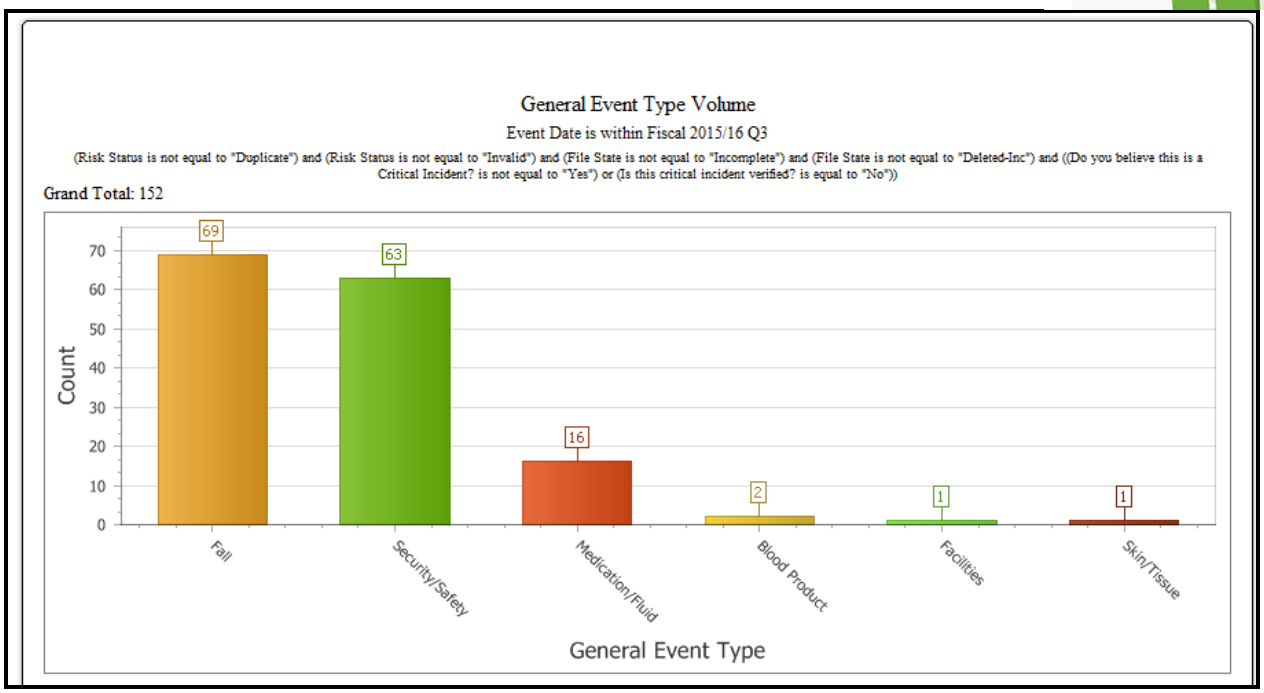
RL6 - WORKING WITH REPORTS



If you have RL6 Risk questions please contact:

RL_support@wrha.mb.ca or (204) 926-1070

WRHA Quality Improvement & Patient Safety
Version: 3.0, November 2, 2018

WORKING WITH REPORTS

Users having a valid login ID for RL are able to receive reports on a scheduled basis (i.e. daily, weekly, monthly, quarterly or annually.) Reports will be sent automatically from RL via email. The message will contain a PDF copy of the report as well as a hyperlink to open the report within RL.

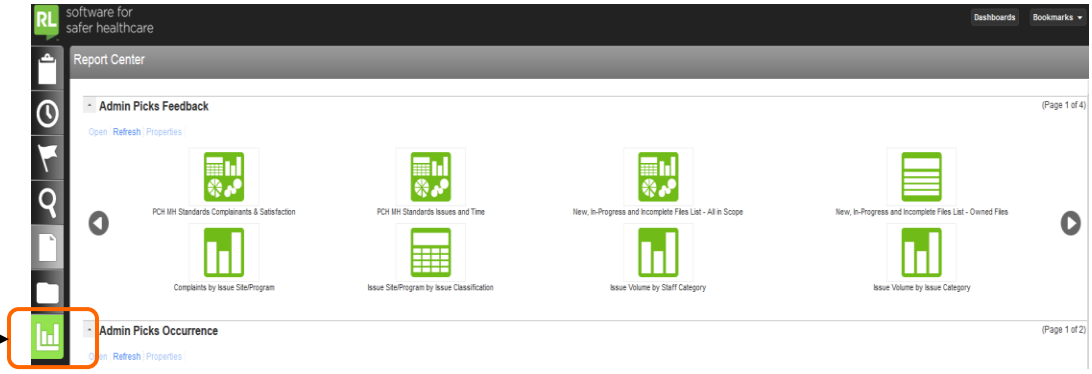
Reports may also be run on an adhoc basis by double-clicking their icon in the Report Centre. User access to the Report Center is controlled by RL.

Security is provided by your 'role' and 'scope' Settings. This controls the files included in a report. As a rule of thumb, if you do not have access to open or view a particular file, it will not be included in your report. For example, a Unit Manager can run reports for their own unit(s), but will not see files that belong to another Manager.

To view a report such as General Event Type Volume for the previous month, you would perform the following steps:

1. Click the **Report Center**  icon on the *Navigation* toolbar.

   The Report Center dialog box opens.

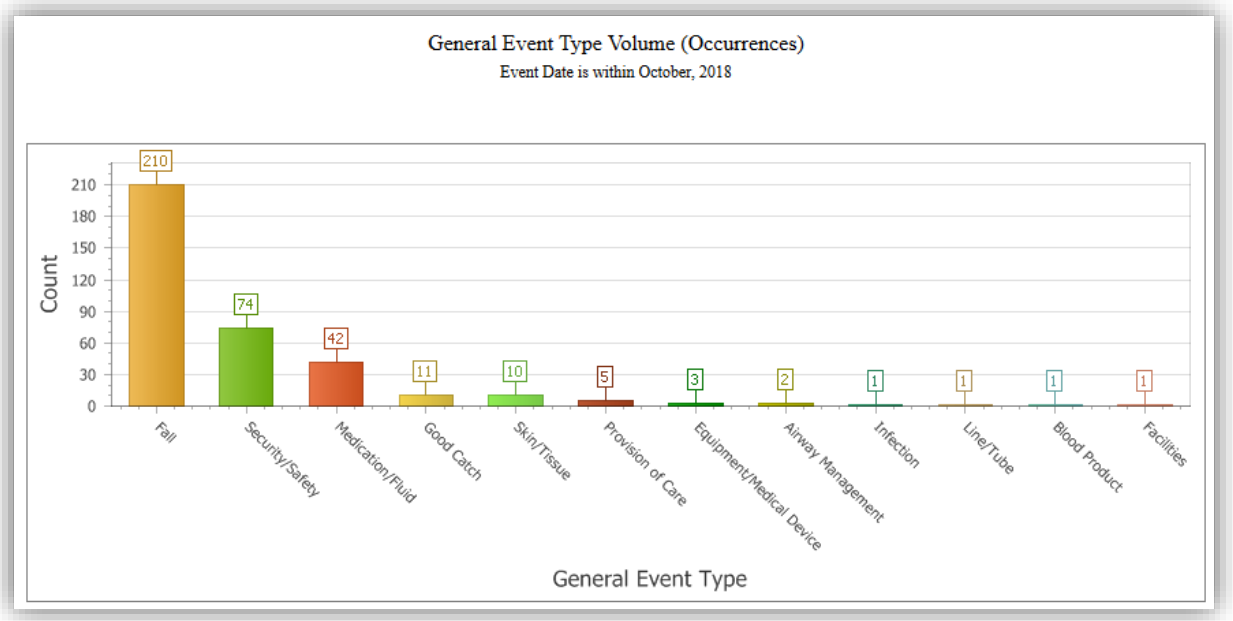


Report Centre icon

2. Double-click the **General Event Type Volume (Monthly)** 

report icon.

The General Event Type Volume (Monthly) report will be displayed. *<u>Please note ALL reports in here are taken from Training</u>*



Understanding the Report Toolbar

The report toolbar is used to make modifications, save, distribute and navigate your reports

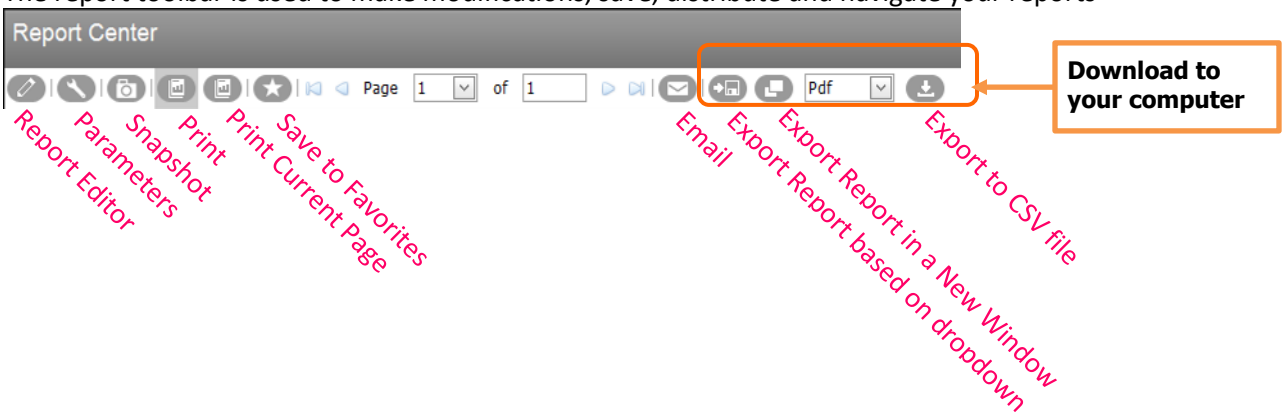
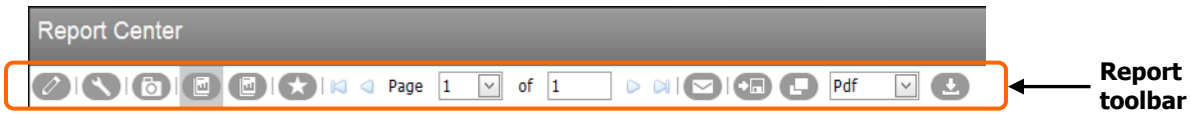


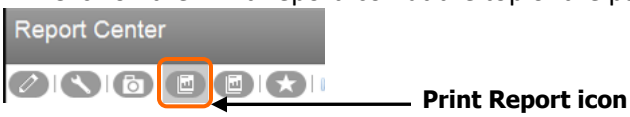
Image	*Description*
	Opens Report Editor, allowing you to either ADD or Modify the report attributes like chart title, date range, fields, etc.
	Provides an easy option change the date range or Report Type
	Takes a snapshot of the report in pdf that you can retrieve at a later date. This can be useful when looking at reports over time for trends.
	Opens your printer dialog box which allows you choose to print all, a range of pages, or current page
	The 2nd print button prints the current page only
	Adds the report to the list of favorites that you can quickly access through the report centre
	Emails a PDF version of the report to ANY email address
	Exports the report based on the drop down list (PDF, XLS, XLSX, RTF (word Doc), MHT, JPG Image)
	Clicking on this converts the graph/chart into a CSV file.

