Reporting in APeX

Getting Started

Welcome to APeX reporting tools Reporting Workbench. This guide walks you through the most common reporting tasks using these tools in APeX.

You can also watch the elearning on Reporting Workbench at link below:

http://myapex.ucsf.edu/sites/myapex.ucsf.edu/files/APeX_Reporting%20WB.pdf

Overview of My Reports

My Reports gives you quick access to your favorite Reporting Workbench reports and to report results that you've saved. You can also view the statuses of recently run reports and open their results from My Reports.

The criteria available for a report and the actions you can take from the report's results vary by report. Depending on the report, you might be able to edit what it searches and how the results appear.

Overview of Dashboards

Dashboards centralize information you need throughout your day. Instead of going to multiple screens to run reports, view your schedule, and access your In Basket messages, you can see all this information on your dashboard.

Your primary Radar dashboard appears when you log in. However, you also have access to other dashboards.

From your primary dashboard, click ⬜. A drop-down menu appears, and you can select a different dashboard.

If you're in another activity and your dashboard is open, select the 🔵 tab under the main toolbar to go back to the dashboard.

Run Key Reports

There are many reports available in the system. The reports available to you depend on your job and the patients you work with. Run these reports to find important information about your work.

Find reports in the Library

You can find reports by searching the Library.

1. Select **APeX button** > **Reports** > **My Reports**. Then select the **Library** tab.
2. Enter the topic of the report you're looking for in the search field.

   □ For example, if you want a report to find patients with diabetes, enter "diabetic visit."
   □ To show only reports in your search results, clear the **Show templates** check box.

3. Click **Search**.
4. To limit your search results, you can apply filters, such as searching for Crystal reports related to billing.

   □ To search only for reports that you own or reports that you ran, select the appropriate check box.
   □ Click **Types** to view all of 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 of 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 of the template types. Types can include Reporting Workbench or Crystal 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.

5. Select a report.

   □ Click ▷ **Run** to run the report with the current settings.
   □ Click the ☆ to add the report to your Favorites list in My Reports and in your My Reports component for easy access later.
   □ Click 🖉 **Edit** to change the report's settings. You can then run the report with your edited settings or save it as a new report.

Find reports using My Favorites

You can find your most frequently used reports in the My Favorite Reports section of My Reports.

1. Go to the **APeX button** > **Reports** > **My Reports.**
2. In the My Favorite Reports section, find your favorite Reporting Workbench reports.
3. Click the report you want to run.
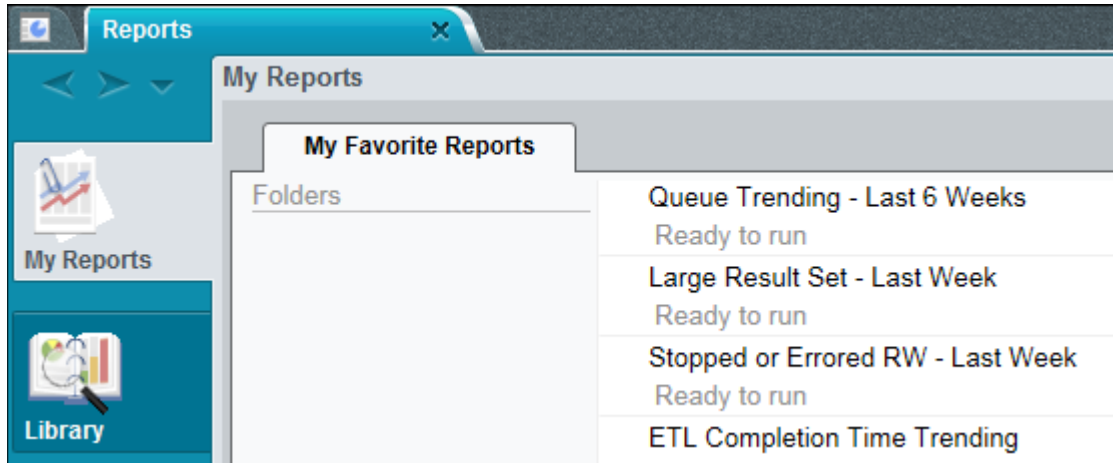
Run a report

You can find and run the report from the Library.

1. Go to the **APeX button > Reports > My Reports > Library tab**.
2. Search for and select a report from the Library and click **Run**. A status indicator appears below the Library showing the progress of the report run.

> Search for Reports that have **UCSF** in the name. These are validated UCSF reports.

3. When the indicator show the results are Ready, click it to open the report's results.
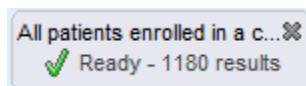
Request Crystal reports

APeX-Crystal reports are run by batch job on a set schedule. Instead of running a report at any time, you must request the report. Crystal reports are indicated by the label below them, which also designates their availability.

1. Go to the **APeX button** > **Reports** > **My Reports** > **Library tab**.
2. Enter a report in the search field.
3. Click **Search**.
4. Click ☆ to add the report to your Favorites list in My Reports.
5. Click the **My Reports** tab.
6. In the My Favorite Reports section, right click the report you want to run.
7. Select **Request Report**.
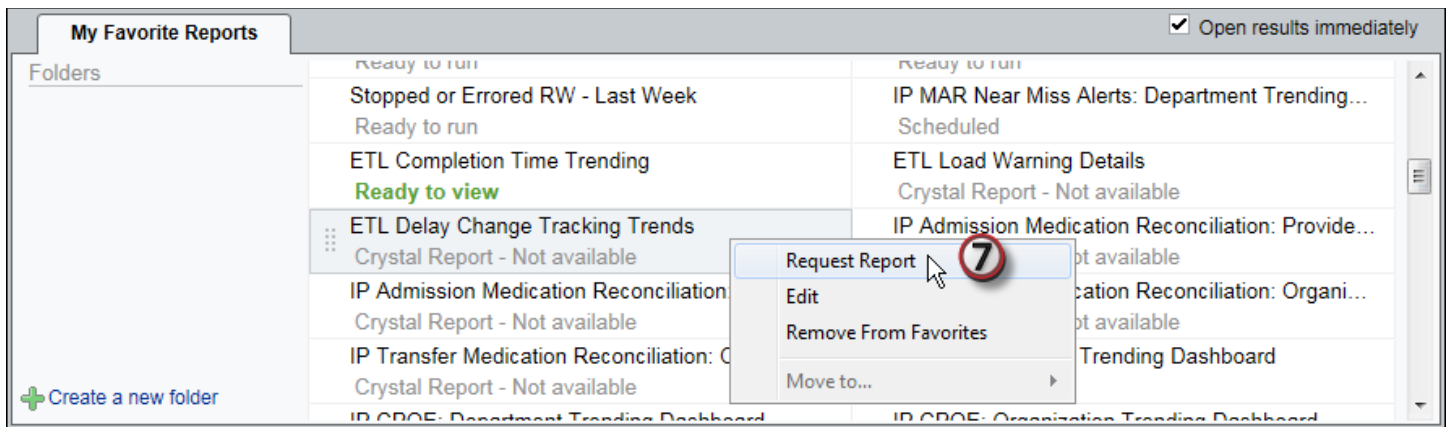
Rerun a report to get updated results

You can't rerun some reports until their results expire, regardless of whether you're accessing the report from a dashboard or from My Reports. This limit is set because if too many reports are running the system slows down. If you click **Run** for a report you've already run, you see the results from the last time you ran the report.

To get updated results, you have to wait for the system to reset the report. You know a report is ready to run again when:

- The status of a report on a dashboard changes to Ready to run.
- The Valid Until time listed in the **Recent Results** section for a report in My Reports has passed and the results are listed as Expired.

Run a report on someone else's patients

Some reports are set up so you can run them to report on someone else's patients. For example, a physician might ask his nurse to contact his patients who didn't show up yesterday for their appointments. The nurse can run a report that searches the physician's patients for no shows.

1. From My Reports, select the report you want to run and click **Edit**. The Report Settings window opens.
2. On the Criteria tab, select the **Run as user** criterion.

   □ You might need to scroll down to see additional criteria. You can also enter a keyword, such as "Run", in the Filter criteria field to search for this criterion.

3. In the **User** field, enter the person for whom you are running the report.
4. Click **Run**.

   □ If you receive a message asking if you want to save the report, click **Save** if you run this report often. Click **Don't Save** if this is the only time you will run this report for this person.

