Understanding Reports

The NEDSS Base System provides standard reports that can be used to view, export and analyze data. It also provides report templates that can be used to create custom reports.

Creating Reports

To create a report, you perform the following procedures:

1. View the available reports from Template or Public Reports and select the report you want.
2. Select the basic filter criteria.
3. Optionally, select advanced filter criteria.
4. For custom reports, select columns to create a custom report.
5. Run the report.

You can also:

- Export a report.
- Save a report.
- Delete a report (only reports created by the user can be deleted.)

Viewing and Selecting Reports

You can view and select a report using the Reports page. The Reports page displays the Reports List and includes a list of the following items:

1. Private reports you create in the My Reports section.
2. Public reports accessible to any user in the Public Reports section.
3. Report templates you use to create a custom report in the Report Templates section.

To view and select a report, perform the following procedure:

1. Click Reports on the top navigation bar.

2. NBS displays the Reports page.

The Reports page is organized by the following sections:

1. Private Reports displays a list of private reports you created using custom report templates or modified using existing Template, Public or Private Reports.
2. Public Reports displays a list of reports available to all users with appropriate permissions.
3. Report Templates Displays a list of report templates you use to create a custom report.

Beneath each section name, the Reports Page displays a list of available reports. You can run a report and in the Private Reports section, delete a report.

Note: Click Delete to delete a report. From the Private Reports section, you can delete public or private reports you create and save.

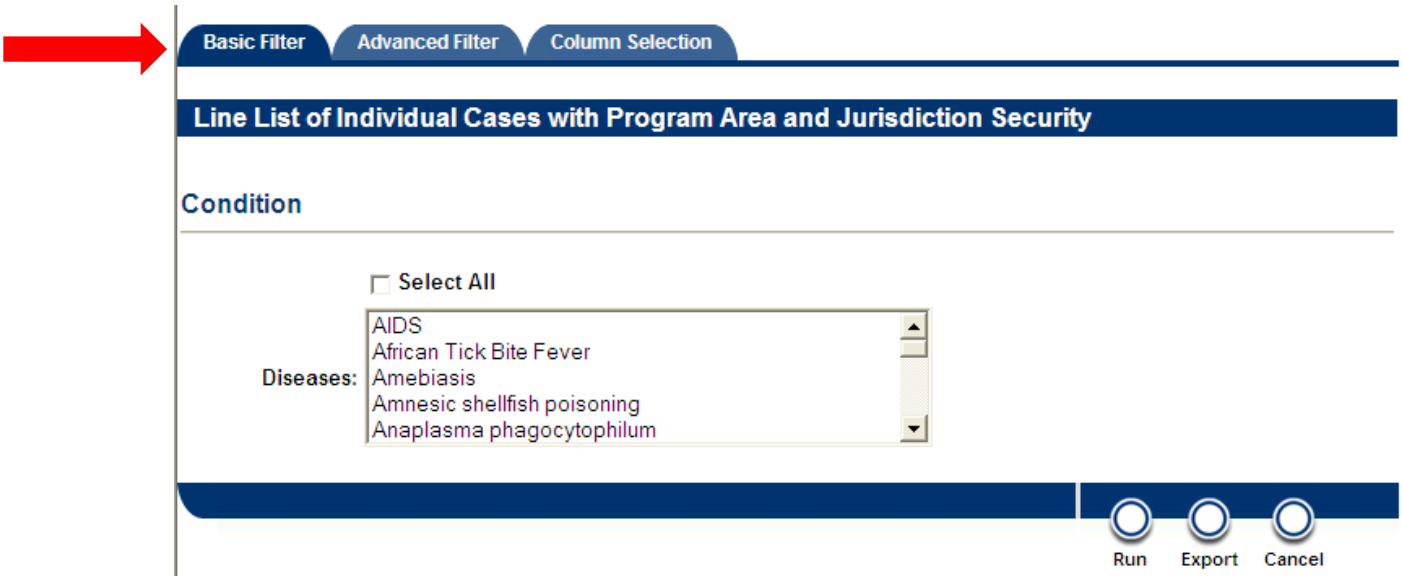
1. Click Run for the report you want.
2. NBS displays the contents of the Basic Filter tab on the Reports page for the selected report.
3. Once you select the report and display the Basic Filter tab, you are ready to select the basic criteria.

Selecting Basic Filter Criteria

You can select the basic filter criteria for your report using the Basic Filter tab. You should note that the available criteria you can use, depends on the report you choose. Not all sections and their associated criteria are available for all reports.

To select basic filter criteria, perform the following procedure:

1. Select the report you want.



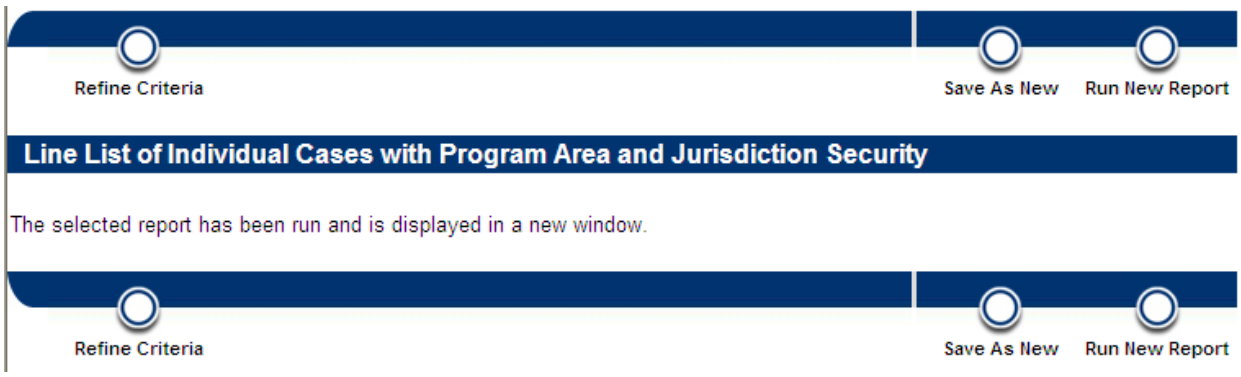
2. Select desired condition.

