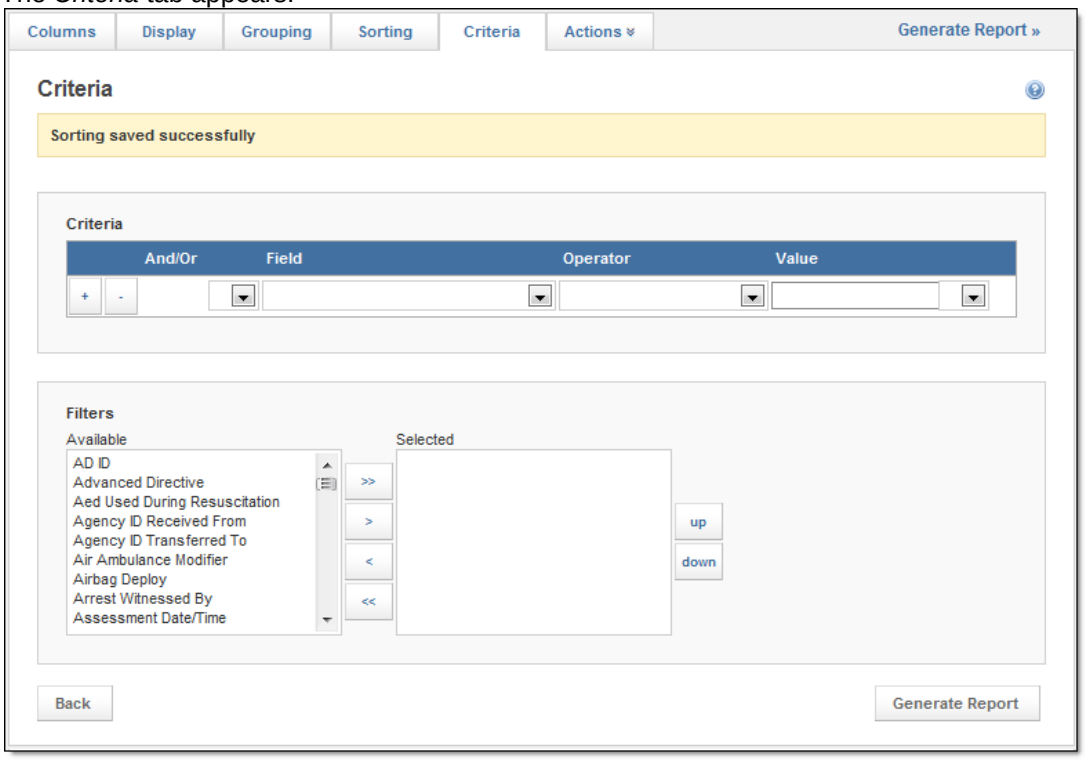


Step Five: Setting Sorting Rules (Optional)

If you would like to place records in a particular order (e.g., a–z, 10–1) by the values in a certain column, you may do so using sorting. When combined with grouping, sorting will be performed after all data is grouped. In this case, after being placed in each of the assigned groups, data in those groups will be sorted according to the rules set here.

1. To indicate the field with the values to sort by, select the desired field (e.g., to display incidents in order based on incident number, select *Incident Number*).
2. Click *Add* [>].
3. If you would like to sort by multiple fields, repeat steps 1–2 until all desired fields are added.
4. **OPTIONAL:** If multiple fields are selected for sorting, select the fields and use the *Up* and *Down* buttons to indicate which sorting should be done first.
   HINT: Fields that are listed first will be the primary sorting rules. Each field following will be sorted within the first field.
   EXAMPLE: If the first field sorts by date, the second field could sort them by incident number. In this case, all runs would be put in order based on the incident date. In cases where multiple runs took place on a single date, they would then be placed in order based on their incident number.
5. To select whether the sorting will be ascending (e.g., 1–10 or a–z) or descending (e.g., 10–1 or z–a), select each field and click the *Asc* or *Desc* buttons.

6. When finished, click *Continue.*
   The *Criteria* tab appears.



Step Six: Setting Criteria and Filters (Optional)

Criteria will allow you to determine limits on the data that will be displayed every time this report is displayed. For example, in a report that displayed only runs in Minnesota, criteria would be used to dictate that only records where the *State* field contains *Minnesota* should be included.

