Reporting Tools

AP*e*X

QUICK
START GUIDE

APeX
Training

Important Telephone Numbers and Addresses

(415) 514-APEX

UCSF APeX Service Desk: 514-4100

APeX Knowledge Bank: http://myapex.ucsf.edu

Remote APeX Access: http://apex.ucsf.edu

Trainer: G Rhodes

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Getting Started

Welcome to APeX, UCSF Medical Center's electronic medical record. This guide walks you through the highlights of APeX Reporting. We will examine the various reporting tools available in APeX.

Getting Started	We will login and access the **My Reports** workspace, search and filter reports from the **Library**, save reports as **Favorites** so they can be accessed quickly the next time. Run the reports. Understand the difference between **Workbench** and **Crystal** Reports. Access the **My Dashboard** workspace.

Accessing My Reports

My Reports gives you quick access to your favorite **Reporting Workbench** and **Crystal Reports** and to saved report results. Here you can view the status of recently run reports as well as open their results. Dependent upon the type of report, some reports will allow the you to change the criteria of the search as well as the appearance of the results.

1. To access **My Reports**, click the **Epic** button ![Epic] and choose the **Reports** submenu, **My Reports** option.

2. This will open the **Reports** tab to **My Reports** ![My Reports] which display a list of all your favorite reports. Click **Library** ![Library] to display a list of available reports. The reports available to you depend on your role and the patients you work with.

3. Type the topic of the report you wish to view in the **Search the library** field, **NO SHOW** for example.

    To limit your search results, select a filter in the Filters option on the right. Select the chevron ![chevron] icon to the right of a category to open it, then check the desired option.

    - To search only for reports that you own or reports that you ran, check the **Reports I own** or **Reports I ran recently** checkbox, respectively.
    - Click **Types** to view all the report types, such as applications or departments. Select the check box next to the type(s) by which you want to filter.
    - Click **Groups** to view all the reports grouped by more granular workflows or users. Select the check box next to the group(s) by which you want to filter.
    - Click **Template Types** to view all the template types. Types can include **Epic-Crystal** or **Workbench** reports. Select the check box next to the type(s) by which you want to filter.
    - Click **Tags** and search for a tag by which you want to filter. Select the check box next to the tag by which you want to filter.
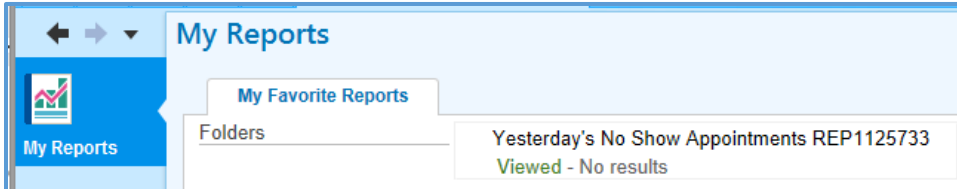   - Click ✖ **Clear Filters** to remove the filters.

> (i) Search for reports with UCSF in the name. These are validated UCSF reports.

4. Once you have found the desired report:

- Click the **Star** ☆ icon to the left of the report name to make it a **Favorite**. Those reports selected as Favorites will appear in **My Reports** for faster access.
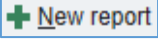

- Depending on the report's template type you will get the option to Run or View. Click **Run** ▶ Run to display the results of the **Workbench** report ☑ Workbench with the current settings. After running the report, a screen will appear with the results. At the bottom of the screen, a status indicator appears showing the report name, its status and number of results.
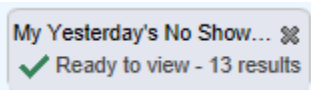
- To subscribe to an **Epic-Crystal** ☑ Epic-Crystal report, first make the report a Favorite by clicking the **Star** ☆ icon. Click **View.** 🔍 View A prompt will appear asking you if you wish to request the report. Click **Request**. This will place the report in the **My Reports** tab.
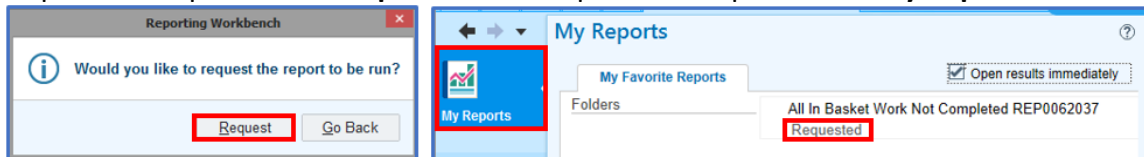
- Click **New report** ➕ New report to create a new version of the report.
- Click **Edit** ✏ Edit the existing report settings. You can then run the report with your new settings, or save it as a new report.
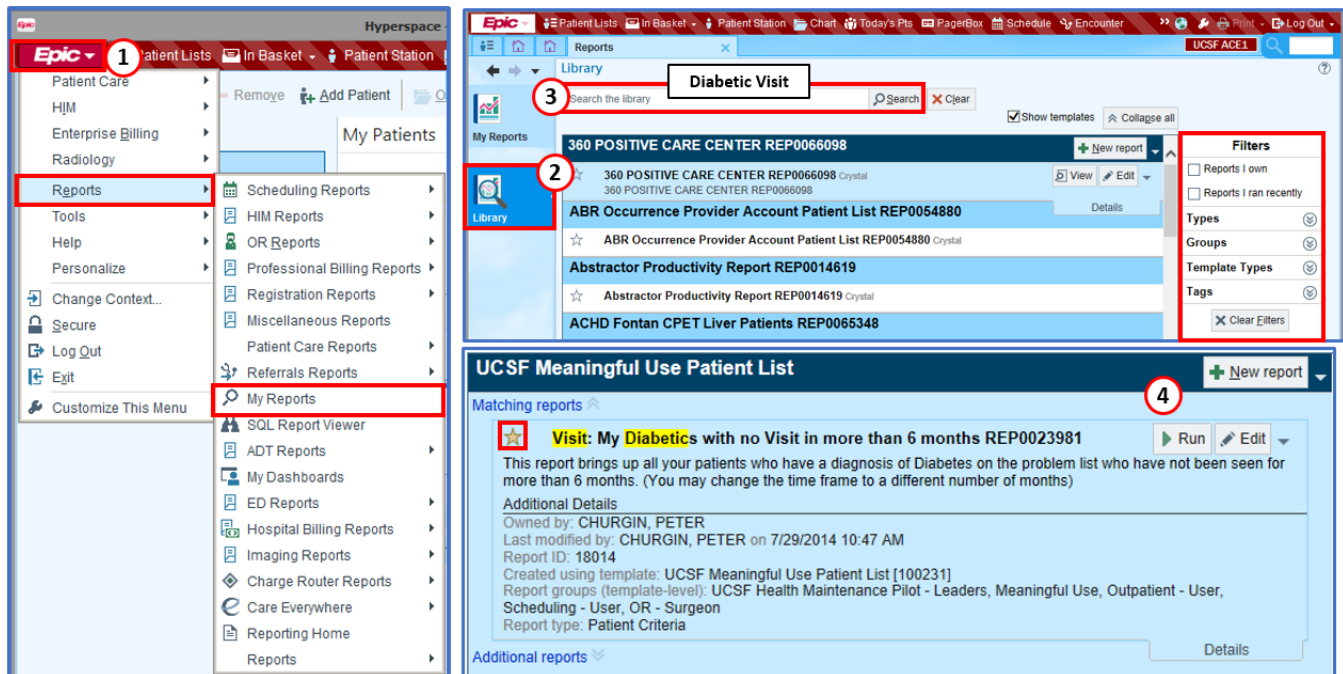
> ⓘ Uncheck the **Show templates** ☑ Show templates checkbox to show only reports in your search results.

Understanding Crystal Reports

APeX Crystal reports are run by batch job on a set schedule. Instead of running reports on demand as Workbench reports, Crystal reports must be subscribed to. The label below the report name indicates that they are a Crystal Report and the report's availability.

Practice Exercise

1. From the **Library** 🔍 Library tab, **Filters** on the right Sidebar, click **Template Types**.

2. Check the checkbox beside **Epic-Crystal** ☑ Epic-Crystal to display only Crystal Reports.

3. Find the desired Crystal report, **All In Basket Work Not Completed** for example. Let's say you do not make the report your favorite first and click **View**, 🔲 View you will be asked if you wish to subscribe to this report. Click **Add to Favorites**. Once the report is a favorite, you will have to request the report in the **My Reports** tab.

4. Click the **My Reports** tab. 📊 My Reports

5. Find the Crystal report in the list of favorites. Right-click the report name. From the menu, select the **Request Report** option.
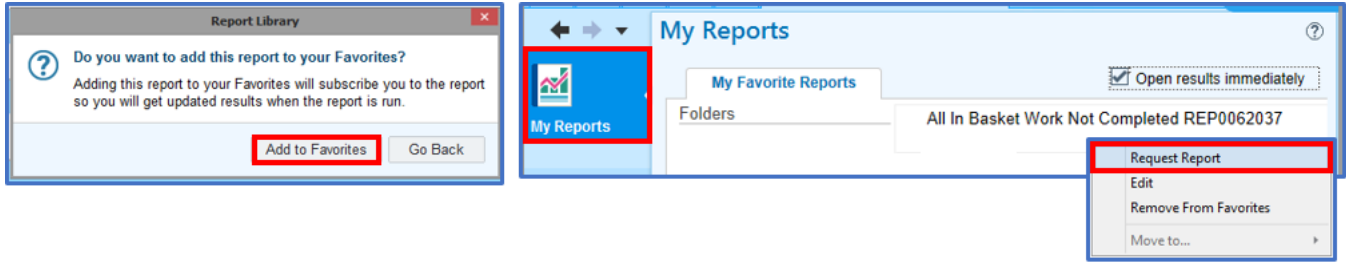
| (i) | From the **My Reports** tab, **My Favorite Reports**, to remove a report from the favorites, right-click the report name and choose the **Remove From Favorites** option. From the **Library**, the Star ☆ icon is a toggle, click the icon to set as a Favorite turning the **Star** gold ⭐ or clear the setting. |

Managing Your Favorites

After you have spent some time searching the **Library** for useful reports, and clicking the **Star** ☆ icon to add them to your **My Reports**, **My Favorite Reports** tab, it would be useful to organize the various reports in folders.

