New Hampshire TEMSIS
Report Writer 2.0 Startup Guide

This document provides an introduction to creating a basic ADHOC (customized) transactional report using Report Writer 2.0 in TEMSIS. In order to be able to build reports in Report Writer, you must have Service TEMSIS Administrator rights for your service.

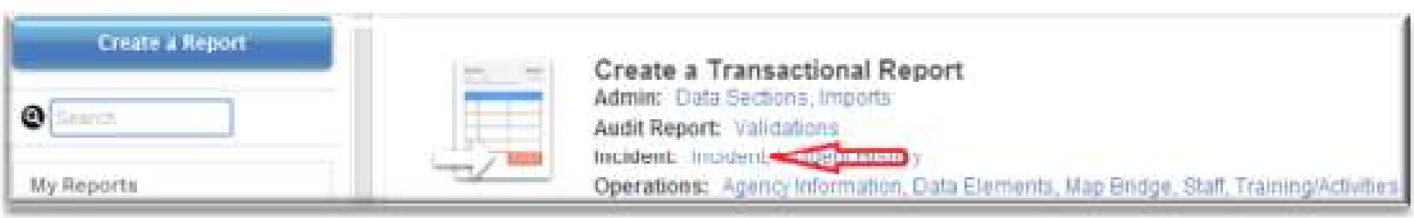
This document is intended to be a “startup” guide to get you going. It only addresses the most basic features of creating a report in Report Writer 2.0. See the end of this document for a list of more advanced features that you can learn about once you have mastered building a basic report, including a link for more comprehensive Report Writer user’s guides from Image Trend.

PLEASE NOTE: For services that had reports previously built in the original Report Writer (sometimes called Report Writer 1.0, now called “Old Report Writer”); This feature will be completely discontinued as of March 31, 2014 *and will no longer be available after that date*. The reports that your service had in the Old Report Writer *MUST BE REBUILT* in Report Writer 2.0-*they do not automatically cross over from the Old Report Writer to Report Writer 2.0.*

To create a basic report:

1. Enter Report Writer 2.0

2. Under “Create a Transactional Report” select the data you would like to query. When building reports related to patient care reports and EMS incidents select “Incident” (you will use this 99% of the time).



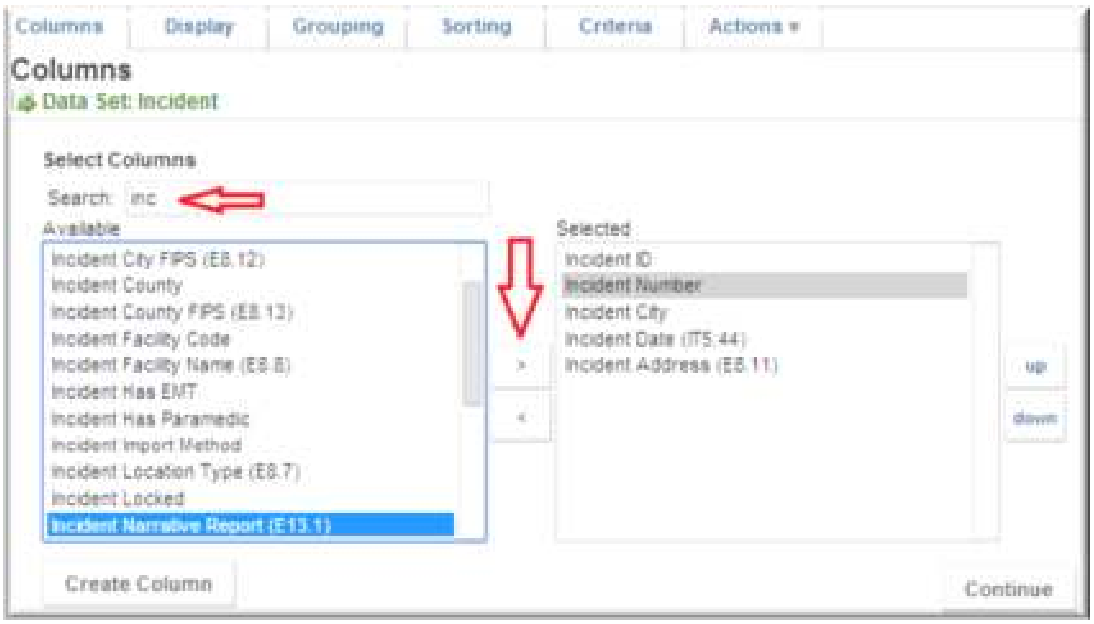
3. The next page you see is the columns tab (see image below); this allows you to select any data elements you wish to actually see *displayed* in your finished report.