Note: Depending on the report you choose, you can select one or more conditions. Hold the Ctrl key to select multiple conditions.

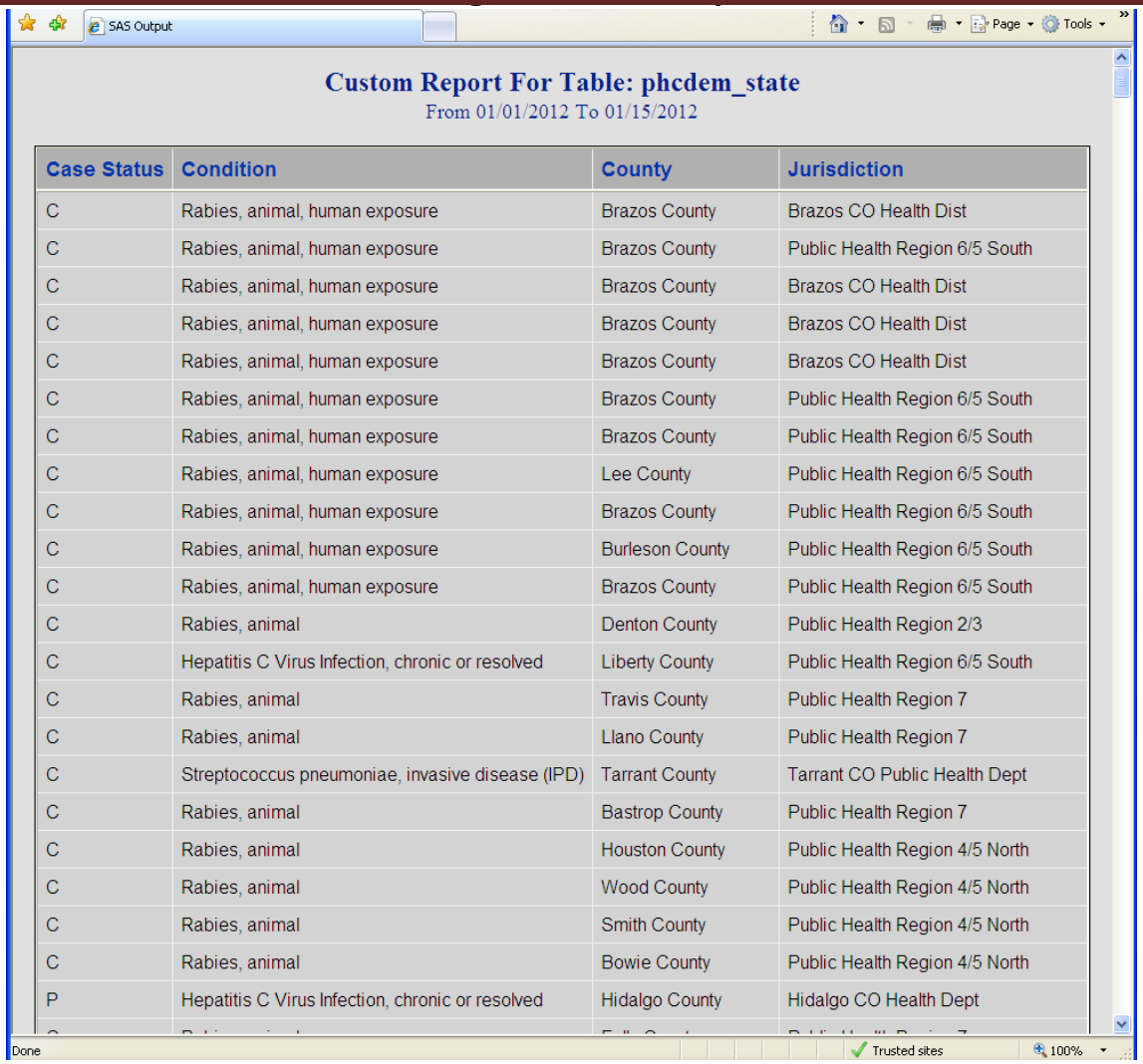
Note: You can also do one of the following:

- Click the Advanced Filter tab to choose advanced filter criteria and further refine your report.
- Click Export to export and save the report's data to your workstation.
- Click Cancel to cancel the report. NBS updates the Reports page.

3. Click Run to run the report.



Note: Depending on the criteria you choose, there may be a brief delay between when the Reports page updates and the report output displays. NBS displays the report output in a new browser window.



Custom Report For Table: phcdem_state
From 01/01/2012 To 01/15/2012

Case Status	Condition	County	Jurisdiction
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Lee County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Burleson County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal	Denton County	Public Health Region 2/3
C	Hepatitis C Virus Infection, chronic or resolved	Liberty County	Public Health Region 6/5 South
C	Rabies, animal	Travis County	Public Health Region 7
C	Rabies, animal	Llano County	Public Health Region 7
C	Streptococcus pneumoniae, invasive disease (IPD)	Tarrant County	Tarrant CO Public Health Dept
C	Rabies, animal	Bastrop County	Public Health Region 7
C	Rabies, animal	Houston County	Public Health Region 4/5 North
C	Rabies, animal	Wood County	Public Health Region 4/5 North
C	Rabies, animal	Smith County	Public Health Region 4/5 North
C	Rabies, animal	Bowie County	Public Health Region 4/5 North
P	Hepatitis C Virus Infection, chronic or resolved	Hidalgo County	Hidalgo CO Health Dept

Note: Depending on the report you choose and your workstation's configuration, Windows may prompt you to click Open to display the report output. The viewer in which the output displays also depends on your workstation's configuration.