Printing Reports

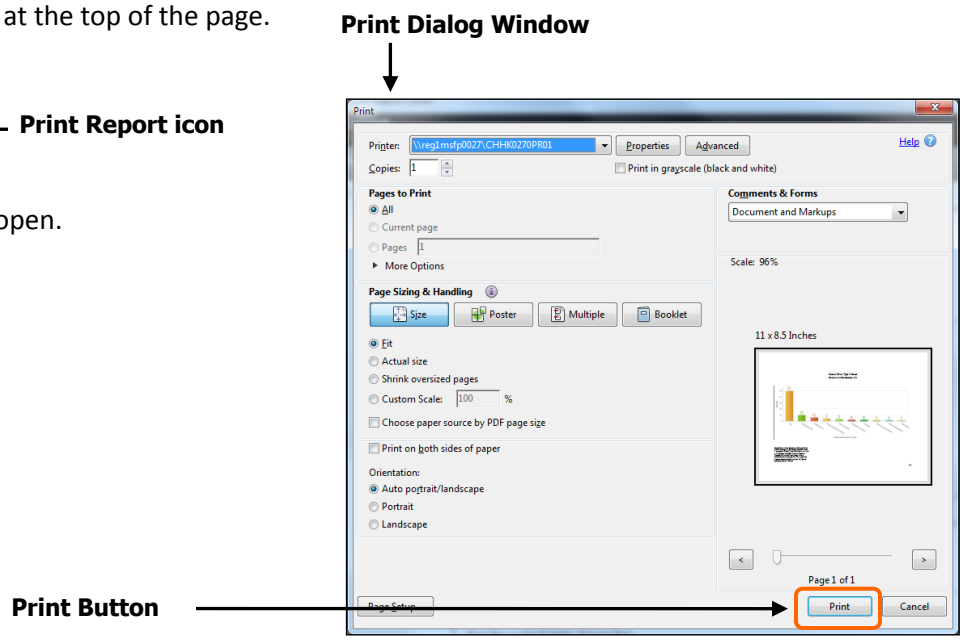
The report toolbar may be used to print a copy of a report that has already been generated.



1. Click on the Print Report icon at the top of the page.



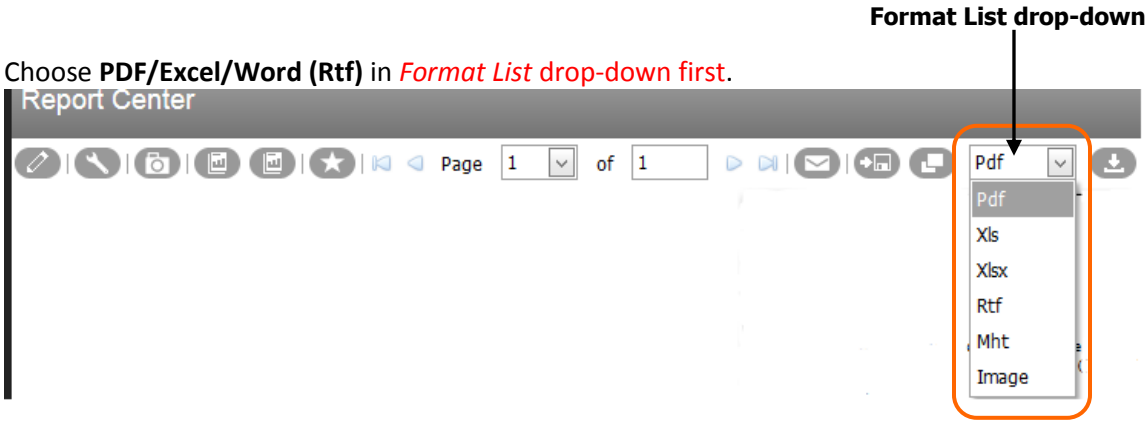
2. A Print dialogue window will open.
   Click on the **Print** button.



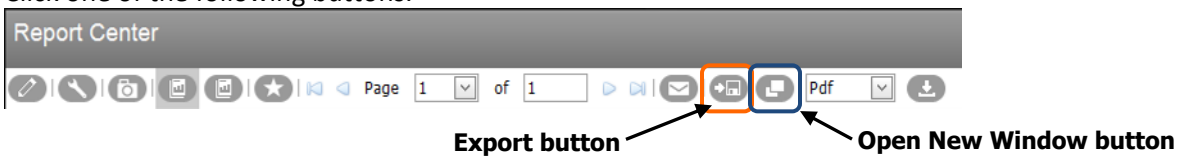
Creating a PDF/Excel/Word Copy of a Report

The report toolbar may be used to create a PDF/Excel/Word (*denoted as RTF*), etc. of a report (you also have other report formats that you can save as such as Image, or MHT (*web archive file displayed in your browser*)).

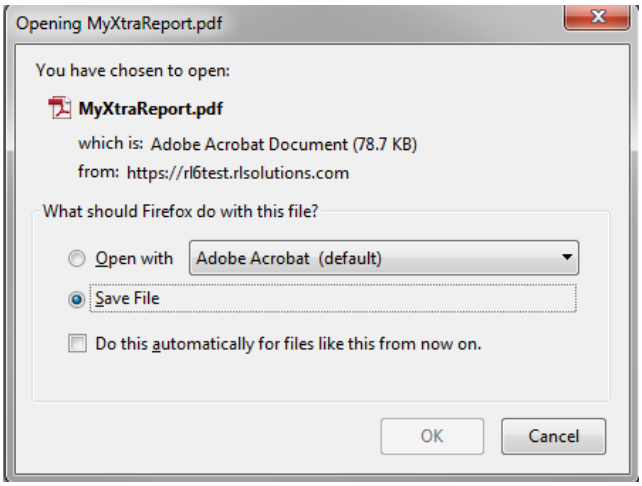
1. Choose **PDF/Excel/Word (Rtf)** in *Format List* drop-down first.



2. Click one of the following buttons:



1. **Export Button** – to display a *File Download* dialog box, which prompts you to save or open the file to your OWN COMPUTER.

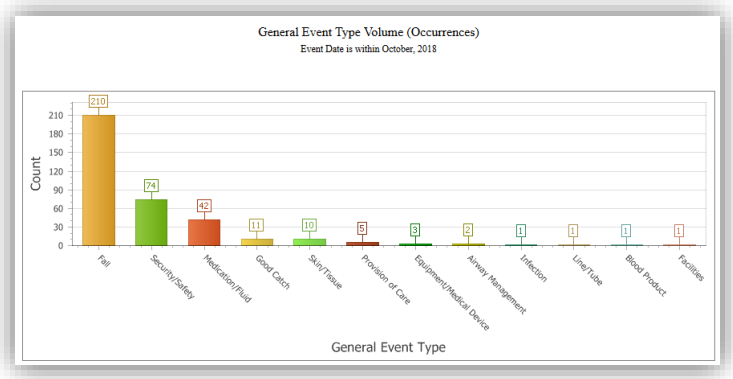


b. **Open New Window** – to open the file in a new window within the browser in the selected format (e.g. PDF).

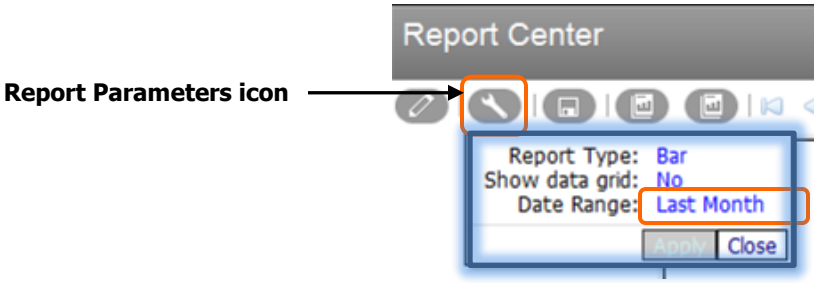
Viewing Results for a Different Date Range

You can change the date range for any open report if needed.

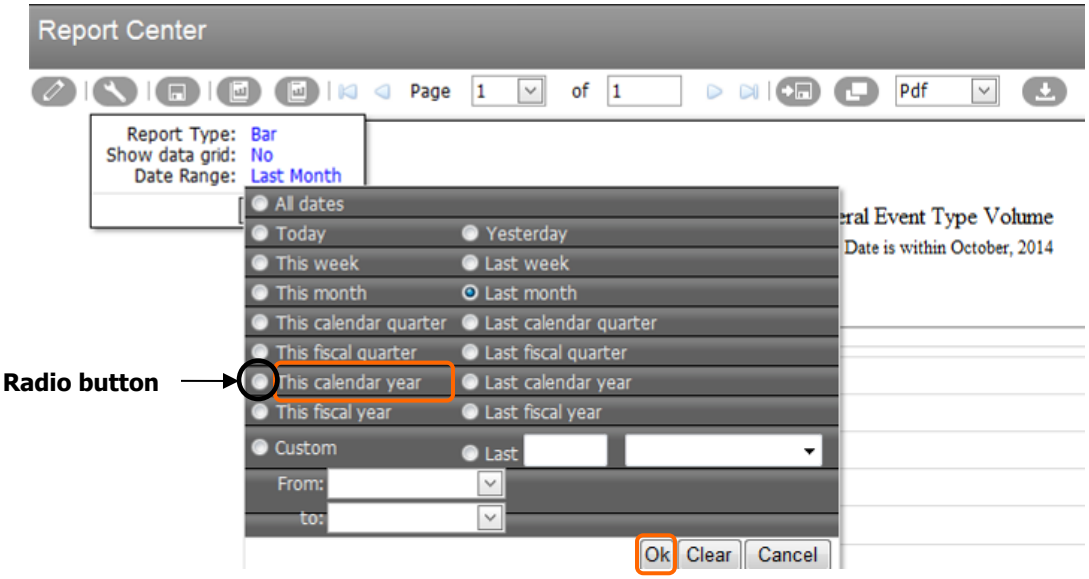
In the graph on the right, we currently have it as Last Month but we want to change this to **THIS CALENDAR YEAR**.



1. Click on the **Report Parameters** icon at the top of the page.
   The following drop-down menu will appear:



2. Click on the value for the current date range setting (initially displayed in a blue font). In this example, you would click on the words "**Last Month**".
   A pop up dialogue box will appear:

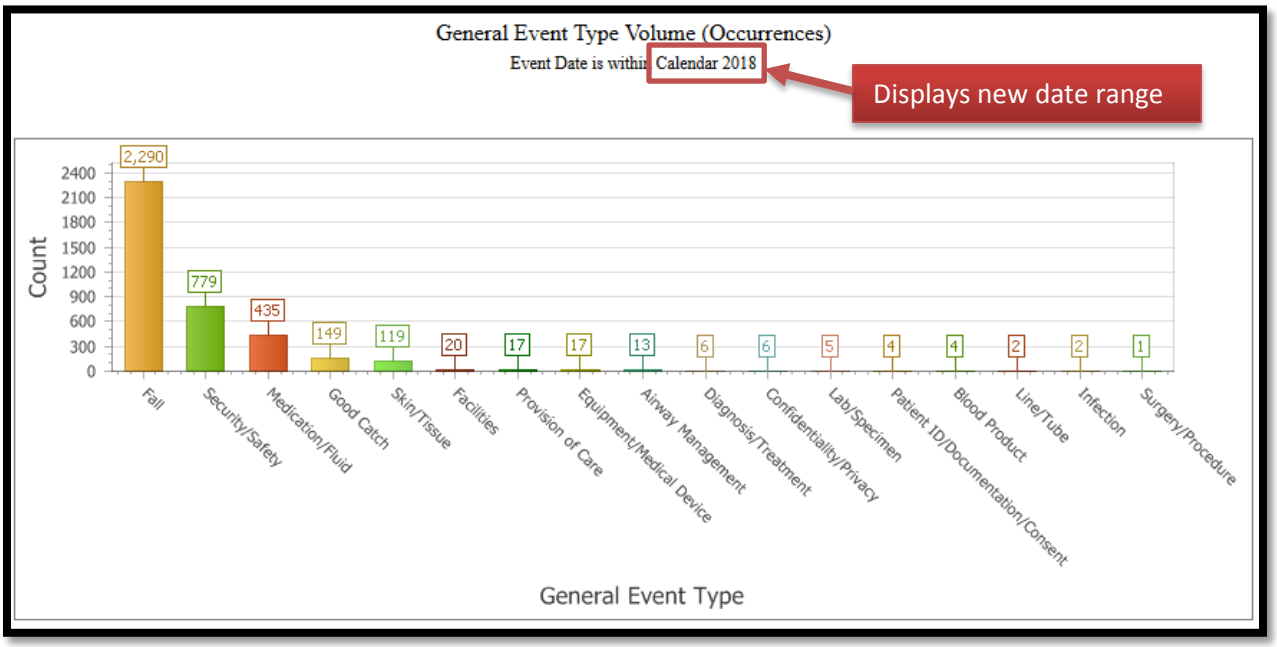


3. Indicate the **new date range** by clicking on the appropriate item of your choice. For example, if you wanted to see results for all occurrences within your scope for the current calendar year, you would click on the radio button immediately to the left of the words "*This calendar year*".

