

# Generating Ad Hoc Reports

## Welcome to the ImmTrac2 Training Video: Generating Ad Hoc Reports

### Training Objectives

The objectives of this video are to demonstrate how to configure and generate the Ad Hoc Count and the Ad Hoc List Reports.

### Generate Reports

ImmTrac2 offers different client and immunization reports that can be generated by users in their organization throughout the application.

The **Generate Reports** menu option, offers additional report options to all user except the View Only – Non Provider users, which can be configured in different ways to meet the needs of their organization.

In this video we will cover the **Ad Hoc Count** and **Ad Hoc List** Reports.

**NOTE:** For information on all the **Generate Report** options, please review the *ImmTrac2 User Manual*.

### Ad Hoc Count Report

The **Ad Hoc Count Report** generates a count of clients or immunizations based on selected criteria. The report produces one or more tables with counts for each item of selected criteria. The information in the report is based on the clients associated with the user's organization.

Let's begin by clicking the **Ad Hoc Count** link to configure the report. Users are redirected to the **Create a Customized Count Report** screen.

**Populate with custom template?** If a template has been previously configured, users can select a template for quicker reporting. Selecting a template will pre-populate the report criteria and data fields.

**NOTE:** Use the **Manage Ad Hoc Template** link, in the **Generate Report** menu option, to create an *Ad Hoc Template*. For more details, please review the *ImmTrac2 User Manual*.

For this example, let's generate a report that counts the total number of Influenza – Seasonal vaccines that were administered in the year 2016 grouped by the vaccine type.

**'Would you like to count Clients or Immunizations':** Use the radio button to select if you are counting clients or immunizations? Let's start by selecting what we would like to count, **Clients or Immunization**.

Let's select the **Immunizations** radio button since we are counting the number of vaccines administered.

**'What factors would you like to use to group the counts on the report':** This section displays items that can be grouped on the Ad Hoc Count Report. Up to three factors can be selected to group the counts.

Let's select the **Vaccine** factor. This will group the count by the different types of Influenza vaccines returned in the report output.

Double click the Vaccine option, or click the **Add** button. The Vaccine option now displays in the right hand column as a group factor.

**'How would you like to filter the data'**: This section gives users the option to apply filters to the report. For our example, we need to create a filter to count only the Seasonal Influenza vaccine.

Use the drop down list to select the **'Item to filter on.'** The filter options are also grouped by **Client Factors** and **Immunizations Factors**.

For our example, let's select the **Vaccine Group** to only count the Seasonal Influenza vaccines.

Notice the **'Comparison'** field becomes active with the **Equals** option pre-selected. The options available in the drop down list are dependent upon the filter item selected. For this example, we will use the Equals options.

Next, we need to select a **'Value to compare.'** The options available in this drop down list are also dependent upon the filter item selected. Using the drop down arrow, select the **Influenza-seasonal** option.

Next, click the **Add/Save Edit** button. The added filter will display in the 'Selected Filters' box.

Because we only want to count the seasonal influenza vaccines administered in 2016, we need to add another filter. Let's repeat those steps to add the second filter.

In the **'Item to Filter on'** section select the **Vaccine Date**.

In the **'Comparison'** section select the **Between** option.

In the **'Value to compare'** field, enter January 01, 2016, or use the calendar icon to select the date. In the **'and'** field, enter December 31, 2016

Remember to click the **Add/Save Edit** button to add the filter. The newly added filter displays second in the 'Selected Filters' box. The **'AND'** statement is automatically added, signifying we are filtering by the first AND second selected filter.

If needed, you may use the command buttons on the right-hand side to modify the selected filter.

- **Edit**: Allows users to edit the selected filter.
- **Remove**: Removes the selected filter.
- **And/Or**: Changes the logical operator selected from "AND" to "OR" or from "OR" to "AND".
- **Group**: Groups together multiple filters selected into one logical statement.
- **Ungroup**: Ungroups multiple filters selected into separate logical statements.

Now that all the filters have been created, let's continue by clicking the **Generate** button.

## Ad Hoc Report Status Screen (1 of 2)

Users are redirected to the **Ad Hoc Report Status** screen. This screen displays only one **Ad Hoc Count** report at a time.