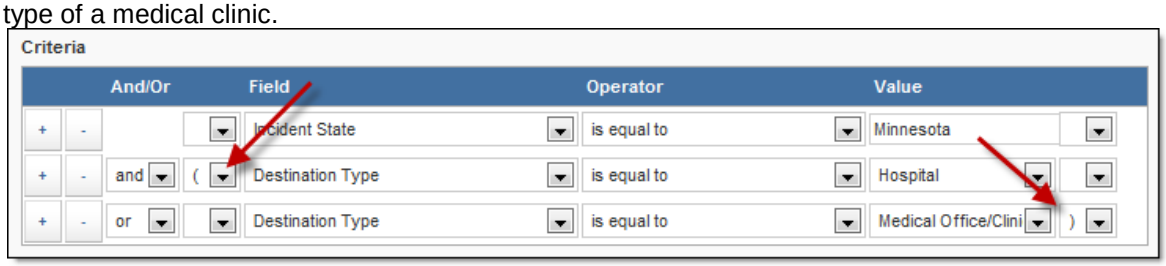
Criteria are important for narrowing the number of results displayed. If your organization has hundreds or thousands of records in the system, this is very important to limit the length of the report and prevent the system from timing out when trying to retrieve a large number of records.

Filters allow you to specify a new value for a criterion each time the report is run. For example, you could use filters to specify a date range, so that each time the report is run, users can select a date range for the runs.

Filters are important for narrowing the number of results displayed. If your organization has hundreds or thousands of records in the system, this is very important to limit the length of the report and prevent the system from timing out when trying to retrieve a large number of records.

1. **OPTIONAL:** To group criteria together, use the parentheses in the second drop down menu and the last drop down menu.
   EXAMPLE: To indicate that the records included in the report should only be for runs within Minnesota with a destination of a hospital or medical clinic, you will need to group the criteria for the destination types together. This indicates to the system that the run must be from Minnesota and have a destination type of either hospital or medical clinic, rather than saying that the run must either be from Minnesota and have a destination type of a hospital, or have a destination

type of a medical clinic.