1. Access the **My Reports**, **My Favorite Reports** tab.
2. Click the Create a new folder ✚ Create a new folder link. In the New folder name field, type an appropriate name, **Appointments** for example.
3. Hover the mouse over the Selection Margin to the left of the report name, over the 8 Dots ⣿ until the mouse pointer appears as a 4-tipped arrow ✛, and drag the report into the new folder.
4. Click the **Pencil** ✏ icon to the right of the folder title to rename an existing folder.
5. By default, reports will open immediately after you click **Click to run**. Some reports may take several seconds to execute which may slow you down if you are trying to run multiple reports. Uncheck the Open results immediately checkbox so that you can review the results of the report later.
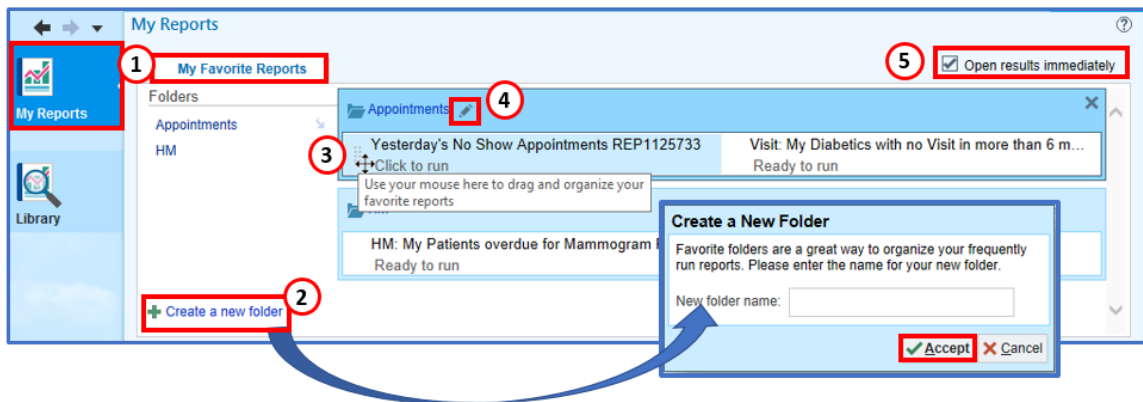
| (i) | The **Selection Margin** to the left of the name can be used to drag reports as well as folders to change their order of appearance. |

Accessing Dashboards

Depending on your role or login department, the **My Dashboard** workspace will appear as your Home Workspace. Dashboards centralize information you need throughout your day. Instead of navigating to various screens to run reports, view your schedule, and access your In Basket messages, all of this information can be viewed in a central location.
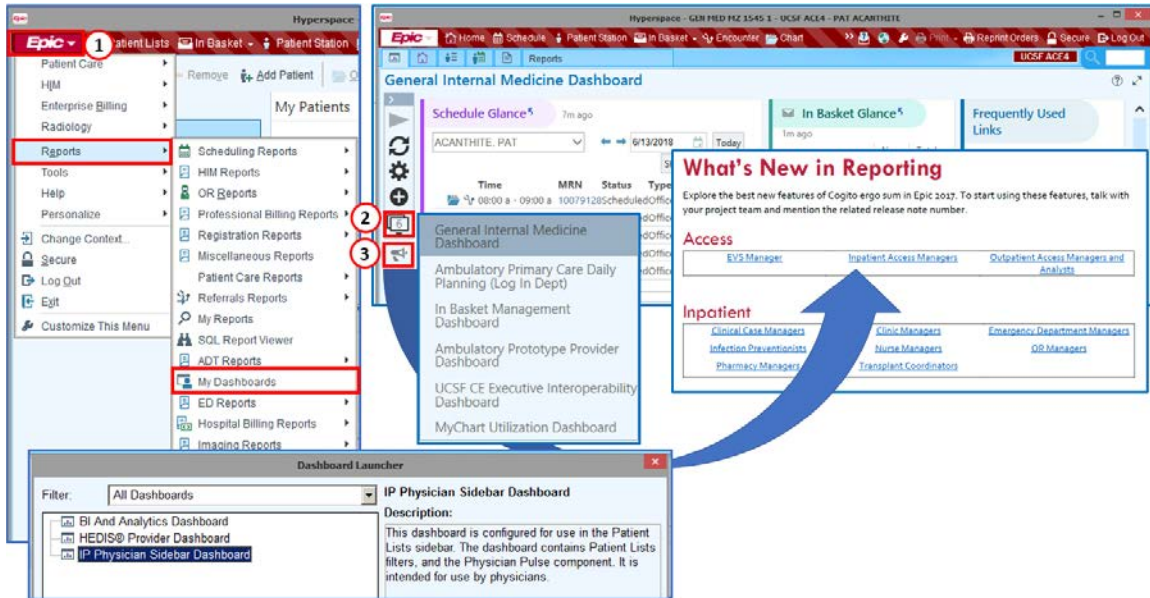
1. If the **My Dashboard** ![icon] workspace is not shown by default, click the **Epic** button ![Epic] and choose the **Reports** submenu, **My Dashboards** option. Select the desired Dashboard from the Dashboard Launcher screen and click **Accept**.

2. From the **My Dashboard** workspace, you can access other available Dashboards from the **Select Dashboards** ![icon] icon.

3. Click the **Megaphone** ![icon] icon to view **What's New in Reporting**.

Working with Report Results

Rerun Reports for Updated Results

The results of a report contain an expiration period so that if the same report is requested repeatedly, such as a user double-clicking rather than single-clicking the system does not try to execute the same report multiple number of times. A reasonable timeframe is set so that likelihood of the data set changing, such as a report showing your female patients overdue for a mammogram, for example, will not differ within one or five minutes of running the report.

By setting these restrictions, it allows for other more patient critical processes to run more efficiently and not slowing down the system.

You will know when a report is ready to run again when:

- The **Valid Until** time listed in the **Recent Results** section of the **My Reports** screen has passed and the results are listed as **Expired**. Expired reports will not show unless you check the **Expired** checkbox.
- The status of the report in the **My Reports** screen, **My Favorite Reports** changes to **Ready to run**. Hover your mouse over the text **Ready to run** and the **Click to run** prompt will appear. Click the report title.
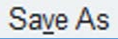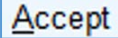

## Changing Report Criteria

> **Scenario**
>
> A physician asks his nurse to contact his patients who didn't show up yesterday for their appointment. The nurse can run a report that searches the physician's patients for no shows.

1. From the **Library** tab, in the **Search the library** field, search for **NO SHOW**.

2. Find the Workbench report, **Yesterday's No Show Appointments REP1125733**. Click **Edit**. This will open the Report Settings window, **Criteria** tab.

3. Click **Save As**. Enter a new name for the report, **My Yesterday's No Show Appointments**, for example, and click **Accept**.

4. The current report criteria are set to report the **Current login department** but we want to specify a specific provider. Uncheck the **Current login department** checkbox. Check the **Department and provider** checkbox instead. To the right specify the **Provider** type **SURMD00** in the **Provider**

column and press **Enter**. Also add a nurse **10000264** on the next row in the Provider column and press **Enter**. You can leave the other columns blank.

5. Click **Run** [Run] to run the report and display the results.
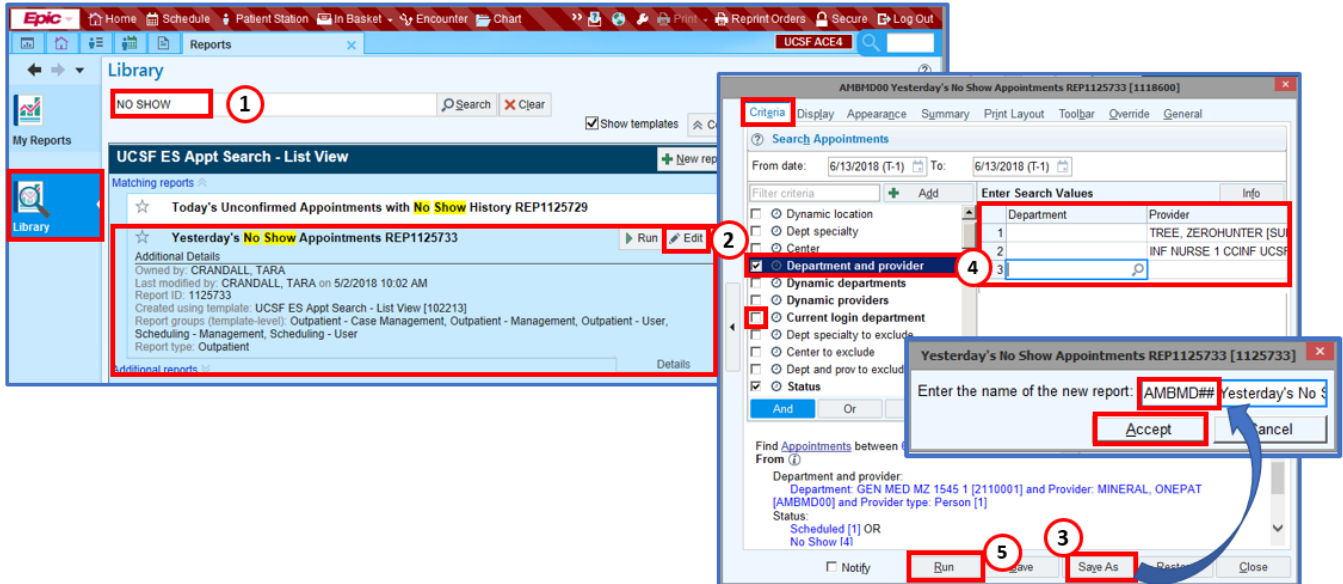
Receiving Notice when Results are Ready

Reports that gather a lot of data can take a long time to run. Before running a report, you can tell the system to send you an **In Basket** message when the results are ready. By default, results will open immediately. You can tell the system that you would like to open each report as they become available by unchecking the **Open results immediately** checkbox.

