SIREN Elite Report Writer
Instructions for Transactional Reports

Background Information

This document provides basic information about the **transactional report** writer feature in SIREN Elite. Report Writer is a tool that allows you to view, create and analyze reports using the data in your system. Transactional reports are customizable and can be simple or detailed, depending on the complexity of the report you wish to create. Transactional reports can be entirely configured, meaning you can change which fields display (columns), define additional criteria for each of those fields (e.g., display only records within a certain postal code) and change the order in which records appear. For more in-depth information, please refer to the report writer section in SIREN Elite's Help University.

Permissions

You must have the appropriate permission level to utilize the Report Writer feature. Users with the permission level of "Rescue Service Administrator" have access. You can see if you have access to Report Writer by logging into your SIREN Elite account and clicking on the "Tools" dropdown list. If you have access to Report Writer, it will appear under the "Tools" dropdown list.

How to use this document

The triangle next to each section header in blue is collapsible and expandable. Hover your mouse over each **Step** and a triangle will appear. Click on the triangle to expand or collapse each step.

> ***Tip: before starting a report, consider each data element you will need to work with to create the report.***
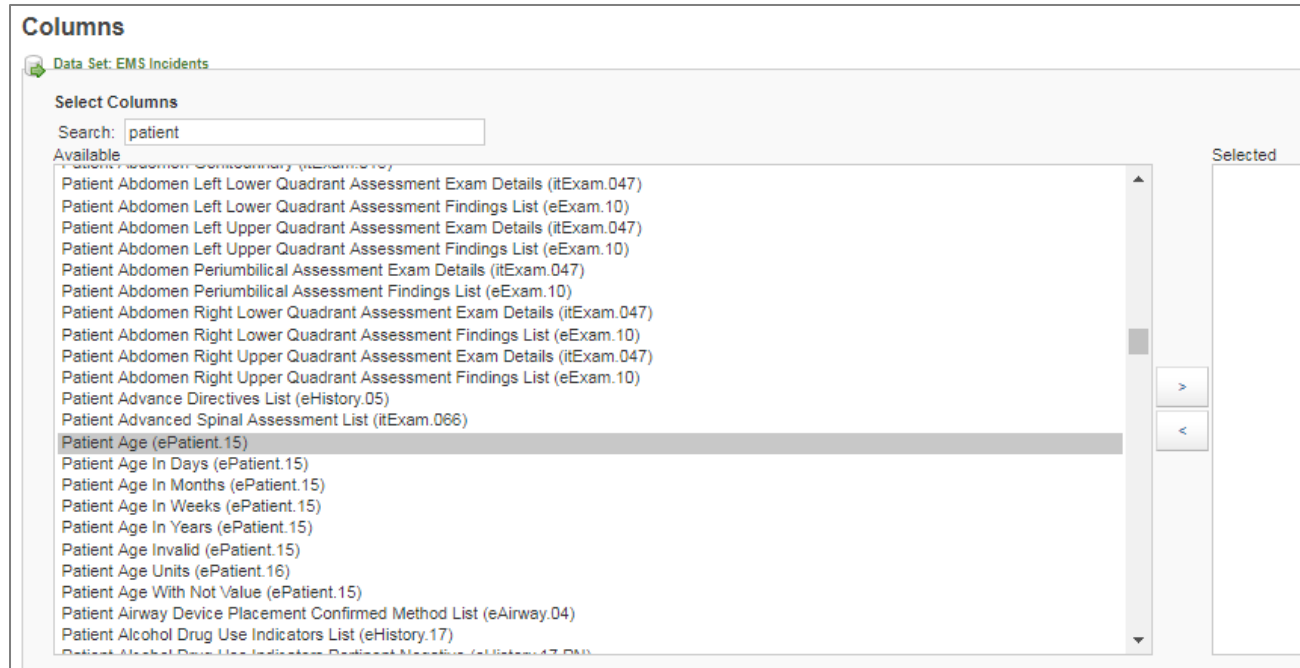
Step 1: Open Transaction Report