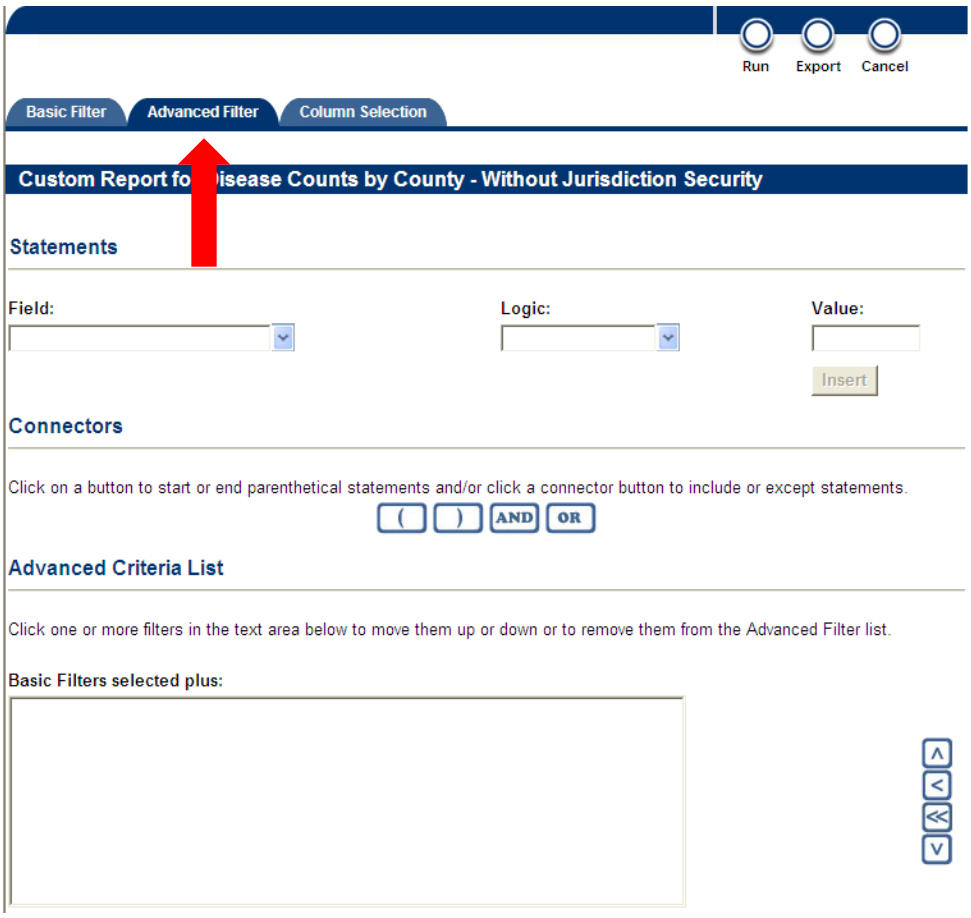
4. Click Close to close the browser window displaying the report output.

Once you run the report, you can do one of the following:

- Refine the report criteria.
- Run a new report.
- Save the report using the button, Save As New.

Selecting Advanced Filter Criteria

Once you select basic filter criteria, you have the option of selecting advanced filter criteria to further refine your report.



Note: While the use of advanced criteria is optional, you must select the basic criteria before entering advanced criteria.

Advanced Filter Tab

The Advanced Filter tab displays a list of advanced selection criteria, enabling you to create logical statements. The Advanced Filter tab also displays descriptive values for those fields that have an associated SRT code set. The user is able to select one or more values from the drop-down, and by clicking on the "Insert" button the values will appear in the Advanced Criteria List.

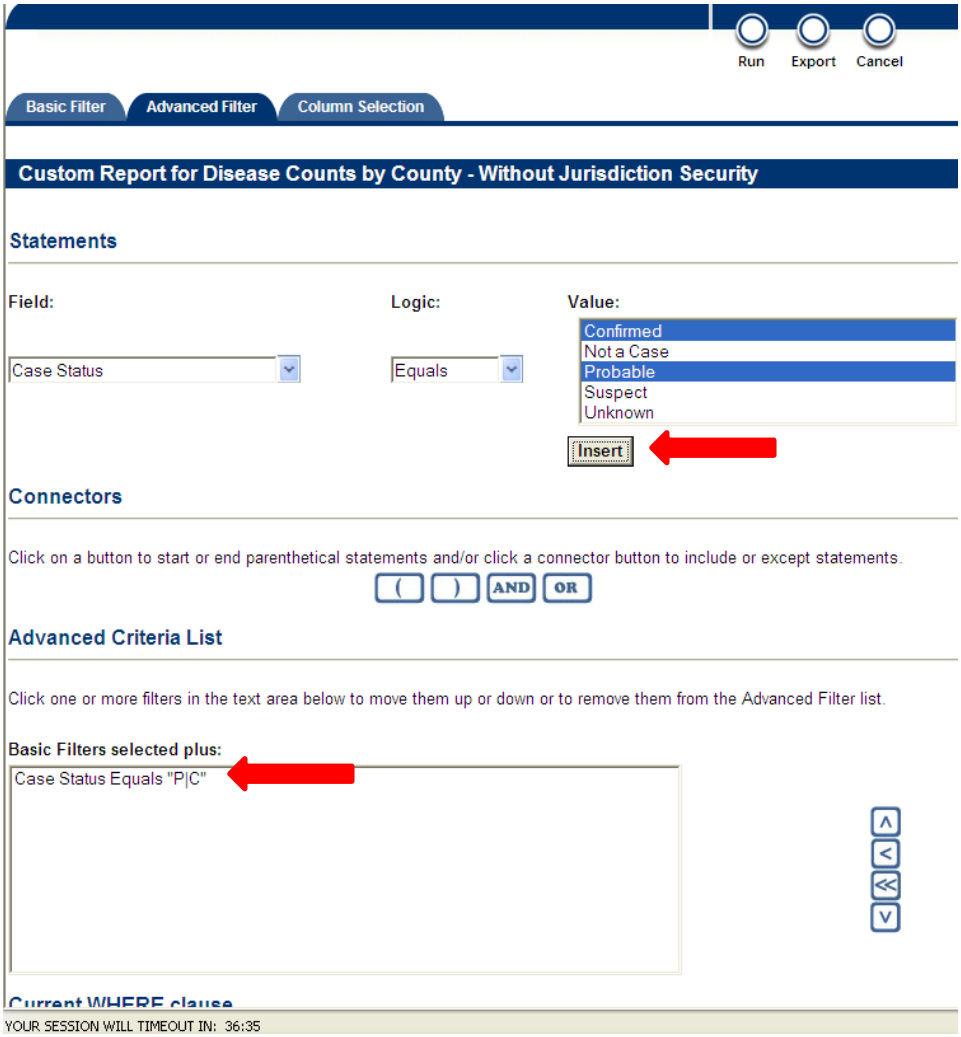
To select advanced filter criteria, perform the following procedure:

1. Select a report and enter the basic criteria you want.
2. Click Advanced Filter in the Reports page. NBS displays the contents of the Advanced Filter tab. The Statements section contains options for you to enter the field, logical operator, and values you want.
3. Click Field and choose the field you want.
4. Click Logic and choose the operator you want. The specific operators available to the user depend on the data type of the field.

