Report Dashboard

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by TruBridge

Clear the way for care.

Report Dashboard

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Chapter 1 Introduction

1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBridge’s interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client’s attestation, TruBridge bears no responsibility for attestation information submitted by the client.

1.2 What's New

This section introduces the new features and improvements for the **Report Dashboard Application** for release Version 22.01. A brief summary of each enhancement is given referencing its particular location if applicable. As new branches of Version 22.01 are made available, the original enhancements will be moved to the Previous Work Requests section. The enhancements related to the most current branch available will be listed under the main What's New section.

Each enhancement includes the Work Request (WR) Number and the description. If further information is needed, please contact **Client Services** Support.

NOTE: *Version 22.01 does not include any new enhancements.*

Chapter 2 Overview

The Report Dashboard is a module that will allow each user to create a customized list of Report Writer reports that are all available in one place. It will also allow certain reports, such as the Data Export report, to be scheduled to run on a certain date and time. The scheduled reports will also be able to viewed from the Report Dashboard.

NOTE: *Facilities outside of the United States may choose a date format of MMDDYY, DDMMYY or YYMMDD to be used on all date fields in the Report Dashboard Application. Where four-digit dates display, a date format of MMDD, DDMM or MMDD, respectively, will be used. Whichever date format is selected will be reflected in all date fields and column displays throughout the application. A TruBridge Representative should be contacted in order for the date format to be changed.*

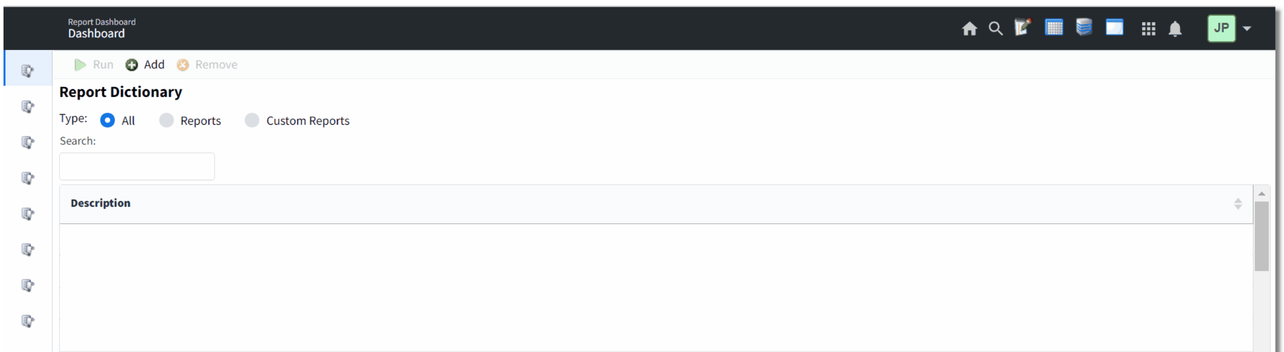
Chapter 3 Reports

3.1 Usage

The Report Dashboard is where each user may create a customized list of Report Writer reports to run at a time of their choosing.

To add reports to the dashboard, begin by selecting **Add** from the action bar.

Select **Web Client** > **Report Dashboard**



Report Dictionary

A listing of all Report Writer reports will then display in alphabetical order. A search option is available to further refine the reports. Once the desired report has been found, select the report and then select **Insert** on the action bar. The report will then be added to the users Report Dashboard.

Once the report displays on the users Report Dashboard it will stay there until removed. To run the report from the Report Dashboard, select the report and then select **Run** on the action bar.

The parameters for the selected report will then display on the screen.

If the report needs to be removed from the dashboard, select the report and then select **Remove** on the action bar.