   Note that there is a difference between the information that you want to display (see) on your finished report and what you want to use for filtering criteria, but don’t need to see.

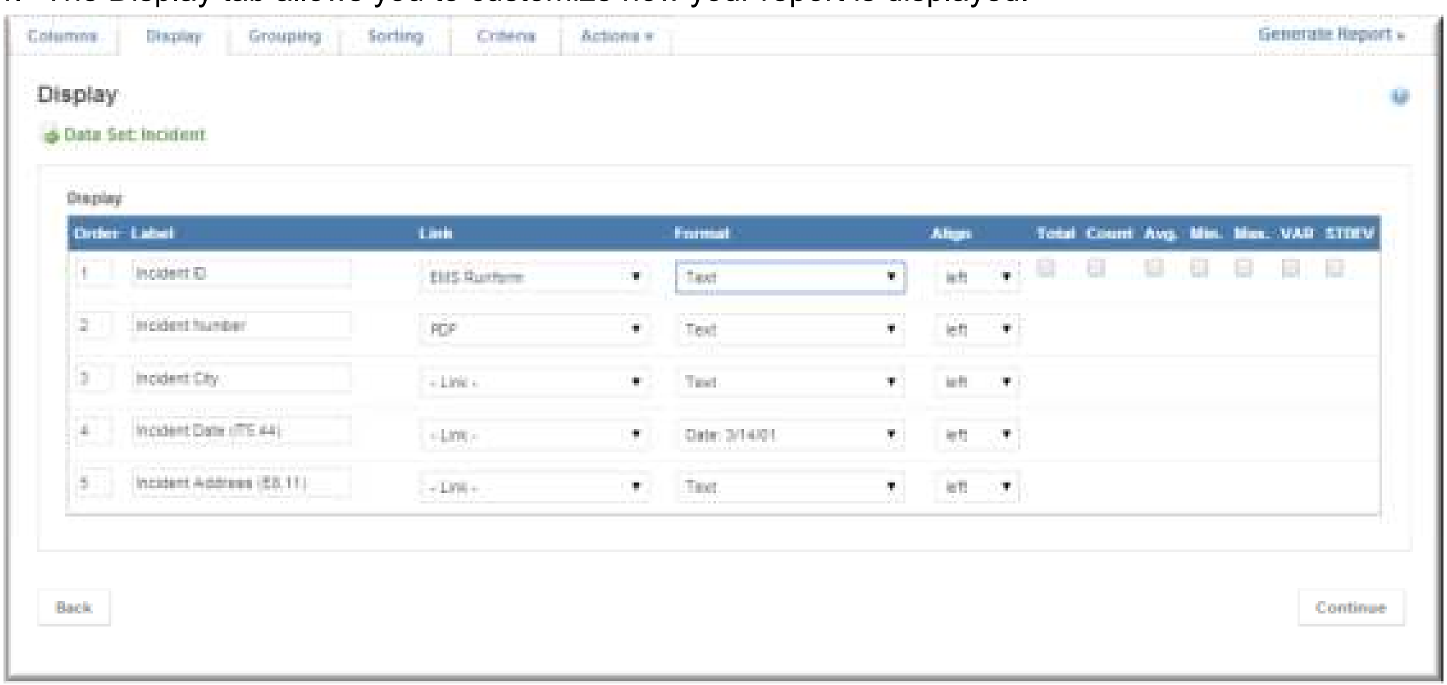
   You do not need to display any elements that you use in the filtering criteria unless you also want to see the information on your finished report. For example, if you want to look at all towns where you did mutual aid calls, you do not need to display the “Type of Call” (chosen in the columns tab) in your finished report to be able to filter for the type of calls to only show “Mutual Aid” calls (chosen in the criteria tab) when you just want a list of the towns without the type of call also showing.