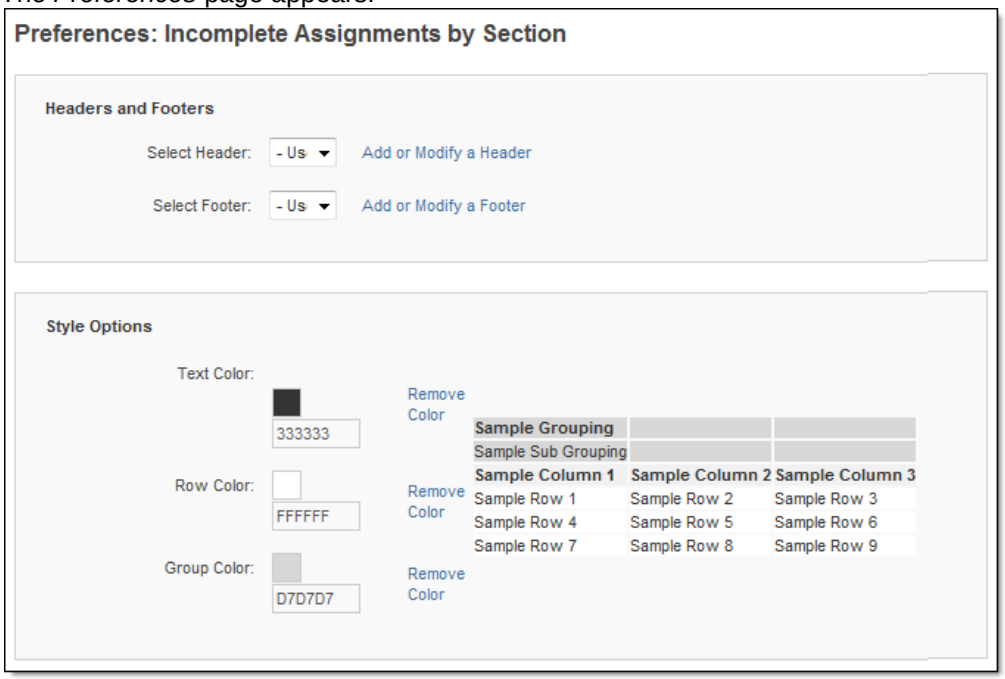


2. From the *Field* drop down menu, select the column for which you are restricting the values.
3. From the *Operator* drop down menu, select the way in which the field value must relate to the value you are specifying (e.g., if the value should be equal to the one you are about to specify, should not be blank, or should contain the value).
4. From the *Value* drop down menu, type or select the value for the criteria.
5. If necessary, close any parentheses by selecting a closed parenthesis from the drop down menu.
   WARNING: Make sure that there are no parentheses left open when you continue; if there is an extra opening or closing parenthesis, the report will generate an error and your criteria selections will be lost.
6. To add a new criterion, click *Add* [+].
   A new row appears.
7. **OPTIONAL:** To relate this criterion to a previous criterion, from the first drop down menu, select whether both criteria must be met (*And*) or only one of them (*Or*).
   NOTE: If both *And* and *Or* are used within one set of criteria, you will need to use the parentheses in the second drop down menu to group criteria together.
8. To add any more criteria, repeat steps 2–7.
9. To add a filter (i.e., a field for which values can be specified before running the report each time), from the *Available* scroll list in the *Filters* section, select the desired field(s).
   HINT: To select multiple fields, press and hold the *Ctrl* key while clicking each desired option.
10. Click *Add* [>].
11. To change the order that the filters will be listed, select the filter to move and use the *Up* and *Down* buttons.
12. When finished, click *Generate Report.*
    The *Filter Your Results* page appears.

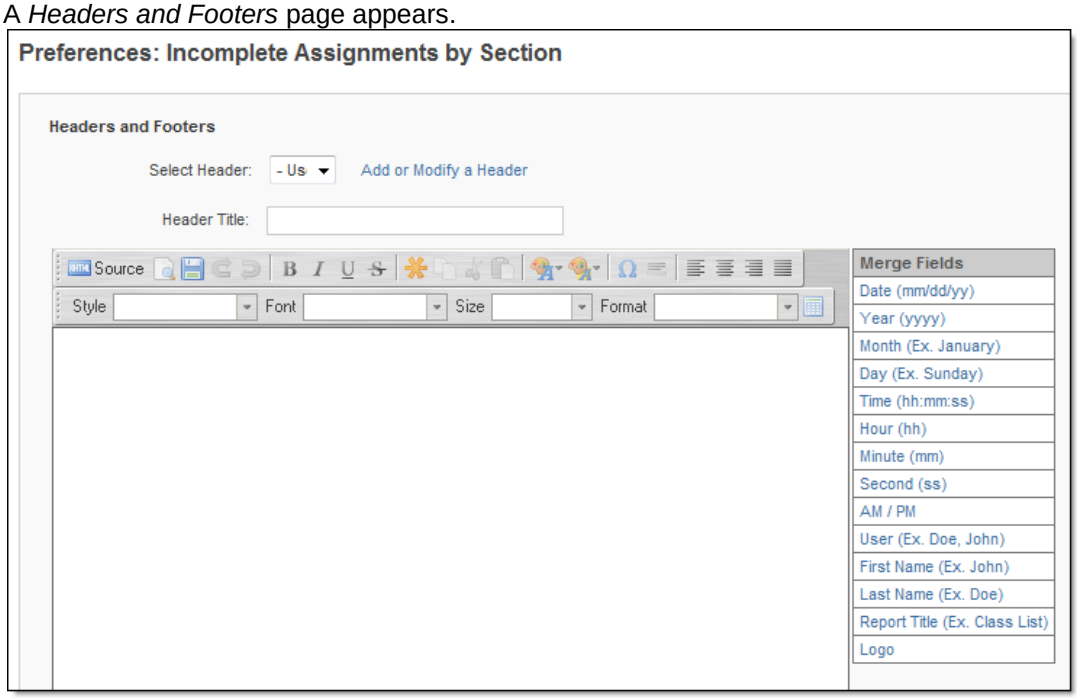
Step Seven: Changing the Appearance of the Report (Optional)

If you want to create a report with a custom look, you can change the headers and footers, as well as the colors for the text, each row, and the rows beginning each group of data.