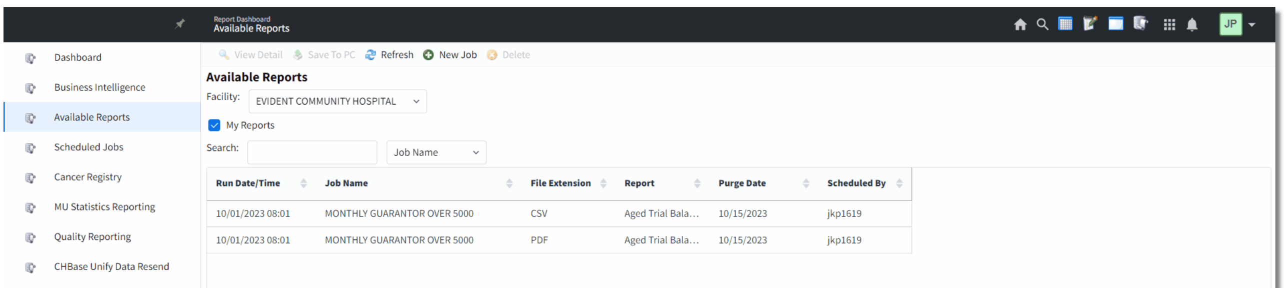
Chapter 4 Available Reports

4.1 Usage

Available Reports may be accessed from within Report Dashboard. To have access to this option, users will need the Report Scheduler application set to allow in System Administration. Available Reports allows all reports, generated on demand or scheduled, to be viewed. A report will remain in the Available Reports list for 14 days before purging.

***NOTE**: If the scheduled report is set up to be spooled, it may be retrieved from the Report Image system as well. The report will purge from the Report Image system based on the Report Image Purge Parameters set up in Special Functions.*

Select **Web Client** > **Report Dashboard** > **Available Reports**



Available Reports

Listed below is an explanation of the parameters.

- **Facility:** Only Facilities selected for access under the signed in login will be available for selection. The facility the login is currently logged in to will default.

- **My Reports:** Select this option to only display reports, generated on demand or scheduled, by the signed-in user. Uncheck this option to view reports, generated on demand or scheduled, by all users. This option will default to checked.

- **Search:** This option may be used if searching for a particular report. The reports may be searched by one of the following.
  - Job Name
  - Report Type
  - Scheduled By

Listed below is an explanation of each column.

- **Run Date/Time:** The date and time the report was run.

- **Job Name:** The job name given to the report by the user who scheduled the report.

- **Report Type:** The report name in the Report Dictionary.

- **Purge Date:** The date when the report will purge from Available Reports. A report will remain in the Available Reports list for 14 days before purging.

- **Scheduled By:** The login of the user who created the scheduled job.

Listed below is an explanation of each option on the action bar.

- **View Detail:** Select this option to view the Job Details screen. The Job Details screen is an informational screen that will display the Parameters, Recurrence, Report Destination and Assigned Users for the scheduled report. This option will be available for selection once a job has been selected.

- **Save to PC:** Allows reports that have been generated to be saved to the user's PC. See Save to PC 8 section of this user guide for more information.

- **Refresh:** Select this option to refresh the information on the screen.

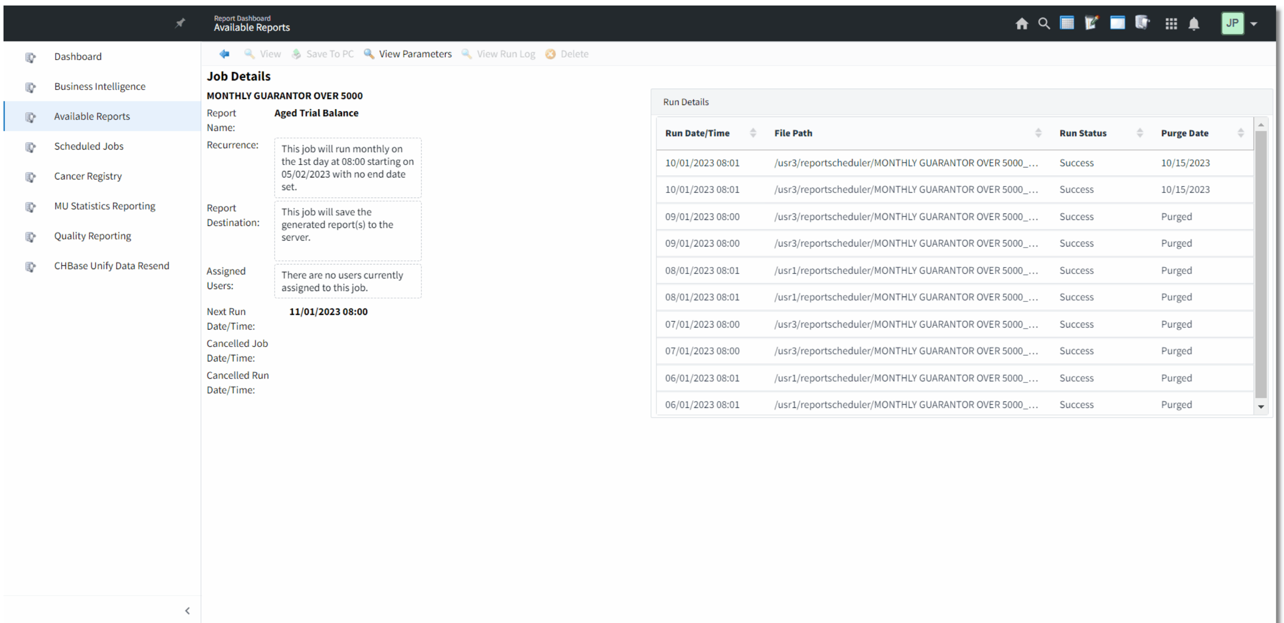
- **New Job:** Select this option to go to the Report Dashboard to schedule a new job. See the New Job 11 section of this user guide for more information.

