



Report Builder: User Guide

A new Report Builder Module is being developed that provides a simple, intuitive method of creating custom reports in the HCCRC Scheduling System. This guide will provide an overview of how to navigate and use the Report Builder.

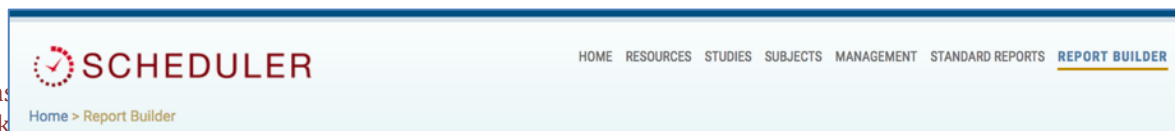
Please note that a separate data guide is also available for the data structure of reports and best practices on how to build reports.

Table of Contents

1. Navigating to the Scheduled Visit Data Report	1
2. Select a Date Parameter	2
3. Field Categories	3
4. Selecting Fields for a Report	5
5. Filtering and Sorting	6
5.1 Sorting	7
5.2 Filtering	8
6. Exporting the Scheduled Visit Data Report	9
7. My Saved Reports	10

1. Navigating to the Report Builder

After logging into the Scheduler System, click on the *Report Builder* module.



Click on an available report type. The example below shows selection of the Scheduled Visit Data report type.

The screenshot shows the 'Report Builder' interface. At the top, there is a section titled 'Select a Report Template' with two main categories: 'My Saved Reports' (dark blue) and 'Administrative Reports' (orange). Under 'Administrative Reports', two sub-options are visible: 'Scheduled Visit Data' (selected with a radio button) and 'Study & Visit Template Data' (unselected). Below this, the 'Scheduled Visit Data' section is expanded, showing two date fields: 'Scheduled Start Date' with the value '10/01/2019' and 'Scheduled End Date' with the value '10/31/2019'. Each date field has a calendar icon to its right. At the bottom left of this section is a 'Collapse All' button with an upward-pointing arrow icon. At the bottom right is a 'Clear All Field Selections' link. A 'Save' button is also visible in the top right corner of the interface.

2. Select a Date Parameter

The Scheduled Visit Data report type pulls scheduled visit records from a user-defined date range. The date range parameter is required for this report type and is based on the Visit Scheduled Start and End Time. All visits that have either their Visit Scheduled Start Time or Visit Scheduled End Time within the user-defined date range will be captured in the dataset.

The default date range is the complete month previous from the current date. For example, if the current date is October 5th, the default date range will be September 1st – September 30th.

To select a new date, click on the calendar icon next to the date field to display the date picker. Then click on a desired date box within the date picker.

Scheduled Visit Data

Scheduled Start Date: ___/___/___ Scheduled End Date: 09/30/2017

Oct 2017 | November 2017 | December 2017

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	
1	2	3	4	5	6	7				1	2	3	4						1	2	
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	
29	30	31	26	27	28	29	30	24	25	26	27	28	29	30							
								31													

Expand All

- Study Info
- Study Staff
- Study Funding Source

Clear All Field Selections

Activities

Activities

Save

NOTE: Users can also select new dates by deleting the date in the date entry field and typing in a desired date in MM/DD/YYYY format.

3. Field Categories

The Scheduled Visit Data report type organizes fields into 9 different Field Categories.

These categories include:

- Study Information
- Study Staff
- Study Funding Source
- Visit Information
- Scheduled Visit
- Subject
- Resource Information
- Scheduled Resource Activities
- Template Resource Activities

