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

Data Set: EMS Incidents	
Select Columns	
Search: patient	
Available	Selecte
Patient Abdomen Left Lower Quadrant Assessment Exam Details (itExam.047)	A
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 (iExam.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)	-

- 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).

Disp	lay									
	Order	Label							Form	nat
-	h	Patient Ag	e (ePatier	t.15)					Nur	mber
	Show Group Sur	mmary		Column Display			Column Formating]
		Total:	Yes	No Link	- Link -	•	Align:	right 🔻		
		Count:	Yes	No Set Blank Value	Yes No		Scale:	- 0 Digits - 🔻		
		Average:	Yes	No Prefix			Time:	- None - 🔻		
		Min:	Yes	Suffix				If your numeric value represents a time, select a time format to display	it in	
		Max:	Yes	No						
		Variance:	Yes	No						
	Standard	I Deviation:	Yes	No						
										1

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)

Columns	Display	Grouping	Sorting	Criteria	Additional Options	Actions ¥

- 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.
 - Example: You may want to view run reports grouped by town or by incident date. Or maybe both.

С	olumns	Display	Grouping	Sorting	Criteria	Additional Options	Actions ¥				
7	This report has been modified. To save your changes go to Actions -> Save										
C	Groupin	g: Wind St EMS Incidents									
	Groupir Available										Selected
	Agency Agency	/ Name (dAgeno / Level2 (asc)		gnosis (eSituatio	on.11) (asc)					> <	Incident Date Time (asc) Scene Incident City Name (eScene.17) (asc)

Step 4: Sorting (optional)

	Columns	Display	Grouping	Sorting	Criteria	Additional Options	Actions ¥
1							

- 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

	Columns	Display	Grouping	Sorting	Criteria	Additional Options	Actions ¥
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).

Columns	Display	Grouping	Sorting	Criteria	Additional Options	Actions ¥					
This report	This report has been modified. To save your changes go to Actions -> Save										
	Criteria: SS Report - Fever										
Criteria											
1	And/Or Fiel	d					Operator	Value			
Add	New										

- 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".

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.

Add New Criteria Line								
Field:	Incident Date							
Operator:	is within							
Value:	last T hours T							

• 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.

\mathbf{i}	Add New Criteria Line	:
	Field:	Incident Date
	Operator:	is within
	Value:	last ▼ 1 months ▼

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

iteria				
And/Or		Field	Operator	Value
	•	Incident Date	Is Within	Last 1 N
Add New		-		

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".

Add New Criteria Line	•	
Field:	Response Type Of Service Requested (eResponse.05)	-
Operator:	is not equal to V	
Value:	Value	
	8	
	911 Response (Scene)	
	Critical Care Interfacility Transfer	
	Intercept	
	Interfacility Transport	
	Medical Transport	
	Mutual Aid	
	Public Assistance/Other Not Listed	
	Standby	
Save		Cancel

- 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.
- Ε.

And/Or		Field	Operator	Value
	•	Incident Date	Is Within	Last 1 Months
and 🔻	•	Response Type Of Service Requested (eResponse.05)	Is Not Equal To	911 Response (Scene

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:

Criteria						
And/Or	Field	Operator	Value			
	 Agency Name (dAgency.03) 	Is Not Equal To	Demo Agency	•	4	۲.
and 🔻	 Agency Name (dAgency.03) 	Is Not Equal To	XYZ Ambulance Service	•	^	4
and 🔻 (Situation Provider Primary Working Diagnosis (eSituation.11) 	Is Equal To	Overdose / Abuse of Opiate (i.e. Heroin) (F11)	•	^	4
or 🔻	 Situation Provider Secondary Working Diagnosis List (eSituation.12) 	Is Equal To	"Overdose / Abuse of Opiate (i.e. Heroin) (F11)"	Ŧ	↑ ↓	r
or 🔻	 Medication Given Description (eMedications.03) 	Is Equal To	Naloxone (Narcan)) 🔻	^	r
and 🔻	v Incident Date	Is Between	3/18/2018 and 3/24/2018	Ŧ	1	

<u>Filters</u> (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.

Actions ¥	
Save	
Save As	
Delete	
Rename/Change Properties	
Permissions	
Schedule Report	
Export	Þ
Print	

- 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".

Save As					
Report Name:	SS Report - GI				
Report Description:	Syndromic Surveillance Report - GI				
		It is important to	1		
Report Folder:	Sundramia	select "No" here!	•		
			, , , , , , , , , , , , , , , , , , ,		
Visible to Everyone:					
	Adds report to 'Shared Reports' for all users based on report permis	sions			
Add this report to 'S	hared Reports' For The Following Users:				
Search:					
User Names:	Available	Selected			
	,	Dubie, Chelsea		*	
	·				
	1				
	,	>			
	,	<			
	, , Jay Peak NSP Ski Patroller 1				
	, Jay Peak NSP Ski Patroller 2				
	, Jay Peak NSP Ski Patroller 3 . Jay Peak Ski Patroller 4	•		-	
	Only the top thousand users will display; use the search box to name	ow your list			
Course				a	
Save				Cancel	

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".

Actions ¥	
Save	
Save As	
Delete	
Rename/Change Properties	
Permissions	
Schedule Report	
Export	Þ
Print	
L	

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"

Scheduling: Staff Info	rmation Summary	0
Schedule Report		
Recurring:	Daily On Sunday Monday Tuesday Wednesday Thursday Friday Saturday	
Time:	12 V: 00 V AN V	
From:	3/23/2010 Today to 3/23/2011 Today	
Subject:	Scheduled Report: Staff Information Summary	
Message:	Attached is the scheduled report: Staff finder for the sc	
Format:	PDF CSV	
Recipients:	Available Selected	
	Abrahamson, Tracy Admin, Hospital Admin, ImageTrend Admin, ImageTrend Admin, Service Admin, Service Admin, Service Admin, Service Administrator, Dallas	
Allow Unsubscribe:	Yes No Allow recipients to unsubscribe from the report	
Save Back		

Step 10: Exporting Report (optional)

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.

DIIS	Actions ¥				
	Save				
	Save As				
	Delete				
	Rename/Change	Properties			Selected
	Permissions			A	Incident Date 1
	Schedule Repor				Agency Name Response Inci
	Export	Þ	PDF		dent
	Print	Export	C SV		e (el e Ur
			Doc		rovi rovi
			HTML		re R
			XML		

*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