1. From the *Actions* menu, select *Preferences.*
   The *Preferences* page appears.



2. From the *Select Header* or *Select Footer* drop down menus, select the footer you would like to display on the report.
   OR
   To create a new header or footer,
   a. Click *Add or Modify a Header* or *Add or Modify a Footer*, as appropriate.
      A *Headers and Footers* page appears.



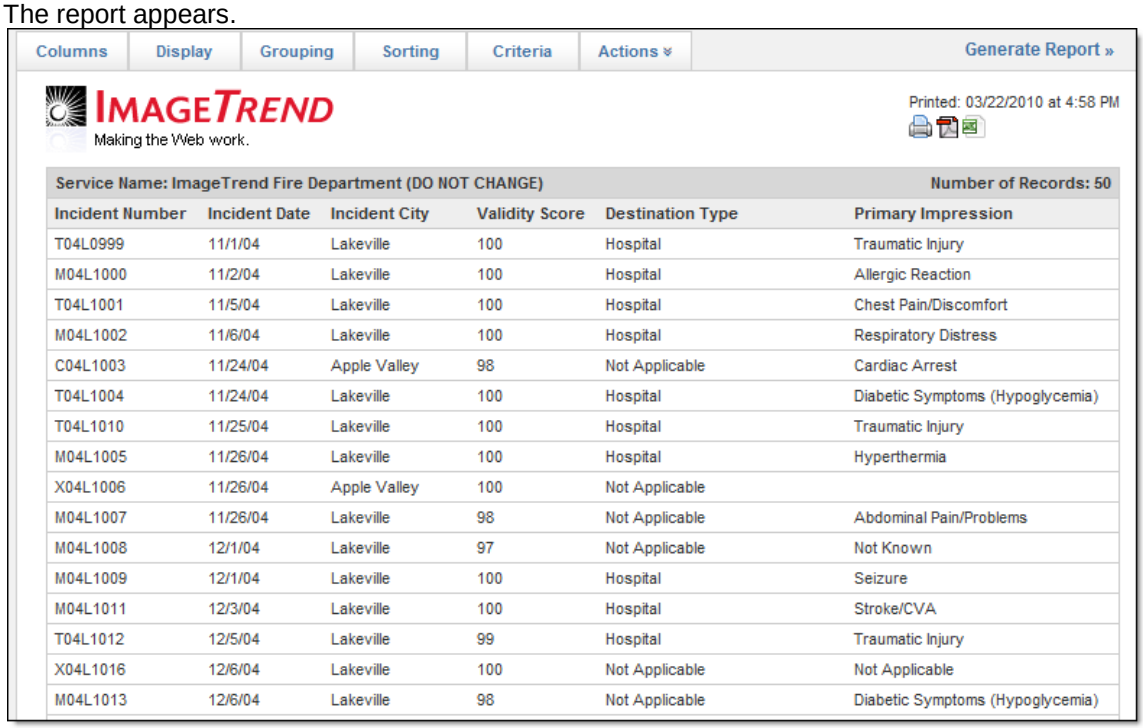
   b. In the *Header Title* text box, type a name for this header.
   c. In the text box, enter any text or pictures to be included in the header or footer.
      HINT: To enter any information that will automatically change when the report is generated, click the desired option from the *Merge Fields* section on the right.

   d. When finished, click *Save.*
3. In the *Style Options* section, select the colors that you would like to apply to the text, rows or groups.
4. When finished, from the bottom of the page, click *Save.*

Step Eight: Viewing the Report

If any filters have been added, you will need to specify the values for the filters before proceeding.

1. If necessary, from the upper right, click *Generate Report.*
2. If any filters are available, to select additional restrictions on the data to be displayed, select the desired criteria.
   HINT: Be sure to select how many records you would like to display on each page of this report. The default value will be 50 rows on each page.
3. When finished, click *Generate.*
   The report appears.