A. Select **EMS: EMS Incidents** under **Create a Transactional Report**. It might take a minute to load.
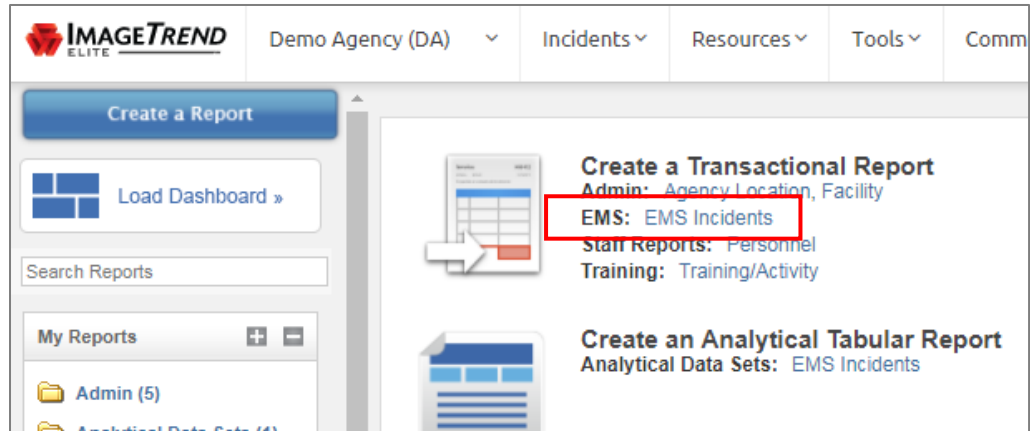
B. The Columns page will appear. This is where you select the columns (fields) that you want displayed. The columns correspond to the fields that are filled out on the SIREN run report.

C. Columns listed in the "Available" list can be *added* to the report.

D. Columns in the "Selected" list will be *displayed* in the report.

E. To choose the columns you want displayed, you can scroll through the list or use the search bar.

F. Highlight the columns you want displayed and use the arrow to move them to the selected box. See image below.

*Tip: You can select multiple fields by holding down the Ctrl key when clicking on the name of each field*

Columns

Data Set: EMS Incidents

Select Columns

Search: patient

Available

Patient Abdomen Left Lower Quadrant Assessment Exam Details (itExam.047)
Patient Abdomen Left Lower Quadrant Assessment Findings List (eExam.10)
Patient Abdomen Left Upper Quadrant Assessment Exam Details (itExam.047)
Patient Abdomen Left Upper Quadrant Assessment Findings List (eExam.10)
Patient Abdomen Periumbilical Assessment Exam Details (itExam.047)
Patient Abdomen Periumbilical Assessment Findings List (eExam.10)
Patient Abdomen Right Lower Quadrant Assessment Exam Details (itExam.047)
Patient Abdomen Right Lower Quadrant Assessment Findings List (eExam.10)
Patient Abdomen Right Upper Quadrant Assessment Exam Details (itExam.047)
Patient Abdomen Right Upper Quadrant Assessment Findings List (eExam.10)
Patient Advance Directives List (eHistory.05)
Patient Advanced Spinal Assessment List (itExam.066)
Patient Age (ePatient.15)
Patient Age In Days (ePatient.15)
Patient Age In Months (ePatient.15)
Patient Age In Weeks (ePatient.15)
Patient Age In Years (ePatient.15)
Patient Age Invalid (ePatient.15)
Patient Age Units (ePatient.16)
Patient Age With Not Value (ePatient.15)
Patient Airway Device Placement Confirmed Method List (eAirway.04)
Patient Alcohol Drug Use Indicators List (eHistory.17)

Selected

G. Once you have selected columns, you can use the **Up** and **Down** buttons to change the order in which they appear in the report.

H. Once you have selected all your columns, click "Continue" to move on to the next step.

Step 2: Display Options (optional)
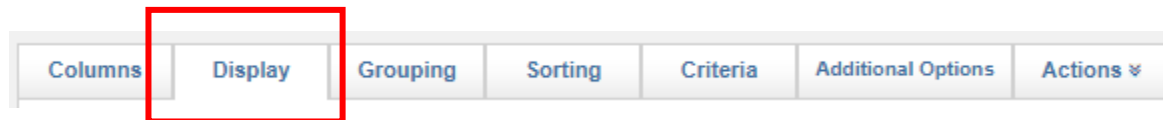
A. The display tab allows you to customize how your report is displayed. **You do not need to do this section.**