Report Builder

Select a Report Template

My Saved Reports

Administrative Reports

Scheduled Visit Data

Study & Visit Template Data

Scheduled Visit Data



Scheduled Start Date Scheduled End Date

Collapse All

Clear All Field Selections

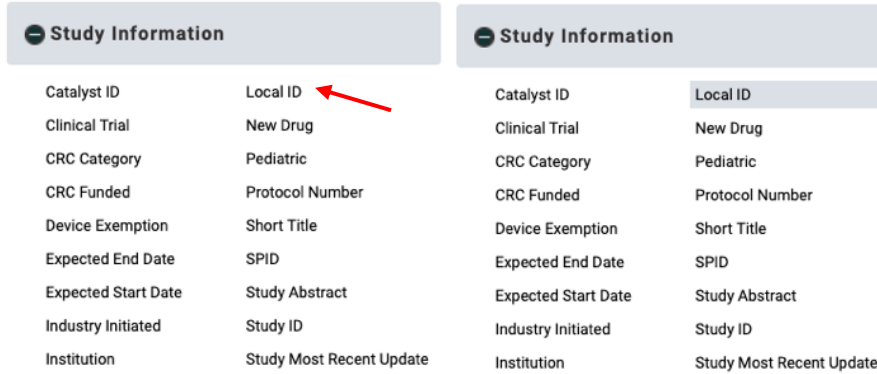
Study Information	Visit Information	Resource Information
Catalyst ID	Active	Billable In Template
Clinical Trial	Approved	Billable When Scheduled
CRC Category	Does part of the visit occur at Non-CRC?	Duration
CRC Funded	Does part of the visit occur Off Institution?	Resource End Time
Device Exemption	Does this involve Research Pharmacy?	Resource Name
Expected End Date	In Relative Time?	Resource Start Time
Expected Start Date	Nursing Level	Resource Type
Industry Initiated	Nutrition Level	Scheduled Resource ID
Institution	Processing Level	Template Resource ID
IRB		
IRB Approval Date		
IRB Expiration Date		
IRB Institution		
IRB Renewal Date		
Local ID	Setup Level	
New Drug	Sub-Location	
Pediatric	Visit Template Comment	
Protocol Number	Visit Template Created Date	
Short Title	Visit Template Duration	
SPID	Visit Template ID	
Study Abstract	Visit Template Most Recent Update	
Study ID	Visit Template Name	
Study Most Recent Update	Visit Template Visit Type	
Study Name		
Study Status		
Total Inpatient Visits		
Total Outpatient Visits		
Total Subjects		

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4. Selecting Fields for a Report

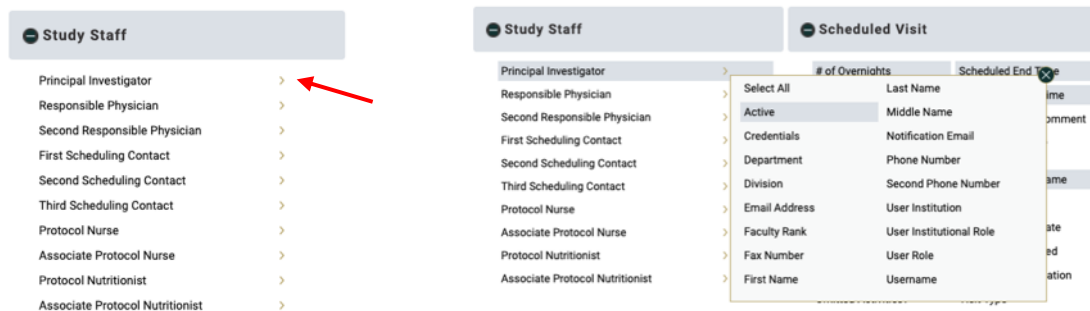
Within each category are fields that users can select to include in the generated report.

To select a desired field, simply click on the field name. This will highlight the field (in light grey) to indicate the field has been selected. In the right image below, Local ID has been selected.



To de-select fields, users can click on the highlighted field name and the field will once again show without a highlight.