The following operators will appear based on the data type as shown in the table below:

Date Type	Operators
Date	Between, Is Null, Not Null, Equals, Not Equals, Less Than, Greater Than, Less or Equal, Greater or Equal
Integer	Between, Is Null, Not Null, Equals, Not Equals, Less Than, Greater Than, Less or Equal, Greater or Equal
String (Free Text)	Contains, Starts With, Is Null, Not Null, Equals, Not Equals
String (Coded Values)	Is Null, Not Null, Equals, Not Equals

1. Click Value and choose or type the value you want.
2. Click Insert.



NBS displays your query in the Advanced Criteria List and the Current WHERE Clause sections. The Advanced Criteria List section displays the line items of the query you build using the options in the Statements and Connections sections, and enables you to set the order in which the statements display. The Current WHERE Clause section displays the WHERE clause expression you build using the available options in the Advanced Filter tab.

3. Optionally, click the item you want in the Connectors section to further refine your search criteria.

The following table displays the options available on the Connectors section:

Item	Description
(	Opened parenthetical connector. Used to start a parenthetical statement. Click to insert the "(" parenthetical symbol in the expression displayed in the Basic Filters selected plus text box in the Current WHERE Clause and Advanced Filter List sections.
)	Closed parenthetical connector. Used to end a parenthetical statement. Click to insert the ")" parenthetical symbol in the expression displayed in the Basic Filters selected plus text box in the Current WHERE Clause and Advanced Filter List sections.
AND	Concatenation. The AND Boolean operator requires both of two inputs to be present or two conditions to be met for an output to be made or a statement to be executed. Click to insert the "AND" statement in the expression displayed in the Basic Filters selected plus text box in the Current WHERE Clause and Advanced Filter List sections.
OR	Alternation. The OR Boolean operator requires either of two inputs to be present or conditions to be met for an output to be made or a statement to be executed. Click to insert the "OR" statement in the expression displayed in the Basic Filters selected plus text box in the Current WHERE Clause and Advanced Filter List sections.

4. Optionally, click the buttons to the right of Basic Filters Selected Plus list in the Advanced Criteria List section to organize or remove the criteria you want.

The following table displays the options available on the Advanced Criteria List section:

Item	Description
^	Move Up. Click to move the selected item up.
<	Remove. Click to remove the selected item.
<<	Remove All. Click to remove all items.
v	Move Down. Click to move the selected item down.

5. Repeat steps 3 – 8 to build your query. The Advanced Criteria List and Current WHERE Clause sections display the line items and WHERE clause expression of the query you build.
6. Click Run.

Note: You can also do one of the following:

- Click Export to export and save the report data to your workstation.
- Click Cancel to cancel the report.

NBS displays the report output in a new browser window and updates the Reports page.

Custom Report For Table: phcdem_state
From 01/01/2012 To 02/01/2012

Case Status	Condition Description	County	Jurisdiction
C	Hepatitis C Virus Infection, chronic or resolved	Liberty County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Burleson County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal	Denton County	Public Health Region 2/3
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Brazos CO Health Dist
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Brazos County	Public Health Region 6/5 South
C	Rabies, animal, human exposure	Lee County	Public Health Region 6/5 South
C	Rabies, animal	Travis County	Public Health Region 7
C	Rabies, animal	Bastrop County	Public Health Region 7
C	Streptococcus pneumoniae, invasive disease (IPD)	Tarrant County	Tarrant CO Public Health Dept
C	Rabies, animal	Llano County	Public Health Region 7
C	Rabies, animal	Houston County	Public Health Region 4/5 North
C	Rabies, animal	Wood County	Public Health Region 4/5 North
C	Rabies, animal	Smith County	Public Health Region 4/5 North
C	Rabies, animal	Bowie County	Public Health Region 4/5 North
P	Hepatitis C Virus Infection, chronic or resolved	Hidalgo County	Hidalgo CO Health Dept

Note: Depending on the report you choose and your workstation's configuration, Windows may prompt you to click Open to display the report output. The viewer in which the output displays also depends on your workstation's configuration.

7. Click Close to close the browser window displaying the report output.

Once you run the report, you can do one of the following:

- Refine the report criteria.
- Run a new report.
- Save the report using the button, Save As New.

Understanding Custom Reports

NBS provides a number of standard reports you use to analyze your data and enables you to use advanced criteria to further refine your reports. You can also create custom reports by selecting the columns (i.e., data elements) displayed in your report output, and ordering those columns to suit your requirements.

While the Advanced Filter options enable you to refine the data displayed, the custom report options provided by the NBS give you additional flexibility in controlling the output of your