B. To adjust the display options for a specific column, click on the Expand arrow to the left.
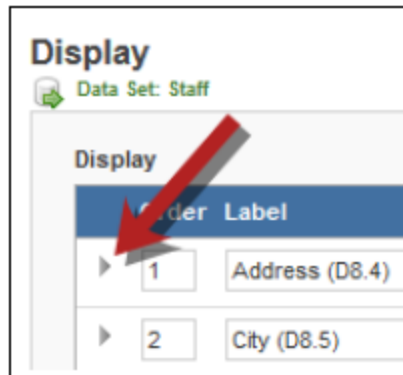
C. It will open the display options (see image below).

Order - The sort order of each column. Update the numbers to change the order in which columns will appear.

**Label** - The header that appears for this column on the report.

Format - The way the data will be displayed. Many columns will offer only one option: however, numeric or date fields may offer several different formatting options.

If you want information about the section definitions (i.e., total, average, standard deviation, link, prefix, etc.) let me know and I'll direct you to where to find the document in Elite.

Step 3: Grouping (optional)
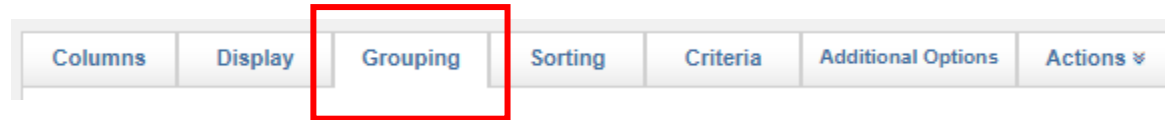
A. The grouping tab allows you place all records with similar values in a column together. It can help display your results in a format that is easier to read. **You do not need to do this section.**

B. You can group your results by multiple fields. The only fields available for grouping are the ones you have selected in your columns tab.

C. Each group can be sorted in ascending or descending order using the Up and Down arrows.

   o Example: You may want to view run reports grouped by town or by incident date. Or maybe both.
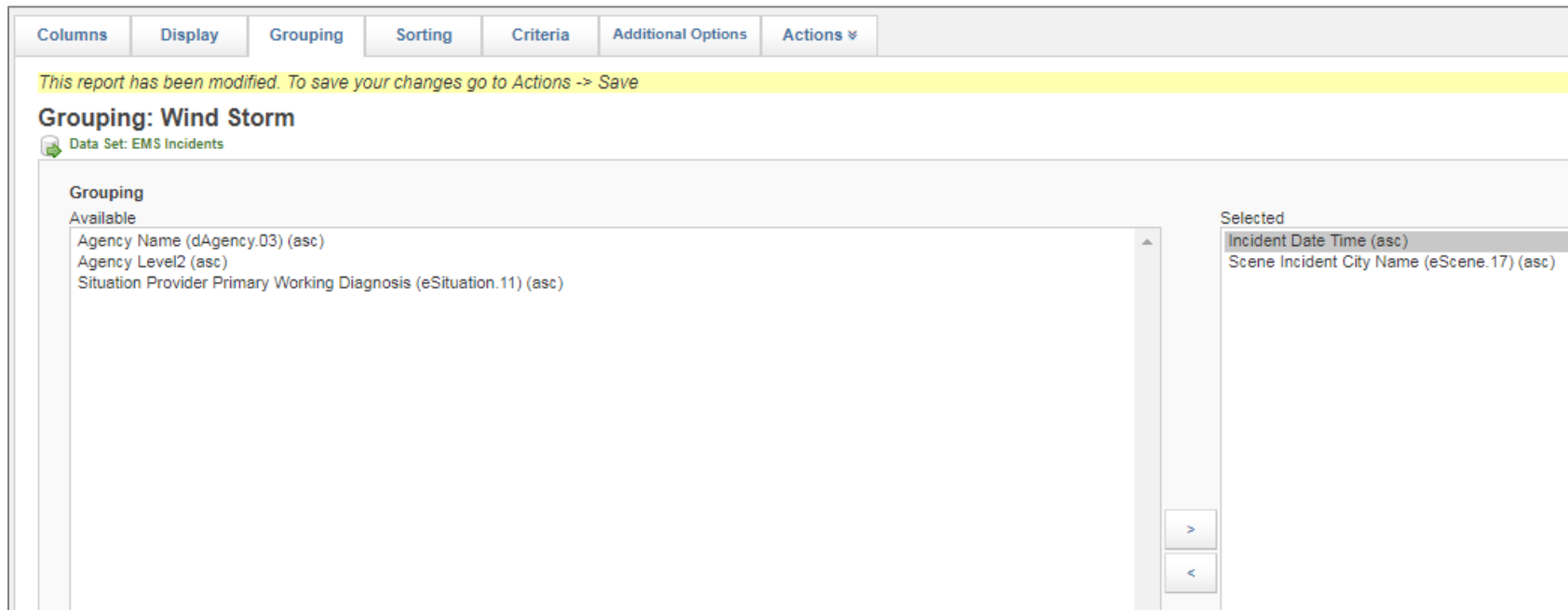
Step 4: Sorting (==optional==)
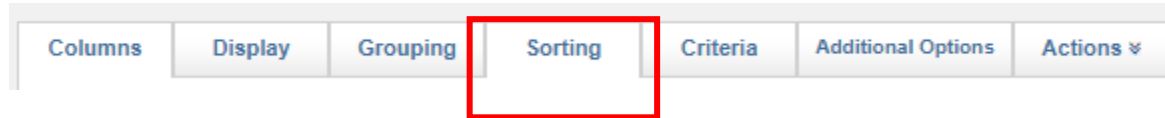
A. Sorting allows you to place records in a particular order (example: A-Z, 10-1) by the values of a specific column. ==**You do not need to do this section.**==