- **Delete**: Select this option to delete the report. In order to delete a report, the user will need the behavior control Ability to delete any Report Scheduler File set to Allow.

4.2 View Detail

The View Detail screen will display the details associated with a scheduled report and job information related to the report. This option may be accessed from the Available Reports screen as well as the Scheduled Jobs screen.

Select **Web Client** > **Report Dashboard** > **Available Reports** > **Select Job** > **<u>View Details</u>** or
Select **Web Client** > **Report Dashboard** > **Scheduled Jobs** > **Select Job** > **<u>View Details</u>**



View Detail

The following details are available on the screen:

- **Job Name:** The job name given to the report by the user who scheduled the report.
- **Report Name:** The report name in the Report Dictionary.
- **Parameters**: Displays the parameters that were selected when the report was scheduled. The parameters box will only display when the selected report is a screen report. If the report is a template report, there will be a View Parameters option on the action bar that may be utilized to display the selected parameters.
- **Recurrence:** The selected pattern for how often (Daily, Weekly, Monthly etc.) the scheduled report will run.
- **Report Destination**: Displays the destination that was selected to save the report.
- **Assigned Users**: Displays any users that were assigned to the job.
- **Next Run Date/Time:** The next day and time the report is scheduled to run.

- **Cancelled Job Date/Time**: Displays the Date and Time that a Job was cancelled, along with the name of the user that cancelled it.

- **Cancelled Run Date/Time**: Displays the Date and Time that a Run was cancelled, along with the name of the user that cancelled it.

For each run of the job, the Run Details section will display the following information:

- **Run Date/Time**: This is the date/time the report was run.

- **File Path**: Displays the path to where the job was saved on the server.

- **Run Status:** The current status of the report will display one of the following:
  - **Success:** Will display if the report completed successfully.
  - **Failure:** Will display if the report did not complete successfully.
  - **Partial Success:** Will display if the report was generated but not exported. This may be caused by the SFTP being down or incorrect setup, for example.
  - **No Data**: Displays when the report finished its recurrence; however, the selected report parameters yielded no data.

- **Purge Date:** The date when the report will purge from Available Reports.

The following options are available on the action bar:

- **View**: Select this option to display the selected report in the format it was generated (Zip, HTML, PDF, XML, CSV, TXT). The PC used for viewing must have a program that supports the generated report's file type. If the appropriate program does not exist on the PC, the View button will appear to not work. For example, if the file format is ZIP, a zip file opener program must exist on the PC to successfully view the report.

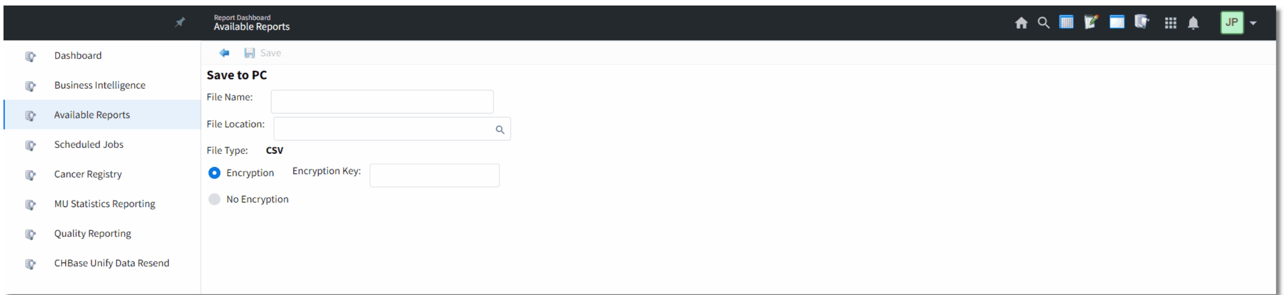
- **Save to PC**: Allows reports that have been generated to be saved to the user's PC. See Save to PC 8 section of this user guide for more information.