1. From **My Reports**, if the report appears in your My Favorite Reports section, right-click the report title and choose **Edit**. From the Library tab, search the report you want to receive an **In Basket** message for and click **Edit**. [Edit]

2. From the Report Settings window, check the **Notify** checkbox.

3. Once selected the next time the report is run you will receive a message in your **In Basket**.
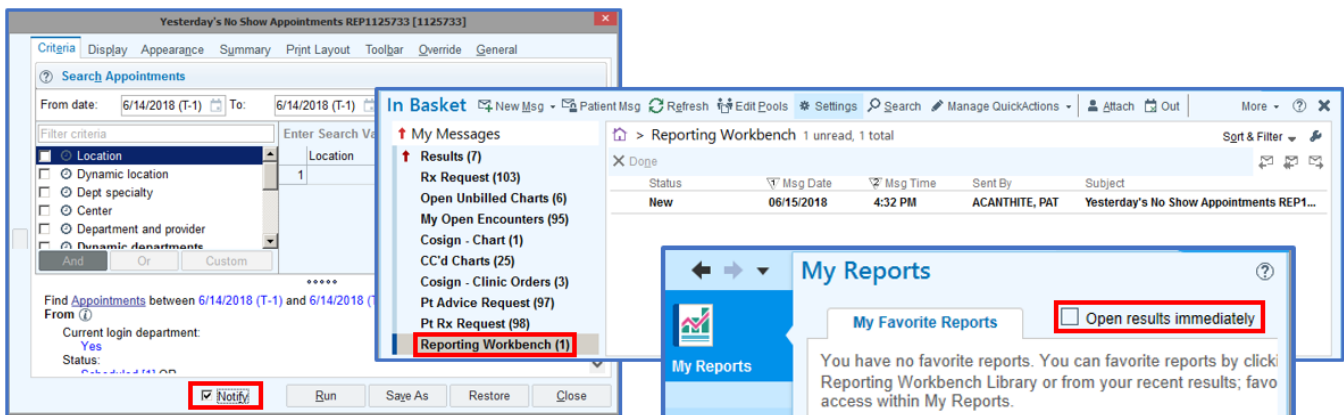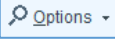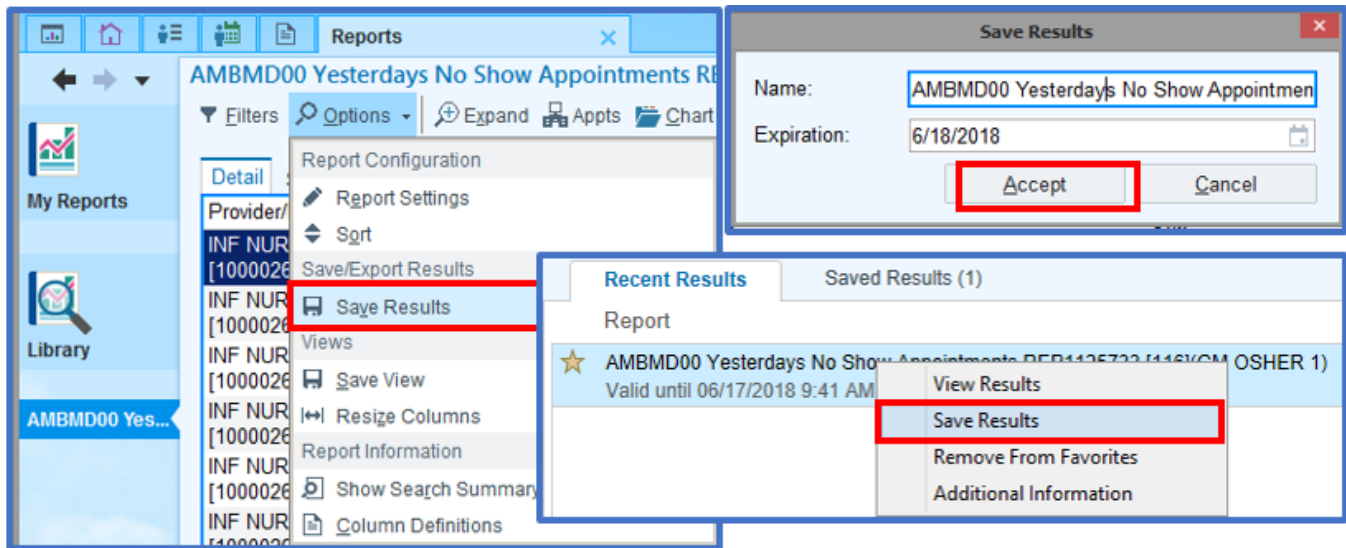
Saving Report Results

The results of a report are valid only for a set amount of time. This time limit means that if you run a report in the morning, the results might not be available after lunch. In **My Reports**, check the **Status** column in the **Recent Results** section to see if the results are still valid. The status appears as **Expired** in red text if the results are no longer valid. To see how long the results are available, look directly under the report's name for the **Valid Until** date and time.

After you run a report, you can save the results if you'll need to review them after they expire.

Saved report results appear in the **Saved Results** section of **My Reports**. Saved report results have expiration dates, after which their information might no longer be relevant. The next time you open the My Reports workspace, if any saved results have expired, you will receive a prompt asking if you wish to delete or resave the results.

1. After running a report, the results will appear in the **Report Results** screen and the **My Reports**, **Recent Results** section.

2. From the **Results** screen, access the **Options** [🔍 Options ▾] drop-down menu and choose the **Save Results** option, or from the **My Reports**, **Recent Results** section, right-click the report name and choose the **Save Results** option.

3. From the **Save Results** screen, type the new result name in the **Name** field. Remove any apostrophes in the name if necessary. Type an appropriate **Expiration Date**. Click **Accept**.
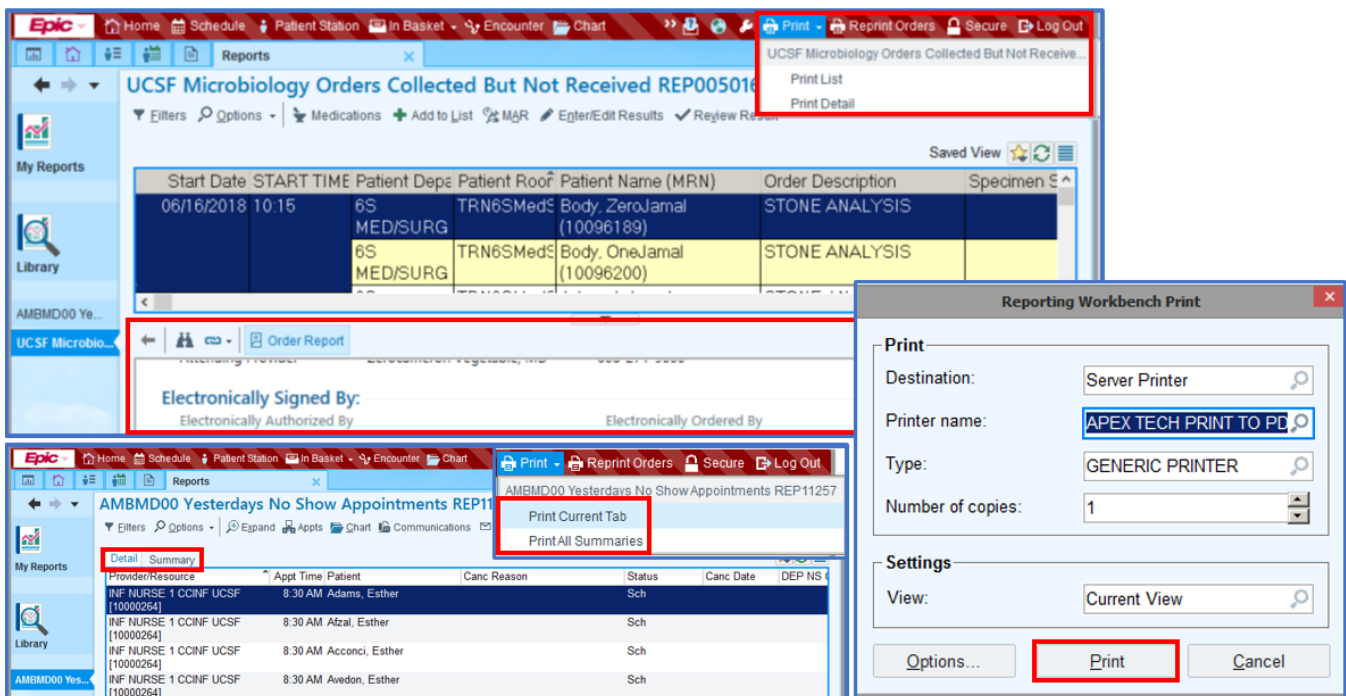

Printing Report Results

Occasionally, you might need a printed copy of a report's results. For example, if you need to call patients on a list, you can print the results and check off patients as you complete each call.