To choose the columns you want to display, you may either scroll through the “available” list on the left side manually or begin typing a keyword in the search field. Once you have entered at least 3 characters the list of elements will begin to filter accordingly. Highlight the element(s) you want to display and click the > button to add them to your report.

To sort the order that the elements (columns) will be shown on your report, use the UP DOWN buttons on the right side of this box sort how your columns are displayed from left to right (top=left, bottom=right) in your finished report. This is the easiest way to do this. Click “Continue” when you are finished.



4. The Display tab allows you to customize how your report is displayed.



 Updated 3-21-2014

Order: This allows you to change where the columns will be displayed from Left (#1) to Right (highest #), by changing the number of the columns manually. (We suggest ordering your elements with the UP DOWN feature on the previous Columns tab instead-it's much easier).

Label: These default to the data element name on the columns tab, but can be edited here.

Link: This allows you to hyperlink the report text to the electronic run-form or PDF printout from your finished report. By clicking on a link you have created here, you can open the actual full report.

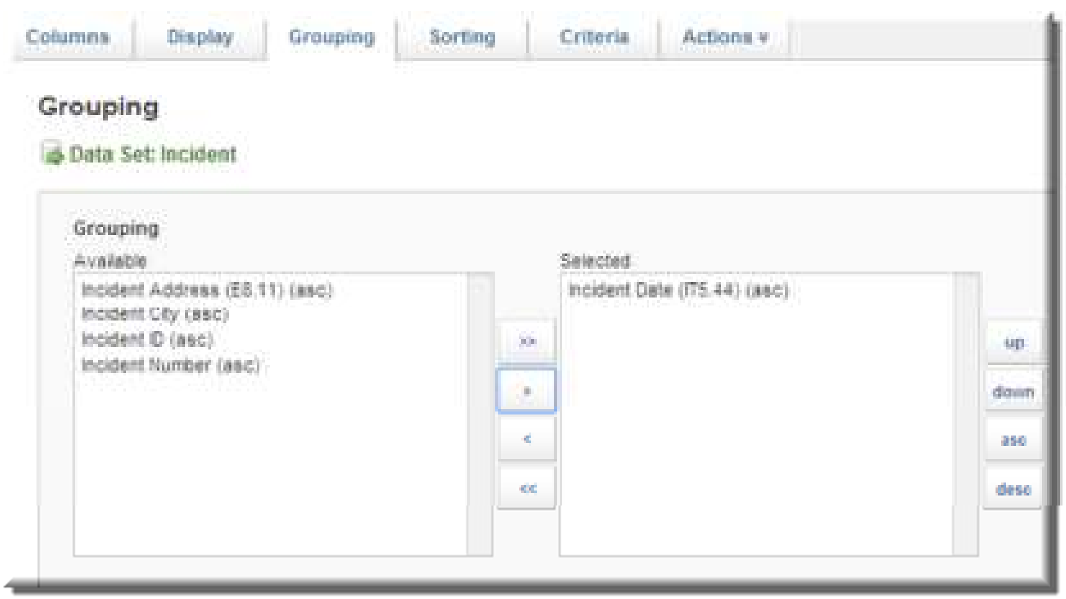
Format: This allows some customization of how data is displayed, such as date/time format.

Align: This allows you to set the cell alignment for each data element.