5. The Report Settings window closes. If you have the **Open results immediately** check box selected in My Reports, your results open automatically. If this checkbox is not selected, you can access your results in the Recent Results section of My Reports.
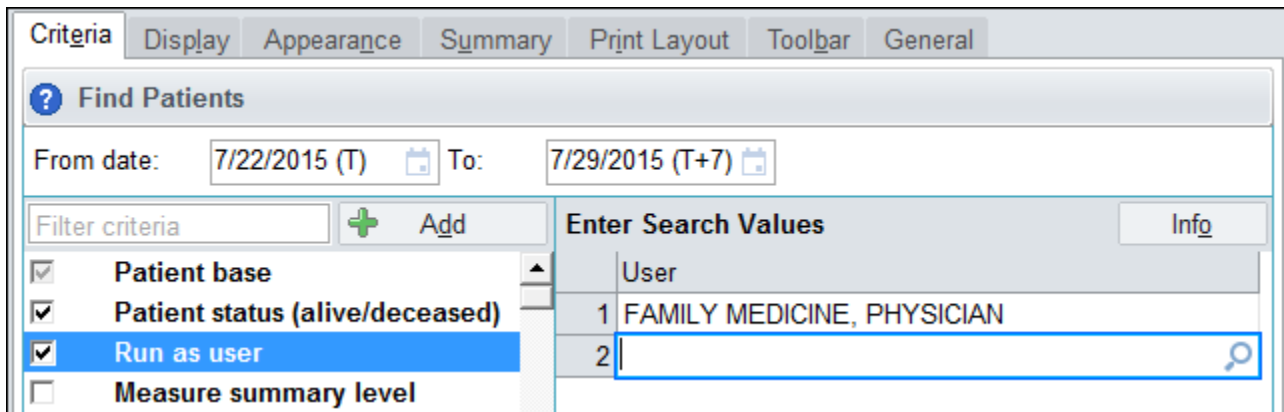
Receive notice when report results are ready

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 so you can do other work while the report runs.

1. From My Reports, select the report for which you want to receive an In Basket message and click **Edit**. The Report Settings window opens.
2. Select the **Notify** check box and click **Close**. The next time you run this report, you receive a Reporting Workbench In Basket message when the results are ready. You can click the hyperlink in the message to open the report's results.

    ▫ You do not need to save the report. The **Notify** option remains selected for this report until you clear it.
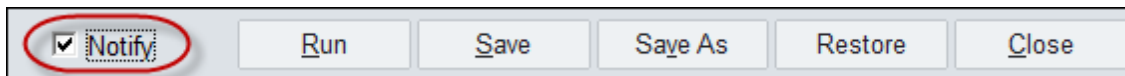
Add a report to your list of favorites

Instead of searching for a report each time you want to run it, you can add it to your Favorites list so it is easy to find. If your dashboard includes a My Reports section, favorite reports also appear on your dashboard.

1. Go to the **APeX button > Reports > My Reports**. Select the **Library** tab and find a report you frequently use.
2. Click ☆ to the left of the report's name. The star turns yellow to signify that this report is one of your Favorites.

    ▫ To remove the report from your Favorites, click the ☆ again. A window appears prompting you to confirm your choice.
    ▫ You can also add a report to your Favorites from the Recent Results section in My Reports by clicking ☆ after you run the report.

3. The report now appears in your Favorites list on the **My Reports** tab. You can run or edit it from there.
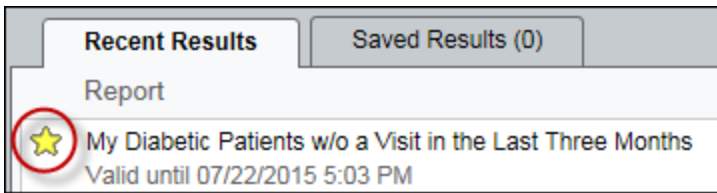
Save a report's results

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.

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 the **My Reports** tab. Saved report results have expiration dates, after which their information might no longer be relevant. The next time you open Reporting Workbench after the saved results have expired, a window appears where you can delete or resave the results.

1. From a report's results, click 🖾 **Options.**
2. Select 💾 **Save Results**. The Save Results window opens.
3. Enter a name and an expiration date for the results.
4. Click **Accept**. The report results appear in the Saved Results section.
5. To view the results, select the report.
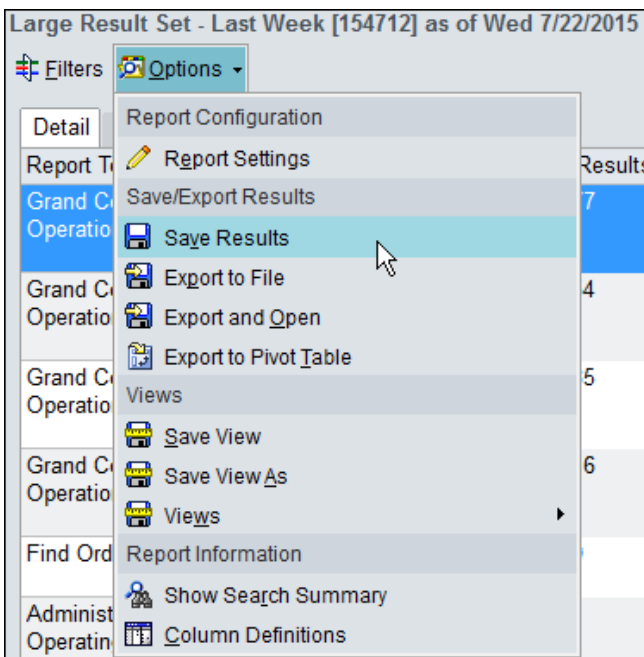
Print a report's results

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.

1. From a report's results, click 🖨 **Print** on the Hyperspace toolbar and select **Print List**. The Reporting Workbench Print window opens.
2. Enter "Server Printer" in the **Destination** field.
3. Select your printer in the **Printer name** field.
4. Enter the number of copies to print.
5. Select a View from the following options:

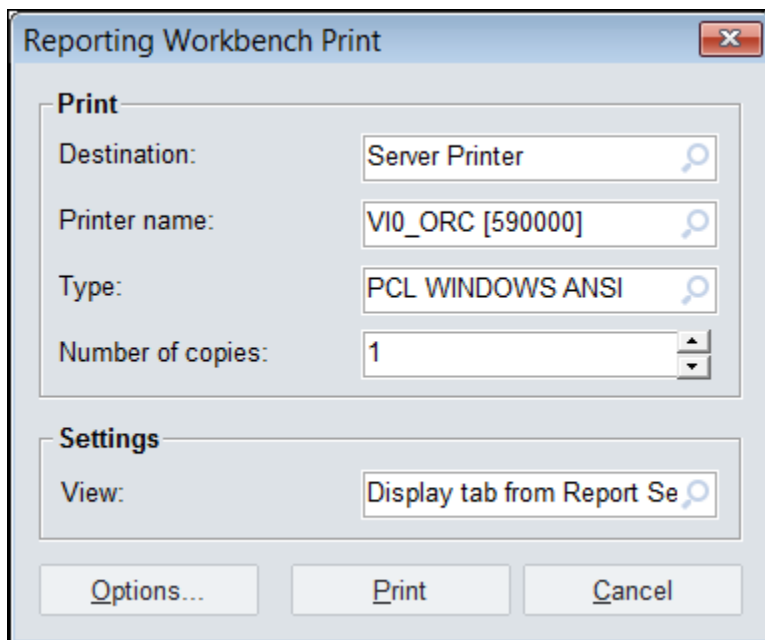   □ **Current View:** This option is only available if you made changes without saving. Selecting the view prints exactly what is on screen.
   □ **Print Layout tab from Report Settings**: This option prints the layout specified on the **Print Layout** tab of Report Settings.
   □ **Saved Views:** Any 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.

6. Click **Print**. The window closes and the results are printed.

Organize your favorite reports from My Reports

Once you add reports to your Favorites, you can change the order in which they appear and add folders to group your reports by topic or by other categories that are more useful for you.