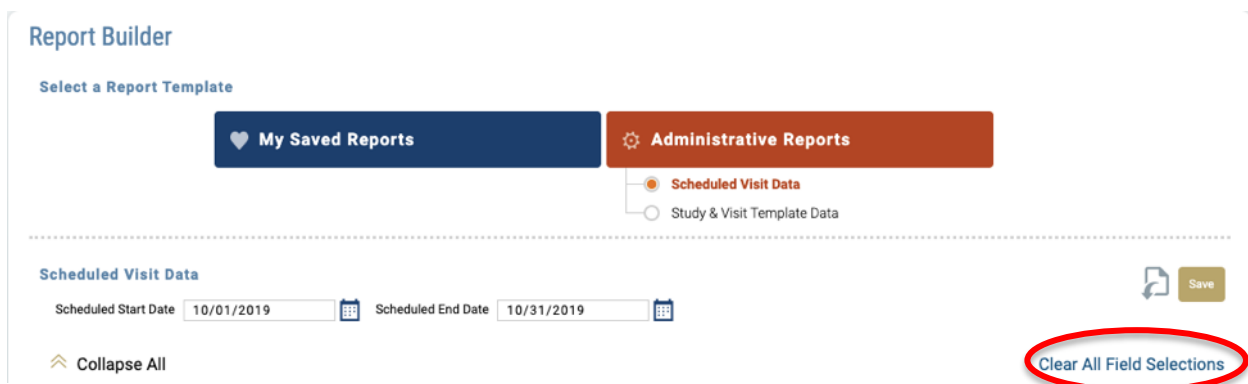
To select fields from Study Staff or Study Funding Source, users must first click on the desired Study Staff member or Funding Source number within the respective field category. This action will display a fly-out from which users can select their desired fields. In the example below, *Principal Investigator* has been selected to open the pop-up window of Study Staff fields. To close this window, simply click on the close icon in the top right corner or click anywhere outside of the field box.



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When opening the Scheduled Visit Data report type, a default group of fields from different categories have been pre-selected. If users wish to build a report from scratch, they can click on the “Clear All Fields” link found on the top section of the screen.

NOTE: To select the default list of selected fields again, users can re-click on the radio button next to Scheduled Visit Data.



5. Filtering and Sorting

Once a user selects a report type and selects at least one sortable field, the filtering and sorting functionality will be available to the user. The purposes of this functionality are for users to be able to narrow down the results set prior to exporting the report and also for users to save (via *My Saved Reports*) specific sort/filter settings that they run on a recurring basis.

Not all fields are currently available for pre-export sorting and filtering. However, you can still choose to include the full data set for the export and sort/filter within the export (e.g. in Excel).

Home > Report Builder

The screenshot displays the 'Report Builder' interface. At the top, there are two main tabs: 'My Saved Reports' and 'Administrative Reports'. Under 'Administrative Reports', there are two radio button options: 'Scheduled Visit Data' (which is selected) and 'Study & Visit Template Data'. Below these, there are date pickers for 'Scheduled Start Date' (10/01/2019) and 'Scheduled End Date' (10/31/2019), along with a 'Save' button. A red arrow points to the 'Scheduled Visit Data' radio button with the text 'Select Report Type'. Below the date pickers, there is a grid of field selection buttons: 'Study Information', 'Visit Information', 'Resource Information', 'Study Staff', 'Scheduled Visit', 'Scheduled Resource Activities', 'Study Funding Source', 'Subject', and 'Template Resource Activities'. A red box highlights this grid. Below the field selection grid, there are sections for 'Sorting' and 'Filtering'. The 'Sorting' section has three dropdown menus labeled 'Sort 1', 'Sort 2', and 'Sort 3', each with 'choose' selected. The 'Filtering' section has five dropdown menus labeled 'Filter 1' through 'Filter 5', each with 'choose' selected. A red box highlights these sections. A red arrow points to the 'Sorting and filtering' section with the text 'Sorting and filtering'. Another red arrow points to the 'Sort 1' dropdown with the text 'Open and select at least 1 sortable field'. At the bottom right, there is a 'Save' button.