Check Boxes: Checking the available boxes will display the result of the selected function on your finished report.

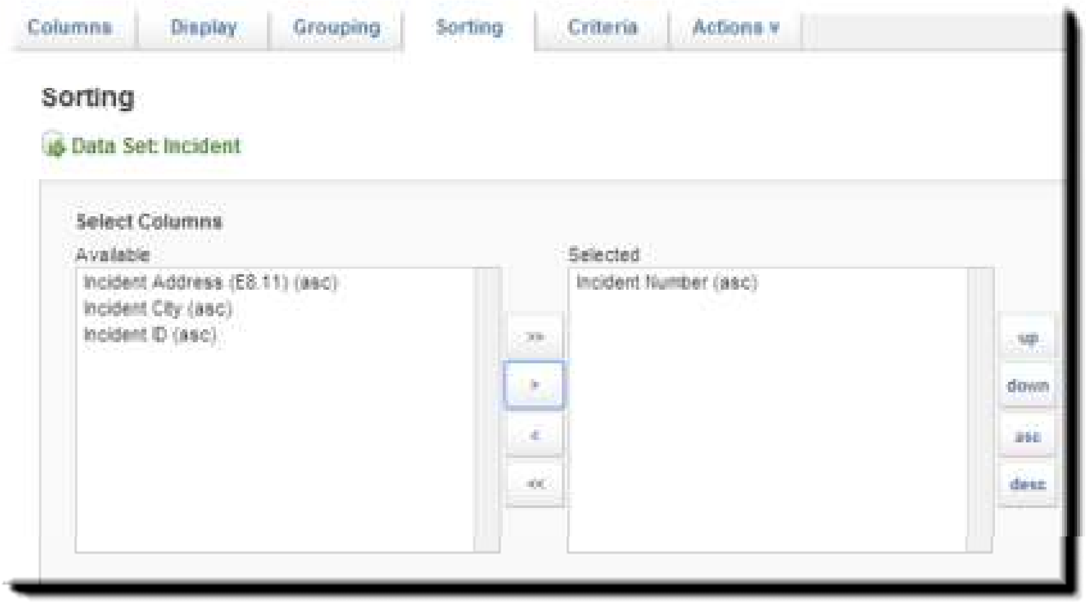
Click "Continue" to save your changes and proceed to the Grouping tab.

5. In the grouping tab, you can select data elements that you would like grouped together in your finished report; for instance if you want to group your displayed calls by incident date you can select that data element and all results will be grouped by that element. Note that in this case (unlike filtering), you can only choose to group the results by elements you have chosen to display from the first tab. Grouping is not a requirement, but it can help format your display for easier reading.



Click "Continue" to move onto the Sorting tab.

6. To Sort your results, you can select multiple elements to sort your results; the results are sorted first the top element listed under selected, then by each subsequent element you have selected. You can either sort elements you have grouped, or sort them without grouping them. If you have already chosen an element for grouping, then it will not be in your choice here for sorting. Sorting is not a requirement, but can help format your report display.



Click “Continue” to move to the Criteria tab*

Tip: *DATE Range Filters are set here!

- If you run the report manually select “Incident Date” under “Filters”.
- If this will be a scheduled/automatic report, you will need to set the date range in “Criteria”.

7. The Criteria tab is one of the most important tabs when setting up your report; this is how you give the directions to report writer to know where and how to find the information you want to found. Here you will establish what your report will include or exclude from your results, including the date ranges for your data. Within the Criteria tab, you have both “Criteria” and “Filters”. We will start by explaining “Criteria”