1. From the **My Reports** tab, click ➕ **Create a new folder** in the **My Favorite Reports** section. A window appears.
2. Enter a name for your folder in the **New folder name** field. Click ✔ **Accept**.
3. To move reports into your new folder, click to the left of the report name so that ✥ appears.
4. Drag the report and drop it in the folder of your choice.
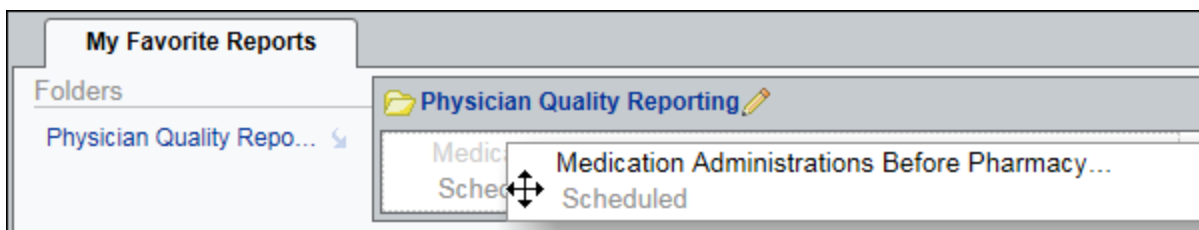
Find and Follow Up on Information in Reports Quickly

Sort a report's results

Sorting lets you rearrange report results so the patients you are most concerned about appear at the top. For example, if you're reviewing a list of pregnant patients, you can sort the results so the patient with the earliest expected date of delivery is listed first.

1. From a report's results, click the column header that you want to sort by. Click the header a second time to sort the results in descending order.
2. To sort results by up to three columns, right-click a column header and select **Custom**. The Custom Sort window opens.

   a. In the **First On** section, select the first column you want to sort by. For example, select **Department**.

   b. 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.

   c. 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.

   d. Click **Accept**. The results are sorted according to your preferences.
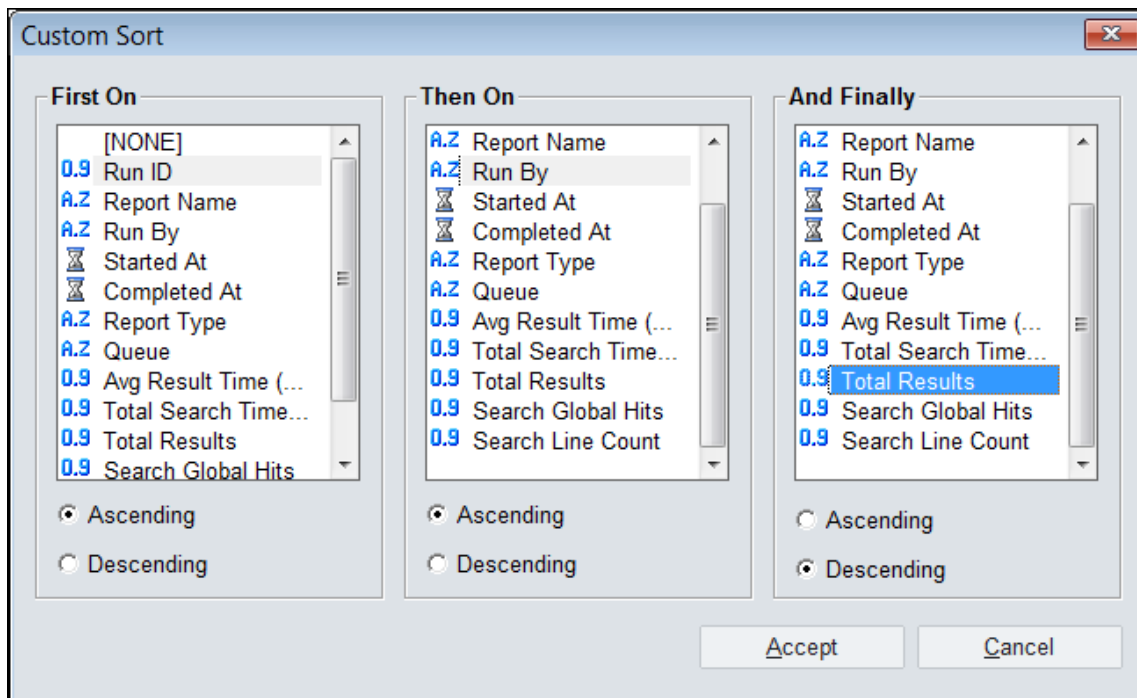
Filter a report's results

To quickly find results that are important to you, you can temporarily hide other results. For example, if you want to see only the patients in the cath lab, you can filter the results to hide the patients in other departments.
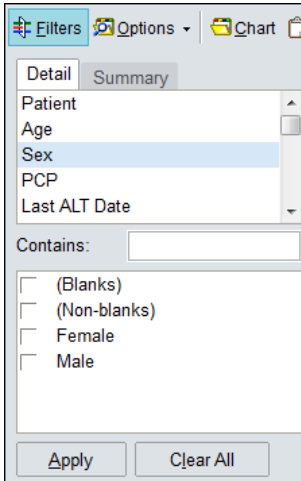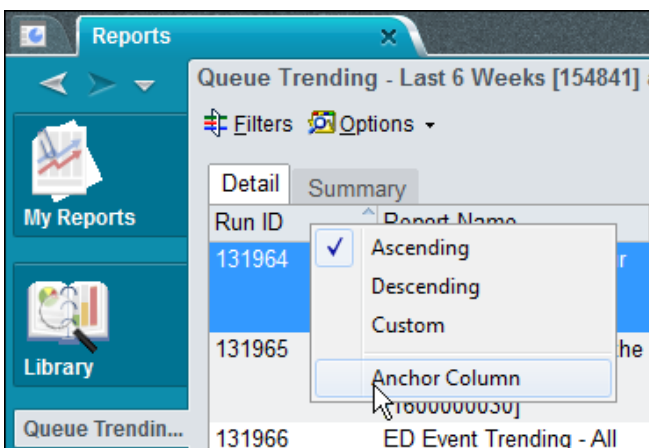
1. From a report's results, click ⬌ **Filters** to open the filter pane.
2. Select the criterion you want to filter on in the top list in the filter pane.
3. Select the options you want to appear in the results in the bottom of the filter pane.
4. Click **Apply**. The results are filtered to include only the values you specified.
5. To remove the filter, click **Clear All**.

Anchor columns

You can prevent Reporting Workbench columns from moving when you scroll by anchoring them in place. For example, if you anchor important columns, such as Patient MRN or Name, this identifying information won't be out of sight when you scroll to view the rest of a report. No matter where you move in a report, the anchored columns always appear on the left side of the screen to give you context for each row you're viewing.

1. Go to **APeX button > Reports > My Reports** and open the report you want to edit.
2. Right-click the heading of the column you want to anchor. All columns to the left of the column you selected will also be anchored.
3. Select **Anchor Column**.

Save your view

After you've applied filters, you can save the report with the filters applied. If you save a view, the filters, sorting, and column anchoring are all saved.

1. After applying filters to a report's results, click ⭐ and select **Save View**.
2. Enter a name for the view.
3. Click **Accept**.

Manage your saved views

Click ⭐ and select **Manage Report Views**.

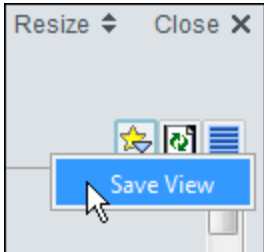- To remove a view, hover over it and click ✖ **Delete**.
- To open a view every time, hover over it and click **Make this my default view**.
- To rename a view, hover over it and click ✏.
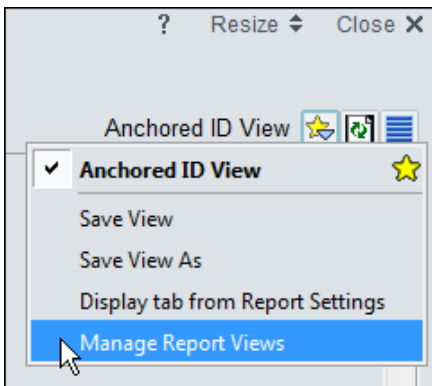
Follow up on a report's results

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.

Add patients to a Health Maintenance plan

Health Maintenance modifiers put patients into or exclude patients from Health Maintenance plans. For example, if most adult females are due for a Pap smear every two years, a Health Maintenance modifier can exclude a patient who needs a yearly Pap smear from the every-two-years plan and include her in the plan for a yearly Pap smear.