After running a report, the results will appear in the Results screen.

1. From the **Report Results** screen, access the Main Toolbar, **Print** [🖨 Print ▾] drop-down menu.

2. Dependent upon the results you will have different options available in the drop-down menu. For reports that provide a report pane below the list, choose the **Print List** or **Print Details** option. For reports that provide a list and summary tab, choose the **Print List** or select the Summary tab and choose the **Print Current Tab** or **Print All Summaries** option.
3. The **Reporting Workbench Print** screen will appear.
   - Enter **Server Printer** in the **Destination** field.
   - Select the appropriate printer in the **Printer name** field.
   - Enter the number of copies to print if you would like multiple copies.
4. Select the appropriate view:
   - **Current View:** This option is only available if you made changes without saving. Selecting the view prints exactly what is on screen.
   - **Print Layout tab from Report Settings:** This option prints the layout specified on the Print Layout tab of Report Settings.
   - **Saved Views:** Any views you saved are options for print layouts. The default saved view is also the default print view.
   - **Display tab from Report Settings:** This option prints the layout specified on the Display tab of Report Settings.
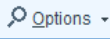5. Click **Print**. Print

Sorting Report Results

Sorting lets you arrange report results placing the more emergent cases at the top of the list. Maternity patients with earliest expected date of delivery, for example.

Sorting a Single Column

Columns can be easily sorted by clicking the column heading to sort the information. When you first click the column heading the data will sort in **Ascending A-Z** order. If you click the

column heading a second time, the data will sort in **Descending Z-A** order. If you know that you want the information in **Descending** order, dates for example, and don't want to wait to sort from **Ascending** to **Descending**, right-click the column heading and choose **Descending**.

Sorting Multiple Columns

1. You can sort up to three columns at a time. Access the **Options** ![Options] drop-down list from the Toolbar, and choose the **Sort** ![Sort] option, or right-click a column heading and choose the **Custom** option.
2. The **Custom Sort** window will appear. In the **First On** section, select the first column you want to sort by and select the sort order for that column:
   - **Ascending** - Values appear alphabetically or with the oldest dates or lesser amounts first.
   - **Descending** - Values appear in reverse alphabetical order or with the most recent dates or greater amounts first.
3. In the **Then On** and the **And Finally** sections, select the other columns you want to sort on and select a sort order for each.
4. Click **Accept**. The results are sorted according to your preferences.
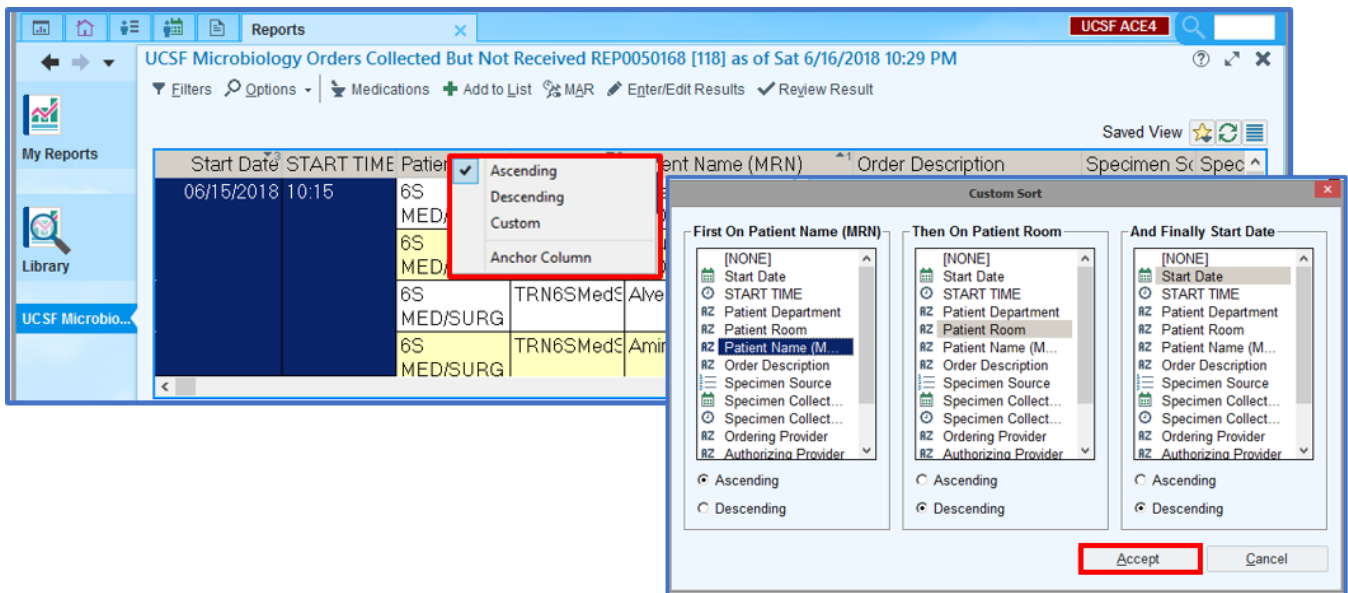
Filtering Report Results

Filtering results allows you to focus your attention on specific records, hiding the others, based on a specific condition. If you are only concerned with patients from one department, the Cath Lab for example, you can filter the results for that specific department.

Practice Exercise

1. From the **Library** ![Library] tab, search for **UCSF MICRO** and select the **UCSF Microbiology Orders Collected But Not Received REP0050168** report.
2. Hover over the report and click the **Run** ![Run] button.
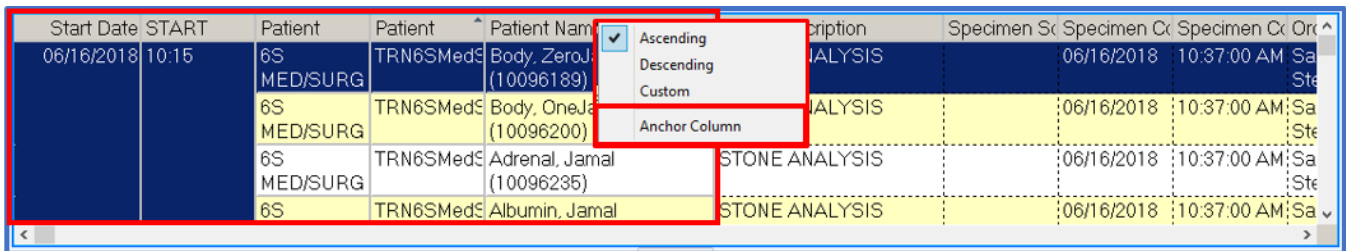
3. View the **Report Results** screen. The results report that there are 20 results but there are none shown. Click the **Filters** [Filters] button on the Toolbar. This will open the **Filter** pane along the left side of the window.
4. Currently the results are filtered by **Patient Department**. Uncheck the **Patient Department** and click **Apply**. This should display the 20 records reported.

Anchoring Columns

When you scroll to the right to view information in report with a large number of columns, pertinent information identifying the patient row often scrolls off the screen making it difficult to keep track of what patient you are reviewing. This can be dangerous to patient care. To prevent the Patient Name or MRN column for example, to scroll off the screen, you can **Anchor** these columns.

Once a column is anchored, it will always appear on the left side of the screen.

1. From the **Report Results** screen, right-click the column heading you want to freeze, **Patient Name** for example.
2. Scroll to the right to the last column and all the columns to the left will not scroll.

Saving Views

After specifying a specific Sort order, Filter or column Anchor these settings can be saved together as a View. That way when you run the report again, you will not have to repeat these types of customizations.

1. To save a view from the **Report Results** screen, click the Gold Star [star] icon to access the drop-down menu.
2. Choose the **Save View As** option. The **Save a View of This Report** window will appear. Type the view name and click **Accept**.
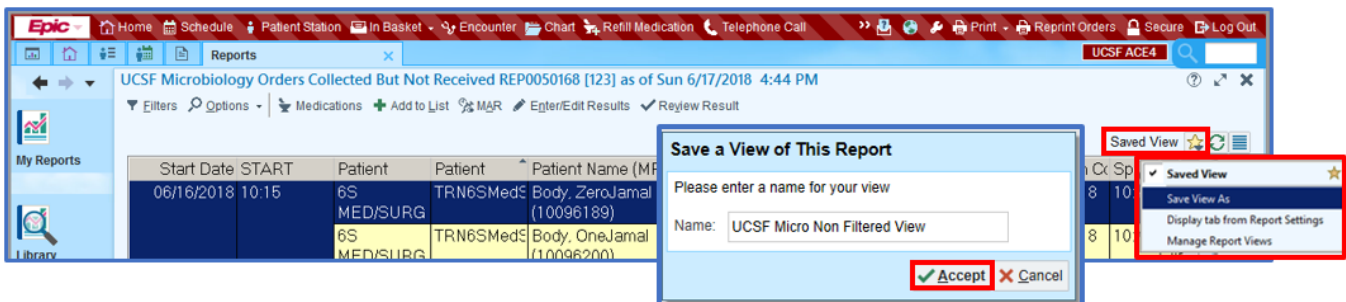
Managing Saved Views

If you want to always see your results for a given report with a specific Sort order, Filter or column Anchor, you can specify that the Saved View is made the default view for this report. That way, whenever you run the report, this view will be applied automatically.

Here you can rename and delete the views.