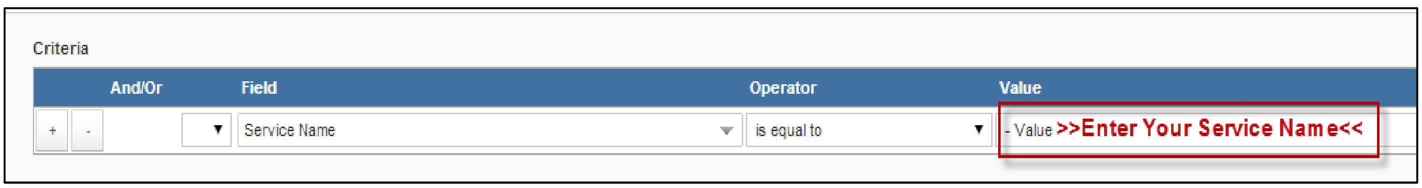
Setting Criteria:

a. Criteria you establish will remain unchanged every time you generate the report; this is the foundation of what the report will return for data. Use this if you don't need to enter different parameters every time you run the report (e.g. you always want this report to run for the last 7 days, regardless of when you run it).

b. To establish your criteria, you will build a series of one or more logical statements that read left to right, top to bottom following standard mathematical order of operations (remember algebra?) using a kind of "If >Then" logic.

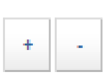
c. If you plan to have your report scheduled to run automatically, ALL of your report search criteria must be setup in this area, including the date range you want to search.

d. **TIP:** to help your report run more efficiently and quickly, we recommend that you set at least one criteria that reads: [Field] = "Service Name"
[Operator] = "Is Equal To"
[Value] = "Pick your service name"



>>Even if you are *only* running data for your service and *only* have permissions to see data from your service, we recommend you do this. This directs the program to only find runs for your service to start with, instead of finding all runs in the state that fit your criteria, and then having to sort out what you are allowed to see. The extra work the program has to do for this extra sorting can cause it to take longer to return results and has sometimes caused errors when running reports at the service level.

Orientation to the Criteria Functions



Adds (+) and removes (-) lines of criteria.

[And / Or] Tells TEMSIS how to include or filter information by what has to be "TRUE".

- "AND" is used as an exclusive filtering tool because *everything* connected with an "and" *must be true* to return a record. (*Both* [This] AND [That] *Must* be True)

- "OR" is used as in inclusive filtering tool because *anything* connected with an "or" *may* be true to return a record. (*Either* [This] OR [That] *May* be True))

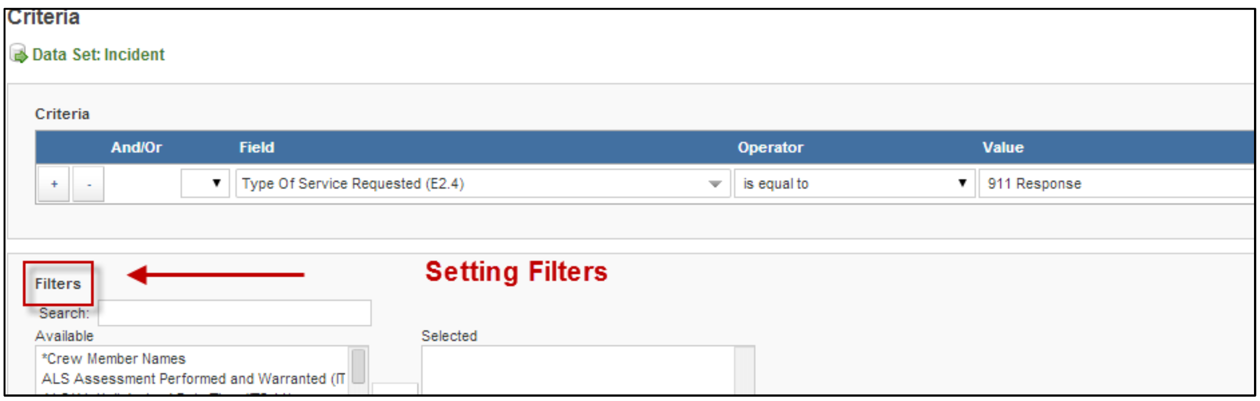
(▼ Parentheses allow grouping of criteria similar to grouping in a mathematical equation to control the outcome. (e.g. [This] AND ([That] OR [Those]) or (5 x (4) + 2) = 22 or 30)

[Field] This contains a searchable list of all data elements within the run form.