4. Click **OK**.

5. Click on the **Apply** button. Doing this the report will refresh and take effect the new date range that you specified

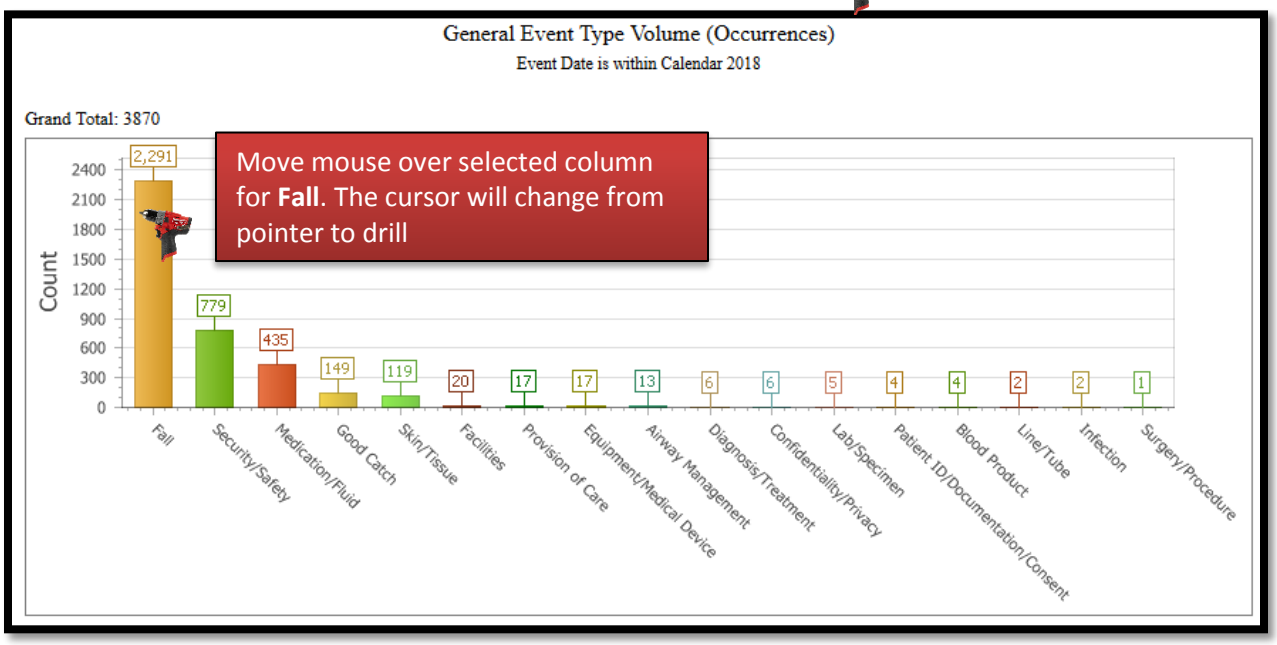
The General Event Type Volume report will now display results for the current calendar year.



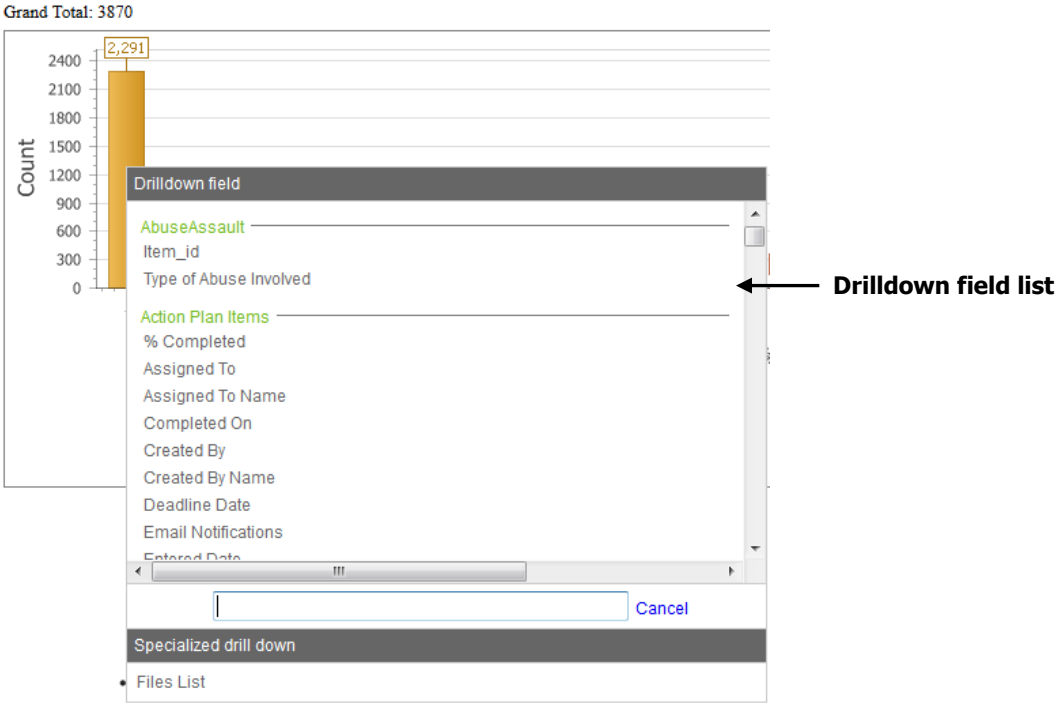
Drilling Down Into Report Details

In report view, you can create a new chart that drills down into a single element of the current report. For this example we will drill down or look at 'Falls' in more detail.

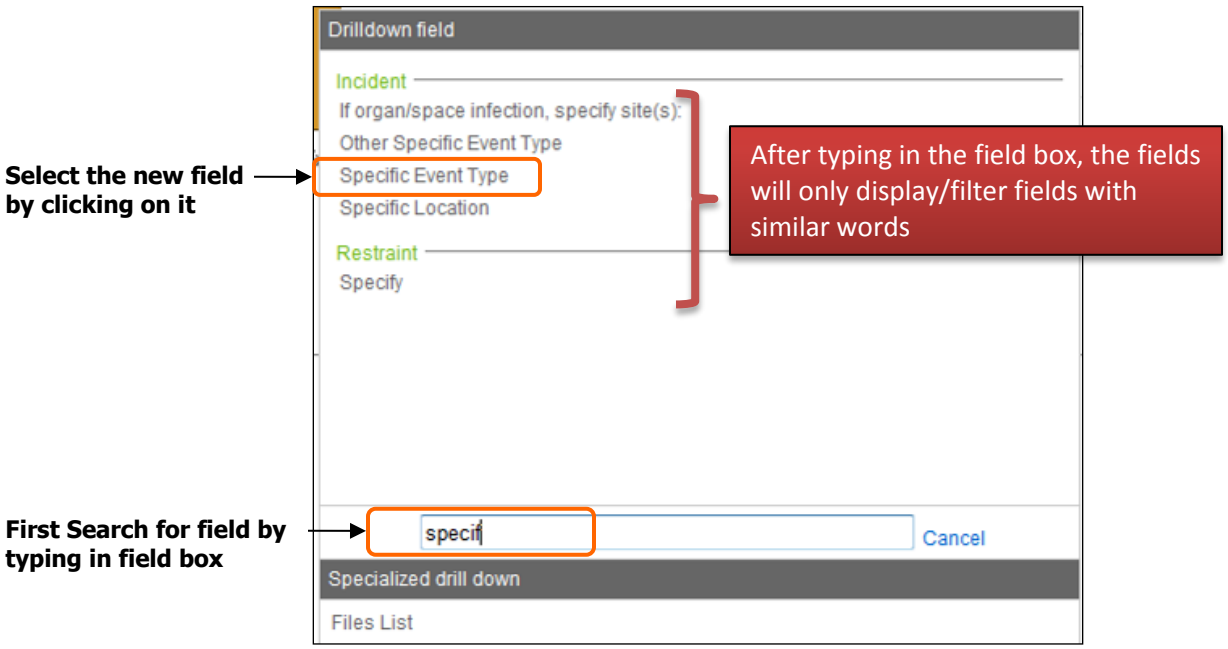
1. Click on a column of the report that you would like to open. Notice that as you move the mouse pointer over the column for Falls that the pointer changes into a drill.



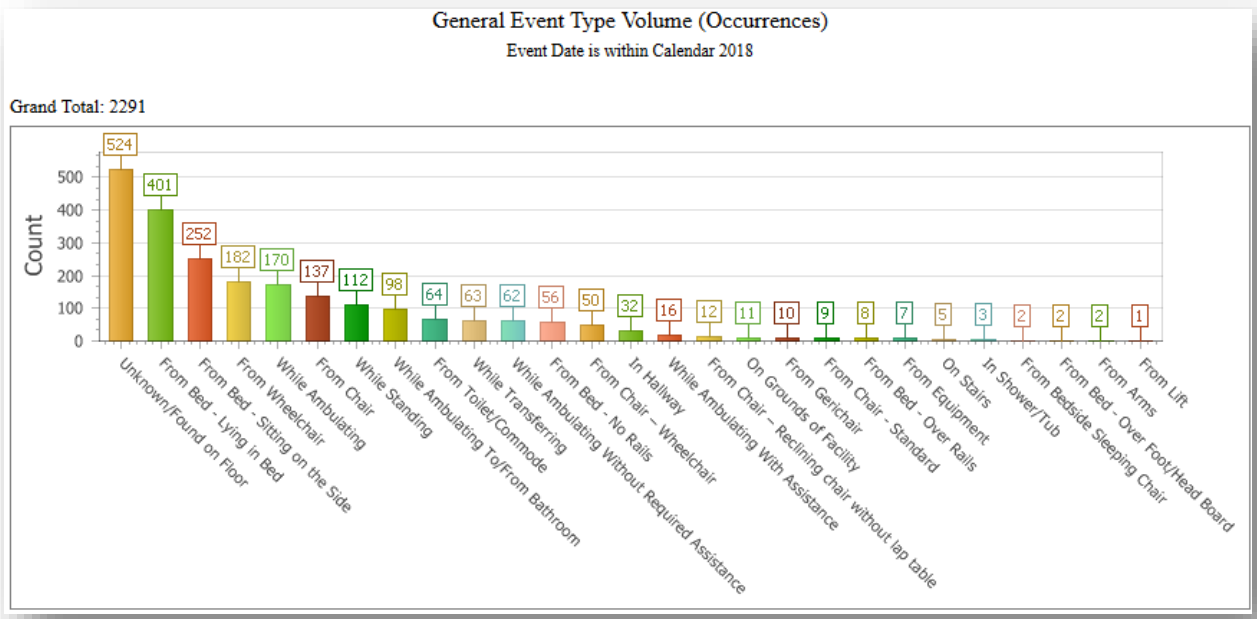
When you click on the '**Falls'** bar with the drill, a Drilldown field list will appear**.**



2. Select the field you would like to have displayed. For example, if you want to drill into the Falls by *Specific Event Type*, you could either scroll down to this field, or, you could type it in the field box:



3. Click on the field name once it appears in the Drilldown field list (e.g. *Specific Event Type*). A new report is created based upon your selection. In this example, it will now show the breakdown of Falls by their **Specific Event Type**.