1. From a report's results, select the patient to whom you want to add a Health Maintenance modifier, and click ⊞ **HM Modifiers**. The Add HM Modifiers window opens. The patient you selected appears in the Patient List section on the right.
2. Select the modifier you want to add in the left pane.
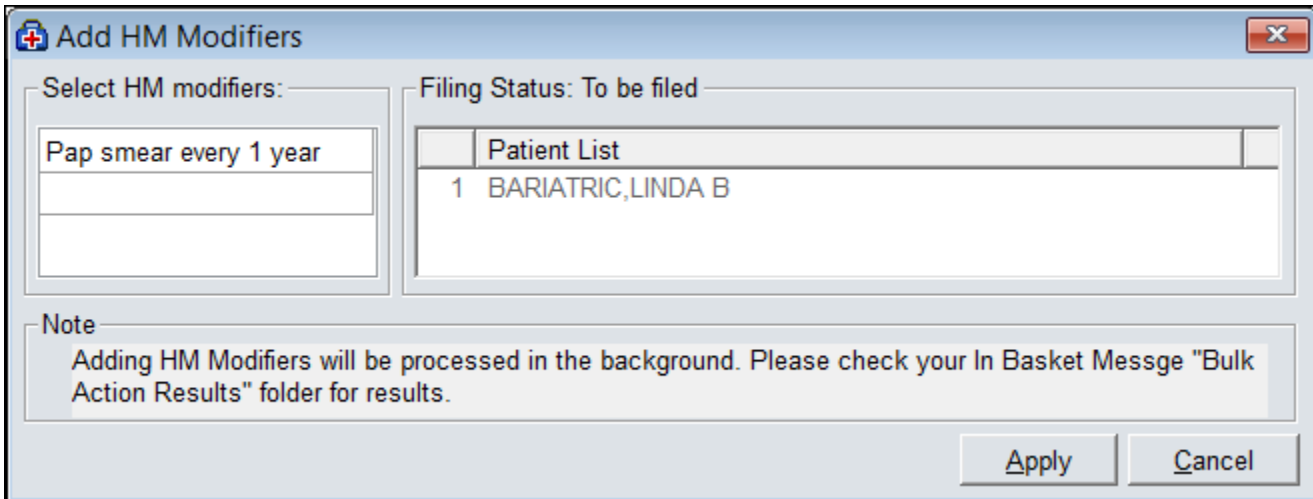3. Click **Apply**. The filing status above the Patient List section changes to Succeeded.
4. Click **Close** to return to the report's results.

> ⓘ From a report's results, you can select a patient, press **Shift**, and select another patient to select all of the patients in between the two. Or, you can select a patient, press **Ctrl**, and select other patients that aren't next to each other. With multiple patients selected, you can add a modifier to all of those patients at once.

Add patients to a patient list

A patient list is simply a list of patients. You might create a patient list to quickly find and access all of the patients you are closely following.

1. From a report's results, select the patient you want to add to a patient list. Click ⛊ **Add to List**. The Add Patients to a Patient List window opens.
2. Select the list you want to add the patient to or create a new list, and click **Add to Patient List**. You return to the report results. When you open that patient list, the patient you added is included. You can now access the patient's information from the patient list instead of looking for the patient in the report's results.

Send Patients a MyChart Message

You can send bulk messages to Active MyChart Messages by clicking **Send Patients Message** button.

Modify Reports

Modify a report's criteria

You can change reports that don't quite meet your needs. For example, you might use a report that finds your patients with diabetes and high HbA1c results. You can change the report to find all patients with diabetes and high HbA1c results who were seen in your primary department and then save a new version of the report.

1. From My Reports, right-click the report you want to change and select **Edit**. The Report Settings window opens.
2. On the Criteria tab, change the search value for any criterion. For example, change Patient Base from My Patients to Patients Seen in My Primary Department.
3. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the results include the modified criteria.

Add criteria to a report's search

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.

1. From the Library, right-click the report you want to use, such as the Find Patients: Generic Criteria report, and select **Edit**. The Report Settings window opens.
2. On the Criteria tab, select a criterion to include in the report, such as Age in Years. A check mark indicates which criteria are selected for this report.
3. If you have a long list of available criteria to choose from, you can enter a keyword in the **Filter criteria** field to search for a criterion in the list.
4. On the right side of the Criteria tab, enter what values the report should find. For example, for the Age in Years criterion, enter "Less than or equal to" in the **Relationship** field and "18" in the **Age in Years** field to find patients greater than 13 years of age. The options that are available depend on the criterion you selected.

5. Click **Save As** and enter a new name if you want to create a new version of the report, and then click **Run**. The report runs and the results include records based on the new criteria.

Change a report's search timeframe

In some reports, you can set a date range to control the time frame the report searches. Setting a date range helps limit the number of results.

The date range applies only to criteria that change over time (these criteria are identified by this ⊘ icon).

For example, if you're searching for your male patients between January 1 and March 1, the date range is ignored because a patient's sex rarely changes. All of 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 January 1 and March 1.

1. From My Reports, right-click the report you want to change and select **Edit**. The Report Settings window opens.
2. In the **Specify Date Range** section, enter from and to dates. Certain reports also let you enter a time range.
3. Enter a relative date using one of the following shortcuts: w=week, m=month, or y=year. For example, enter "m-3" to search for patients whose BMI was greater than 30 in the past three months. You can also use an absolute date.
4. Click **Save As** if you want to save a new version of the report, and then click **Run**.

Remove deceased patients from a report's 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.

1. From My Reports, right-click the report you want to run and select **Edit**. The Report Settings window opens.
2. Select **Patient Status** from the criteria on the left.

   □ If you don't see the Patient Status criterion, click **Choose Criteria** and search for it.

3. In the **Relationship** field, enter "Not equal to."
4. In the **Patient Status** field, enter "Deceased."
5. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the results do not include deceased patients.

Patient status (alive/deceased)				Relationship	Living Status
And	Or	Custom	1	Not equal to	Deceased
			2		

Add a column to a report's results to show additional data

To see other information about the records in a report's results, you can add additional columns to the results.

1. From My Favorite Reports, right-click the report you want to use and select **Edit**. The Report Settings window opens.
2. Select the **Display** tab. All of the columns available for the report appear in the Available Columns list. All of 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 **Add >**. The column moves to the Selected Columns list.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**.

Available Columns	Selected Columns	Width(
Column Name ▲	Column Name	
Next Immunization Outreach Date [187(	Anchor (0 anchored)	
Next Obesity Outreach Date [18743]	Patient Name	2500
Next Osteoporosis Outreach Date [187₄	PATIENT AGE	1200
Next Tobacco Cessation Outreach Date	PCP	2340
Patient DOB [54500]	Recent CHF Outreach Date	1455
Patient HM Modifiers [17820]	Recent CHF Outreach Type	3525
Patient MRN [1003]	Next CHF Outreach Date	1455
Patient Phone Number [1005]	MPM CHF - Most Recent Curr...	1845
Patient Sex [54501]	MPM CHF - Most Recent Curr...	1845
Patient's Primary Location [54504]	MPM CHF - Most Recent LVEF	750
Recent Breast Cancer Screening Outre₂	MPM CHF - Most Recent LVE...	1200
Recent Breast Cancer Screening Outre₂	MPM General - Most Recent ...	750

Criteria | Display | Appearance | Summary | Print Layout | Toolbar | General

Add >
Remove <
Clear <<

Remove a column from a report's results

If a report's results are too crowded, you can remove columns that show information you don't need.