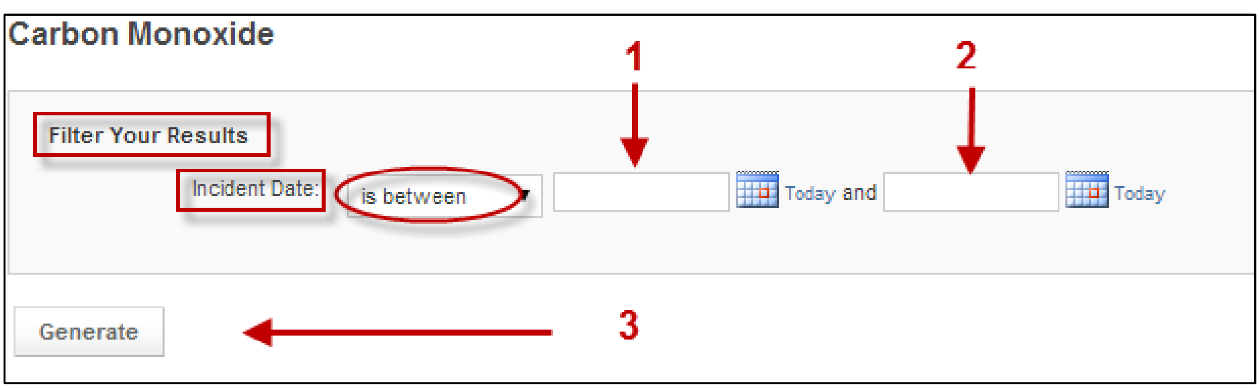
[Operator] This establishes the logical comparison between the data element your chose in [Field] and the value you select in [Value]. Examples of Operators are: "Is Equal To", "Is Not Equal To", "Contains", "Is Between", "Is Blank".

[Value] Depending on the Field and Operator you choose this will either be a free text field or a drop down menu.

Setting Filters:



a. Filters are used when you want to use search criteria that will be different every time you run a report. The most common filter is date range (found under "Incident Date"). If you want to set your own date range for a report every time you run it, here is where you set that up.
b. If you plan to schedule a report, then any "filters" you set will not help with the report because filters are intended to be answered just before the system generates the report.



c. You can mix both "Criteria" and "Filters" if you are manually running a report.

d. To change the default filter operators (“Is Equal To”) to something else (“Is Between” If you want to routinely enter a start and end date), you will want to change so you don’t have to do it manually every time. Choose the Filter Elements you wish to use, and then click the “Edit Labels” button.

*The “Edit Labels” button allows you to customize the names of filters you choose to add to your report, provide brief instructions to serve as a reminder or an explanation to others within you service, and reset a Default Operator to avoid changing this each time you generate you report.

After you have set your labels Click “Continue” to have those changes saved.

8. If you have just set up a quick report and won’t want to run it ever again, you can actually “Generate” a report right now (skip to step 10). However, if you think there is a possibility you might want to change something or run this report again, then you will want to save the full report for future use.

9. To save your report by click “Actions” then “Save As” the first time you save it, for subsequent saves Click “Continue” first, then use “Save” or the system will duplicate your report (including the same name).

   a. Choose a name for your report. Make sure you use a key word or two that is descriptive enough that you can use to search for it later (e.g. avoid things like “My Report”).