4. Similarly, you may continue to drill down further in this new report (as many times as available.)

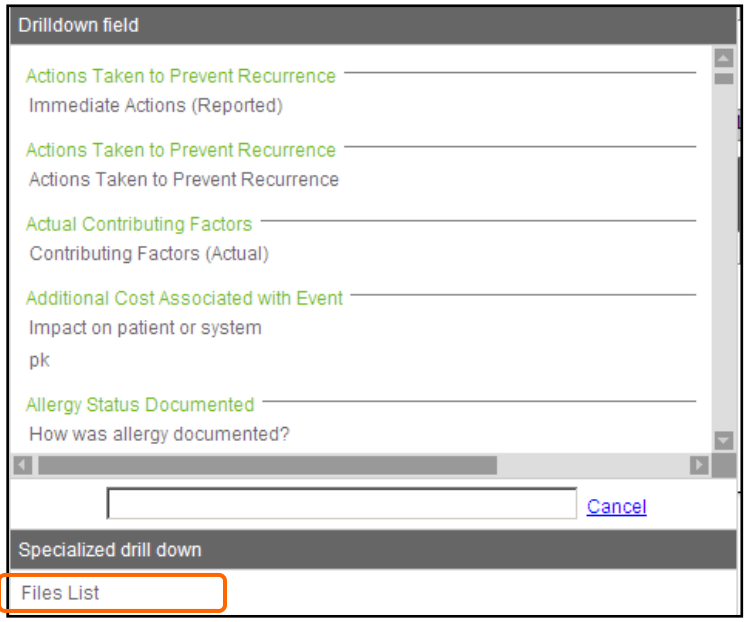
NOTE: The Title of the report does **NOT** automatically change when you drill into the results. In the example above, the results displayed in the chart are for Specific Event Type field. The Report Title still shows "General Event Type Volume (Occurrences)".

Opening a File from a Report

In report view, you are able to see a list of specific files that make up the reported results. From there, you may also open a specific incident to review.

1. Click on the chart element (e.g. column) in the report that you would like to explore further.
   Your mouse pointer changes to a drill.

   The Drilldown field dialog box opens.



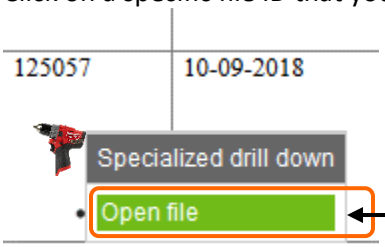
Files List

2. Click the **Files List** selection from the dialog box. This will display a tabular report of all the files that make up the chart element selected.

(Event Date is within October, 2018) and ((General Event Type is not equal to "Employee Event") and ((File State is equal to "New") or (File State is equal to "In-Progress") or ((File State is equal to "Closed") and (Risk Status is equal to "Resolved")))) and ((Do you believe this is a Critical Incident? is not equal to "Yes") or (Is this critical incident verified? is equal to "No")) and (General Event Type is equal to "Fall"))

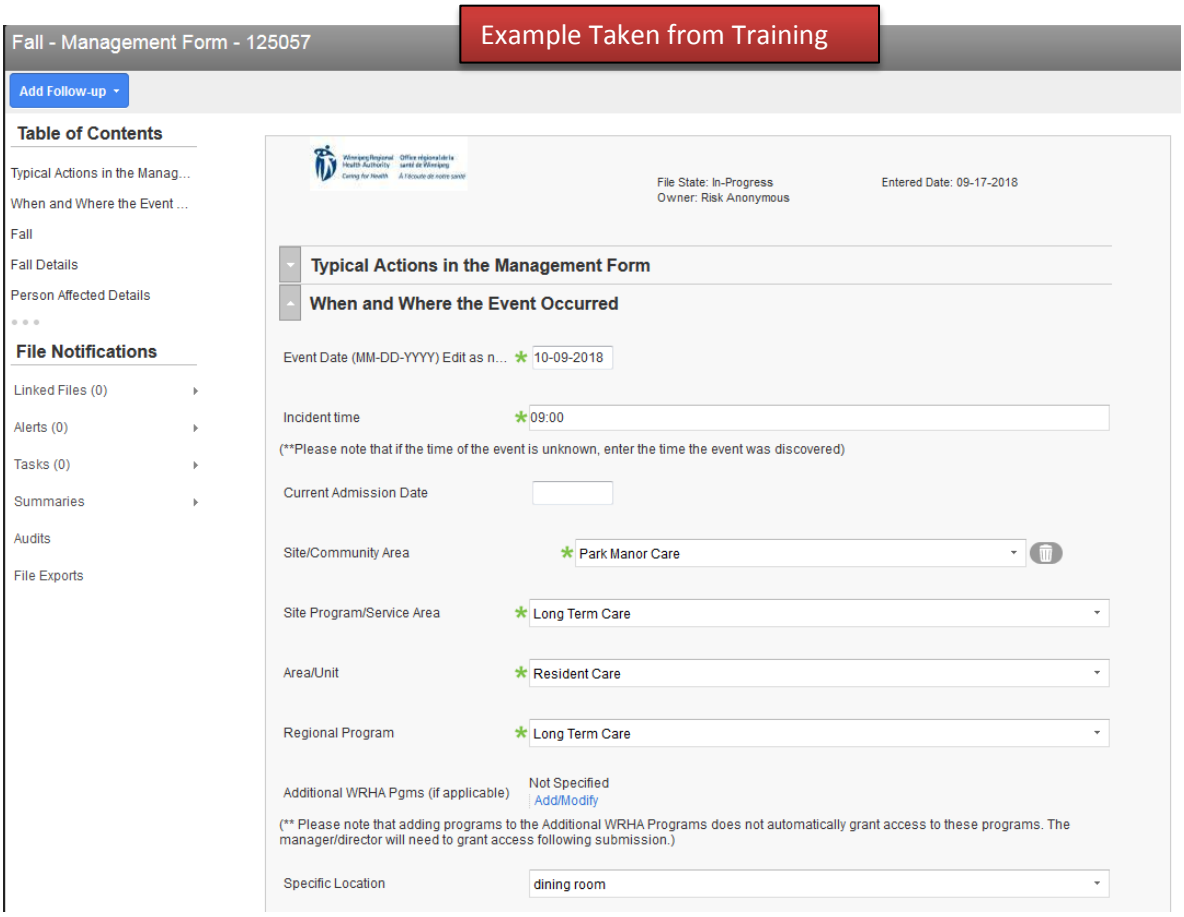
File ID	Event Date	Any Additional Information
125056	10-02-2018	At 7:30am, Ned came and fed Ralph a late snack and to give him meds. At 8:00am Ned heard a loud bang and went into the patient's room. The patient was found on the floor and was assisted back to the bed and vital signs were taken. It was noted that Ralph had a bump on their right side of forehead and right leg appeared to be slightly shortened. Fall unwitnessedReporter
125057	10-09-2018	passing medications and heard a loud sound and screaming, turned to find resident on floor beside table on the dining room floor. assessment of resident showed no bruises or cuts, range of motion to bilateral arms and legs. resident states he did not hit his head, he states " I slid to floor"table mate confirmed, both competent to do so. vitals completed BP 120/74 pulse is 86 and respiration -22 . resident was able to get up by himself after cueing by writer and using his standard dining chair.

3. Click on a specific file ID that you would like to open. *A pop-up menu will appear.*



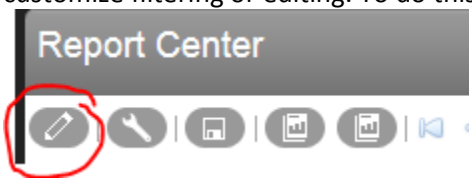
Open File

4. Select Open file from the drop-down box. The specific file will open.

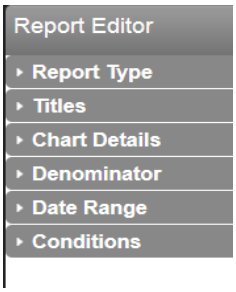


Editing a Report

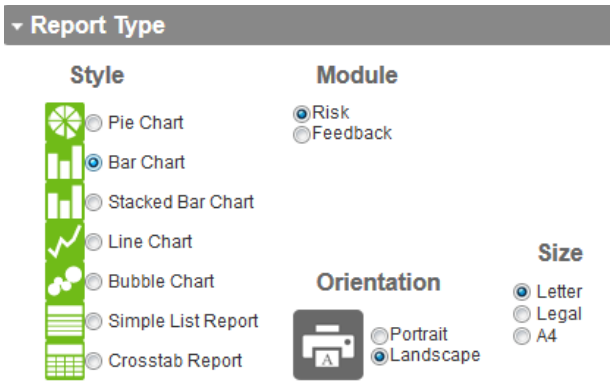
With any report open, you have the option to edit the existing report in case you want to do more customize filtering or editing. To do this you need to click the pencil right next to the wrench icon



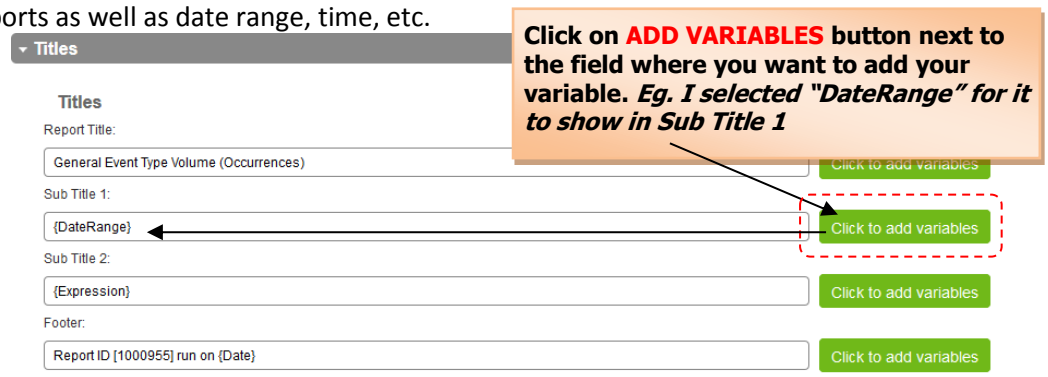
Once you are in Report Editor, there are **6 sections** that you can change or modify:



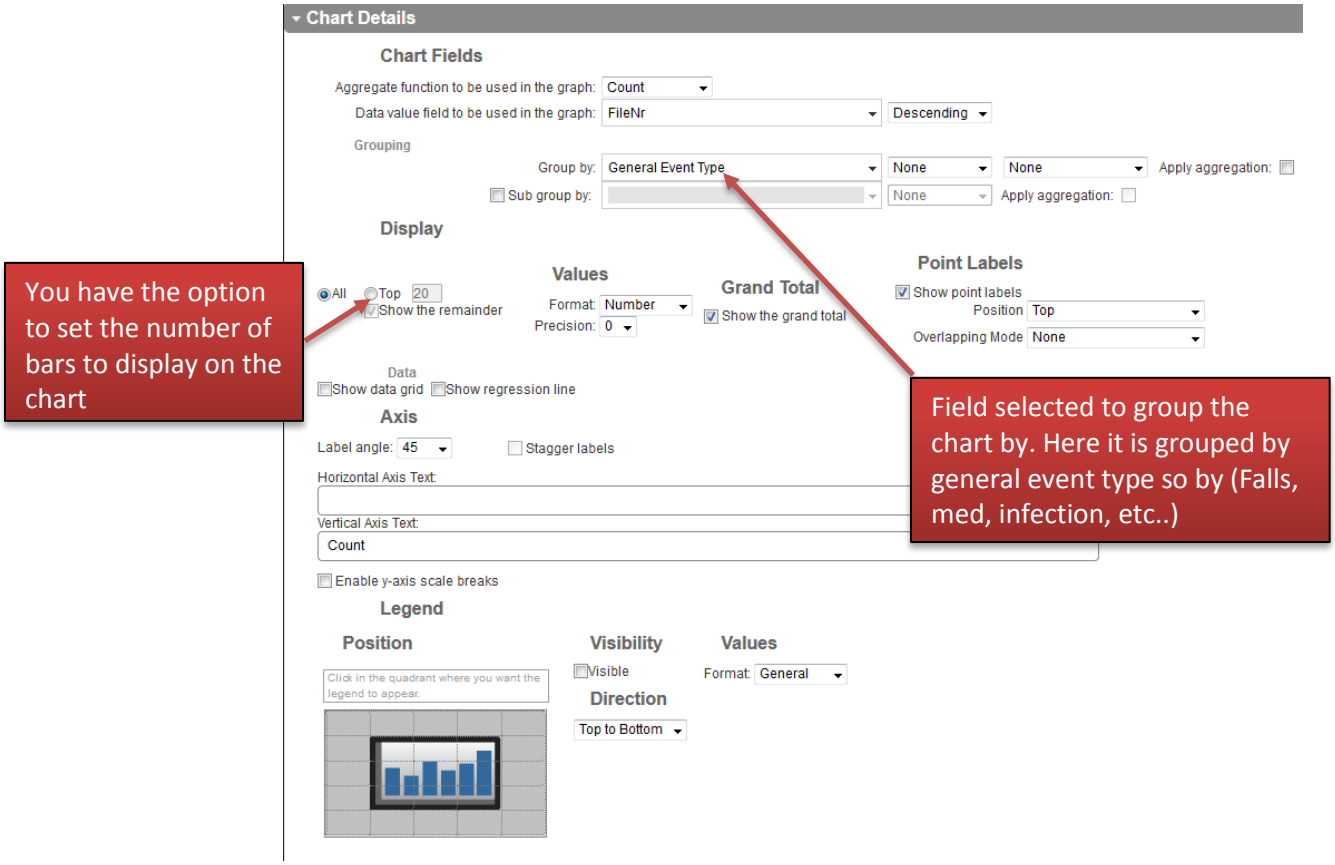
1. **Report Type** – is used to define the report style (bar chart, pie chart, etc) and the report orientation. Please note, if the report was originally a Chart and you change it to either a Crosstab or Simple List Report, the Chart details section values will reset b/c the structure is now different



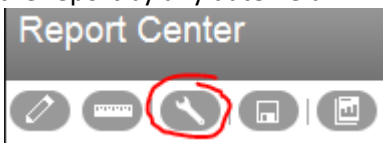
2. **Titles** – is used to define the 3 headings above your report and the footer that appears below your report. You may insert variables into the title fields to show the filters used to generate the reports as well as date range, time, etc.

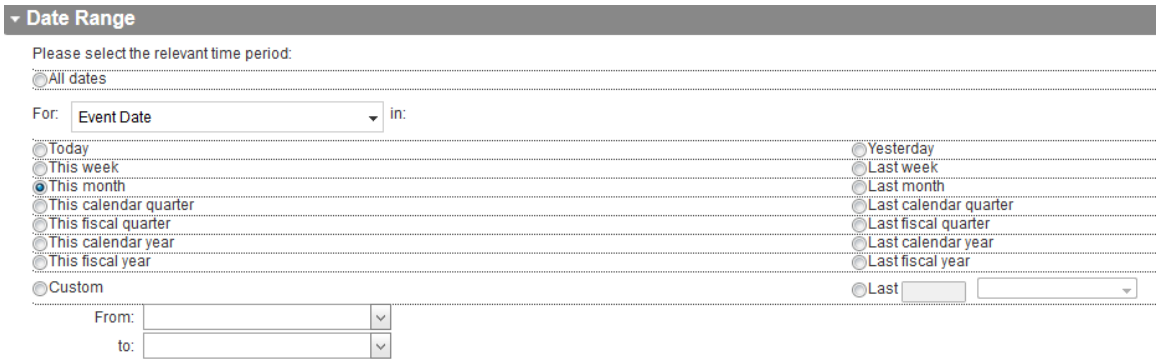


3. **Chart Details** – This is the report details section and the name will change depending on the Style report you selected so we selected "Bar Chart" and the report details section displays CHART DETAILS. This section defines the fields used to generate the report.

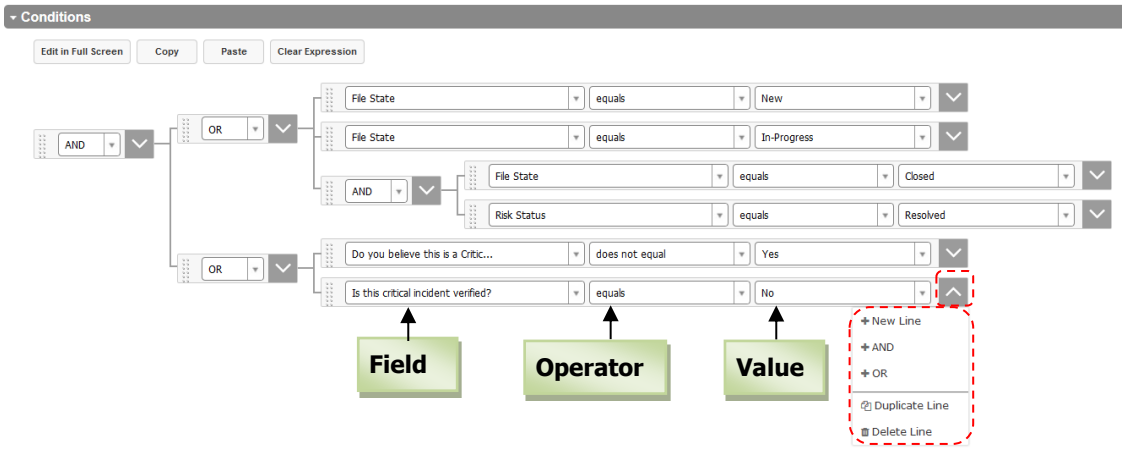


4. **Denominator** (not going to be covered)
5. **Date Range** – This is similar to using the Wrench icon in the reports. This allows users to filter the report by any date field





6. **Conditions** – this allows you to build more complex searches/filters using the expression editor by choosing the search fields and determining how the search criteria should be evaluated by using the AND or OR statements to create these expressions.



Building an Expression in the conditions:

a. When building an expression you first need to select a **Field Type**, next an **Operator** (equals, less than, etc), and finally a **Value.** The field, Operator and Value are now within each of the expressions.

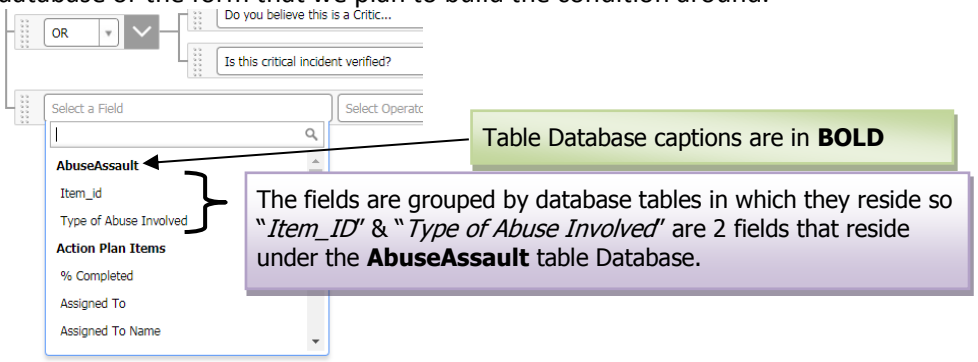
b. When selecting a Field type, this will determine the Value type for selection or manual entry so for the above example, the Field type "Is this Critical Incident Verified" will determine a set list to pick for in the Values section (Yes, No).

c. To add more criteria to the same group of statements, click on the statement dropdown menus which are the arrows on each of the expression. The options you have are "New Line or Duplicate Line". To add another nested criteria with a connector, you select either the AND or the OR connectors.

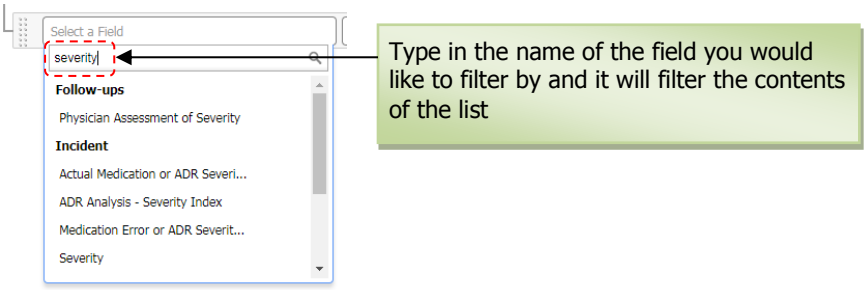
d. Alternatively, if there is a report that you like with the proper expression in the conditions, you can click on the **COPY** button to copy the expression and paste it another report by clicking on the **PASTE** button. This can help resuce making an expression from scratch.

Fields:

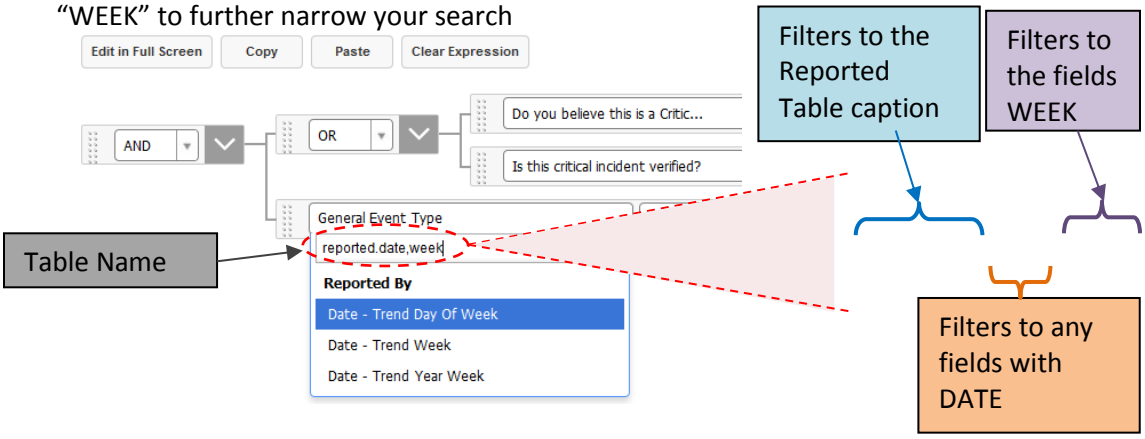
- The field lists allow you to create an expression using any field stored in the database or the form that we plan to build the condition around.