1. From My Reports, right-click the report you want to use and select **Edit**. The Report Settings window opens.
2. Select the **Display** tab. All of the columns that currently appear in the report are in the Selected Columns list.
3. Select a column from the Selected Columns list, and click **Remove <**. The column moves to the Available Columns list.
4. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the column you removed no longer appears.
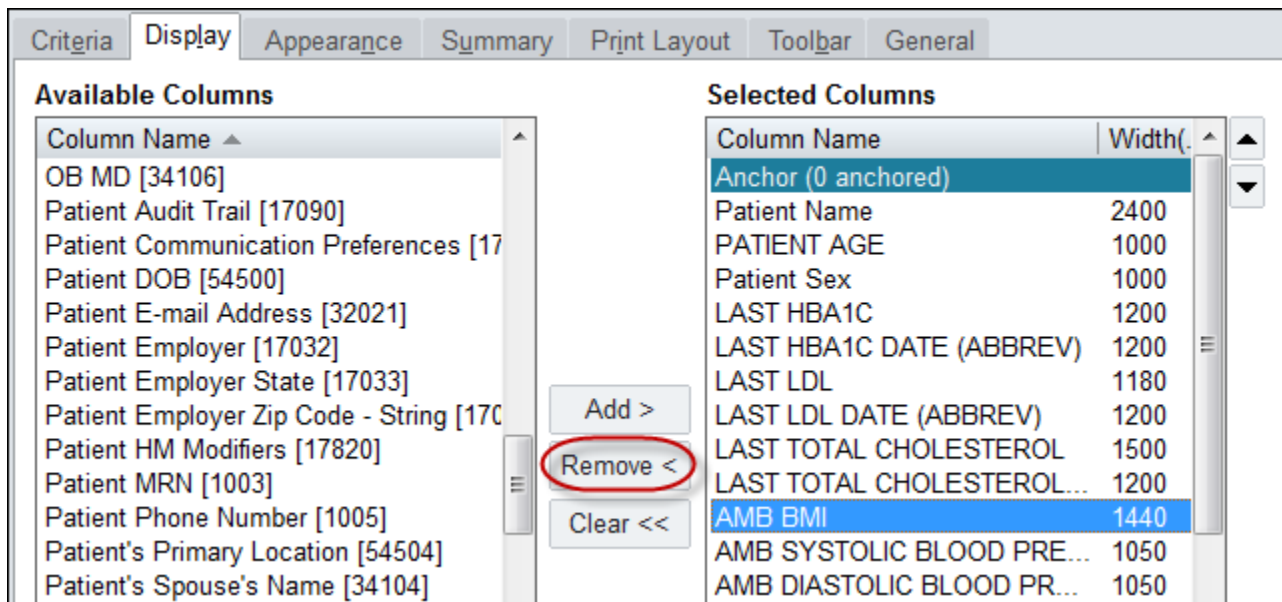
Keep columns in the same place

You can prevent Reporting Workbench columns from moving when you scroll by anchoring them in place in Report Settings.

1. Go to **APeX button > Reports > My Reports** and select the **Library** activity tab. Create a new report or select **Edit** for the report you want to update. The Report Settings window opens.
2. On the **Display** tab, move the blue Anchor divider in the Selected Columns list using the ▲ and ▼ arrows so that the columns you want anchored are above the divider. The Anchor divider appears by default and shows the number of columns that you've anchored.
3. Click **Save** to save the new anchor settings.
4. Click **Run** to run the report

Change the order of the columns in a report's results

1. From My Reports, right-click the report you want to use and click **Edit**. The Report Settings window opens.
2. Select the **Display** tab.
3. Select a column in the Selected Columns list.

4. Click ▲ or ▼ to move the column up or down. The first column in the list is the leftmost column in the report's results.
5. Repeat steps 3 and 4 until you are satisfied with the column order.
6. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the columns appear in the order that you specified.

Change the width of a column in a report's results

Besides adjusting the column widths from the report results by clicking and dragging the columns' headers, you can also adjust the widths listed on the **Display** tab of the Report Settings window.

1. From My Reports, select the report you want to use and click **Edit**. The Report Settings window opens.
2. Select the **Display** tab.
3. Double-click a column in the Selected Columns list. The Column width window opens.
4. Enter the column width you want to use and click **Accept**. You return to the **Display** tab.

   ▫ 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.
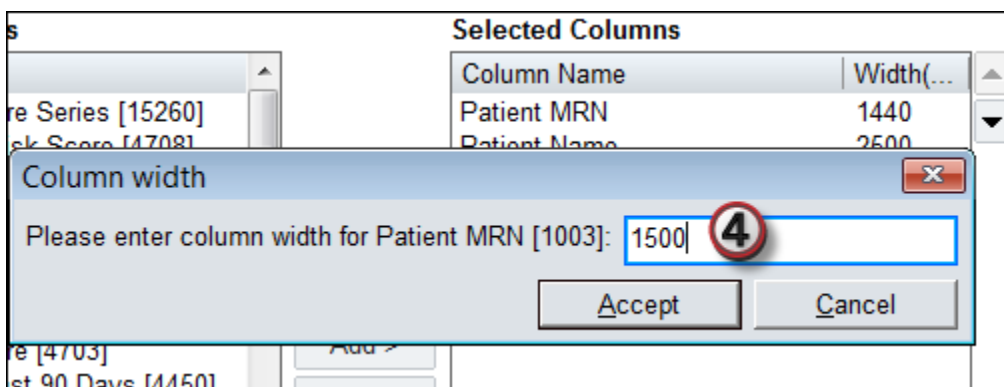

5. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the columns are the width that you specified.

Change the color and font in a report's results

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 My Reports, select the report you want to use and click **Edit**. The Report Settings window opens.
2. Select the **Appearance** tab.
3. Clear the **Use theme colors** box.
4. Select **By row** or **By column** to indicate whether you're changing the appearance of the rows or columns.
5. Select the area of the results you want to change from the **Property** menu.
6. To change the font:

   ▫ Click in the **Font** field. The Font window opens.
   ▫ Select the font type from the **Font** menu.
   ▫ Select the font style from the **Font style** menu.
   ▫ Select the font size from the **Size** menu.
   ▫ Click **OK**. An example of the font appears in the Colors and Fonts table.

7. To change the color:

   ▫ Click **Set** next to the **Color** field. The Color window opens.
   ▫ Select a color and click **OK**. An example of the color appears in the Colors and Fonts table.

8. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the results appear using the font and color you specified.
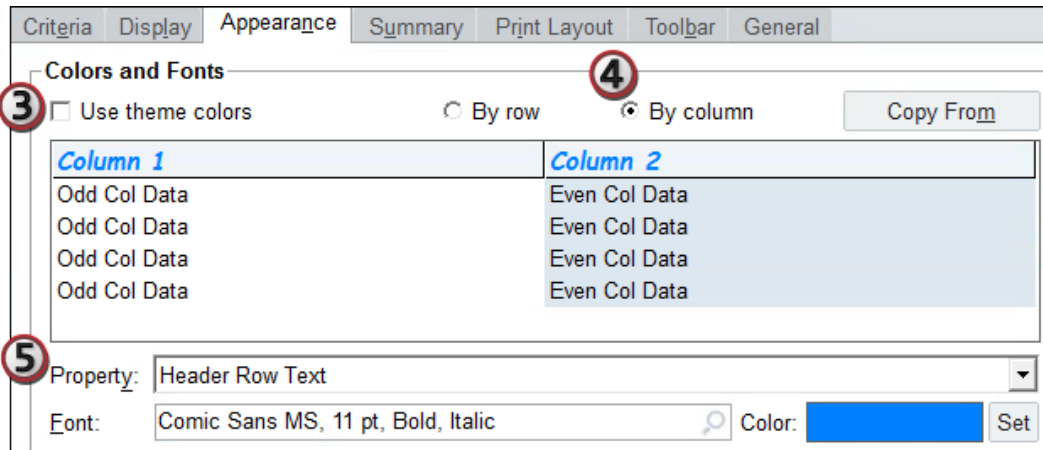
Call attention to specific values in a report's results

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' recent A1C levels, you can have any level above 7 (abnormal) appear with a red background so you can quickly identify patients to check on.

1. From My Reports, right-click the report you want to use and select **Edit**. The Report Settings window opens.
2. Select the **Appearance** tab.
3. Below the Row Color and Font Overrides table, click **Add**.
4. In the **Column** field, select the column that contains the values you want to call out. For example, if you're looking for high A1C levels, select the Last HBA1C column. Click **Accept**.
5. Enter the logic you want to use in the **Operator** field. For example, enter "Greater Than."
6. Enter what the system should look for in the **Value** field. For example, enter "7."
7. To change the font:

   a. Select the **Text font** option.
   b. Click 🔍 in the **Text font** field. The Font window opens.
   c. Select the font from the **Font** menu.
   d. Select the font style from the **Font style** menu.
   e. Select the font size from the **Size** menu.
   f. Click **OK**. An example of the font appears.

8. To change the text color:

   a. Select the **Text color** option.
   b. Click **Set** next to the block of sample color. The Color window opens.
   c. Select the color.
   d. Click **OK**. An example of the text color appears.

9. To change the background color of the cell:

   a. Select the **Background color** option.
   b. Click **Set** next to the block of sample color. The Color window opens.
   c. Select the text color.
   d. Click **OK**. An example of the text color appears.