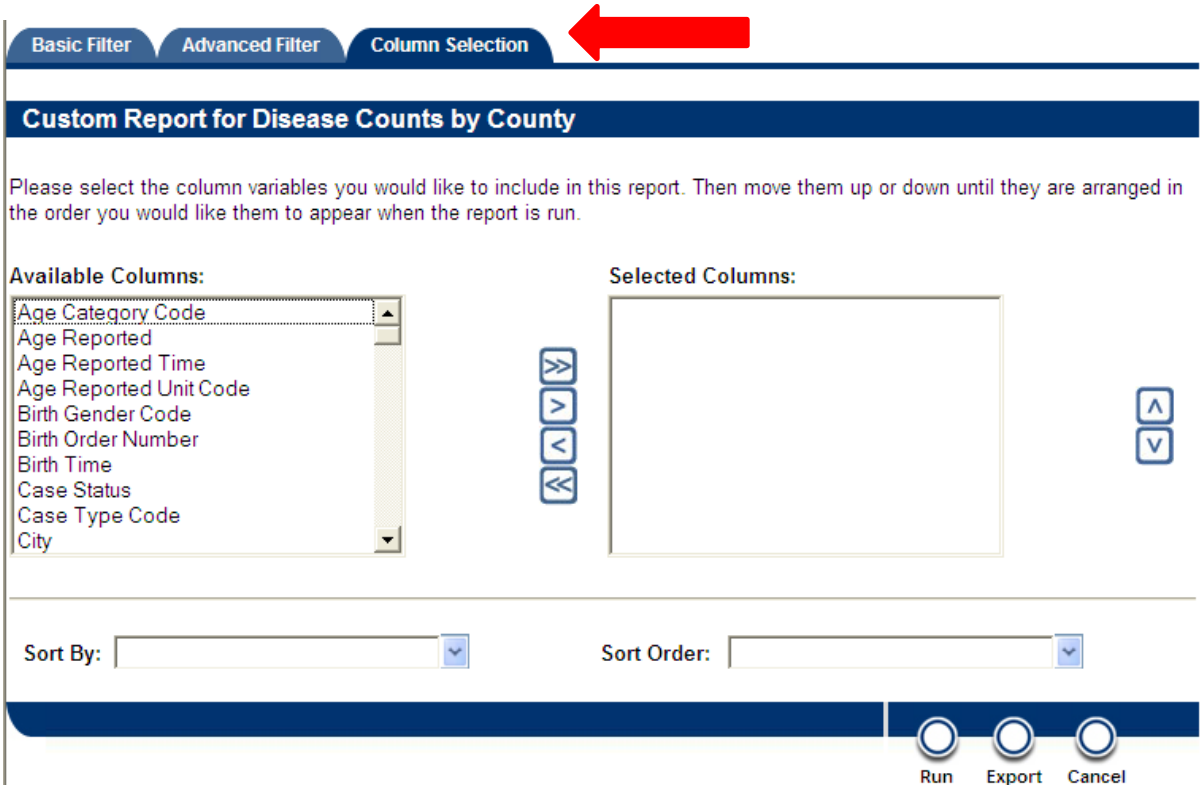
report by enabling you to choose the columns you want to display and the order in which they appear.

The NBS custom reports functionality gives you the flexibility to extract the data you need to conduct effective analysis of your data. This is further enhanced when combined with the ability to create logical query statements using the Advanced Filter options.

Selecting Columns to Create a Custom Report

You can create a custom report from a report template by selecting and arranging the columns you want displayed in the report output. You create custom reports using the report templates provided with the NBS. A report template page is identical to a standard report page, with the exception of the Column Selection tab.

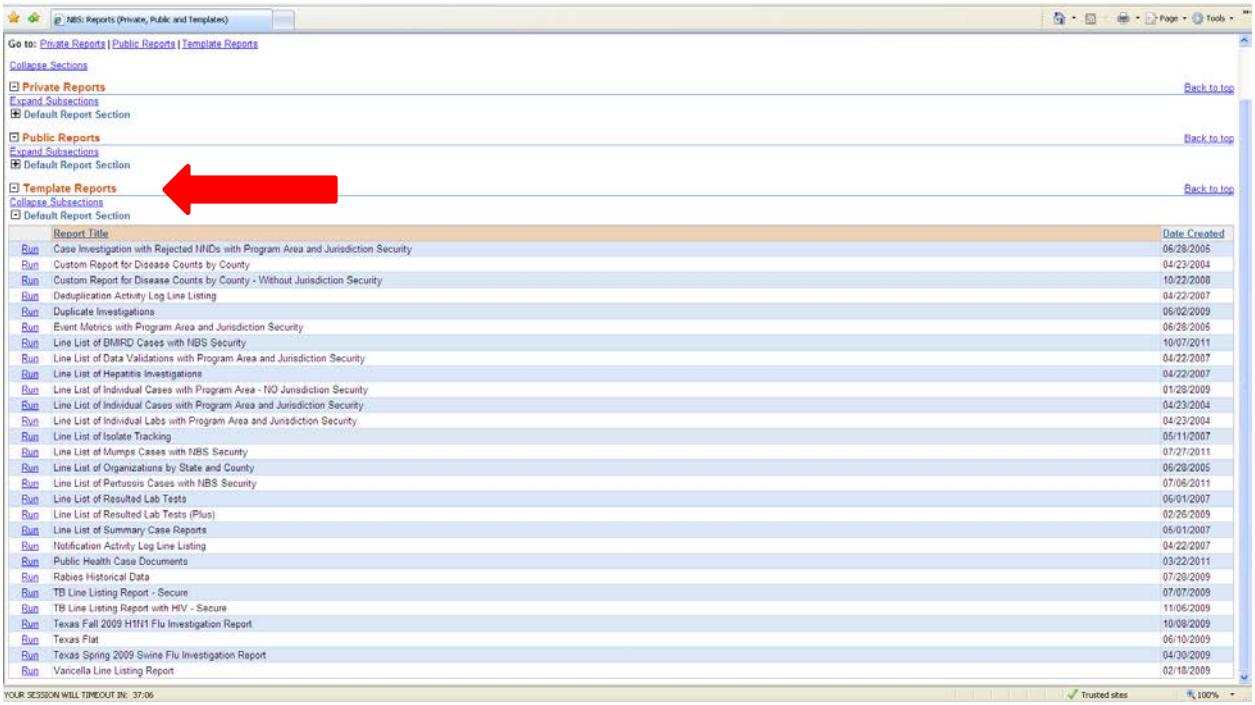
Note: The Column Selection tab is only available when you create or edit custom reports.