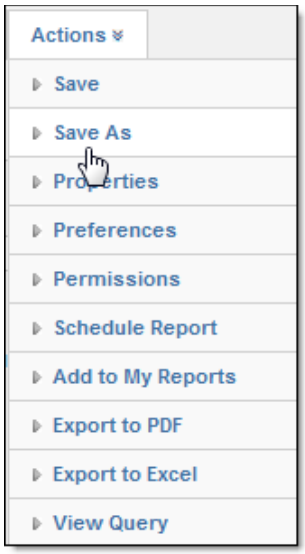


Incident Number	Incident Date	Incident City	Validity Score	Destination Type	Primary Impression
T04L0999	11/1/04	Lakeville	100	Hospital	Traumatic Injury
M04L1000	11/2/04	Lakeville	100	Hospital	Allergic Reaction
T04L1001	11/5/04	Lakeville	100	Hospital	Chest Pain/Discomfort
M04L1002	11/6/04	Lakeville	100	Hospital	Respiratory Distress
C04L1003	11/24/04	Apple Valley	98	Not Applicable	Cardiac Arrest
T04L1004	11/24/04	Lakeville	100	Hospital	Diabetic Symptoms (Hypoglycemia)
T04L1010	11/25/04	Lakeville	100	Hospital	Traumatic Injury
M04L1005	11/26/04	Lakeville	100	Hospital	Hyperthermia
X04L1006	11/26/04	Apple Valley	100	Not Applicable	
M04L1007	11/26/04	Lakeville	98	Not Applicable	Abdominal Pain/Problems
M04L1008	12/1/04	Lakeville	97	Not Applicable	Not Known
M04L1009	12/1/04	Lakeville	100	Hospital	Seizure
M04L1011	12/3/04	Lakeville	100	Hospital	Stroke/CVA
T04L1012	12/5/04	Lakeville	99	Hospital	Traumatic Injury
X04L1016	12/6/04	Lakeville	100	Not Applicable	Not Applicable
M04L1013	12/6/04	Lakeville	98	Not Applicable	Diabetic Symptoms (Hypoglycemia)

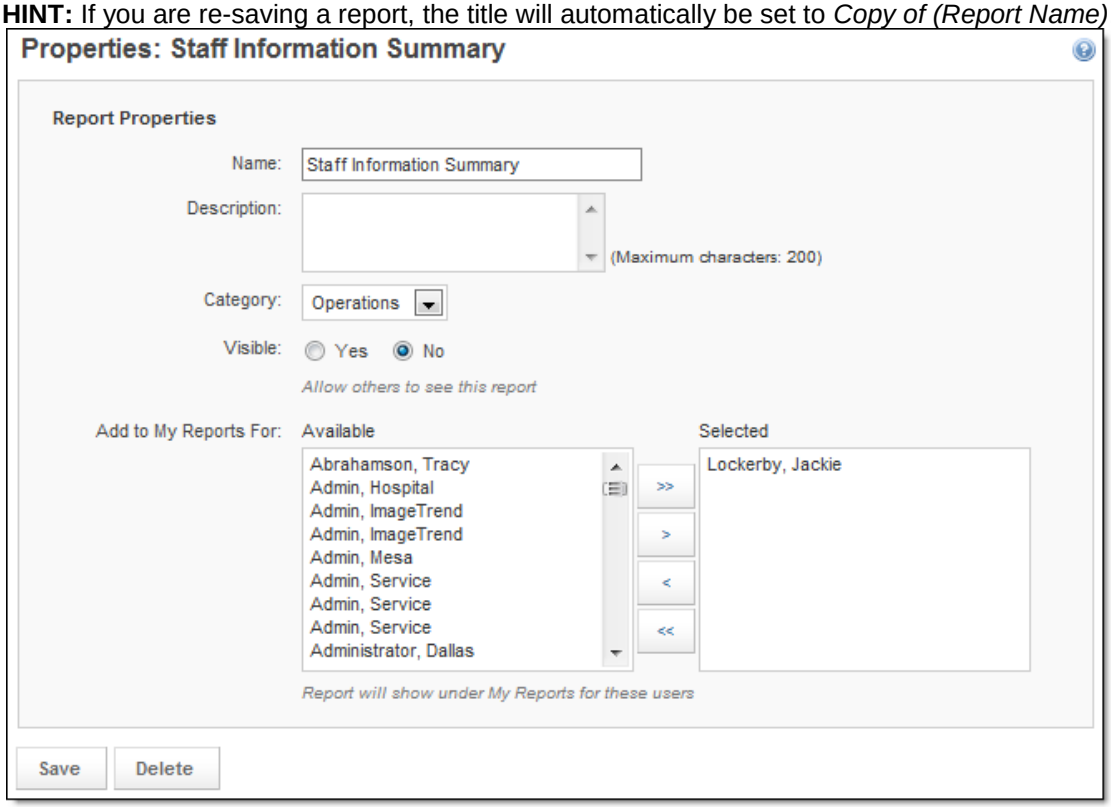
Step Nine: Saving the Report (Optional)