10. Click **Accept**. A sample of the display appears in the Override rules table. Click **Add** if you have another value you want to call out for that column.
11. Click **Save As** if you want to create a new version of the report, and then click **Run**. The report runs and the values that meet the criteria you specified appear in the font and color you selected.
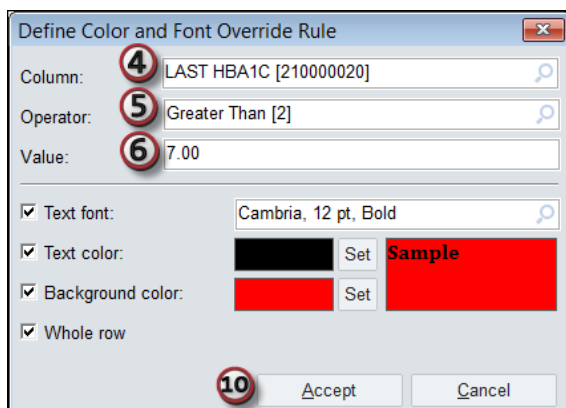
Organize action buttons

Sometimes the buttons that appear by default in your Reporting Workbench toolbar 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 report results.

1. Go to **APeX button > Reports > My Reports > Library**. Create a new report or select **Edit** for the report you want to edit. Report Settings opens.
2. Select the Toolbar tab.
3. Use the check boxes to determine which buttons appear for that report. Click **Select All** or **Clear All** to add or remove all buttons at the same time.
4. Click the arrows on the right side of the screen to reorder the buttons. Buttons at the top of the tab appear to the left of the toolbar, while buttons at the bottom appear on the right of the toolbar.
5. Click **Save** to keep your changes when you're finished. The next time your run this report, you'll see your changes.
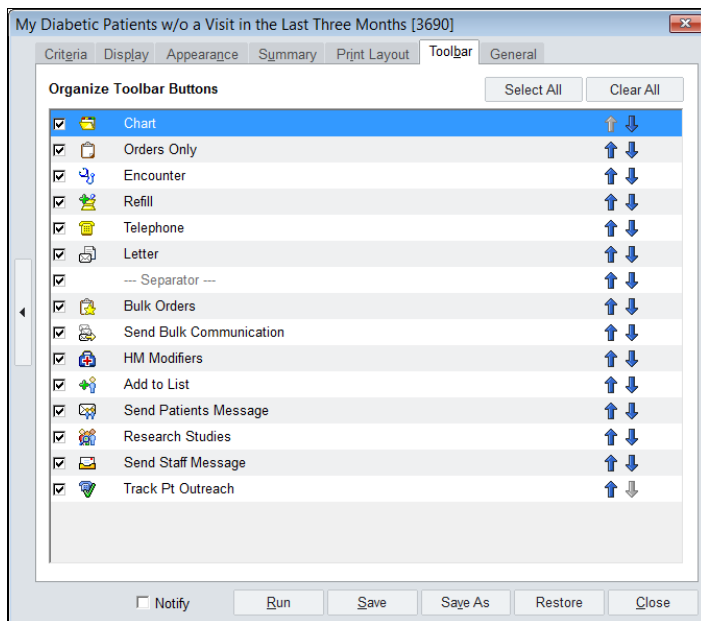
# Save a modified copy of a report

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.

If the **Save As** button isn't available in Report Settings, you need to change the report each time you want to run it with these settings. If you often make the same changes, ask your reporting team to create a new version of the report.

After you've created your own copy of a standard report, you can continue to change and save that copy. You don't need to keep making new copies of the same standard report.

1. Go to the **APeX button > Reports > My Reports > Library tab** and find the report you want to change.
2. Select the report and click **Edit**. The Report Settings window opens.
3. Modify the report to meet your needs.
4. On the **General** tab, select **Public** or **Private** to make your modified copy available to either everyone who has access to the report's template or only you.

□   If you select Private, the report appears with this 🔒 icon in the Library.

5. Click **Save As**. Enter a descriptive title for the report in the window that opens.
6. Click **Accept**. You return to the Report Settings window. The report is now available in the Library.
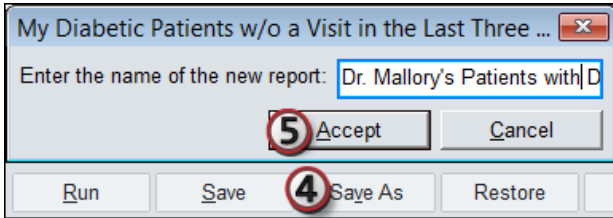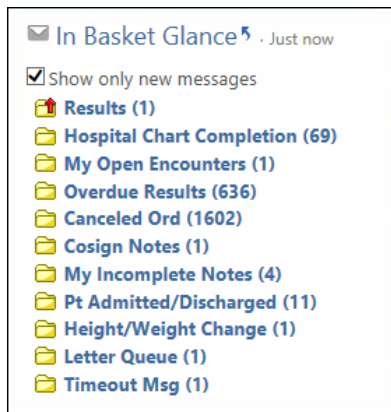

7. Click **Close** to exit the Report Settings window.

Use My Dashboards

(Only for Users that currently have Dashboards)

Manage In Basket

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 In Basket.

View reports from your dashboard

Your dashboard should give you quick access to all of the reports you commonly run. If a report you run frequently isn't on your dashboard, you can add it.

Your reports appear on your dashboard in the Favorite Reports component or in a link component. The Favorite Reports component is populated with the reports that you added to your favorites in Reporting Workbench. Link components often contain links to reports that are useful for a specific aspect of your job, such as monitoring Meaningful Use statistics.

Add a report to a report listing component

To add a report to a report listing component that shows your favorite reports:

1. Go to the **APeX button** > **Reports** > **My Reports** > **Library tab** and search for the report you want to add to your dashboard.
2. Click ☆ next to the report.
3. Return to your dashboard and click ⟳ to refresh your dashboard. The report now appears in the list.

Add a report to a link component

To add a report to a link component:

1. Click ▤ and select **Personalize**. The personalization screen opens.
2. In the **Add item** field, click 🔍 and select Report. Click **Accept**.
3. Click ➕ **Add**. A search window appears.
4. Enter the topic of the report you are looking for in the **Report** field and press **Enter**. A list of matching reports appears.
5. Select a report and click **Accept**.
6. The report appears in the search window. In the **Label** field, you can change the title that appears for the report.
7. Click **Accept** to add the report to the component.
8. Click **Accept** to save your changes and return to the dashboard.
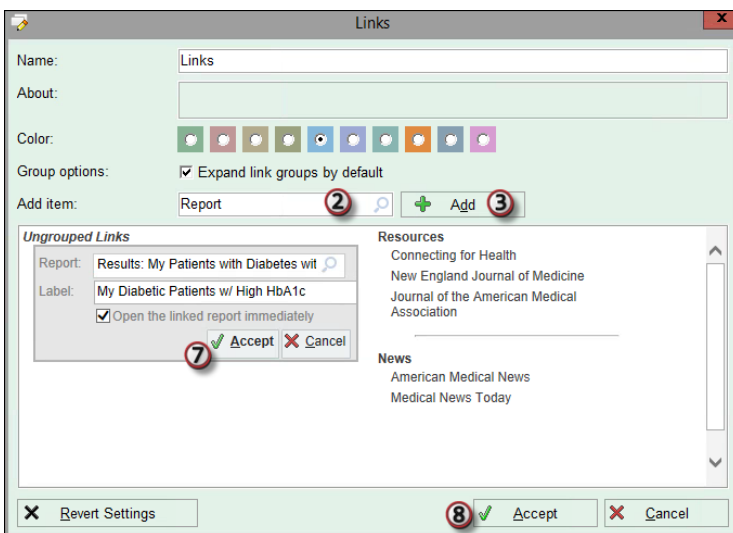
Organize reports on a dashboard

You can arrange how reports appear on your dashboard. For example, you can group all of your reports about diabetic patients together.