To select columns and create a custom report, perform the following procedure:

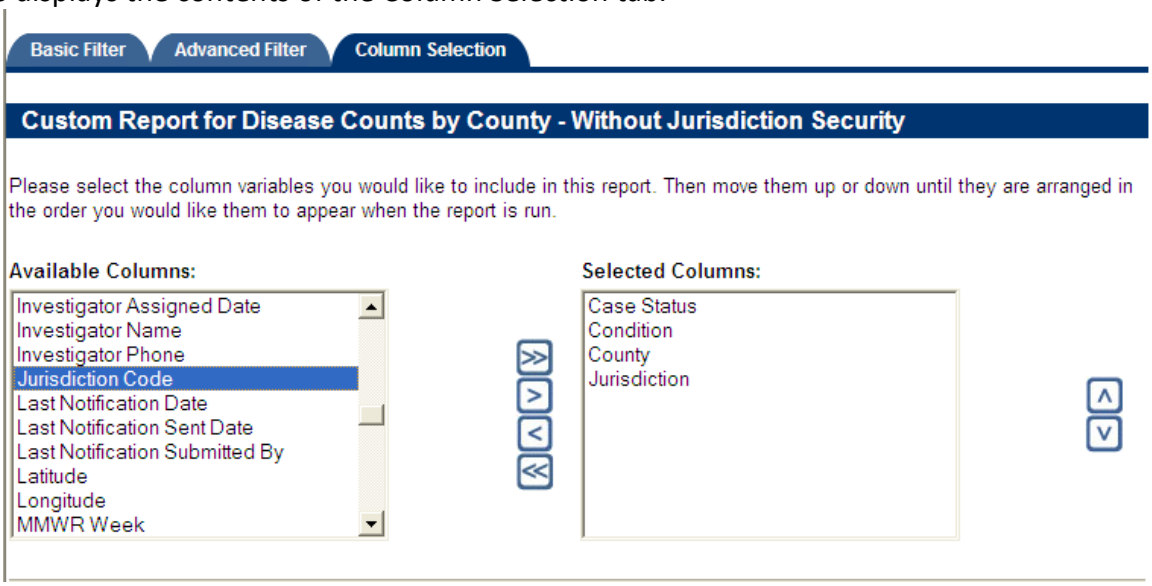
1. Select the report template you want.

Note: You can use the scroll bar, or click the Report Templates link to display the Report Templates section. NBS displays the report template.



2. Enter the basic and (optionally) the advanced criteria you want.
3. Click the Column Selection tab.

NBS displays the contents of the Column Selection tab.

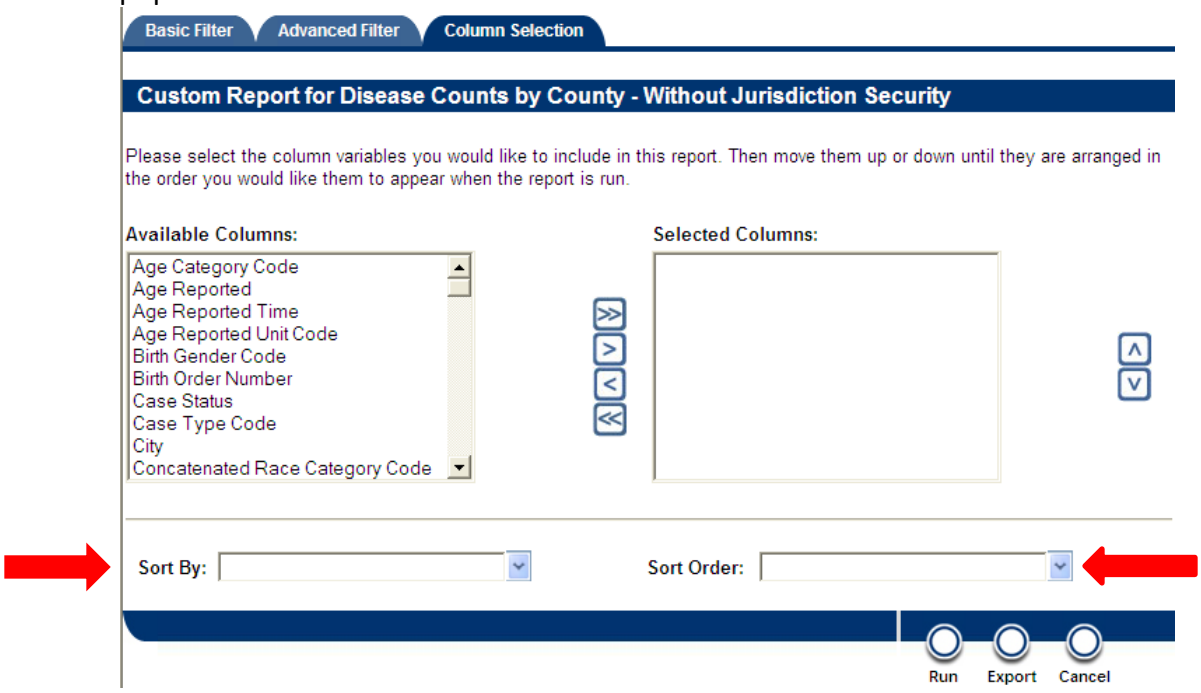


4. Click the column name you want in the Available Columns list.
5. Click the right arrow to move to the selected columns.

Note: You can also double-click the column name you want in the Available Columns list to display it in Selected Columns list.

NBS displays the column name you selected in Selected Columns list and removes the selected column from the Available Columns list.

Note: On the Column Selection tab the user can select a column for sorting the report output. The user can also choose whether to sort the column in ascending or descending order. The "Sort By" column is populated based on the fields selected and the field order populated in the "Selected Columns."



The following table list the buttons displayed between the Available Columns and Selected Columns lists and describes their function:

Item	Description
	Add All. Click to move all column names in the Available Columns list into the Selected Columns list
	Add. Click to move the selected column name in the Available Columns list into the Selected Columns list
	Remove. Click to move the selected column name in the Selected Columns list into the Available Columns list.
	Remove All. Click to move all column names in the Selected Columns list into the Available Columns list.
	Move Up. Click to move the column name up the list, and its equivalent location on the final report output.
	Move Down. Click to move the column name down the list, and its equivalent location on the final report output.