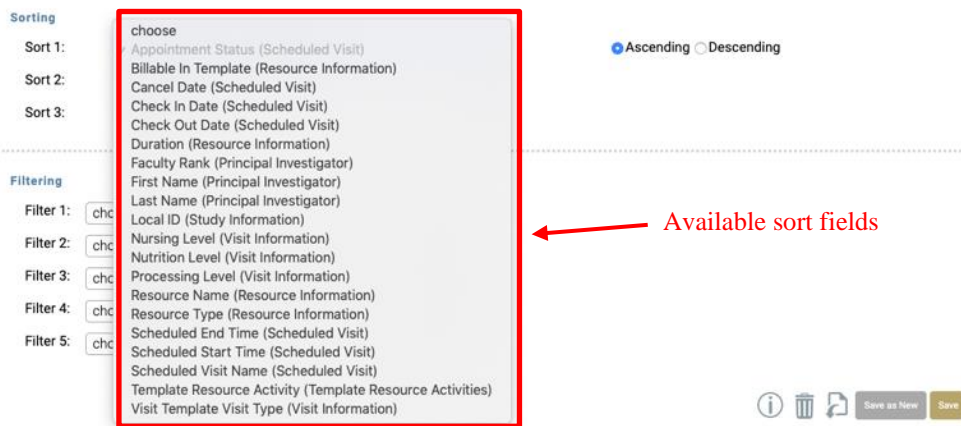
5.1 Sorting

There are 3 sorting selection boxes to allow primary, secondary and tertiary sorting of a report. The sort lists contain sortable fields chosen for the report. Once a sort field is selected, Ascending and Descending radio buttons will be available for selecting sort order.

Fields currently not supported for sorting:

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- Subject fields that are encrypted in the database (personally identifiable information)
- Long text fields (e.g. Study Abstract, Comment fields)
- Calculated fields (e.g. # Overnights, First Scheduled Visit Date, Most Recent Scheduled Visit Date)



5.2 Filtering

The system provides filtering capabilities on up to 5 data fields in a report. Each filter list contains filterable fields for user selection. Once selected, appropriate filter parameter selection boxes will be displayed to the right of the corresponding filter choice.

The filter parameter selection boxes correspond to the type of filter. They can be in the format of multi-select drop down lists, data ranges and data entry boxes. Once valid parameters are entered, the filter(s) will apply to the report accordingly.

Filter options vary depending on the field/data type.

- Long text fields (Study Abstract, Comment fields)
 - Includes, Does Not Include (filters for if the entry has a value for those fields or not)
- Shorter text fields (e.g. Local ID)
 - Auto-suggest, begin typing and select suggested options
- Set list of values (e.g. Study Status)
 - Multi-select dropdown
- Dates and Numbers
 - Range

Fields currently not supported for filtering:

- Subject fields that are encrypted in the database (personally identifiable information)
- Calculated fields (e.g. # Overnights, First Scheduled Visit Date, Most Recent Scheduled Visit Date)

Sorting

Sort 1: choose

Sort 2:

Sort 3:

Filtering

Filter 1: chc

Filter 2: chc

Filter 3: chc

Filter 4: chc

Filter 5: chc

✓ choose

Appointment Status (Scheduled Visit)

Billable In Template (Resource Information)

Check In Date (Scheduled Visit)

Check Out Date (Scheduled Visit)

Duration (Resource Information)

Faculty Rank (Principal Investigator)

First Name (Principal Investigator)

Last Name (Principal Investigator)

Local ID (Study Information)

Nursing Level (Visit Information)

Nutrition Level (Visit Information)

Processing Level (Visit Information)

Resource Type (Resource Information)


Scheduled End Time (Scheduled Visit)

Scheduled Start Time (Scheduled Visit)

Scheduled Visit Name (Scheduled Visit)

Template Resource Activity (Template Resource Activities)

Visit Template Visit Type (Visit Information)

 Save

Filtering

Filter 1: Appointment Status (Scheduled Visit)



Filter 2: Cancel Date (Scheduled Visit)

Filter 3: Local ID (Study Information)

Filter 4: Resource Name (Resource Information)


Filter 5: Resource Type (Resource Information)