Organize your reports in a link component

To organize the reports in a link component:

1. Click ▤ and select **Personalize**. The personalization screen opens.
2. Click a report title and drag it to where you want it to appear in the list.
3. When you're finished organizing the reports, click **Accept** to exit the Component Editor and return to the dashboard.
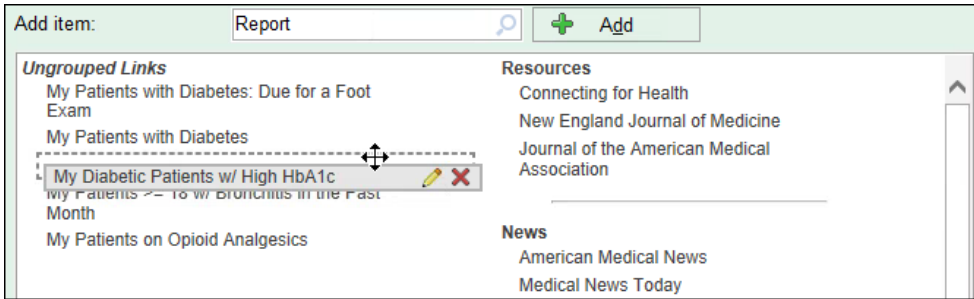
Organize your favorite reports

You can also organize the reports in your Favorite Reports component by their source.

1. On your Favorite Reports component, click ▤ and select **Personalize**.
2. Select the **Group reports by their source** check box.
3. Click **Accept**.
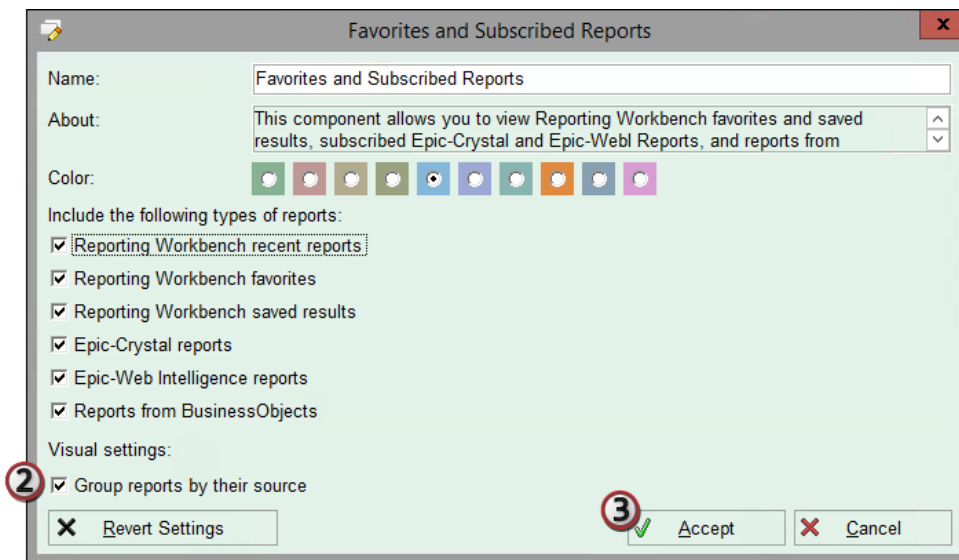
Personalize your dashboard

You can make your dashboard and components more useful for you by personalizing them.

1. On your dashboard, click ⚙. The personalization screen opens.
2. On the **Layout** tab, enter a new Display title to change what the dashboard is named.
3. Click 🔧 next to a component to change its name, color, and display settings. Click **Accept** when you're finished editing a component.
4. Click **Save As** to save your changes.

Layout	Parameters

Display title: Inpatient and Outpatient Clinical Metric Trends: Physician

Description: An inpatient and outpatient trending dashboard for physicians.

Components:

Compliance and System Proficiency	Compliance and Proficiency
Outcome Metrics	MR Patient Engagement Statistics: Provider Trending
Inpatient Pulse Metrics	My Panel Metrics
	Outpatient Pulse Metrics

Save As   Accept   Cancel

Manage Populations with SlicerDicer

(For Advanced Users with Proper Security)

What is SlicerDicer?

SlicerDicer is a reporting tool that helps you discover information about the patients at your organization. It pulls together data from patients across your organization to help you find patterns and investigate trends. You can quickly display information about groups of patients in graphs within Hyperspace.

SlicerDicer can also be a useful tool to show a patient how he compares to other patients like him. For example, if you have a patient with COPD who refuses to stop smoking, you can use SlicerDicer to show that COPD patients who stop smoking have better lung function.

Create patient populations

To view meaningful data, you need to create a group of patients to examine. In SlicerDicer, a group of patient you want to compare is called a patient population.

1. Click **New**.
2. If you want to find trends across your organization, select **All Patients.** Select **My Patients** to include data for only patients that you've seen in one of the following capacities:

   - Primary care provider
   - Care team member
   - Treatment team member
   - Encounter provider
   - Attending provider
   - ED attending provider
   - ED treatment team member

3. You can compare multiple populations by clicking 🧑‍🤝‍🧑 **New** again. Another population loads in a new color.

> ℹ️ You can change the color for each population by clicking 🗂️.

Modify a patient population

With any population, you can narrow down which patients you view. For example, if you wanted to only view male patients, you could remove female patients from the results.

1. Click **Add Criteria.** The Include patients who... window opens.

   □ If you want to change the criteria to exclude a group of patients, change **Include** to **Exclude** in the header.

2. Click the **All** tab to see all available criteria.
3. Click a folder, such as **Demographics**. Each folder represents a category of criteria.
4. Select a criterion, such as **Sex**.

   □ Click ⭐ to add the criterion to your favorites if you plan to use it frequently. This criterion now appears on the Favorites tab.

5. Select a value that you want to include, such as **Male**. The chart with the new population loads.
6. To change the relationship of the criteria from AND to WHILE, select the **Require AND criteria be met concurrently** check box.
7. Click **Start Over**, **Undo**, or **Redo** to change the population you're working with.
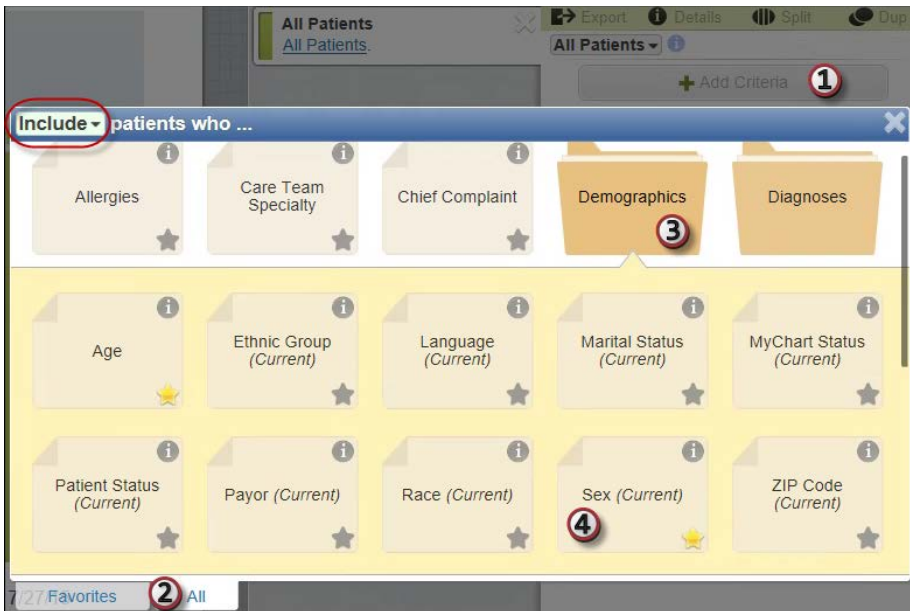
> ℹ️ If the criteria you want to add is a diagnosis, you can choose whether to search for that diagnosis in either SNOMED or ICD/Grouper mode.

Split criteria

If you want to divide your groups of patients based on whether they meet a specific criterion, you can split your population based on that criterion.