Users can save reports within the Report Writer, with the options to *Save* or *Save As. Save* will save over any report with the same title with new changes, while *Save As* allows you to save the report under a different name, preserving both versions of a report. If you are creating a new report from scratch, you should use the *Save* option so that you can specify a name for the report.

1. Within the report you wish to save, click the *Actions* tab at the top of the screen.
2. Click *Save* to save the report with the current title.
   OR
   Click *Save As* to save the report under a different title.



3. If you select *Save As,* enter a new title for the report in the *Name* field.
   HINT: If you are re-saving a report, the title will automatically be set to *Copy of (Report Name)*.



4. If desired, enter a new description.
5. Use the *Category* drop down menu to select where the report should be placed.
6. Use the radio buttons to select if the report is visible.
   NOTE: If you select *No,* only you will be able to view the report.
7. In the *Add to My Reports For* section, from the *Available* text box, select any people who should be able to view the report.
8. Click *Add.*
9. When finished, click *Save.*
   The report is saved.

Step Ten: Deleting the Report (Optional)

While the report cannot be deleted completely from the system, you can mark it so no one, including you, can access the report.

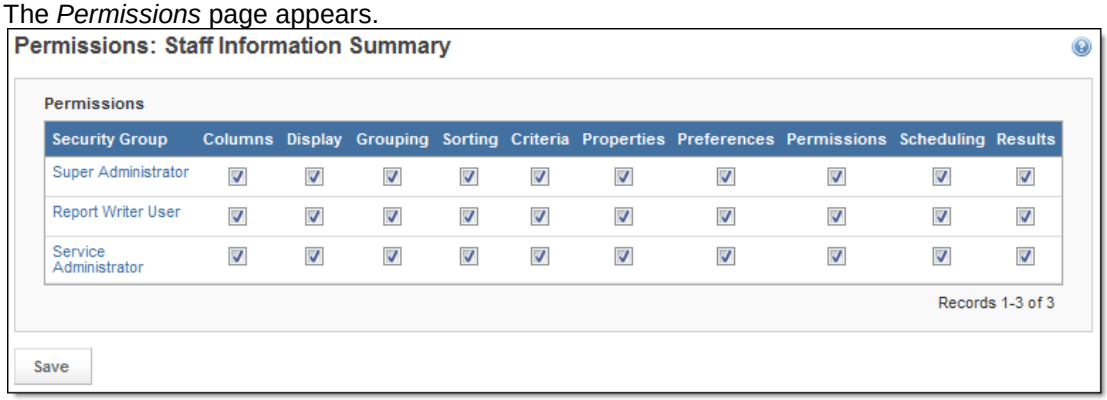
1. From the *Reports* toolbar at the top of the pane, select *Properties.*
2. In the *Visible* section, select *No.*
3. Make sure no users are in the *Selected* scroll list.

4. Click *Save.*
   The report is no longer accessible.

Step Eleven: Assigning Permissions (Optional)

You can assign permissions to the report after saving it. This allows you to set who sees which part of the report. Viewing permission can be restricted for parts or all of the report, depending on your preferences.