All Selected

09/01/2019  09/30/2019 

All Selected

All Selected

 Save

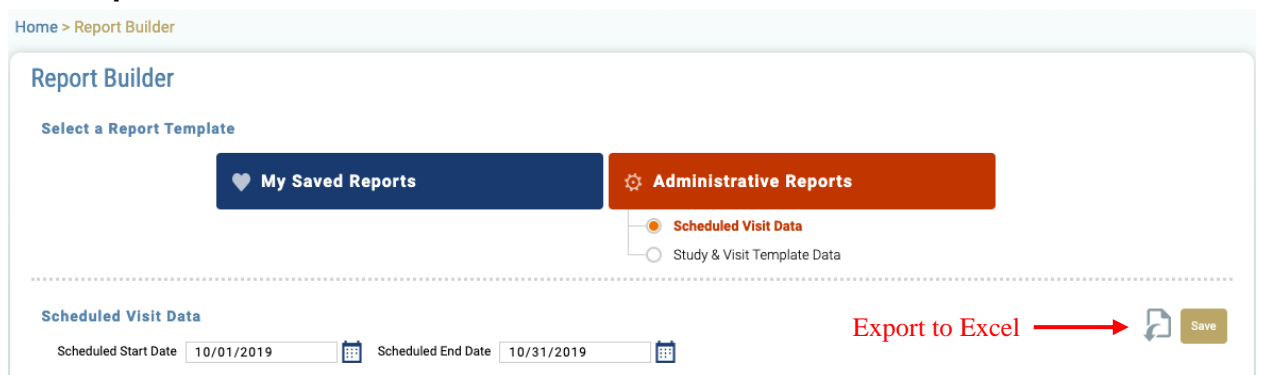
← Selections based on filtering

6. Exporting the Scheduled Visit Data Report

- After selecting the desired date parameter and fields, and applying any desired filtering and sorting, users can download the dataset by clicking on

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the “Export to CSV” icon.



NOTE: The dataset will download to the folder specified in your browser’s download destination. Download times will depend on the amount of data in the results set (e.g. a longer date range and more fields may generate larger amounts of data). Typically, a month range will take a few seconds while a complete year will take a few minutes.

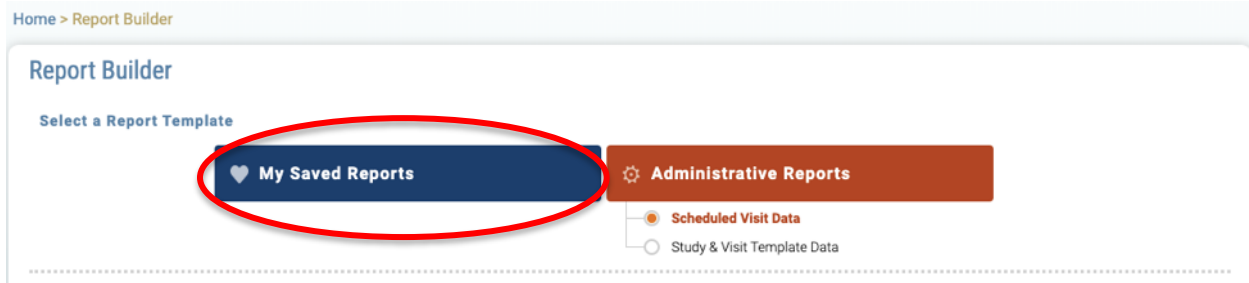
The dataset fields (columns) will have a default order list similar to the order of field categories listing in Section 2.3 when users open the dataset in a spreadsheet application (ex. Microsoft Excel).

NOTE: There are a few exceptions to the dataset order. Fields pertaining to date and time values will display start time fields before the paired end time fields. Fields pertaining to resource intensity (Nursing Level, Nutrition Level, Processing Level and Setup Level) will be grouped together. Fields pertaining to names will order first by the Last Name column, then the First Name column.