- **Delete**: Select this option to delete the report. In order to delete a report, the user will need the behavior control Ability to delete any Report Scheduler File set to Allow.

4.3 Save to PC

The Save to PC option allows reports that have been generated to be saved to the user's PC. This option is available on the Available Reports screen and the View Details screen.

Select **Web Client** > **Report Dashboard** > **Available Reports** > **Select Job** > **<u>Save to PC</u>** or
Select **Web Client** > **Report Dashboard** > **Available Reports** > **Select Job** > **View Details** > **<u>Save to PC</u>**



Save to PC

The following information will need to be entered:

- **File Name**: Enter the name to which the file should be saved.
- **File Location**: Use the magnifying glass to locate the folder where the report should be saved.
- **File Type**: Displays the file format of the report.
- **Encryption**: Select this option and enter an Encryption Key that will be used to view the report after it is saved to the PC.
- **No Encryption**: Select this option to exclude the use of an Encryption Key when viewing the report after it is saved to the PC. If selected, a warning message will display indicating that the user accepts responsibility for any improper disclosure of PHI or resulting HIPAA violations when proceeding with saving or submitting unencrypted data.

Once the information has been completed, select 

Save.

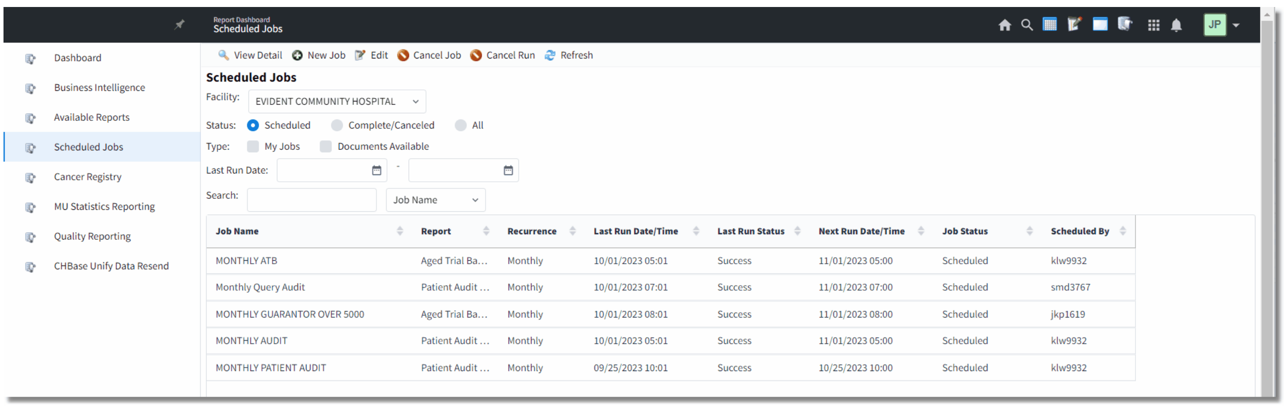
Chapter 5 Scheduled Jobs

5.1 Usage

Scheduled Jobs may be accessed from within Report Dashboard. To have access to this option, users will need the Report Scheduler application set to allow in System Administration. Scheduled Jobs allows a user to view reports that have been scheduled to run on a particular day and time. It will also allow scheduled reports to be modified or canceled, if needed.

NOTE: *The Behavior Control "Schedule Reports" will need to be set to allow in Identity Management in order for users to create, edit or cancel their own reports.*

Select **Web Client** > **Report Dashboard** > **Scheduled Jobs**



Scheduled Jobs

Listed below is an explanation of the parameters.

- **Facility:** Only Facilities selected for access under the signed in user will be available for selection. The facility will default to the facility that the the user is currently logged into.

- **Status:** Select one of the following statuses:
  - **Scheduled:** Select this status to only display currently scheduled reports.
  - **Complete/Canceled:** Select this status to only display reports that have completed or have been canceled by a user.
  - **All:** Select this status to view all scheduled and completed/canceled reports.

- **Type:** Select one of the following:
  - **My Jobs:** Select this option to view reports scheduled by the signed in user. If unchecked, the screen will list all scheduled reports.
  - **Documents Available:** Select this option to view scheduled reports that currently have a document available to view.

- **Last Run Date:** Enter a beginning and end date to search for reports scheduled within a certain time frame. Leave this field blank to run for all dates.