1. From the *Actions* menu, select *Permissions.*
   The *Permissions* page appears.

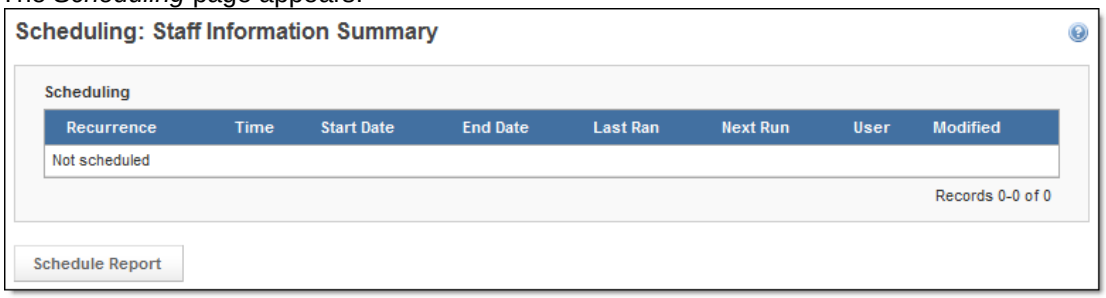


2. Use the checkboxes to select the appropriate permissions for each security group.
3. When finished, click *Save.*
   The permissions are updated.

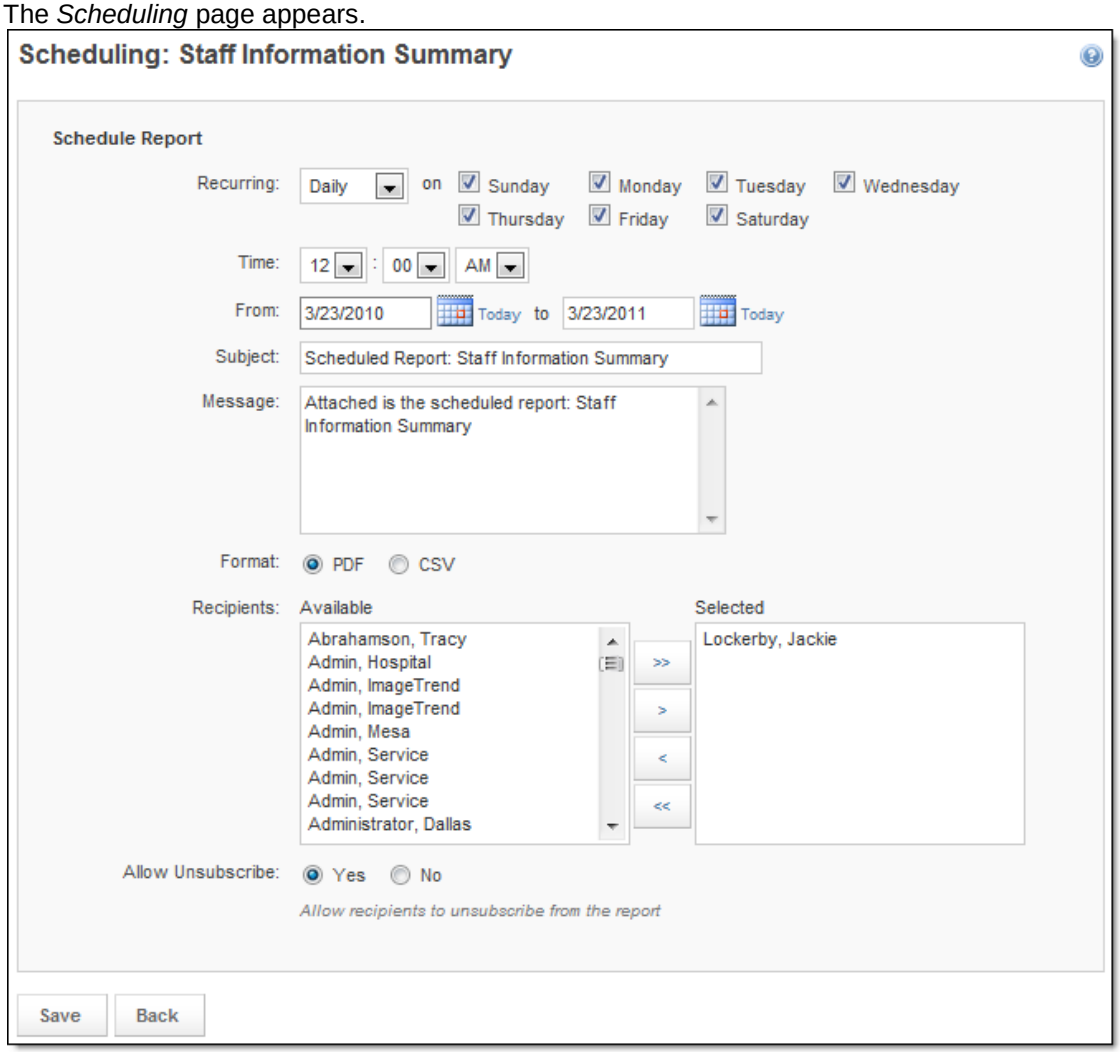
Step Twelve: Scheduling Reports (Optional)