8. My Saved Reports

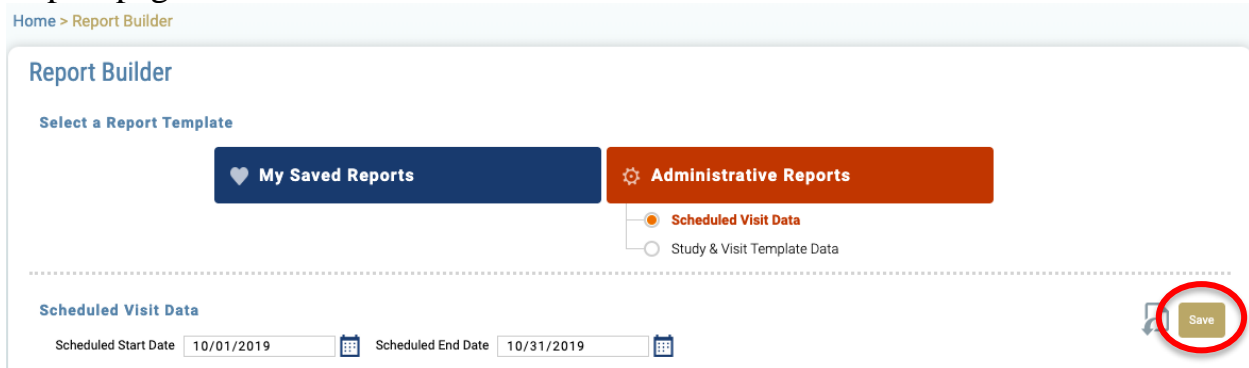
The My Saved Reports feature of the application allows users to save any reports for future use. This feature allows each user to access previously saved reports without having to generate and select the parameters again.

When there is no previously saved report, the My Saved Reports section of the application is empty:



A user is required to select a report type and select at least one report parameter in order to save any report. Once the desired report type and parameters are chosen, click the “Save” button to save the report.

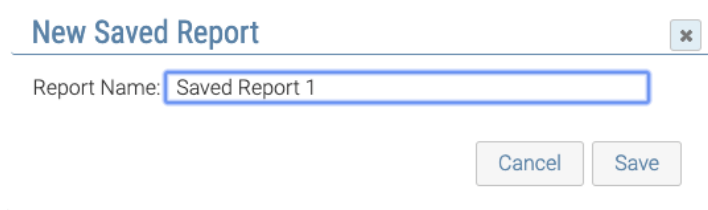
Top of page:



Bottom of page:



A pop-up window will appear for entering a name for the report to be saved. Note that a name is required in order for a report to be saved.



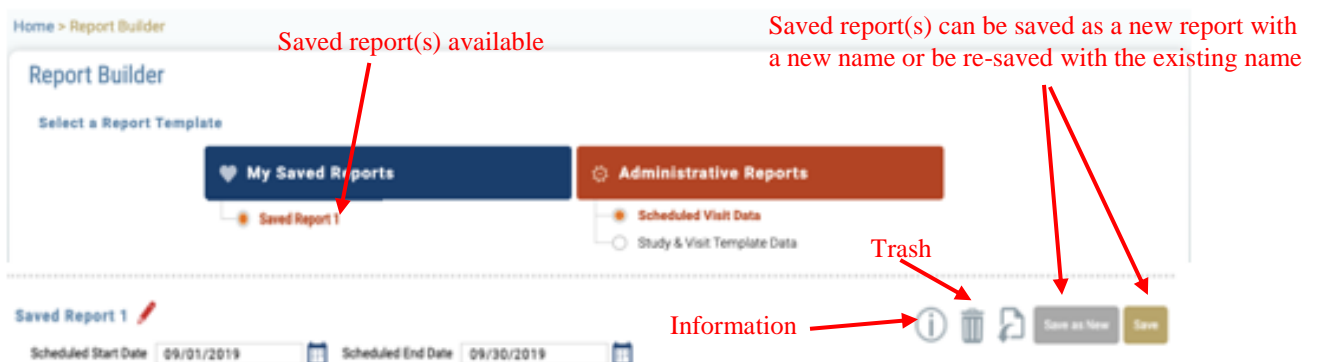
Once a report is saved, it is accessible from the My Saved Reports section. Selecting a previously saved report in this section will generate fresh report data based on the previously saved parameters.

9. Modifying a saved report:

If you make any changes to your saved report that you would like to save, click the “Save” button after making those changes. If you would like to preserve your original saved report, but use it as a template for a different report, click the “Save as New” button to save a copy.

A saved report can be deleted by clicking the “trash can” icon. A system confirmation will be displayed. Once confirmed, the report is deleted.

The system displays information on a saved report upon a user clicking the “information” icon. The information displayed includes the original report type and last saved date/time.



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