1. To save a view from the **Report Results** screen, click the Gold Star ⭐ icon to access the drop-down menu.
2. Choose the **Manage Report Views** option. The **Manage Report Views** window will appear.
   - Hover over the view name and click **Make this my default view** to make the view the default.
   - To organize the display order, move your mouse to the Selection Margin to the left of the view name until it turns into a 4-tipped arrow ✛ and drag the view to the desired location.
   - To delete the view, click the **Delete** button. ✖ Delete
   - To change the view name, click the **Pencil** ✏️ icon. In the **Rename This View** window type a new name and click **Accept**.
3. Click **Accept**.
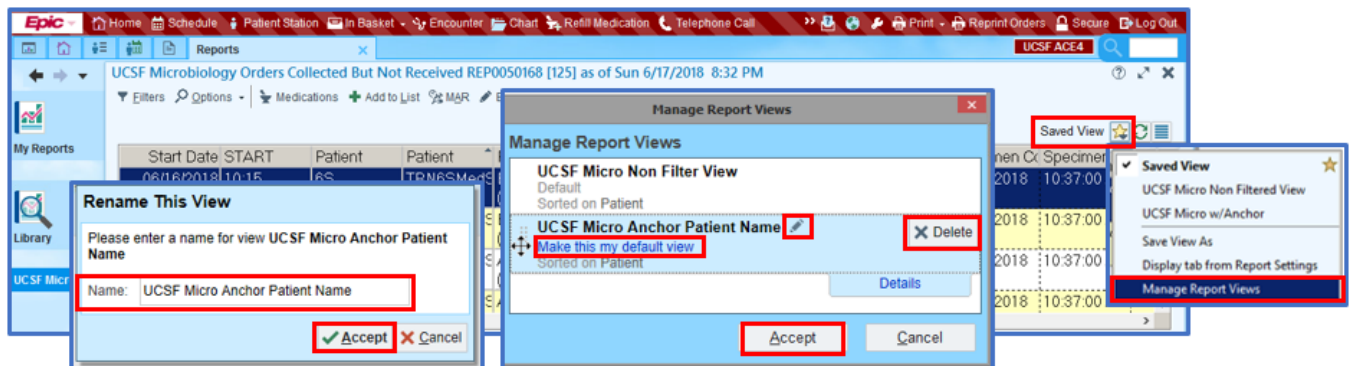
Following Up on Report Results

From a report's results, you can follow up on individual patients or groups of patients. For example, you can review a patient's chart to place an order for a patient. When following up on several patients, you can send them all letters or add them to the same patient list. These follow-up actions appear as buttons in the report toolbar. The buttons that appear depend on the report that you run.
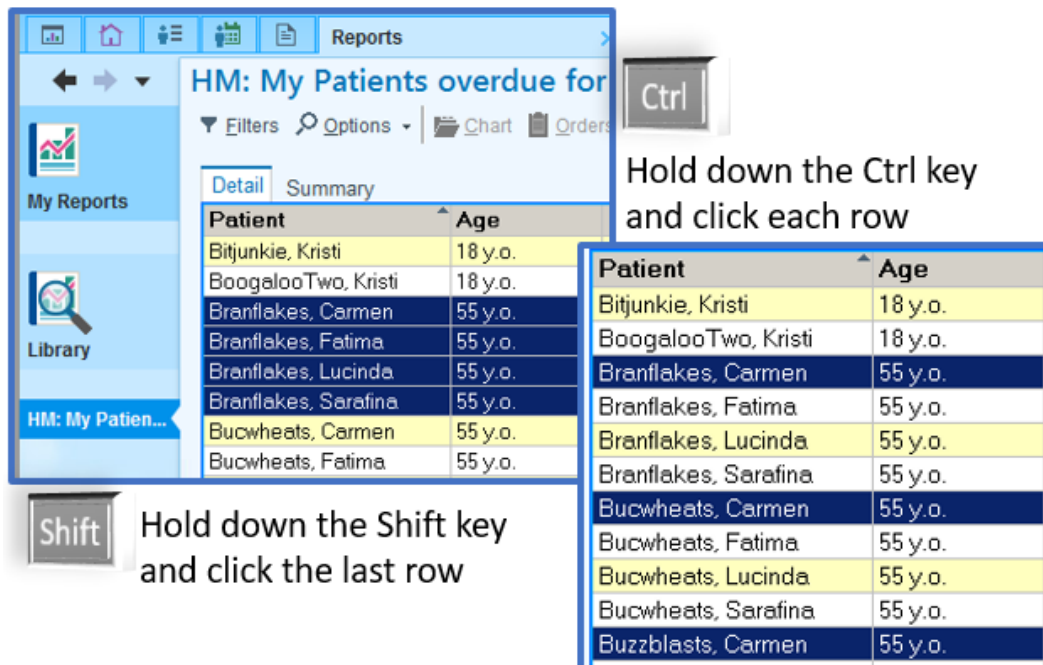
To follow up on one or more patients in your report results, select the patients and click the button for the appropriate action.

Selecting Continuous Rows

From the Report Results screen, to select continuous blocks of reported patients, select the first patient, hold down the **Shift** key and select the last row on the list, or drag you mouse across the rows to select multiple rows.

Selecting Non-Continuous Rows

From the Report Results screen, to select non-continuous rows, select the first patient, hold down the **Ctrl** key and select each row.

Adding Patients to a Health Maintenance Plan
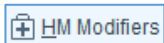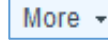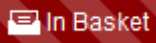
Health Maintenance modifiers put patients into or exclude patients from Health Maintenance plans.

> ### Scenario
>
> Most adult females are due for a Pap smear every two years. Use a Health Maintenance modifier to exclude your patient who needs a yearly Pap smear from the two year plan and include her in the plan for a yearly Pap smear.
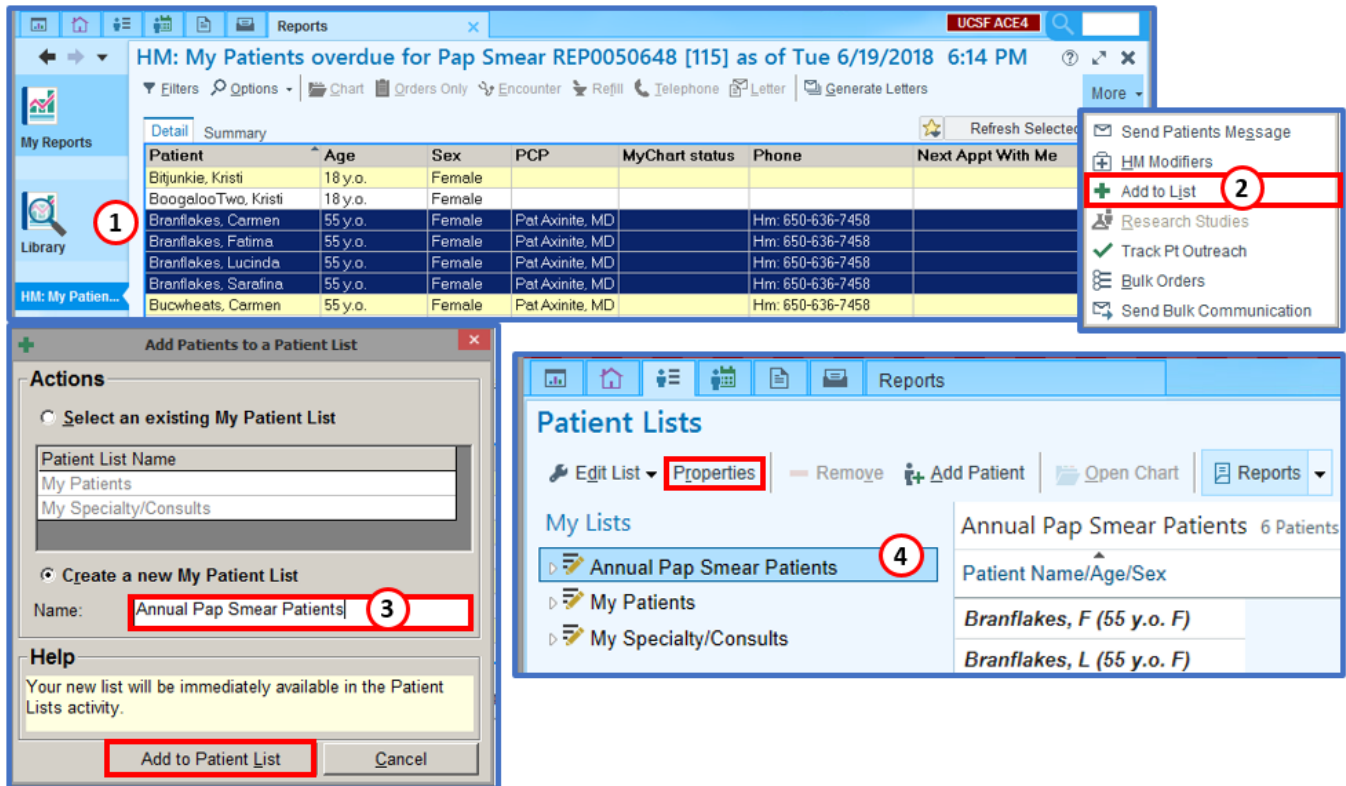
1. From the **Library** tab, search for **HM** and select the **HM: My Patients overdue for a Pap Smear REP0050648** report. Hover over the report and click the Run button. From the **Report Results** screen, practice selecting multiple continuous or non-continuous rows.

2. From the **Report Results Toolbar**, click the **HM Modifiers** button. Depending on the width of the screen, you may find this option in the More drop-down.

3. This will open the **Add HM Modifiers** screen. In the **Select HM Modifiers** search field, type **PAP** and choose **Pap Smear – annual** from the drop-down list. Click **Apply**.

4. A warning message will appear that you are attempting to apply this modifier to multiple patients. Click **Yes**.

5. Click the **In Basket** button on the Main Toolbar. Find the UCSF Bulk Action Results message to see if the action was successful.