This screen displays the following information:

- **Report Type:** This column displays either 'Count' or 'List' to identify the report type.
- **Started:** Displays the date and time the report started processing.
- **Completed:** Displays the date and time the report completed processing.
- **Status:** Displays the percent complete of the report. Currently running reports will have a percent less than 100%.
- **Completed:** List the number of records that met the Ad Hoc List report criteria. This field will be blank for the Count report.

Click the **Refresh** button until the report has completed generating. Once the status is **DONE**, the report name becomes a hyperlink.

Click the hyperlink to view the report results. Report results display in a table at the bottom of the screen in the **Ad Hoc Report Results section**.

The report results produce a table with a column for each item that was selected, much like a spreadsheet.

In our example, the table displays the type of influenza vaccines and the number of each that were administered in the year 2016, with a total of 284.

The report can be exported as a Text file, Spreadsheet or PDF, and opens in a separate browser window.

Now that we have looked at the Ad Hoc Count Report, let's look at the Ad Hoc List Report. Click the **Generate Report** menu option to return to the **Reports Available** screen.

## Ad Hoc List Report

The **Ad Hoc List Report** is very similar to the Ad Hoc Count report, but it generates a list of selected items instead of a count. This report generates a list of clients or immunizations associated to the user's organization, based on the selected report criteria.

Let's begin by clicking the **Ad Hoc List** link to configure the report. Users are redirected to the **Create a Customized List Report** screen.

**Populate with custom template?** If a template has been previously configured, users can select a template for quicker reporting. Selecting a template will pre-populate the report criteria and data fields.

**'What items would you like to display on the report?':** This section is used to select which items will be included in the report.

Users can select as many items as needed to be included in the report, such as Client, Address, Immunization and Responsible Person's information. Double click an item, or use the Add button to select items to display in the report.

For this example, let's generate a **list** of clients including their name, date of birth, and responsible person information that were born in 2016.

The following items were selected: The client's Last Name, First Name and Birth Date. The Responsible Person's First Name, Last Name and Relationship to client. The selected items will appear in the report in the order they were selected.

**How would you like the report to be sorted?:** Use this section to select how to sort the report. Use the 'Item to sort on' drop down arrow to select how the report will be sorted. Let's sort by last name.

Next, we need to create the filter to only list the clients that were born in the year 2016.

As demonstrated in the previous report, use the '**How would you like to filter the data**' section to create any needed filters.

Use the '**Item to filter on**' drop down list and select the 'Birth Date' filter.

In the **Comparison** field, select the '**Between**' option. After enter the dates in the '**Value to compare**' fields, click the **Add/Save Edit** button. The newly added filter displays second in the 'Selected Filters' box.

Next, click the **Generate** button.

## Ad Hoc Report Status Screen (2 of 2)

Users are once again redirected to the **Ad Hoc Report Status** screen as we saw in the previous report.

This screen only displays one **Ad Hoc Count** report, and one **Ad Hoc List** report at any given time.

Click the **Refresh** button until the report has completed processing.

**NOTE:** *Users can leave this screen at any time, and return later to check the status.*

Once the status equals **DONE**, the report name will become a hyperlink. The **Row Count** will display the total number of records that are returned in the **Ad Hoc List** report. In this example, there are 20 clients meeting the report criteria.

Click the hyperlink to view the report results.

Report results display in a table at the bottom of the screen in the **Ad Hoc Report Results** section. This report results in 20 clients that were born in 2016.

The table includes a column for each item that was select, much like a spreadsheet.

The results are sorted by Last Name, and includes all the items that were selected in the report criteria.

The report can be exported as a Text file, Spreadsheet or PDF, and opens in a separate browser window.

To navigate to the **Ad Hoc Report Status** screen at a later time, click the **Generate Report** menu option. Click either **Status** link to open the Ad Hoc Report Status screen.

If a new report is generated, it will replace the existing report. These reports will be available for up to 7 days.

For more detailed information regarding any of these topics, see the Online User Manual located on the Related Links tab.

Please review the other ImmTrac2 videos at <https://immtrac.dshs.texas.gov> at your convenience.