Working with standard and ad hoc reports

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Roadmap: Working with standard reports

OutcomeLogix reporting provides a library of standard reports through the Oracle Business Intelligence Publisher tool (BI Publisher). These standard reports satisfy the reporting needs of most site users. For example, you can use standard reports to report on the number of visits that are complete for a study, the number of forms that are frozen or locked, patient enrollment statistics, eCodes distribution, or, if your study includes a call center, the number of calls made by each staff member every day.

Step	Action	Description
1	View a standard report.	1 Select **Reports** (). 2 Click the link for the report to view.
2	Work with a standard report.	Using options in the BI Publisher tool, perform the following procedures as needed.
	Change the sort order of data in the columns.	• From the **View** drop-down list, select the desired format. In the column to sort, click the arrow in the column heading, and select the sorting option.
	Filter the data in the report.	• Graphs and report listing—Right-click the report sub-heading area above the graphical view, and select a filtering option. The charts or graphs and the report listing reflect the filter selection. • Report listing only—Right-click a column, and select a filtering option. Only the report listing reflects the filter selection.
	View the report in various formats.	• From the **View** drop-down list, select the desired format in which to view the report (for example, RTF, PDF, Microsoft Excel spreadsheet software).
	Export a standard report.	1 From the **Actions** drop-down list, select **Export**. 2 From the **Export** drop-down list, select the output format in which to export the report.

Roadmap: Creating and saving an ad hoc report

Ad hoc reports can display operational and clinical data from the forms in your study. If you have the appropriate rights, you can access the ad hoc reporting workspace in the BI Publisher tool and create and save ad hoc reports.

Before creating and saving your first ad hoc report, you should create a new folder in the BI Publisher tool in which to store all of your ad hoc reports.

Step	Action	Description
1	Create an ad hoc report.	Using the BI Publisher tool, select the layout and choose the components of the report.
	Access the ad hoc reporting function.	1 Select **Reports** (). 2 Click the **Design a New Report** link. 3 From the **Create** section, select **Report**.
	Choose the OLX Data Model.	1 From the **Catalog** section, select the folder that contains the data model (OLXAdHocDataModel). 2 Highlight the data model, and click **Open**. The Create Layout page appears.
	Select the layout.	• Select from the predefined layouts, or upload an existing layout.
	Add the report components.	1 At the top of the page, select the **Insert** tab. 2 In the **Components** section of the **Insert** tab, select the components as needed, and drag them into the workspace.
	Drag in the report columns from the datasets.	1 From the **Data Source** tree, navigate to a dataset. 2 Select a data item to add to the report, and drag it to the report component where it should be used. 3 Repeat step 2 until all the columns have been added to the report layout.
	Save the report layout.	1 In the upper-right corner of the page, click **Save** (). The Save Layout dialog box appears. 2 Specify a Layout Name and Locale for the layout. 3 Click **Save**. 4 Click **Return**. The report layout appears on the page.

Step	Action	Description
2	Save the report.	1 In the upper-right corner of the page, click **Save Report** (). The Save As dialog box appears. 2 Specify a location in which to save the report, the report name, and a description of the report. You can save the report to any folder so that when you later view it in the list on the Reporting page, it will appear under its folder heading, making it easier to differentiate between standard reports and ad hoc reports. You can create subfolders to organize your reports. 3 Click **Save**.
3	View the report	• In the upper-right corner of the page, click **View Report** (View Report). The report appears in a BI Publisher window.
4	Assign the report to OutcomeLogix roles.	1 Select **Administration** (). 2 Click **Assign Reports to Roles**. 3 Click the **Assign Reports to Roles** link for the role. 4 From the **Available Reports** list, select the ad hoc report to assign to the role, and click **Add**. 5 Click **Submit**. **Note:** You must assign every report you create to one or more roles.

Roadmap: Assigning report rights

Rights control your ability to view reports and create ad hoc reports.

Step	Action	Description
1	Configure the report server.	Configure the server settings for the server on which the BI Publisher software is installed.
2	Assign reporting rights to roles.	Assign one or both of the following rights to one or more roles: • **Design Report**—Allows users in a role to create and modify ad hoc reports. • **View Report**—Allows users in a role to view assigned standard and ad hoc reports.
3	Assign reports to roles.	Associate each report to one or more roles. The reporting rights associated with the role determine whether users assigned to the role can view or modify the report. **Note:** When you create and save ad hoc reports, you must perform this step for each new report to allow users to view the report.