Adding Patients to a Patient List

1. From the **Report Results** screen, select multiple patients. This may be the patients selected in the previous exercise.

2. From the **Report Results Toolbar**, click the **Add to List** button. ✚ Add to List Depending on the width of the screen, you may find this option in the More ⌐ More ▾ ⌐ drop-down.

3. This will open the **Add Patients to a Patient List** screen. You can select an existing My Patient List or create a new list by typing a name in the **Name** field. Click **Add to Patient List**.
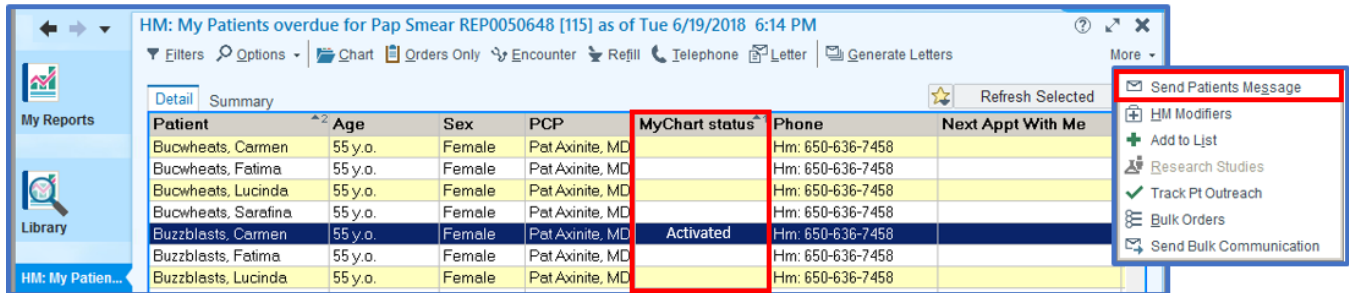
4. Click the **Patient Lists** ⊞ tab to open the Patient Lists workspace. Find the patients by clicking the new list. You can add additional columns to the list by clicking **Properties**.
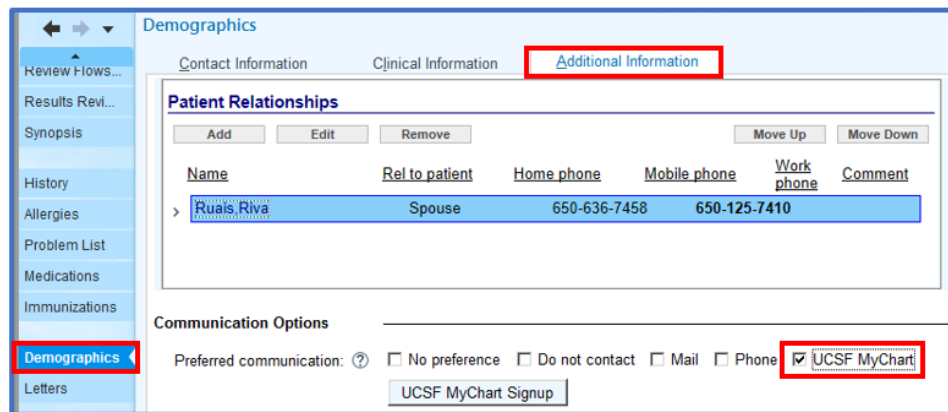
Sending Patients a MyChart Message

If your patient has an **Activated** MyChart status, you can send secure MyChart Messages. From the patient's chart, **Demographics** activity, the **Additional Information** tab contains the patient's **Preferred communication** method and **UCSF MyChart Signup** button. Select the patient row and click the **Send Patients Message** option.

Modify Reports

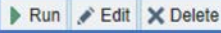## Saving a Modified Copy of a Report

The reports you find in the Library are protected by default and **you will have to create your own copy of the report before you modify them.** This prevents someone from unknowingly changing a critical report used by the department. If you change a report, you can save a private copy so you don't have to make the changes each time you run the report. The copy of the report is available to view and run only by you. You should give the report a meaningful name and save it as a favorite so you will be able to find it the next time you need to run the report.

1. From the **Library** tab, search for **DIABETES** and select the **Chronic Condition: My Patients with Diabetes Mellitus REP0023962** report.
2. Hover over the report and click the **Edit** button. The **Report Settings**, **Criteria** tab appears.
3. Click the **Save As** button. Type an appropriate name in the **Enter the name of the new report** field, and click **Accept**.
4. Make the appropriate changes and click **Save** to save your changes.

> ⓘ If you no longer need a report you have saved, you can delete the report by clicking the **Delete** button to the right of the **Edit** button. ▶ Run ✎ Edit ✕ Delete This option is only available for reports you have created.

Adding Criteria to a Report

You can change reports that don't quite meet your needs. Criteria determine what a report searches for and help you target specific patients in your results. The criteria available vary by report. You might want to add criteria to broaden or narrow your search.

For example, you might use a report that finds your patients with diabetes. You can change the report to find all diabetic patients that are overweight, **BMI > 25** for example. Before modifying a library report, you must save a copy, then make the appropriate changes.

1. From the **Library** [Library] tab, search for the desired report.

2. Hover over the report and click the **Edit** [Edit] button. The **Report Settings**, **Criteria** tab appears.

3. Click the **Save As** button. Type an appropriate name in the **Enter the name of the new report** field, and click **Accept**.

4. If you need more information about any of the fields in the list of criteria on the left, select the row and click the Info button on the top right. A **Criteria Information** window will appear giving a description of the criteria. Click **Close**.

5. In the **Enter Search Values** section, search for the appropriate **Relationship**, and type the desired value. Click the **And** button to set the logic to find patients with Diabetes and with a Body Mass Index greater than or equal to 25, for example.

Changing a Report's Search Timeframe

In some reports, you can set a date range to control the timeframe the report searches.

Setting a date range helps limit the number of results. The date range applies only to criteria that change over time identified by the **Clock** icon. ⏰ Enter the **From date** and **To** relative values in the field. Certain reports also let you enter a time range. Enter a relative date using one of the following shortcuts: **T=Today**, **W=Week**, **M=Month**, or **Y=Year**. So to find a range from 1 month ago through today, type **M-1** in the **From date** field and **T** in the **To** field.

For example, if you're searching for your male patients between 1 month ago through the present, the date range is ignored because a patient's sex rarely changes. All your patients appear in the results. If you add the criterion BMI > 30, the report uses the date range because BMI can change over time. The search results include only male patients that had a BMI greater than 30 between one month ago through today.
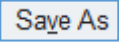
Removing Deceased Patients from Results

Sometimes deceased patients appear in a report's results. These records aren't useful if you're using the results to find a specific patient population and follow up with those patients.

You can exclude deceased patients from certain reports' results. In the **Chronic Condition: My Patients with Diabetes Mellitus REP0023962** report, the **Patient living status** criteria is set to **Alive** which is the same as the **Patient Status**, Not equal to **Deceased**. Either criteria will be sufficient to filter out deceased patients.

☑	**Patient Base**	▲		Living Status	
☑	**Patient living status**		1	Alive	

☐	**Patient Status**	▲		Relationship	Patient Status
☑	**Problem List by Grouper**		1	Not equal to	Deceased

Managing Report Columns

To see other information about the records in a report's results, you can add additional columns to the results, move the order of the columns, and remove unwanted columns.

1. From the **Library** 🔍 **Library** tab, search for the desired report. Click the **Edit** 🖉 Edit buton. The **Report Settings** screen will appear.
2. Before modifying a report, click **Save As** Save As and rename the report you wish to modify.
3. Modify the columns as described below.
4. Click **Save** Save and **Run** Run to run the report.
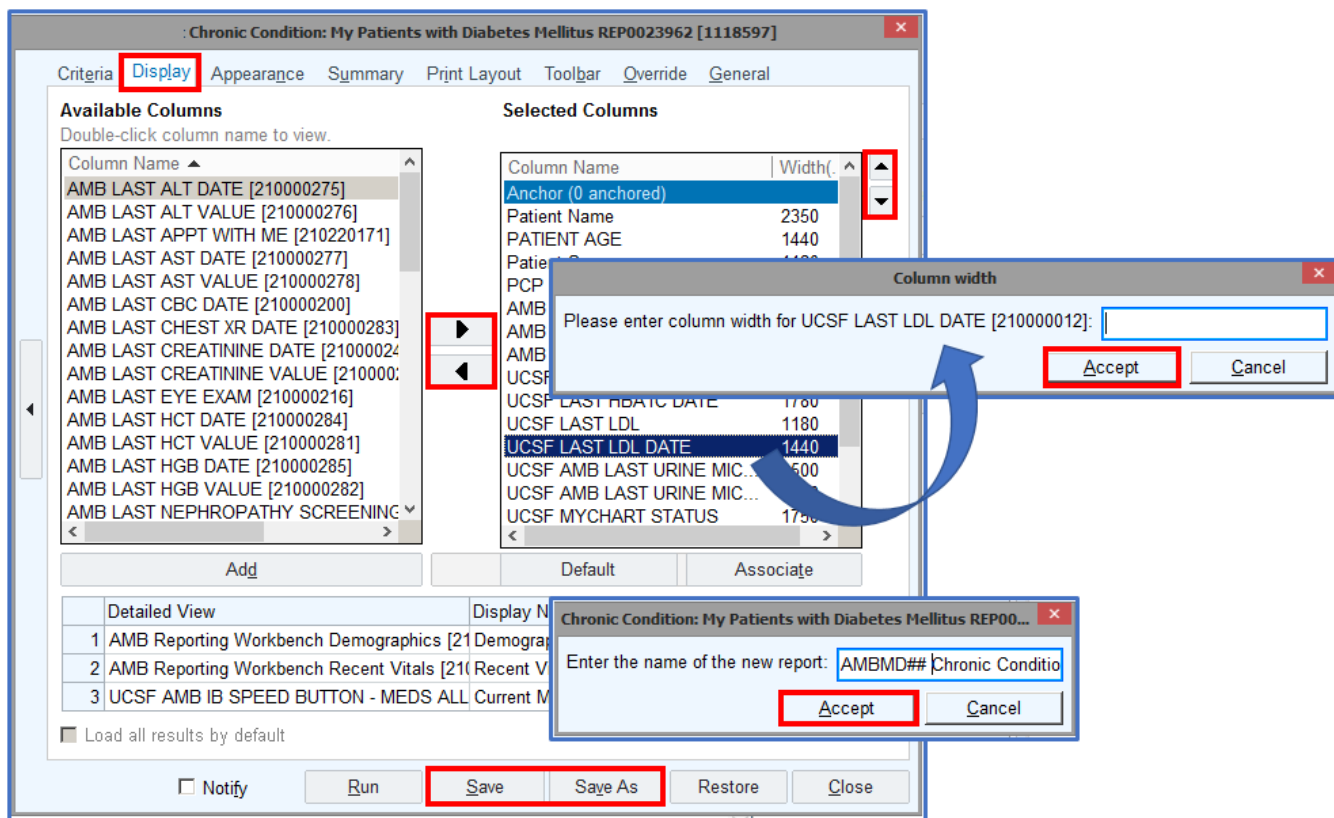
Adding a Column