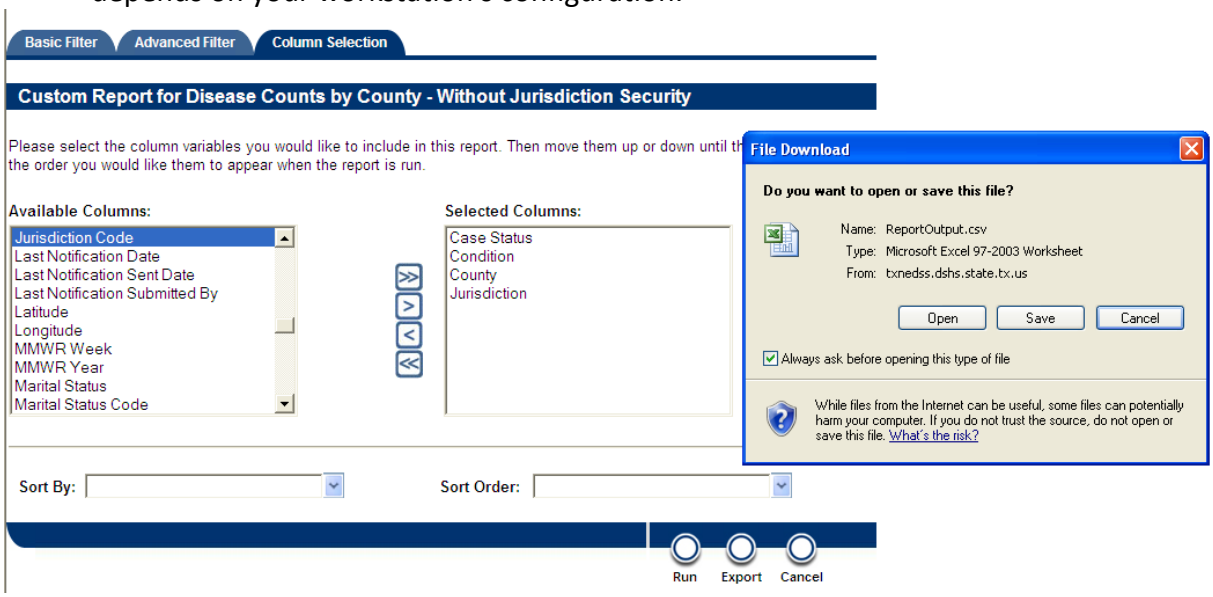
6. Highlight variable and use the arrow keys to move the column name up or down the list, and its equivalent location on the final report output.

7. Repeat steps 4 – 5 to select the columns you want.
8. Click Run.

Note: You can also do one of the following:

- Click Export to export and save the report data to your workstation.
- Click Cancel to cancel the report.

Note: Depending on the report you choose and your workstation's configuration, you may need to click Open to view the file. The viewer in which the output displays also depends on your workstation's configuration.



9. Click Close to close the browser window displaying the report output.

Once you run the report, you can do one of the following:

- Refine the report criteria.
- Run a new report.
- Save the report using the button, Save As New.

Saving Reports

You can save a new report or overwrite a previously saved report. When you save a report, you can give the report a Private or Public status. Private reports are not available to other users and display in the My Reports section on the Dashboard or Homepage. Public reports are available to other users and display in both the Private section and the Public Reports section.

Note: The My Reports section display a list of public and private reports you created. Only this section provides the option to delete a report. Any user with the appropriate permissions can access public reports. They display in the Public Reports section.

Note: The Public Reports section displays a list of all public reports created by all users, as well as the standard reports provides with the NBS. You can save new reports, or overwrite existing reports.

Saving a New Report

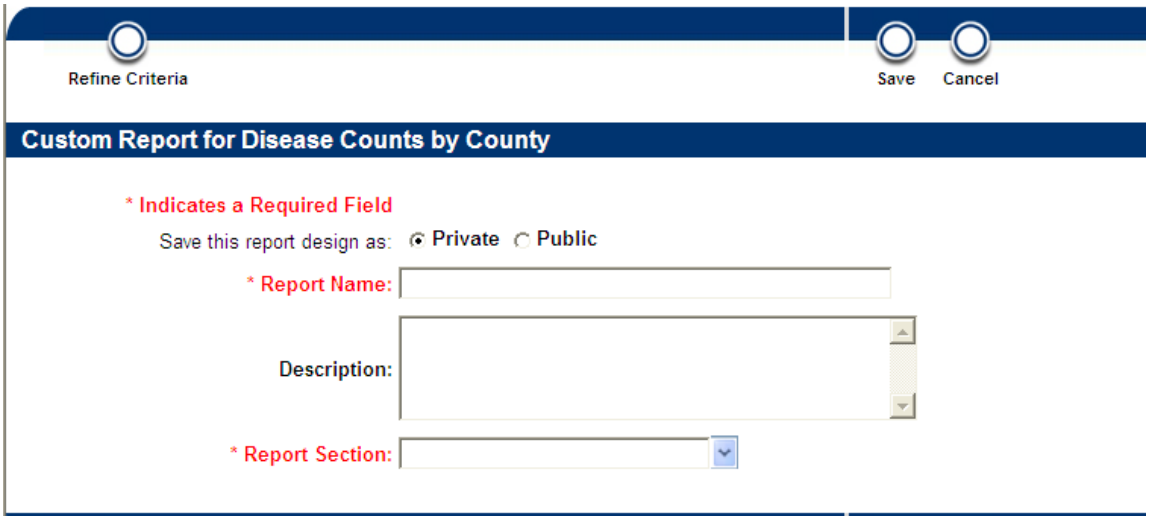
To save a new report, perform the following procedure:

1. Select the report you want.
2. Choose the basic filter criteria you want.
3. Optionally, choose the advanced filter criteria you want.
4. Optionally, when working with report templates, select the columns you want.
5. Click Run.

NBS displays the report output in a new window. Click the Close button to close the output window.

6. Click Save as New.

NBS displays the following page.



Note: Click Refine Criteria to modify the criteria for the report.

7. Do one of the following:
   - Click Public to save the report as public.
   - Click Private to save the report as private.
8. Click Report Name and type the name you want.
9. Click Description and type the description you want.
10. Click Report Section and choose Default Report Section.
11. Click Save.

NBS saves the report and displays the report name and description in the My Reports section shown on the Dashboard on the Homepage and in the Reports section.

Note: If you saved the report as public, the report name and description also displays in the Public Reports section.

Overwriting a Previously Saved Report

To overwrite a previously saved report, perform the following procedure:

1. Select the report you want.
2. Optionally, choose the basic filter criteria you want.
3. Optionally, choose the advanced filter criteria you want.
4. Optionally, when working with report templates, select the columns you want.
5. Click Run.