1. Click **Split**.
2. Click **Split by a New Criterion**.
3. Click a category of criteria to split by. If you want to compare which male patients who are smokers, select the **Social History** folder and then **Smoking Status.** The Split By Criterion window opens.
4. Select the criterion, such as **Smoking Status**.
5. Choose how to split the criterion.
6. Confirm that the split is correct and click **Split**.
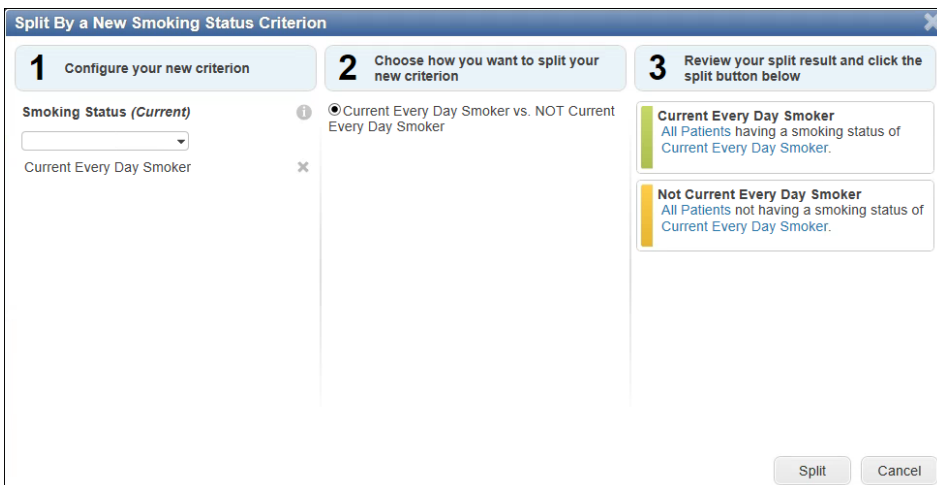
> ℹ️ If you split the population by age, you need to select the different age ranges to split by. Use the **Keep ranges even** check box to divide the range into even sections and save some time.

Add sequential criteria

If you want to track the progress of a group of patients over time, you can add sequential criteria. For example, you can discover how many patients with a hospital encounter were diagnosed with different types of sepsis.

1. Add your first criterion as you would normally.
2. Click ⚙ on the criteria you added.
3. Click **Add Sequential Criteria**.
4. Select the criterion you want to add.
5. Choose the date range for the criterion to search for. For example, you might want to see patients with hospital encounters who were diagnosed with sepsis six days within after their hospital encounter
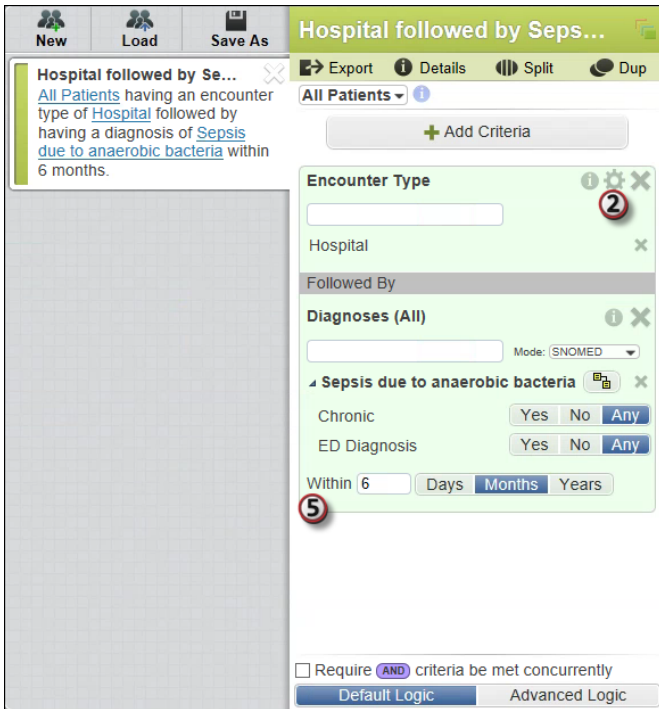
Duplicate populations

To save yourself time if you've already created a grouping of patients and want to compare it to another population with one additional criterion, you can duplicate the populations with applied criteria.

1. Select the population you want to duplicate.
2. Click Dup. A second population that matches the first opens.
3. Make changes to the second population to compare them.

Use advanced logic

All criteria use default AND logic. You can edit this logic to use AND, OR, or NOT by clicking **Advanced Logic** at the bottom of the criteria pane.

You can also click AND between two criteria to change it to OR.

Save a population

You can save a population if you use it frequently and might want to revisit it later.

1. Click **Save As** .
2. Click **Save Population**.
3. Type a name.
4. Select **Save to My Groups**.
5. Click **New Group**.
6. Enter a name.
7. Click **Save Population.**

Share a population

If you've created a population that you want other physicians to see, you can send it to everyone with a Hyperspace login or to a specific user. These users are notified about the population and can then load the population to view it or modify it.

1. Click **Save As** .
2. Click **Save Population**.
3. Type a name.
4. Select **Share with Others**.
5. Click **Everyone** or **Specific People**.
6. If you select **Specific People**, enter the logins of people you want to share with in the **Users** field.
7. Click **Save Population**.

View populations in different graphs

In SlicerDicer, you can view your population in multiple ways to find the easiest ways to view the data. You can view graphs for your populations as a percentage or as a number by choosing **123** or **%** next to the graph. If you need to view general trends, you can look at the percentage, but if you need specific numbers for following up, the number option is more fitting.

View the percentage of populations having another criterion

The default view for your graphs is a percentage of the common criteria. To compare different populations against each other, you can alternatively view your graphs as a percentage also having another criterion.

1. Click **%** next to the graph to view the numbers as a percentage.
2. Click the **% Setup** tab.
3. Select **Show % (rate) of each population also having another criterion**.
4. Choose a criterion.
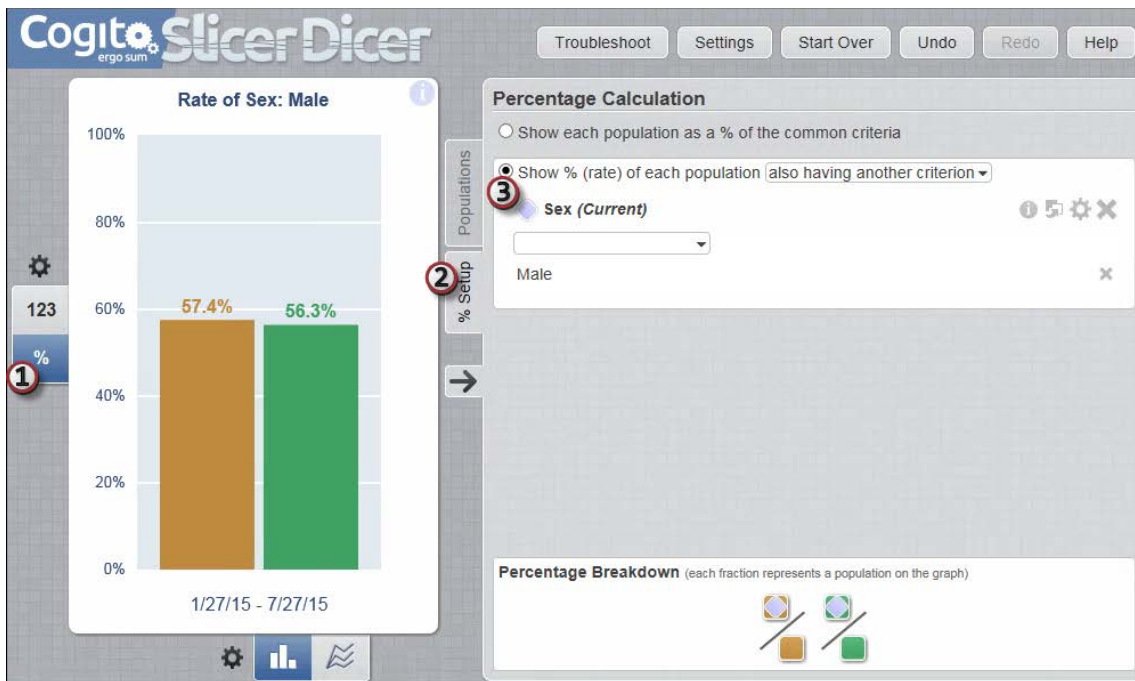
View a line graph

You can track changes over time with a line graph.

1. Click the icon underneath the graph.
2. Click and choose a timeframe and summary level.
3. Click outside the Horizontal Axis Configuration window to see your changes.

See saved populations

You can also open populations that you previously saved so you can edit them.

1. Click **Load**.
2. Click the population you want to load.

Export a population to Reporting Workbench

To export populations to Reporting Workbench, click . Reporting Workbench opens when the export is complete. From Reporting Workbench, you can jump into a chart, place orders, or view more details.

This guide is based on APeX 2015.