1. From the **Report Settings**, **Criteria** tab appears. Click the **Display** tab.
2. All the columns available for the report appear in the **Available Columns** list. All the columns that currently appear in the report are in the **Selected Columns** list.
3. Select a column from the **Available Columns** list, and click **Right Arrow** ▶ button between the two lists. The column moves to the **Selected Columns** list.

Changing Column Order

1. From the **Report Settings** window, **Display** tab, select the column you wish to order.
2. Click the **Up** or **Down Arrow** button in the **Selected Columns** list to move the selected column up or down. The first column in the list will appear as the leftmost column in the **Report Results** screen.
3. Repeat the above steps until you are satisfied with the column order.

Anchoring Columns

Columns can be anchored from the Report Results window and saved as a view or the anchor column configuration can be saved with the report.

1. The **Anchor Divider** Anchor (0 anchored) will appear as a row in the **Selected Columns** list.
2. Select the **Anchor Divider** and click the **Up** or **Down Arrow** button in the **Selected Columns** list to move the selected column up or down in the desired position.

Changing Column Width

1. From the **Report Settings** window, **Display** tab, select the column you wish to change the column width from the **Selected Columns** list.
2. Right-click the row and a **Column Width** window will appear. Type the desired width and click **Accept**.

> Column width is measured in twips. To figure out how many twips to enter, compare the width of the column you want to change to the width of other columns. 1 Twip is exactly one twentieth (1/20) of a PostScript point. A PostScript point itself being 1/72 of an inch, making a twip 1/1440 inch.
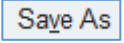
Removing a Column

1. From the **Report Settings** window, **Display** tab, select the column you wish to remove from the **Selected Columns** list.
2. Click **Left Arrow** ◀ to remove the selected column from the **Selected Columns** list and move to the **Available Columns** list.

Managing Report Format

Changing Font and Background Color

You can easily recognize different reports and quickly identify key information by changing the fonts and colors used to display report columns and rows. You can change the color and font of each row or column heading, and the background color of headings, columns, and rows.
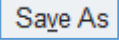
1. From the **Library** tab, search for the desired report. Click the **Edit** button. The **Report Settings** screen will appear.
2. Before modifying a report, click **Save As** and rename the report you wish to modify if necessary.
3. From the **Report Settings** screen, select the **Appearance** tab.
4. Uncheck the **Use theme colors** checkbox.
5. Select the **By row** or **By column** to indicate whether you're changing the appearance of the rows or columns.
6. Click the **Property** field drop-down to select the area of the results you want to change.
7. In the **Font** field, click **Search** to open the **Font** window. Select the font type, style and size. Click **OK**.
8. To change the color, click **Set** to the right of the **Color** field. Select a color and click **OK**.
9. Click **Save** and **Run** to run the report.
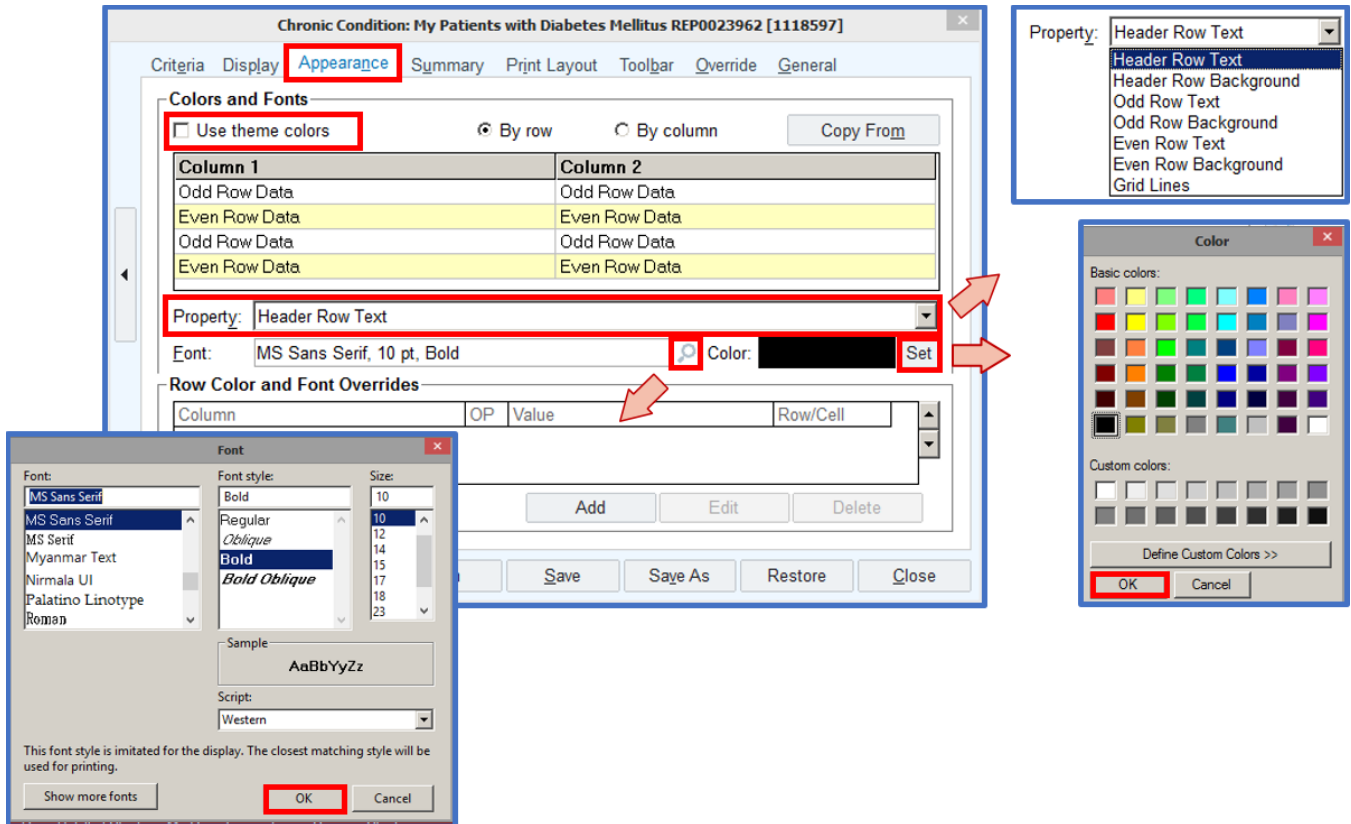
Creating Alert Conditions in Results

You can change a report's display so specific values in the results stand out. For example, when running a report to see all diabetic patients, you can show those patients whose BMI is greater than 25 with a red background so you can quickly identify those patients.

1. From the **Library** [Library icon] tab, search for the desired report. Click the **Edit** [Edit button] button. The **Report Settings** screen will appear.

2. Before modifying a report, click **Save As** [Save As button] and rename the report you wish to modify if necessary.

3. From the **Report Settings** screen, select the **Appearance** tab. In the Row Color and Font Overrides section, click the **Add** button.

4. This will open the Define Color and Font Override Rule window. Select if you want this change to occur for a cell or the entire row in the **Apply to** field and what condition in the **When** field. In the **Column** field, specify the column to be examined. In the **Operator** field, specify the conditional statement. In the **Value** field, specify the value to compare.

5. In the **Preset** tab, you can select **Red**, **Yellow** or **Green** and if it applies to the **Background** or **Text**, or select the **Custom** tab to specify the Font type, size and style, text color and background color.