- **Search:** This option may be used if searching for a particular report. The reports may be searched by one of the following.
  - Job Name
  - Report Type
  - Scheduled By

Listed below is an explanation of each column.

- **Job Name:** The job name given to the report by the user who scheduled the report.

- **Report:** The report name in the Report Dictionary.

- **Recurrence:** The selected pattern for how often (Daily, Weekly, Monthly etc.) the scheduled report will run.

- **Last Run Date/Time:** The last day and time the report was run.

- **Last Run Status:** The status of the last time the report was run. This will display one of the following:
  - **Success:** Will display if the report completed successfully.
  - **Failure:** Will display if the report did not complete successfully.
  - **Partial Success:** Will display if the report was generated but not exported. This may be caused by the SFTP being down or incorrect setup, for example.
  - **No Data**: Displays when the report finished its recurrence; however, the selected report parameters yielded no data.

- **Next Run Date/Time:** The next day and time the report is scheduled to run. If the report is currently being run, this column will display "In Progress" and the percentage of completion will display in the Job Status column.

- **Job Status:** The current status of the report will display one of the following:
  - **Scheduled:** Will display if the report is actively scheduled.
  - **Completed:** Will display if the report finished its recurrence.
  - **Canceled:** Will display if the report was canceled prior to completing its recurrence.
  - **Percentage**: Will display the percentage completed for reports in progress.

- **Scheduled By:** The login of the user who scheduled the report.

Listed below is an explanation of the options of the action bar.

- **View Detail:** Select this option to view the Job Details screen. The Job Details screen is an informational screen that will display the Parameters, Recurrence, Report Destination and Assigned Users for the scheduled report. This option will be available for selection once a job has been selected.

- **New Job:** Select this option to go to the Report Dashboard to schedule a new job. See the New Job 11 section of this user guide for more information.

- **Edit:** Select this option to Edit the assigned users for a scheduled job.

- **Cancel Job:** Select this option to cancel the selected job <u>and</u> all future occurrences. A job may only be canceled by the user who scheduled the job.

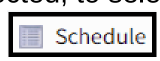
- **Cancel Run**: Select this option to cancel <u>just</u> the next scheduled run or a current run in progress. A run may only be canceled by the user who scheduled the run.

NOTE: *The Behavior Control "Edit/Cancel Any Scheduled Report" will need to be set to allow in Identity Management if one user needs the ability to edit or cancel another user's scheduled jobs.*

- **Refresh:** Select this option to refresh the information on the screen.

5.2 New Job

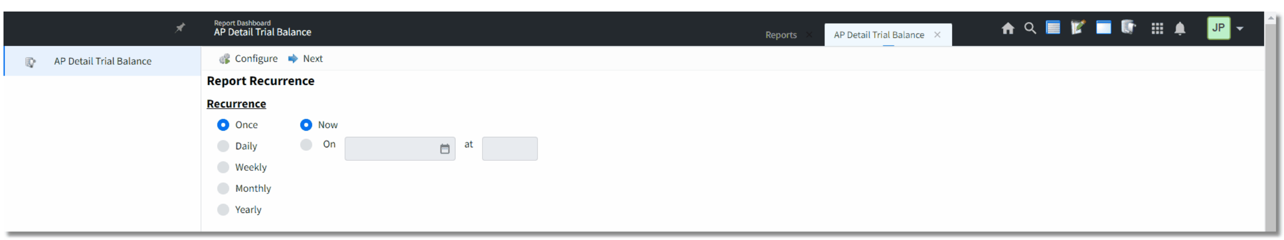
The New Job option on the action bar will allow a new schedule to be created for a report. The Report Dashboard will open, once 

New Job is selected, to select the report to be scheduled. Once the parameters have been addressed, select 

Schedule on the action bar. The Schedule option will only be available if the user has been given access to the Report Scheduler application in Identity Management.

NOTE: *Users will also need the Report Scheduler Behavior Control, "Schedule Reports" set to allow in Identity Management in order to create a schedule for the report.*

Select **Web Client** > **Report Dashboard** > **Scheduled Jobs** > **Select Report** > **<u>Schedule</u>**



Report Recurrence

Below is an explanation of each section and the options available within each section.