- In the list filter, you type in the name of the field you would like to add to your search in order to filter the contents of the list



- With the newest version of RL, you can take this further by typing in another field name with or without commas to refine your search
- So for example, I wanted to find the "Reported By" table and the field that contains "Date" and "Week". You will first need to type in part of the table name "REPORTED" followed with a period (*this filters to that table and its list fields within it*). Then you type in "DATE" to narrow your search within that table "REPORTED", type in a comma and type in "WEEK" to further narrow your search



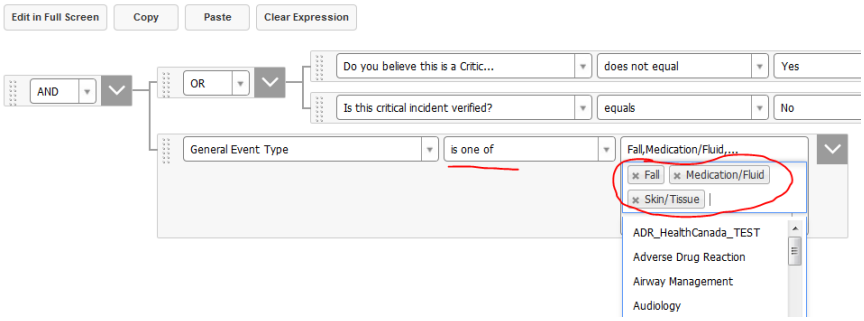
Operator:

- Operators are used to determine what comparison type we will be applying between our field and our value. Here is an expanded list of operators that you can choose from:

Operator	Description
is	Applicable to Date, Time, and User field types.
is not	Applicable to Date, Time, and User field types.
is after	Applicable to Date and Time field types.
is on or after	Applicable to Date and Time field types.
is before	Applicable to Date and Time field types.
is on or before	Applicable to Date and Time field types.
begins with	Applicable to Text, Multi-line Text, Pick list, and Multi-pick list field types.
does not begin with	Applicable to Text, Multi-line Text, Pick list, and Multi-pick list field types.
is between	Applicable to Number, Date, and Time field types.
is not between	Applicable to Number, Date, and Time field types.
contains	Applicable to Text and Multi-line Text field types.
does not contain	Applicable to Text and Multi-line Text field types.
is current user	Applicable to User field type only.
is current user's	Applicable to Text and Pick list field types.

is during the current	Applicable to Date and Time field types.
is during the last	Applicable to Date and Time field types.
is during the next	Applicable to Date and Time field types.
is empty	Applicable to all field types.
is not empty	Applicable to all field types.
ends with	Applicable to Text, Multi-line text, Pick list, and Multi-pick list field types.
does not end with	Applicable to Text, Multi-line text, Pick list, and Multi-pick list field types.
equals	Applicable to Number, Text, Pick list, Multi-pick list, and Boolean field types.
does not equal	Applicable to Number, Text, Pick list, Multi-pick list, and Boolean field types.
is greater than	Applicable to Number, Text (alphabetical order), Pick list, and Multi-pick list field types.
is greater than or equal to	Applicable to Number, Text (alphabetical order), Pick list, and Multi-pick list field types.
is less than	Applicable to Number, Text (alphabetical order), Pick list, and Multi-pick list field types.
is less than or equal to	Applicable to Number, Text (alphabetical order), Pick list, and Multi-pick list field types.
is one of	Applicable to Text, Pick list, Multi-pick list, and User field types. Reduces the number of OR connector statements. Listed when creating multiple statements that search for values of the same field type.
is not one of	Applicable to Text, Pick list, Multi-pick list, and User field types. Reduces the number of OR connector statements. Listed when creating multiple statements that search for values of the same field type.

- From this above list, "IS ONE OF" is a useful feature where it would substitute an expression with multiple "OR" as opposed to doing each separately:

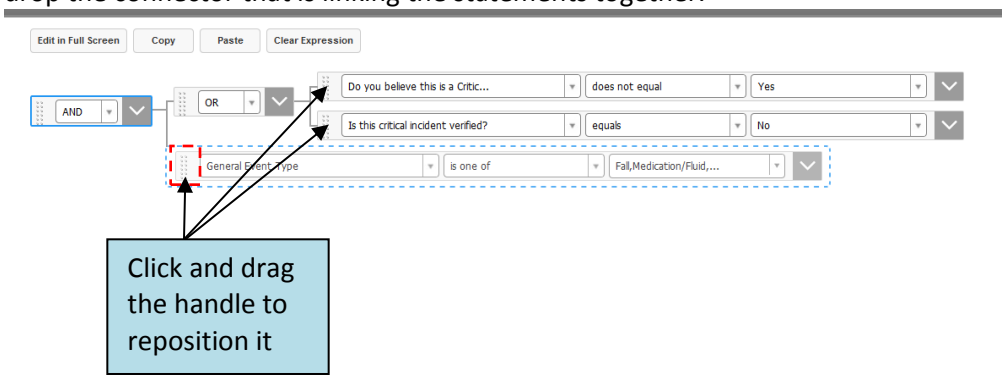


Values:

- This is the value from the form you would like to filter by.

Organizing Expression Editor Statements with Drag and Drop:

- Once you create an expression condition and additional modifications are required which involves moving around conditions, the drag and drop function is available.
- Every Expression Editor statement has a drag handle which you can use to rearrange an expression. You can drag and drop a statement and move it to a different nested layer. If you want to move a group of statements, can drag and drop the connector that is linking the statements together.

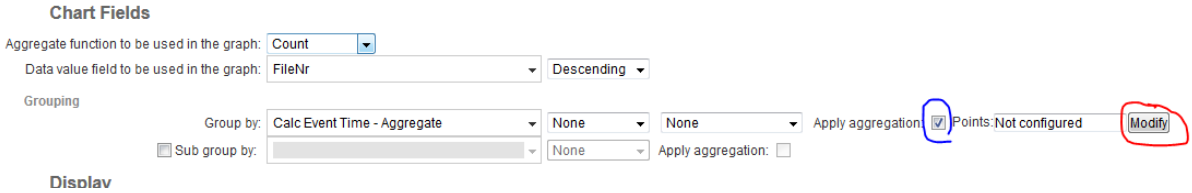


Applying Aggregation

Aggregation is used to group numeric fields into ranges such as hour of the day. If we used hour of the day for a bar graph, then without aggregation, the graph generated will become cluttered. To keep this

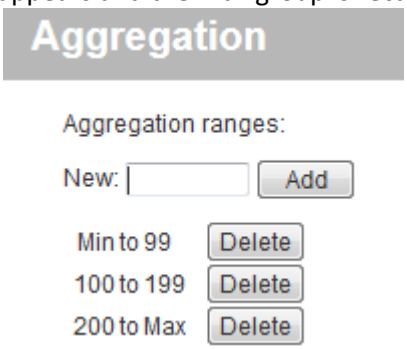
We need group the hour of the day into multiple categories so 0 to 99 can be from midnight to 1am, 100 to 199 can be the time from 1 t o2 am, etc

1. Click on the pencil icon. This will take to you to the report editor. Now go to the Report Detail section (this section is always after the Titles section)
2. Select the ***numeric*** field for the "Group By" or 'Subgroup by" field
3. Check the APPLY AGGREGATION box



4. Type in the END value for the 1st range so in this example, type 99 and click ADD. The min and Max groups will appear.

5. Type the END value for the next range (in this example 199) and click **ADD**. A 3rd group appears and the Max group is recalculated.



6. Repeat until all groups have been defined.

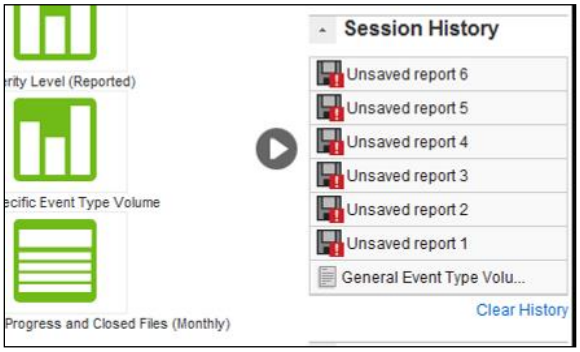
Accessing a Previous Report

The Session History widget shows a list of reports you have viewed or generated since logging into RL6. In this example, seven reports have been generated (six of them unsaved.) Reports are listed with the most recent report displayed at the top of the list.

From the *Session History* 'widget' you can:

a.) Access a report you generated earlier by clicking on its 'file name'.

b.) Click the **Clear History** link to remove all reports from the widget.

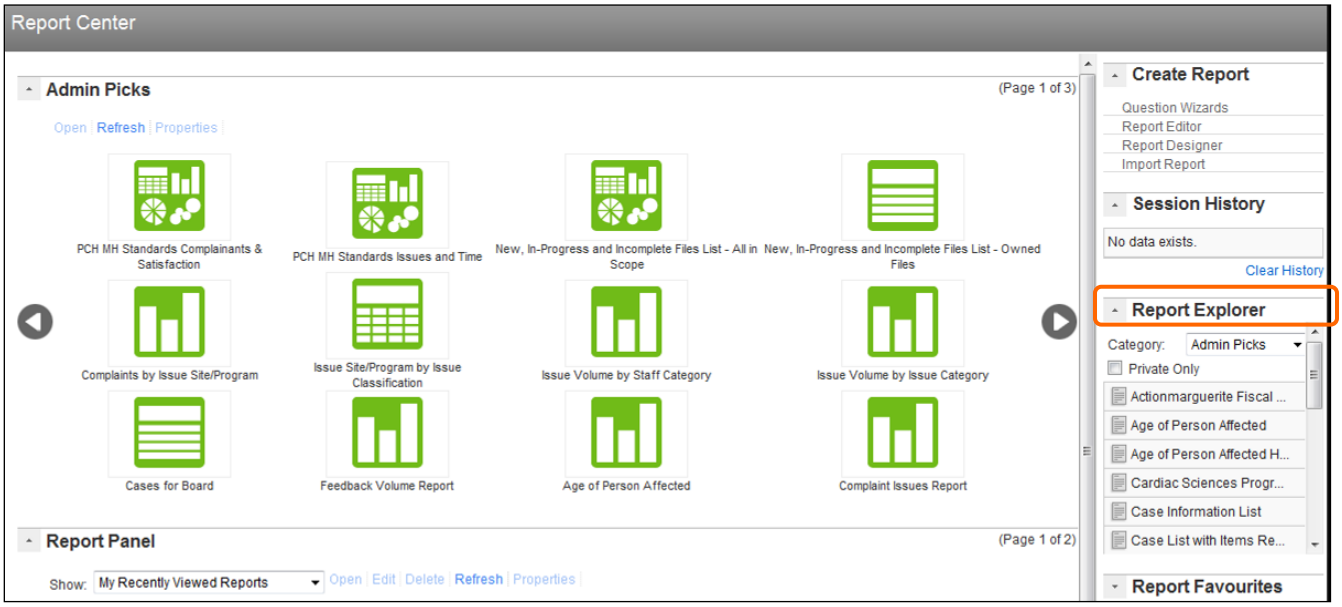


Searching for a Report

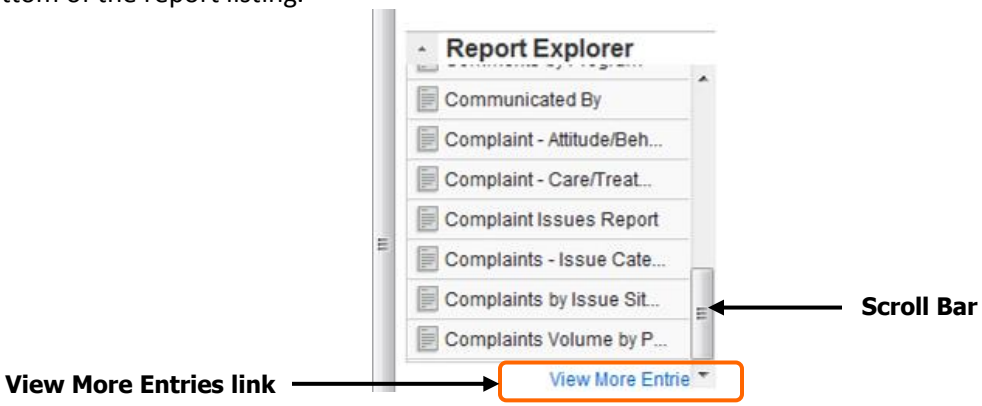
Reports already exist within RL. The Report Explorer section within the Report Center allows you to search for existing reports of interest.