NBS displays the report output in a new window. Click the Close button to close the output window.

6. Click Save.

Note: If you did not create the report you are intending to save, the save option does not display. Click Save As New to save the report with a new name. NBS prompts you to overwrite the file.

7. Do one of the following:
   - Click Yes to overwrite the report and display the Reports List.
   - Click No to preserve the existing report.

NBS performs the selected function.

Note: Click Save As New to save the report with a new name, or click Run New Report to run a new report.

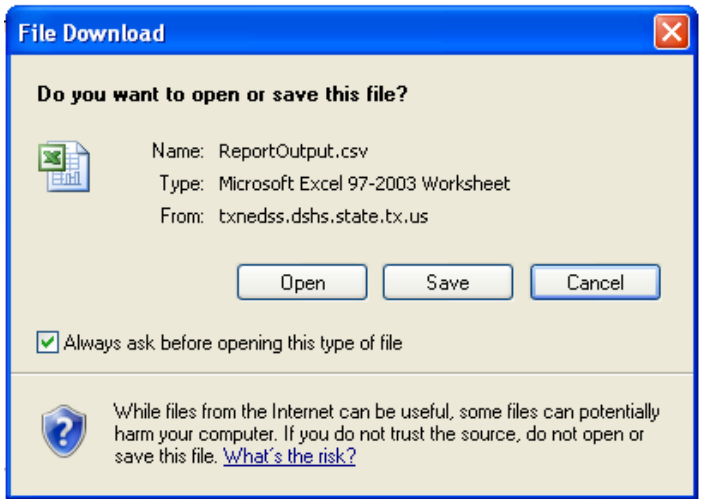
Exporting Reports

You can export the report data and save it to your workstation. Once saved, you can view and manipulate the output using the appropriate program, such as Microsoft Excel.

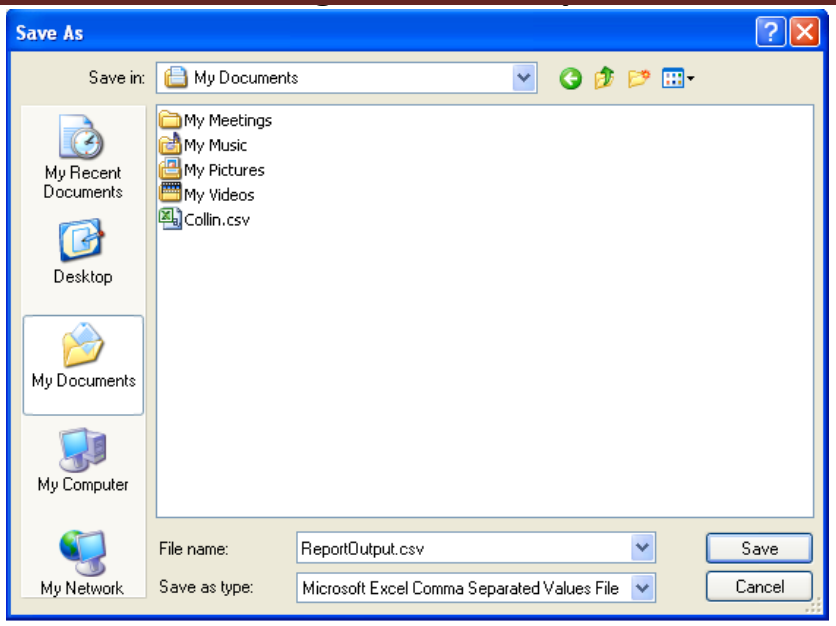
To export a report's data, perform the following procedure:

1. Select the report you want.
2. Optionally, choose the advanced filter criteria you want.
3. Optionally, when working with report templates, select the columns you want.
4. Click Export when you are finished building your query.

NBS displays the File Download dialog box:



5. Click Save. NBS displays the Save As dialog box and prompts you to save the file.
6. Type the file name you want.

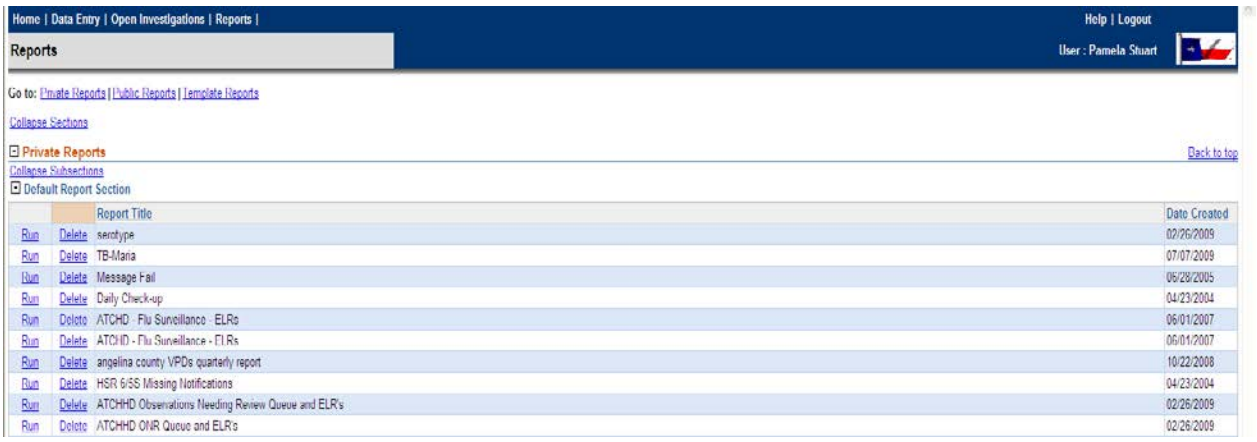


Note: NBS sets the default type to .csv (comma separated values).

7. Open the file using the program you want, such as Microsoft Excel.

Deleting Reports

You can delete private and public reports you create. You cannot delete reports created by another person. The delete option is only available in the My Reports or Private Reports sections.

To delete a report, perform the following procedure:

1. Display the Private Reports List.
2. Click Delete. NBS prompts you to delete the report.
3. Click Yes. NBS deletes the report.