- **Recurrence:** Select one of the following options based on how often the report will need run.
  - **Once:** Select this option if the report will only need to be run one time. If selected, two additional fields will display allowing the report to be run Now or On a set Date/Time.
  - **Daily:** Select this option if the report will need to be run daily. If selected, an additional field will display next to this field to enter what time each day to run the report. The Range of Recurrence section will also need to be completed to determine how long the report will run.
  - **Weekly:** Select this option if the report will need to run weekly. If selected, additional fields will display next to this field to select which days during the week the report will run and at what time. The Range of Recurrence section will also need to be completed to determine how long the report will run.

- **Monthly:** Select this option if the report will need to run monthly. If selected, additional fields will display next to this field to enter which day of the month to run the report and at what time. The Range of Recurrence section will also need to be completed to determine how long the report will run.
- **Yearly:** Select this option if the report will need to run yearly. If selected, additional fields will display next to the field to enter which month and day to run the report and at what time. The Range of Recurrence section will also need to be completed to determine how long the report will run.

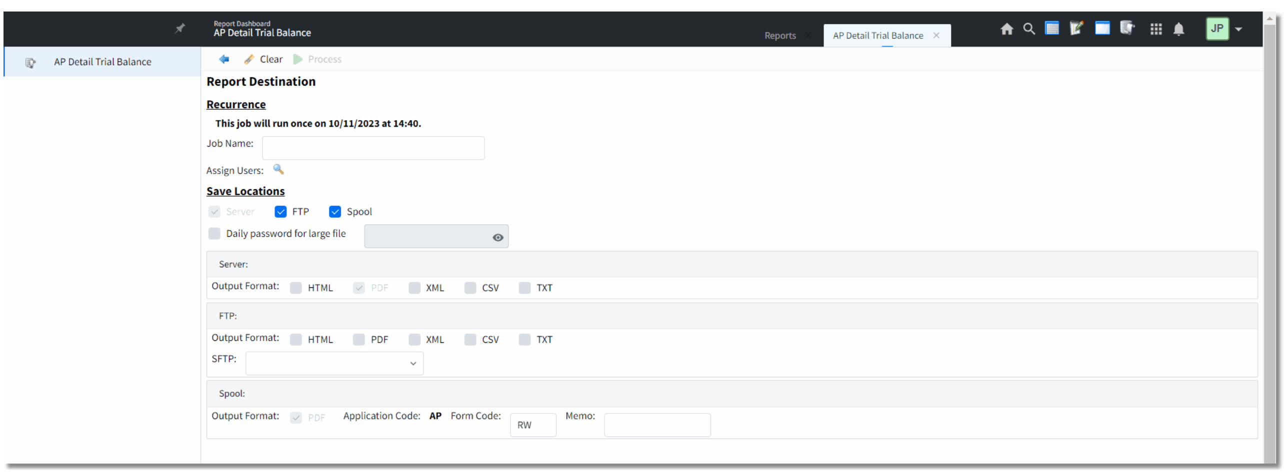
- **Range of Recurrence:** This section will determine how long the report will need to run for. The following fields will need to be addressed if Daily, Weekly, Monthly or Yearly was selected in the Recurrence section.
  - **Start Date:** Select the date to begin running the report.
  - **End Date:** Select one of the following options for when the report will need to stop running.
    - **No End Date:** Select this option if the report will always need to run.
    - **End After:** Select this option to enter in how many times (occurrences) the report will need to run.
    - **End By:** Select this option to select a date as to when the report will need to stop running.

Once all the sections have been addressed select 

Next on the action bar to go to the Report Destination screen. Select 

Configure on the action bar if needing to return to the report screen to make any changes to the parameters.

Select **Web Client** > **Report Dashboard** > **Scheduled Jobs** > **Select Report** > **Schedule** > **Next**



Report Destination

The Report Destination will need to be addressed to determine where the report will be saved when it runs at its scheduled day and time. Listed below is an explanation of each section.

- **Recurrence:** Displays the parameters selected on the Report Recurrence screen. The Report Recurrence screen is accessed when selecting Schedule from the Data Export parameters screen.

- **Job Name:** Enter a Job Name for the scheduled report. A Job Name must be entered in order to process the report.

- **Assign Users**: Users may be assigned to the scheduled report by selecting the Assign Users magnifying glass. For more information on assigning users, please refer to the Assign Users 14 section of this document.