1. Click the **Report Center**  icon on the *Navigation* toolbar found on the left-hand side of the window.

2. Locate the **Report Explorer** on the right-hand side of Report Center screen.

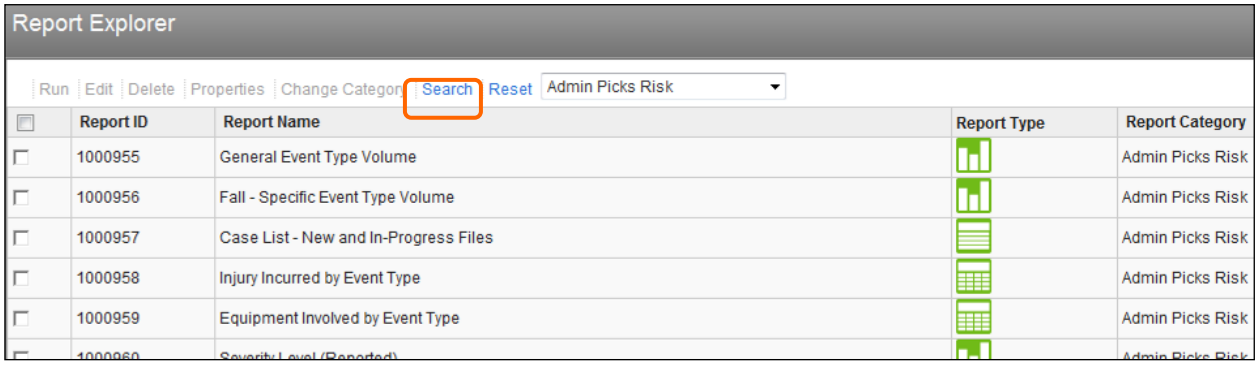


3. Use the scroll bar on the right side of the Report Explorer section (if necessary) to move to the bottom of the report listing.



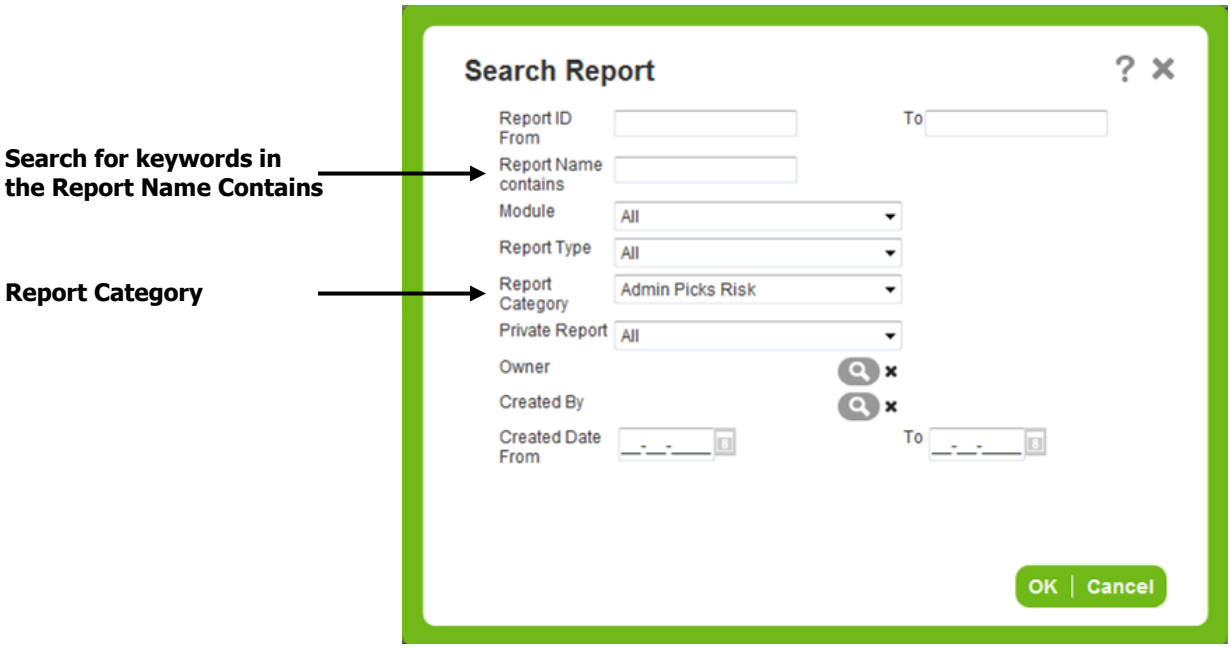
4. Click the **View More Entries...** link located at the bottom of the list.

5. A *Report Explorer* window will open. Click the **Search** link.



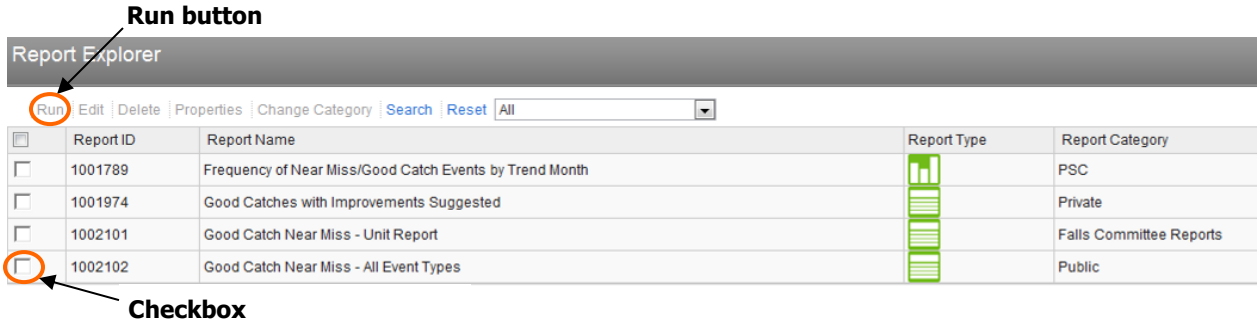
6. A Search Report window opens. You are able to filter the list of reports displayed through the use of a number of report attributes such as the name, type and category. Indicate your report search criteria in this window:

- *Report ID* – most reports will contain the report ID in the bottom left-hand corner of the page. This number can be used to find that specific report.
- *Report Name contains* – often the report name will be similar to the title that appears on the top of a report. Select keyword(s) to locate related reports.
- *Module* – Choices include All, Risk, Feedback and any other module in RL you have access to.
- *Report Type* – Choices include All, Bar, Bubble, Crosstab, Document, Line, Pie, Stacked Bar.
- *Report Category* – Name of the group in which reports are stored (Report Category is like a folder.) Choices include All, Admin Picks Risk, Falls Committee Reports, Medication Safety, etc.
- *Private Report* – Do you want to display private reports? Choices include All, Yes, No.



7. Click **OK**.

A list of corresponding reports will be displayed. In this example, all reports containing '*Good*' in the Report Name Contains were selected.



8. To run a report, first select it by clicking on the checkbox located next to that report. Next, click on the **Run** button. This will generate the report.

9. Note - the ***Edit*** button will open the report in Report Editor. The ***Delete*** button will remove the report from RL. (Note- most users can only delete reports they have created.) ***Properties*** button shows details about the selected report. ***Change Category*** will move the selected report to a new category or location within RL.

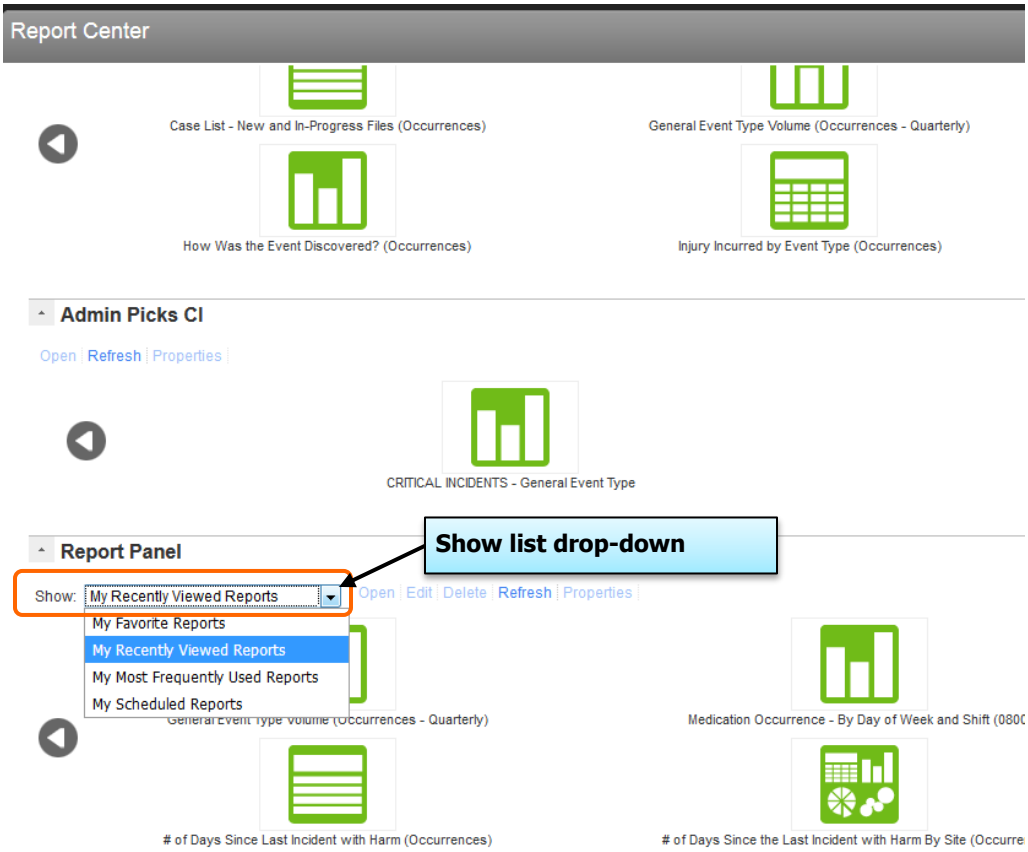
TIP: The bottom-left corner of many reports contains its Report ID number. You can search for the **Report ID** by looking for this number. In the example below, you would use a search term of 1000986.