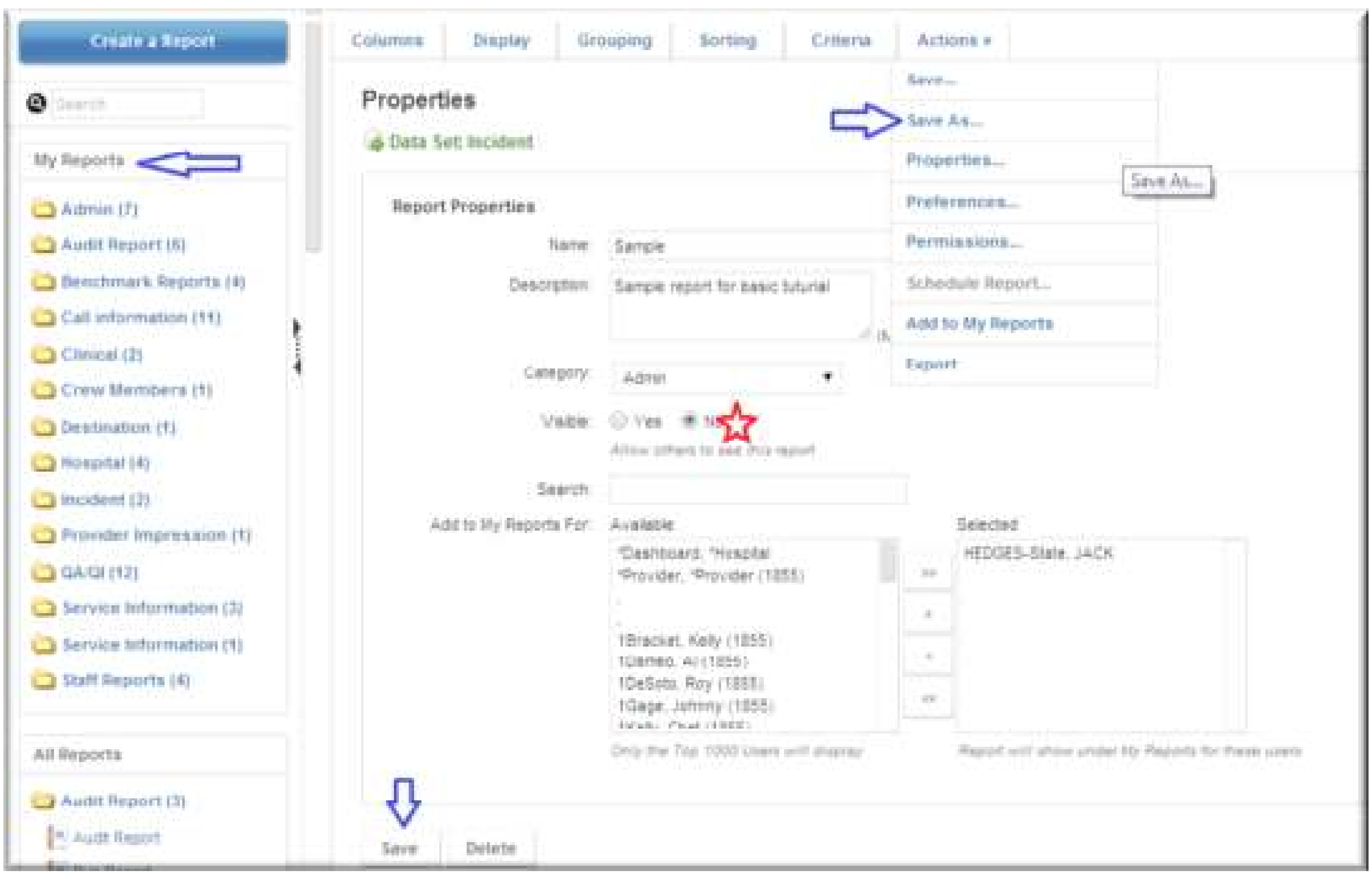
b. Enter a description of your report that will remind you what it was used for when you revisit it down the road. This is optional.

c. Choose a category under “My Reports” you would like your report saved under. This is not Optional, but to you can choose whatever you want, so you could theoretically put everything in the same category if you wanted to so you only have one folder to look in.

d. Ensure **VISIBLE** is set to **NO;** choosing “Yes” will cause your report to be visible to ALL USERS state wide. While it seem intuitive that you would want to say “yes” if you thought others in your service might use this same report, choosing “yes” for visible means everyone in the TEMSIS system can now see your report and it tends to start cluttering up all the canned reports folders fairly quickly. JUST SAY NO here.