- **Save Locations:** Select one of the following location options when saving reports:
  - **Server:** This option will be selected by default and allows the report to be saved to the facility server so that it may be transferred to other locations. When selected, the Server Output Format will need to be defined.
  - **FTP:** Select this option to save the report to an FTP location. When selected, the FTP Output Format and the FTP Server will need to be selected. The SFTP drop-down will only list active FTP servers created by the facility in the FTP Setup table in HIM Table Maintenance. To save a report to FTP, users will need the Report Scheduler Behavior Control, "Send reports using SFTP" set to allow in Identity Management.
  - **Spool**: Select this option to save a copy of the report in the Report Image System. When selected, the output format will default to PDF and a Form Code and Memo may be entered.
  - **Daily Password for large file**: Select this option and enter the Daily Password for reports that will generate a large file.
  - **Output Format**: For each Save Location selected, any applicable output formats for that location will display. Select the desired output format for each location selected. The Zip option will be selected by default for each Save Location.

NOTE: *The Save to PC option will be available after the report is generated. This option may be selected from the Available Reports or Scheduled Jobs screens. Please see Available Reports - Usage 4 or Available Reports - View Detail 6 for more information.*

Listed below is an explanation of the options on the action bar.

- **Clear:** This option will clear all selections that have been made on the screen.

- **Process:** Select this option to save the report to the selected destination. This option will not become available until all required fields have been populated.

Once all the required information has been populated, select 

Process on the action bar to complete scheduling the report. The Report Confirmation screen will then display letting the user know the report has been scheduled successfully. To exit the confirmation screen, it will need to be closed from the navigation panel.

Assign Users

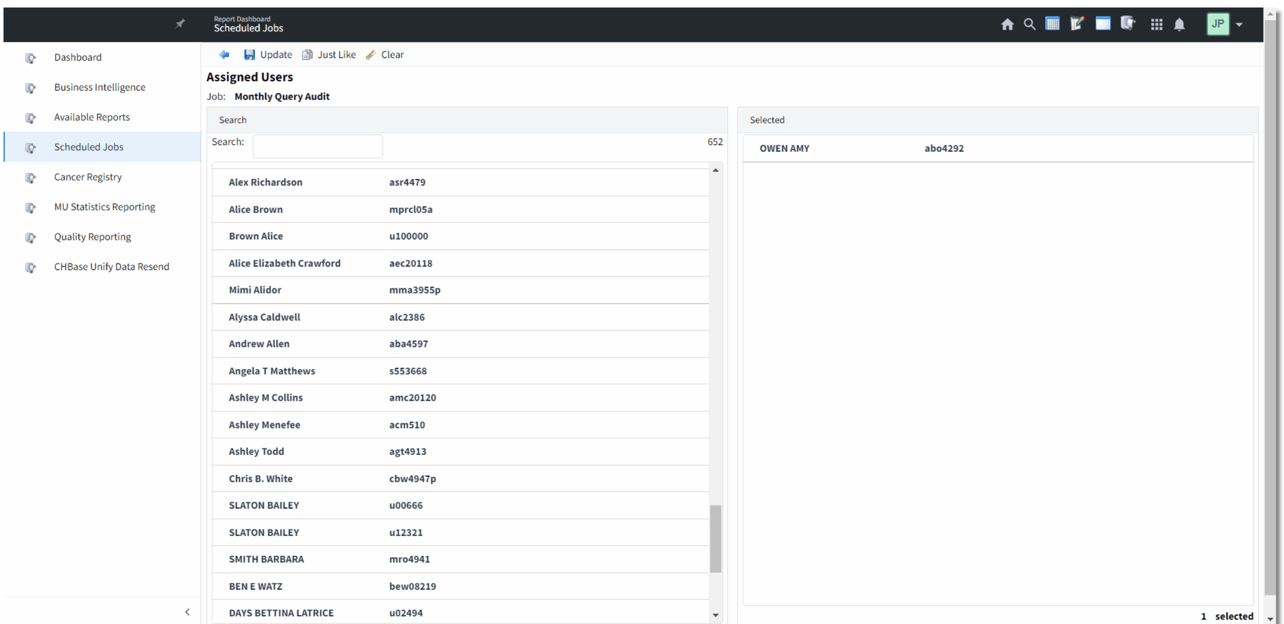
The Assign Users option will allow users to be assigned to the scheduled job for the report. This will allow those users to make any changes to the scheduled job in addition to the user that created the job. This option will also allow users from an existing scheduled report to be easily copied to a new scheduled report.

Once on the Assigned Users screen, existing users will display on the left-side of the screen to be selected. To assign a user to the scheduled report, double-click the users name to add them to the Selected column on the right-side of the screen. To remove a user from the Selected column, double-click on the name. To remove all users from the Selected column, select 

Clear on the action bar. Select 

Update on the action bar to save changes.