B. You can sort by multiple fields. Select the fields using the Up and Down button to indicate which fields should be sorted *first*.

C. Sorting is performed after all the data is grouped (if you decide to group your data).

Step 5: Setting Criteria and Filters (==recommended==)
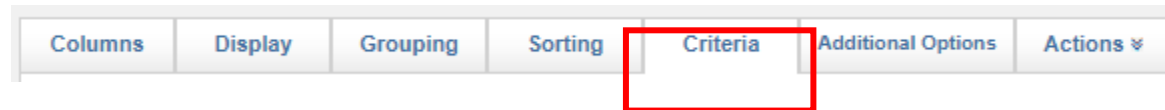
Background Information
- The Criteria tab is one of the most important tabs in your report.

- Criteria and filters allow you to narrow down the numbers of results displayed in your report by adding limits.

- This is where you will tell Report Writer what information you want to include and exclude in your results.

- The criteria tab will be helpful to limit the report if your agency has hundreds or thousands of records.

Criteria (*recommended*)
A. Criteria allows you to determine limits on the data that will be displayed every time the report is run. For example, if you want to only display calls for a date range, you can set the criteria here. To establish criteria, you will build a series of logical statements that read left to right, top to bottom (like equations in math).

B. Click "**Add New**". A box will appear that says "**Add New Criteria Line**".

- **Field** - Select the field for which you want to restrict. For example, if you want to view calls for the previous month then you would select the field "Incident Date".

- **Operator** - Here comes the math. The operator establishes the logical comparison between the field you choose and the value that you will select. Using our previous example, if you want to view calls for the last month then your operator will be "is within". You will note that if you select a certain operator that the value field will adjust accordingly.

- **Value** - This is the value that the system will check records against. It will be a dropdown field or a free text field depending on the operator chosen.

C. When you are finished, click "**Save**". Your criteria box will now look like the image below:

If you want to add more criteria, click "**Add New**" again and fill out the appropriate information.

- Example: let's say I want to look at all 911 calls in the last month. We already have the month criteria in place, but now I want to add in the *type* of response. I'm going to select the field "Response Type of Service Requested", I'll make the operator "is equal to", and the value will automatically present me with all the possible responses that can be selected for that field. I'll choose "911 Response".

D. You will notice that the **[And / Or]** box now appears. ***You must choose either "And" or "Or" to relate the second row of criteria to the first one***.

E.

And = **Both** this criterion and the one immediately preceding it must be true in order for a record to appear on the report.

Or = **Either** this criterion or the one immediately preceding it must be true for a record to appear on the report.

- In the example above, if I want to look at all calls for the last month that are also 911 responses, I would select "And". If I wanted to see all the calls within the last month OR all 911 response calls for my agency, I would select "Or".