Report ID [1000986]

Report Panel

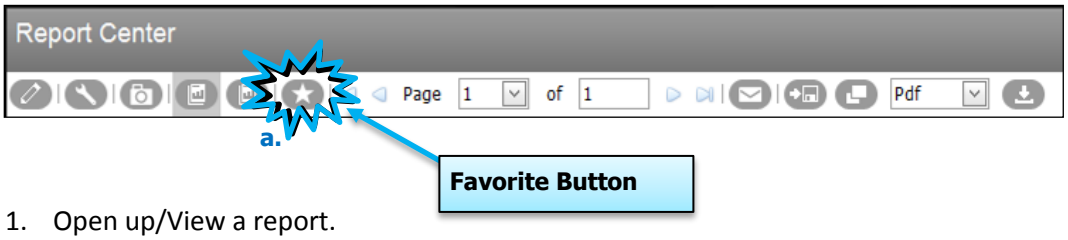
Located towards the bottom of the Report Center, the Report Panel is a dynamic area that can display any reports you have marked as a favorite, recently viewed, have most frequently accessed or receive on a scheduled basis.

Use the **Show** list drop-down to toggle between these various views:



Adding a Report to Your Favorites List

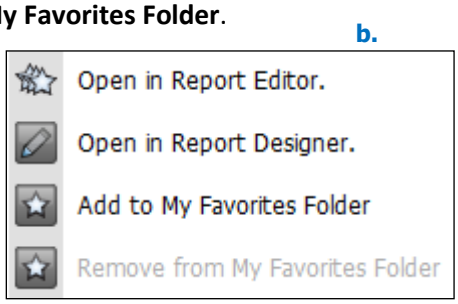
While viewing a report, you can quickly add or remove it from your favorites list using the shortcut menu, as shown below:



1. Open up/View a report.
2. Do ***one*** of the following:
   a. From the *Report* Toolbar, click the **Favorite** button. The Favorite button will turn blue to indicate the report is now a favorite. 

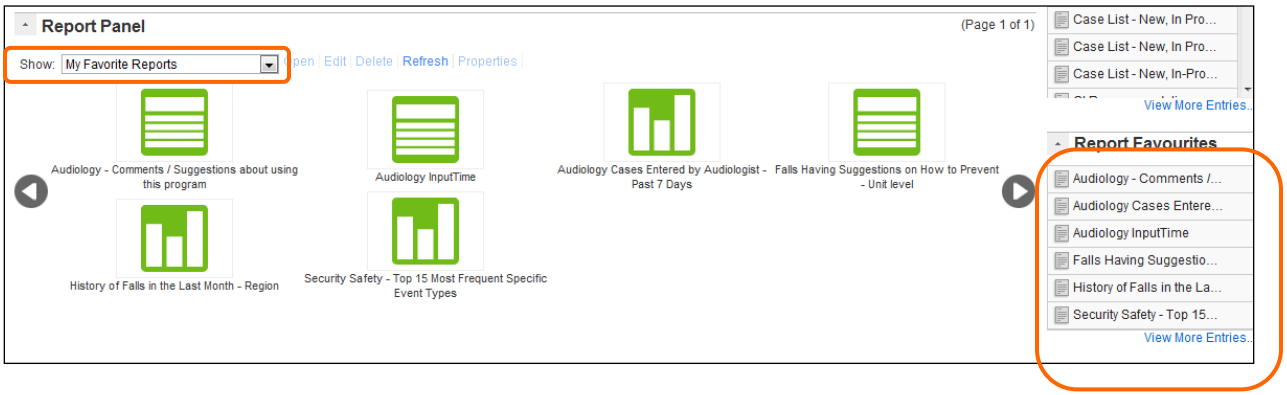
      Note: clicking on the blue button will remove it from your favorites.

   b. Right-click on the chart or report and choose **Add to My Favorites Folder**.



Report Favorites

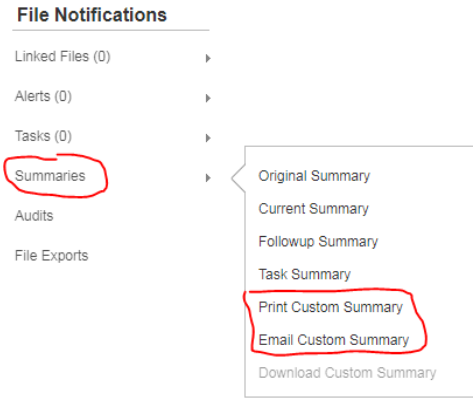
RL allows you to designate specific reports as a 'favorite'. The ones you've chosen will be listed in the Report Favorites widget located in the lower right-hand corner of the Report Centre. This section displays a list of the reports you've selected as a favorite.
Similarly, a list of your favorite reports can be displayed in the Report Panel using the Show list drop-down.



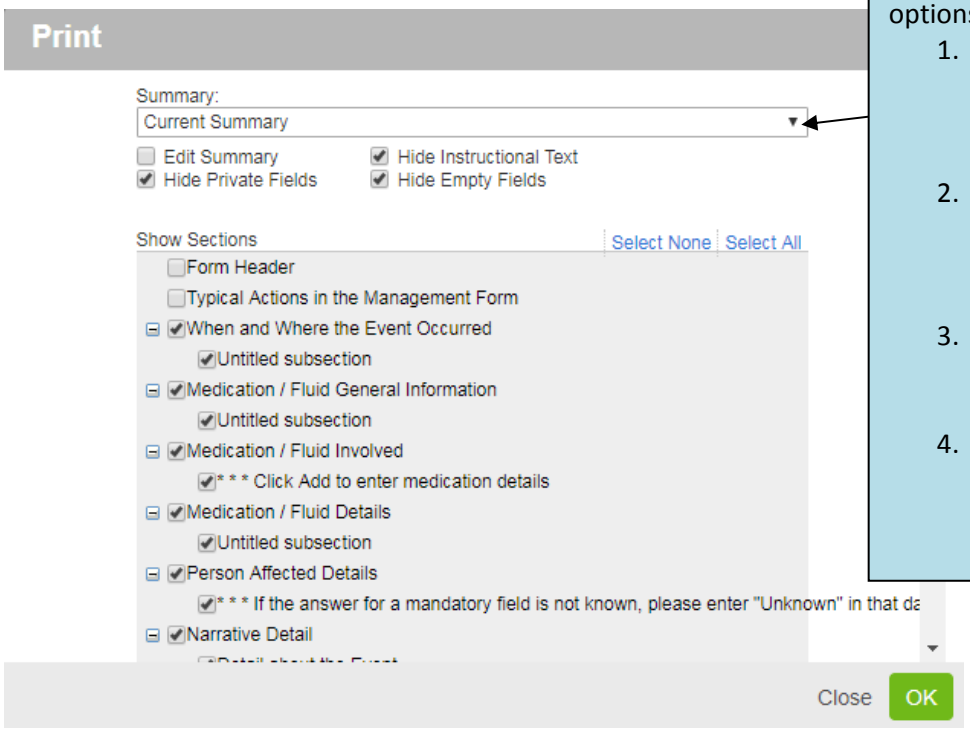
Tip: Unfamiliar with the Available Fields? Print a Case Summary!

There are hundreds of field names in the RL system. One technique you can use to help with this is print out a Case Summary for the type of occurrence you are interested in (e.g. Fall).

1. Open any occurrence. For this example, we'll choose a Fall.
2. Previously in the old version you would click the **Share** button (top-right) but now with the current version, it is located under File Notifications panel and click summaries



3. Select the **Print** option to print the summary.
   The following screen will appear:



Click on one of the following options:

1. **Original Summary** – the information included in the file at the time of its submission.
2. **Current Summary** – the information currently included in the file. (*original plus any new info added*)
3. **Follow-Up Summary** – list details of all follow-ups currently in the file
4. **Task Summary** – list the details of all task that are associated with that file Number

4. If desired, click the **Hide Private Fields** check box to hide the patient's name, DOB and MRN.
5. Click **OK**.

A sample Case Summary is shown below. Note the field names and some of the possible values.

Current Summary

Medication/Fluid Event (124657) - 07-18-2017

When and Where the Event Occurred

Event Date (MM-DD-YYYY) Edit as needed -- 04-26-2017
--->

Incident time	10:00

(**Please note that if the time of the event is unknown, enter the time the event was discovered)

Site/Community Area	Concordia Hospital
Site Program/Service Area	Family Medicine
Area/Unit	N3E- Family Medicine
Regional Program	Family Medicine

(** Please note that adding programs to the Additional WRHA Programs does not automatically grant access to these programs. The manager/director will need to grant access following submission.)

Specific Location	treatment/exam room
How was event discovered?	Review of Record/Chart

Medication / Fluid General Information

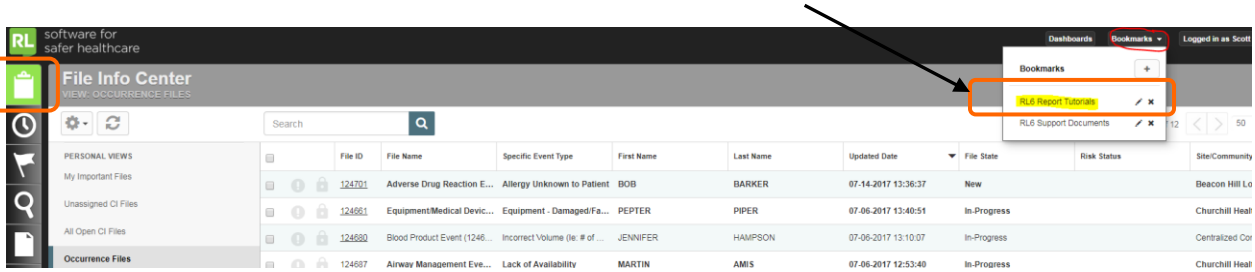
Specific Event Type	Med Process - Order Incorrect
Type of Person Affected	In-patient
Injury Incurred?	No
Equipment Involved/Malfunctioned?	NO
Did the event require an unplanned or extended hospitalization?	Yes
Did the event result from the individual's underlying health condition?	No
Was the event a risk inherent in providing health services?	No

RL Report Videos

For additional information about reporting, the Info Center contains support links to a series of nine Report Tutorials that were developed by RL.

RL6 Report Tutorials link

Info Center icon



To access these videos:

1. Click the **Info Center** icon on the *Navigation* toolbar found on the left-hand side of the window.

2. Click the **RL6 Report Tutorials** link located on the right hand side of the window.
   The RL6 Support window will open:

3. To view one of the videos, click on the corresponding **video name link** and click **OK**.
   The selected video will open.

   It would take a total of 50:00 minutes to view all 9 videos on reporting. The length of each video follows:

   1. Basic Modification Using Report Window (6:02)
   2. Drilling Down into a Report (3:25)
   3. Using the Expression Editor in Report Editor (4:27)
   4. Basic Bar Chart (4:38)
   5. Advanced Bar Chart (7:15)
   6. Basic Line Chart (5:41)
   7. Advanced Line (6:32)
   8. Basic List Report (4:59)
   9. Advanced List Report (7:01)

***Note**: Try these at your level of comfort but if you require some extra help on this, please contact us:

If you have RL6 Risk questions please contact:

RL_support@wrha.mb.ca or (204) 926-1070