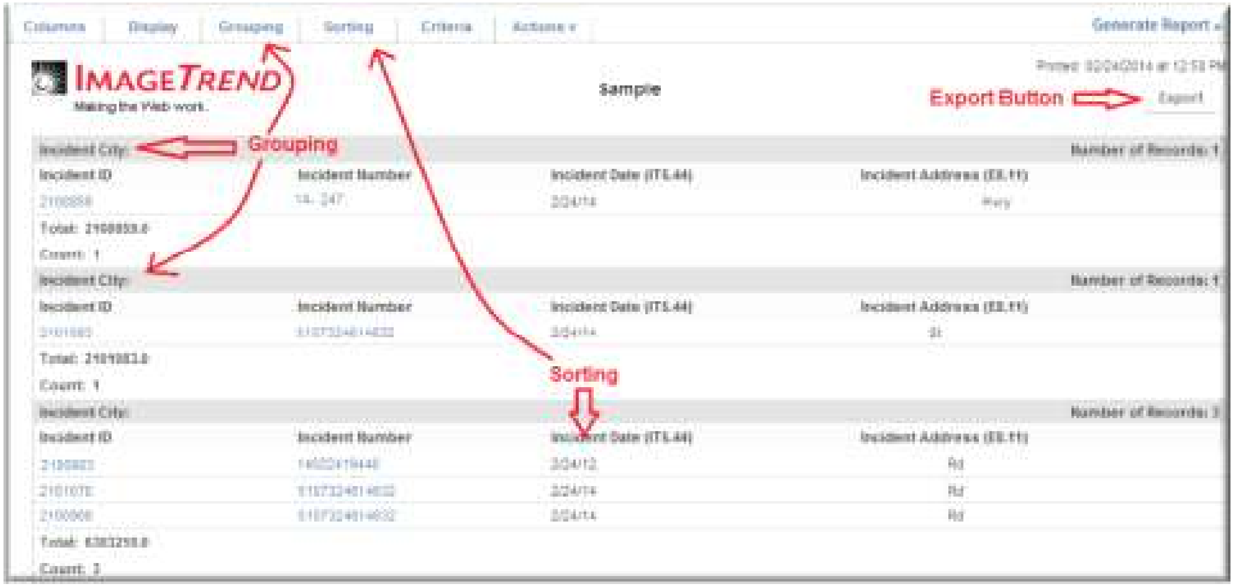
e. If you would like to make your report visible to other users *in your service* enter their last name in the search box and select them individually. Then click Save.

Note: If you have trouble with a report and need technical support from the TEMSIS staff or Image Trend, you will need to follow this same step to make your report visible to the support person.



10. You are now ready to generate your report by clicking Generate Report » in the top right corner.
11. If you have set you filters, you will get a pop-up menu for you to then fill them in. Once you do, click “Generate” again.

12. View your results, or export them to a different format with the Export button.



13. Export your report by clicking on the export button then select the format you would like it in, note the limitations that are placed on the number of records that can be exported based on the file export type you choose.

NOTE: When exporting to Excel the file will down load as a .csv file. To convert it: SAVE AS in Excel and select a file type of .xls (Excel 2003) or .xlsx (Excel 2007 or later) .

There are additional, more advanced features available in Report Writer that are not discussed in detail within this document including: scheduling a report to auto generate and creating sub-columns to show multiple records including vitals, medications, and procedures under one incident.

To see more comprehensive User's Guides: in TEMSIS go to "MORE" > "HELP" or visit http://university.imagetrend.com/#search/Report Writer or contact NH Bureau of EMS staff or the Image Trend Support desk.