Parentheses = You will only need to add parentheses if you have multiple criteria linked with both "And" and "Or". See image below for example:

Filters (*optional*)

A. **Filters** are useful for reports that will be run multiple times. It allows you to specify a new value criterion to be entered every time the report is generated.

B. When you add filters, a **Filter Your Results** page will be displayed every time the report is run and will allow viewers to select the value to narrow down report results.

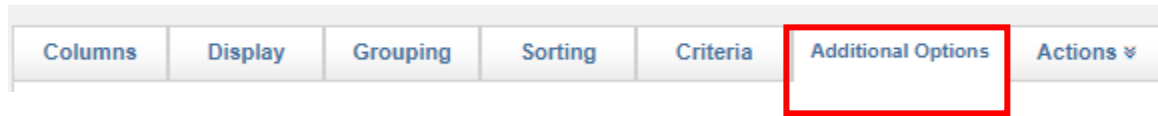C. The most common filter is date range (incident date).

Step 6: Additional Report Options (optional)

A. The **Additional Options** tab includes a variety of options of how records are displayed per page when the report is generated, whether a header or footer appears, and style options like colors. If you want specific information on each option, send me an email and I can forward you a document that contains that information.

B. To **expand** any section to edit the details, click on the section header:
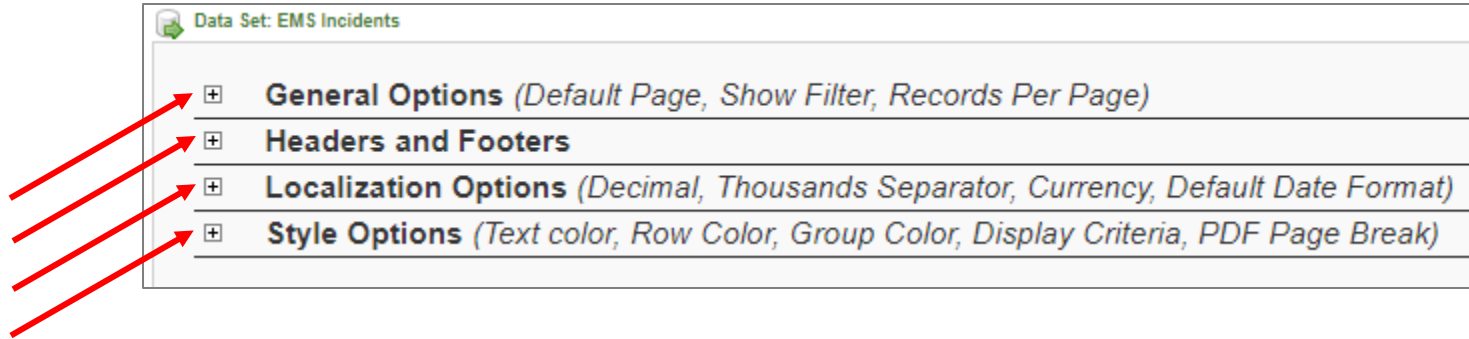
Step 7: Viewing the Report

A. Click the button "**Generate Report**". Generate Report »
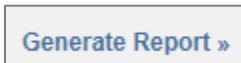
B. If any filters have been added, you will need to specify the values for the filters before proceeding. The system will prompt you to do so when you click the button "**Generate Report**".

Step 8: Saving the Report (optional)

A. If you think you will want to change something in the report or use it again in the future, then you will want to save the report for future use.

B. Click the "**Actions**" tab at the top of the screen.
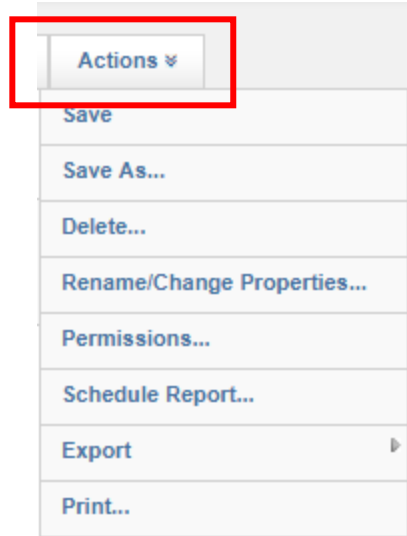
C. You will have the option to "**Save**", "**Save As**", or "**Rename/Change Properties**"

- **Save** – will save over any report with the same title with the new changes. If you are creating a new report from scratch, you should use the **Save** option so that you can specify a name for the report.