You can schedule reports to automatically run for individuals at a certain time interval. The report will then be emailed to a person as an attachment.

1. From the *Actions* menu, select *Schedule Report.*
   The *Scheduling* page appears.



2. Click *Schedule Report.*
   The *Scheduling* page appears.



3. In the *Recurring* section, select how often this report will run.
4. In the *Time* section, select when the report will run.
   HINT: If this is a large report, you will want to run it at a time when few people will be using the system, so it will not slow down people who are working on other reports.
5. In the *From* section, type any dates that should restrict when this report will run (e.g., if the report should only be run for a month or a year).
6. In the *Subject* section, type a subject line for the email that will be sent with the report.
7. In the *Message* text box, type the message that will appear in the body of the email with the report.

8. In the *Format* section, select the format in which the report should be saved (e.g., PDF).
9. In the *Recipients* section, from the *Available* text box, select any people who should receive this report on this time schedule.
10. Click *Add.*
11. In the *Allow Unsubscribe* section, select whether these recipients should be able to set themselves to no longer receive this report.
12. When finished, click *Save.*

Step Thirteen: Exporting and Printing Reports (Optional)

If you would like to print or save a copy of a report with all the data that is displayed in the report as you are viewing it, you can choose to either print the report or to export the report into a PDF or spreadsheet file that you can save and refer to at any time.

1. Generate the report you would like to export or print.
2. To print the report,
    a. In the upper right of the report, click the *Print* icon .
    b. Use the *Print* dialog box to select the printer and select any printing options for the report. **HINT:** These options will depend on the printer you use and the printers that are set up for your computer.
    c. Click *Print.*
3. To export the report to a file that you can save or print,
    a. In the upper right of the report, click the *Export to PDF* or *Export to Spreadsheet* icon, as appropriate.
    HINT: If you choose to export to a PDF, a PDF file that can be viewed with the free Adobe Reader program will be generated. If you choose to export to a spreadsheet, a basic spreadsheet file that can be viewed and edited with a spreadsheet program such as Microsoft Excel will be generated.
    b. Select whether you would like to save or view the generated file.

Chapter 2

ImageTrend Report Writer

Help and Support

Help and Product Support

Before Contacting ImageTrend

Please have the following information accessible when calling ImageTrend:

- A description of your computer system.
- The name of your operating system and service pack version (if applicable).
- A description of what happened and what you were doing when the problem occurred.
- The exact wording of any error messages you see.
- Your company name and contact information.

Contacting ImageTrend

If you are unable to find the information needed to use Report Writer effectively, please consult ImageTrend in any of the following ways:

- Phone (952) 469.1589
- Toll-Free (888) 469.7789
- Fax (952) 985.5671
- Email support@imagetrend.com
- Web http://support.imagetrend.com

ImageTrend support services are available:

Monday – Friday
8:30 a.m. to 5:00 p.m. central time

Technical Support

For 24-hour technical support, ImageTrend provides online assistance through the ImageTrend University, their website and email services:

- University The *Help* link within your product
- Email support@imagetrend.com
- Web http://support.imagetrend.com