Select **Web Client** > **Report Dashboard** > **Scheduled Jobs** > **Select Report** > **Schedule** > **Next** > **<u>Assign Users Magnifying Glass</u>**



Assigned Users

<u>Just Like</u>

Users may also be copied from an existing scheduled report by selecting 

Just Like on the action bar.

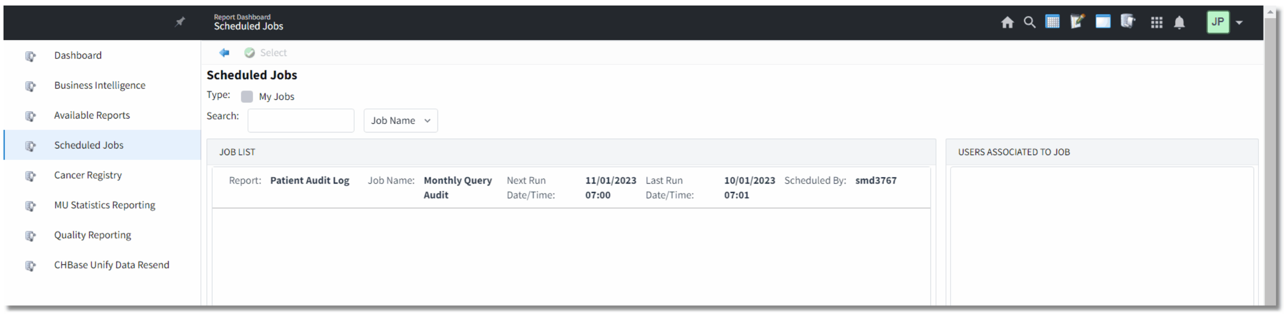
The screen will default to a Job List of existing scheduled reports created by the signed in user. To view a Job List of scheduled reports created by other users, uncheck the **My Jobs** check-box at the top of the screen.

A Search option is available to search the Job List by Job Name, Report Type or Users. To view a listing of users associated with a scheduled report, select one of the Jobs from the Job List. The users will then display in the Users Associated to Job column.

To continue with the Just Like function, select the scheduled job from the Job List and then select 

Select on the action bar.

Select **Web Client** > **Report Dashboard** > **Scheduled Jobs** > **Select Report** > **Schedule** > **Next** > **Assign Users Magnifying Glass** > **<u>Just-Like</u>**



Just Like - Scheduled Jobs

Thrive will then return to the Assigned Users screen. Select 

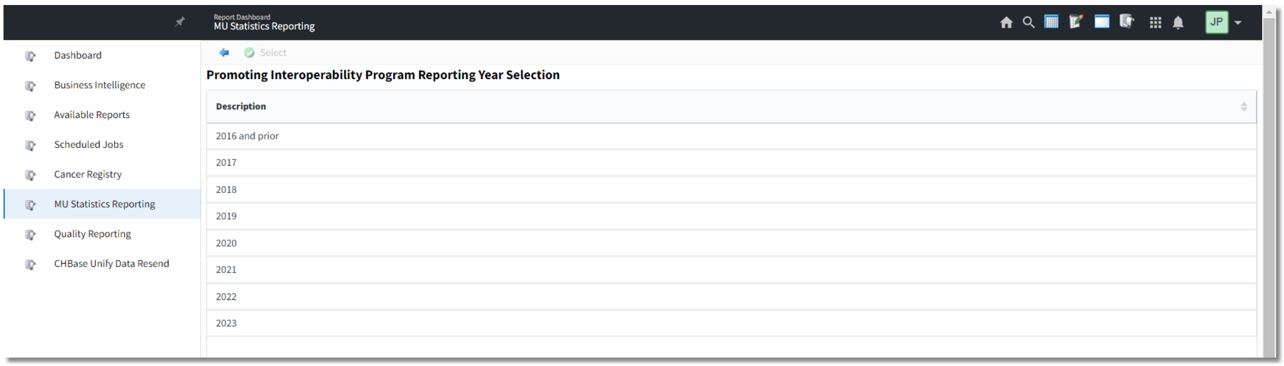
Update to save.

Chapter 6 MU Statistics Reporting

6.1 Usage

Promoting Interoperability Statistics Reporting may be accessed from the Report Dashboard.

Select **Web Client** > **Report Dashboard**



MU Statistics Reporting

For more information on Promoting Interoperability Statistics Reporting, please refer to the Promoting Interoperability 2011 - 2020 and/or Promoting Interoperability 2021 user guides.