- **Save As** – allows you to save the report under a different name, preserving both versions of a report.
- **Rename/Change Properties** - Additionally, you can use the Rename/Change Properties option to change the name of an existing report without saving a copy. This option is not available for new reports that haven't been saved yet.

D. Enter the details of the report.

- **Report Name** – the title of the report, as it will appear at the top of the report and in the menu when people access it.

- **Report Description** – any additional descriptive information.

- **Report Folder** – the category in the left menu that this report will appear underneath.

- **Visible to Everyone** – **SET TO NO**. Choosing "**Yes**" will make your report visible to **ALL USERS IN THE STATE**.

*If you want the report to be visible to other users *in your service*, enter their last name in the search box and select them individually. Then click "**Save**".
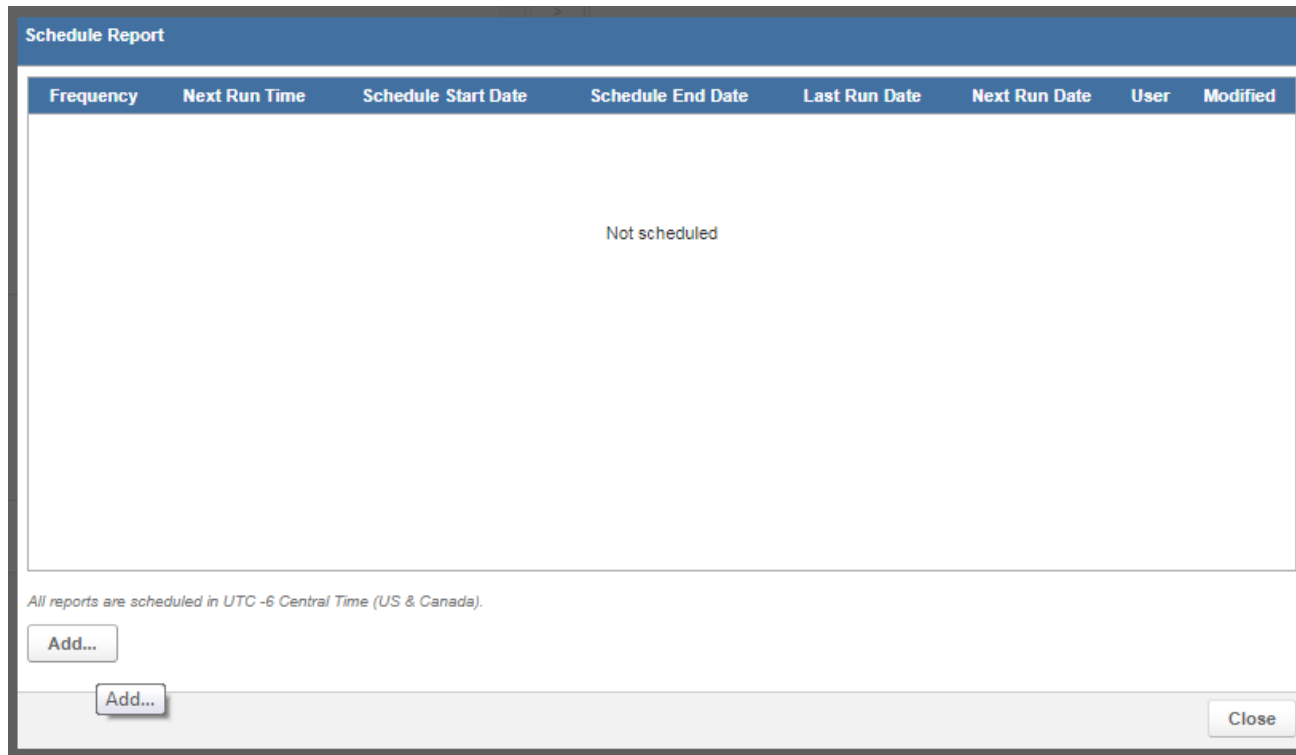
E. When finished, click "**Save**".