6. Click **Accept** to return to the **Report Settings** screen.

7. Click **Save** [Save button] and **Run** [Run button] to run the report.

Customizing the Report Results Toolbar

Sometimes the **Toolbar** buttons that appear by default in your **Report Results** screen aren't the ones you use most often. You can remove and reorder the buttons that appear on your toolbar to reduce clutter and more efficiently follow up on patients reported.
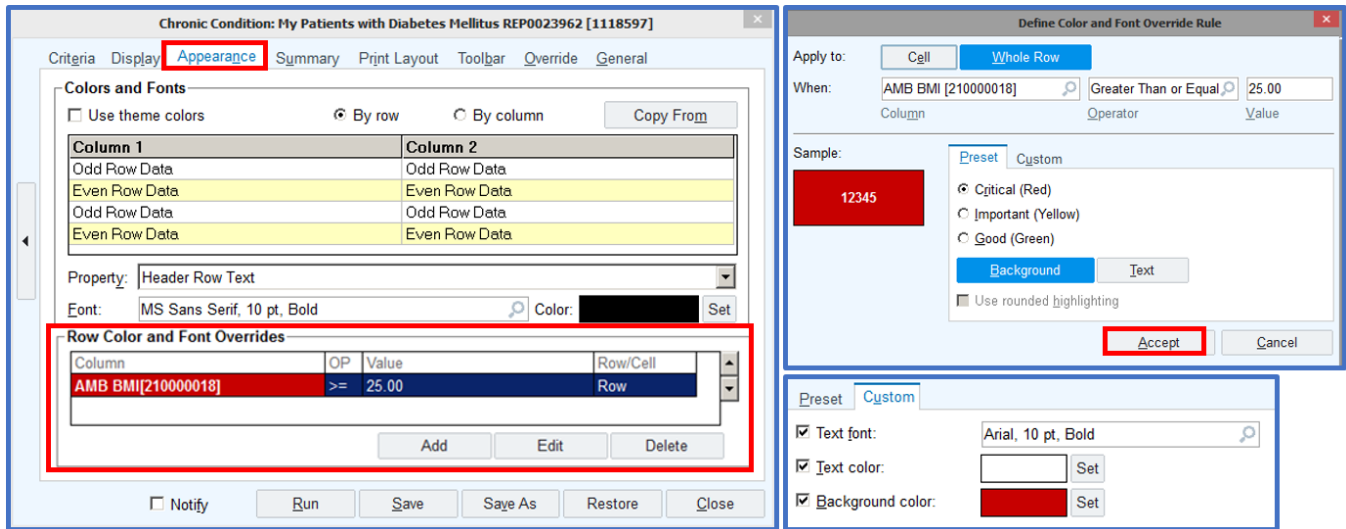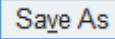
1. From the **Library** tab, search for the desired report. Click the **Edit** button. The **Report Settings** screen will appear.

2. Before modifying a report, click **Save As** and rename the report you wish to modify if necessary.

3. From the **Report Settings** screen, select the **Toolbar** tab. From the Organize Toolbar Buttons list, check or uncheck the button you wish to show or hide. Click the Up or Down Arrow button to move the button up or down the list, which will in turn move the button left or right along the Toolbar.

: Chronic Condition: My Patients with Diabetes Mellitus REP0023962 [1118597]

Criteria   Display   Appearance   Summary   Print Layout   **Toolbar**   Override   General

Organize Toolbar Buttons   Select All   Clear All

☑	📂	Chart	↑ ↓
☑	📋	Orders Only	↑ ↓
☑	⚕	Encounter	↑ ↓
☑	⚗	Refill	↑ ↓
☑	📞	Telephone	↑ ↓
☑	✉	Letter	↑ ↓
☑		--- Separator ---	↑ ↓
☑	🗐	Generate Letters	↑ ↓
☑	✉	Send Patients Message	↑ ↓
☑	⊞	HM Modifiers	↑ ↓
☑	✚	Add to List	↑ ↓
☑	📞	Initiate Calls	**Move HM Modifiers up** ↑ ↓
☑	🧍	Research Studies	↑ ↓
☑	✓	Track Pt Outreach	↑ ↓
☑	☰	Bulk Orders	↑ ↓
☑	🗪	Send Bulk Communication	↑ ↓

☐ Notify   Run   Save   Save As   Restore   Close

Use My Dashboards

The **My Dashboard** workspace is the default workspace for many user roles.   **Note:** Not all users have Dashboard reports.

1. Some user roles do not show the **My Dashboard** [icon] workspace by default.
2. Click the **Epic** button [Epic] and choose the **Reports** submenu, **My Dashboards** option, or in the upper right corner of the screen, search for **MY DASHBOARDS**.
3. From the **Dashboard Launcher** window, select the desired dashboard and click **Accept**.
4. Click the **Open Dashboard** [icon] button on the left sidebar. This will open the **Dashboard Launcher** window. Select the next dashboard and click **Accept**. Click the **Select Dashboard** [icon] button to navigate to each dashboard.
5. The **BI And Analytics Dashboard** contains a **Data/Dashboard Catalog** section. Here you can access resources for dashboards. The available components will vary depending on your user role.
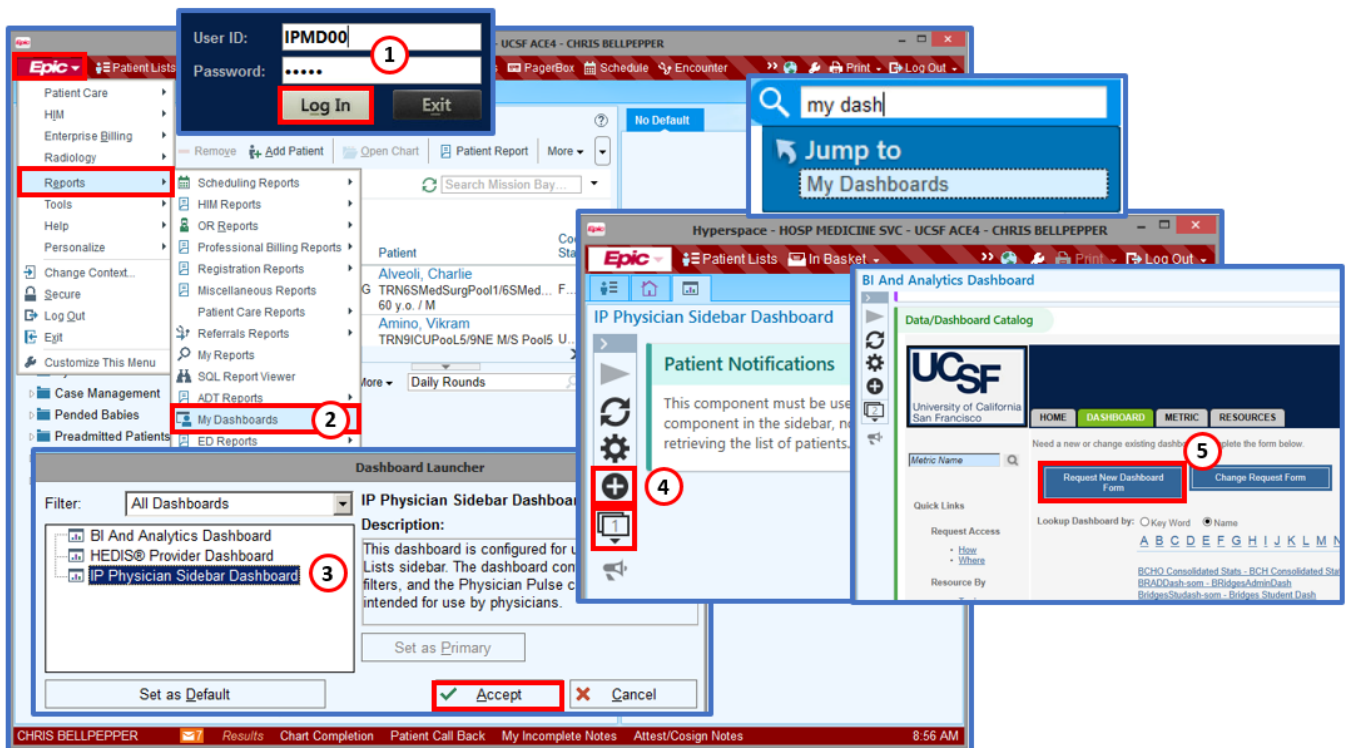
In Basket Glance Component

You can directly access your **In Basket** from a dashboard. Your **In Basket Glance** component contains a summary of your In Basket folders and unread emails. Clicking a folder brings you directly to that folder in the In Basket. If the **In Basket Glance** component is not available, you can request access.

1. If you have just logged in, the **My Dashboard** workspace will be the first screen that will appear otherwise, click the **My Dashboard** ⊞ tab.

2. Hover the mouse over the right corner of the component. You will see a Diagonal Arrow. ↗
    Clicking the **Diagonal Arrow** will collapse and expand the component.

3. On the Left Sidebar click the **Gear** ⚙ button to open the **Dashboard Settings**. Here you can change the Display Title and change the order and configuration of the Dashboard Components.

4. Click the **Wrench** 🔧 beside the component you wish to personalize. Here you can change the component name, color and view threshold. Click **Accept**. You can also access this screen by hovering the mouse over the right corner of the component and clicking the **Options** ☰ button. From the menu, choose **Personalize**.

The **In Basket Management Dashboard** is a more comprehensive view of your In Basket.

Cheat Sheet

The following is a list of shortcuts to help you navigate in APeX.

Keyboard Shortcuts	
CTRL+ALT+L	Log out of Hyperspace.
CTRL+ALT+S	Secure your workstation.
TAB or SHIFT+TAB	Move to the next or previous field.
CTRL+TAB or CTRL+SHIFT+TAB	Access next or previous Workspace tab.
CTRL+ALT+Number	Access the second (2), third (3), etc., Workspace tab depending on the number pressed.
CTRL+C	Copy selected text.
CTRL+V	Paste text that you copied.
CTRL+P	Prints documents like reports or patient instructions.
CTRL + PAGE UP / PAGE DOWN	Select Next or Previous Dashboard
ALT+O	Open the Dashboard Launcher window.
ALT+E	Open the Dashboard Settings window.
ALT+R	Refresh Dashboard.
ALT+P	From Library tab, Collapse and Expand all templates.
ALT+S	From Library tab, access the Search field.

Relative Date Criteria	
T	Today
W-1	Last Week
M-1	Last Month
Y-1	Last Year