Step 9: Scheduling Reports (==optional==)

A. You can schedule reports to automatically run at a certain time interval. The report will be emailed to a person as an attachment.

B. Click on the "**Actions**" tab and select "**Schedule Report**".
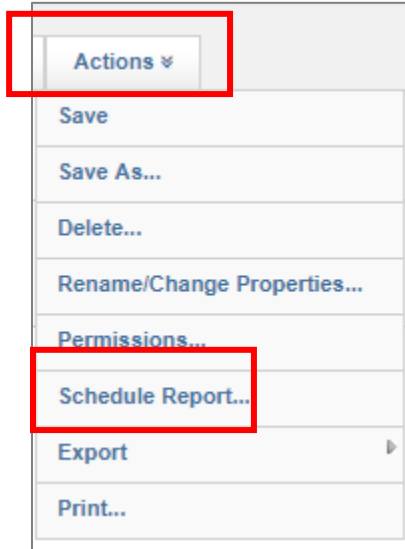
C. A "**Schedule Report**" box will appear. Click "**Add**".

D. The "**Add Schedule**" Box will appear.

- **Recurring** – how often the report will run

- **Time** – when the report will run

- **From** – any dates that should restrict when this report will run (ex: if the report should only be run for a month)

- **Subject** – type a subject line for the email that will be sent with the report

- **Message** – the message that will appear in the body of the email with the report

- **Format** – format in which the report should be saved

- **Recipients** – select any people who should receive this report

- Click "**Add**"

- **Allow Unsubscribe** – select whether these recipients should be able to set themselves to no longer receive the report

- When finished, click "**Save**"

Step 10: Exporting Report (<mark>optional</mark>)

A. If you would like to **print or save a copy of the report** with the data that is displayed, you can click on the "Actions" tab at the top of the screen and hover over the "Export" tab. This will display the different formats that you can export the report in. Some file types have limitations on the abilities to export. For example, you cannot export to PDF with more than 1,000 records in a report.
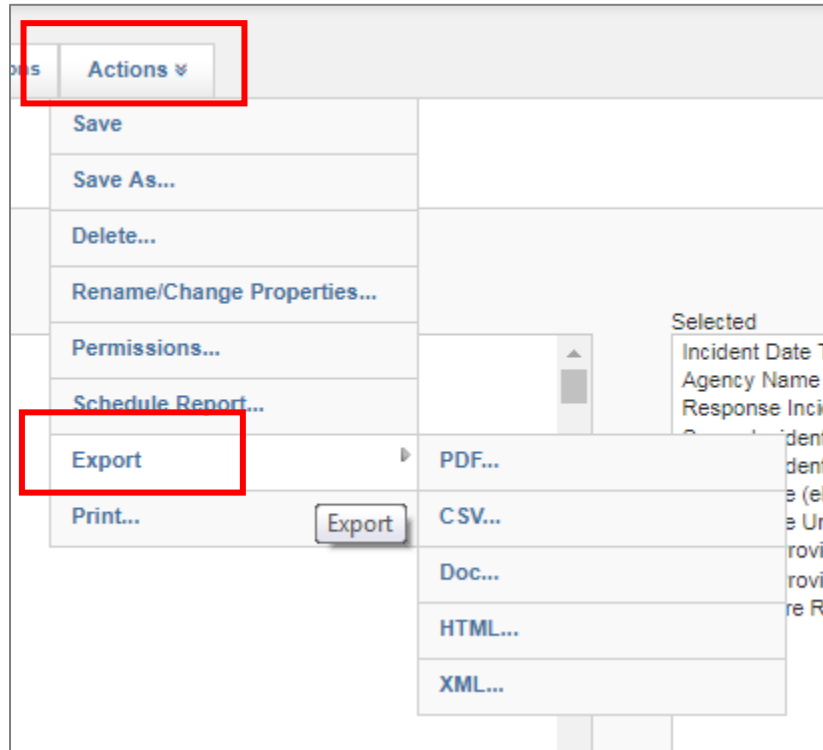
*Note: When exporting to **Excel**, you will select the **CSV** file option. To convert it, select **SAVE AS** in Excel and select a file type: .xls or .xlsx