



## Training Documentation

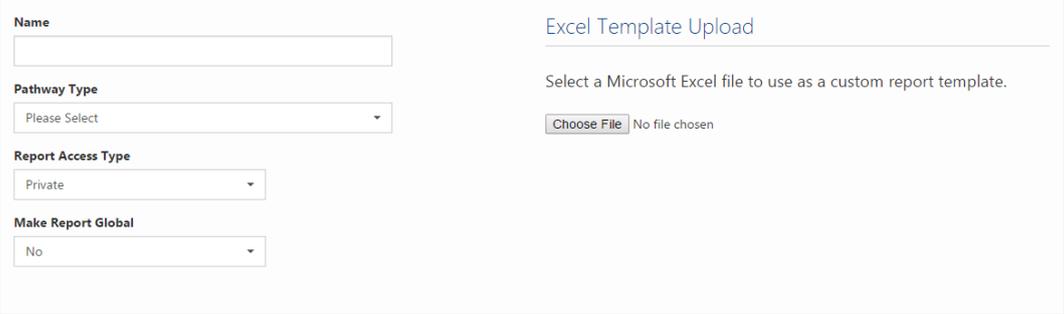
### Report Builder

*Purpose: To teach users to use the report builder.*

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## Creating a Report Template



The screenshot shows the 'Report Builder' interface. At the top right, there are navigation icons: a home icon, a search icon, a bar chart icon, a document icon with a red notification bubble, a settings gear icon, and a help question mark icon. Below the title 'Report Builder' is the 'REPORT OPTIONS' section, which is currently expanded. This section contains several form elements: a text input field for 'Name', a dropdown menu for 'Pathway Type' with the text 'Please Select', a dropdown menu for 'Report Access Type' with the text 'Private', and a dropdown menu for 'Make Report Global' with the text 'No'. To the right of these fields is the 'Excel Template Upload' section, which includes a text input field containing the text 'Excel Template Upload', a sub-header 'Excel Template Upload', a description 'Select a Microsoft Excel file to use as a custom report template.', and a file selection button labeled 'Choose File' with the text 'No file chosen' next to it. At the bottom right of the form area are two buttons: 'Cancel' and 'Save'.

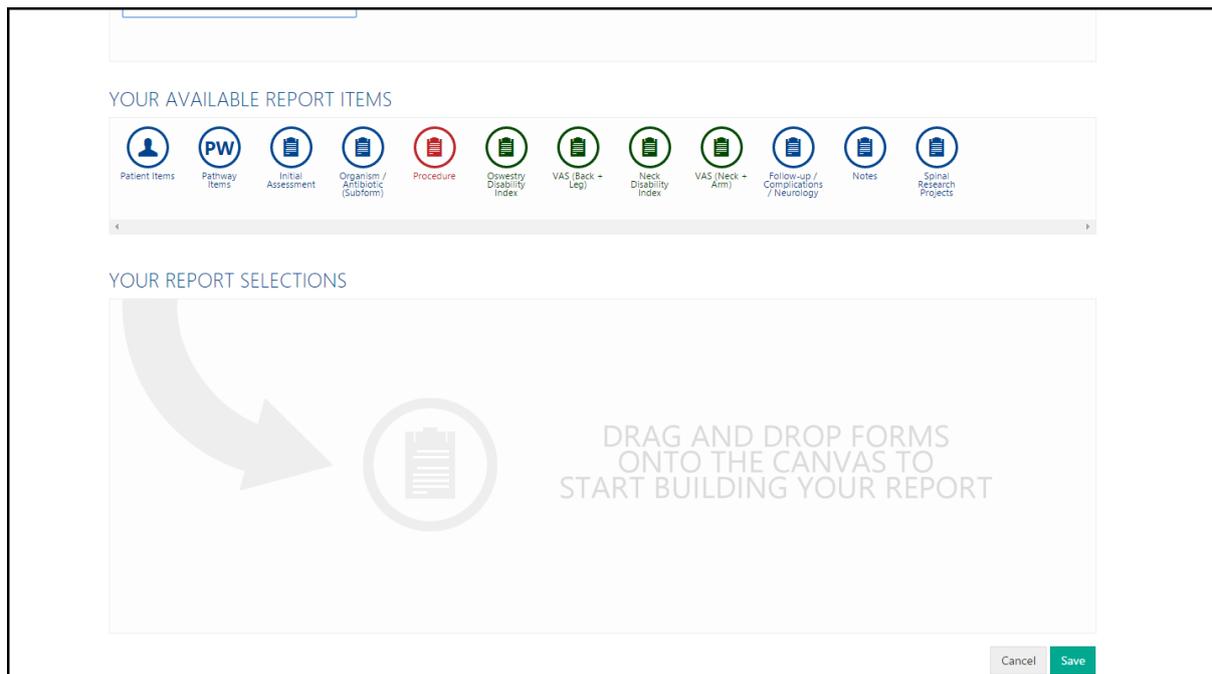
**Name** – Name your report template

**Pathway type** – Choose which pathway to run the report on. You cannot run reports across more than one pathway. Once selected, it shows the forms available in that pathway.

**Report Access Type** – It only affects Registry and Enterprise users. Choose to make the report **Private** or **Public**. When made public, all users within your organisation can see it. If set to private, only you or delegates can see the template.

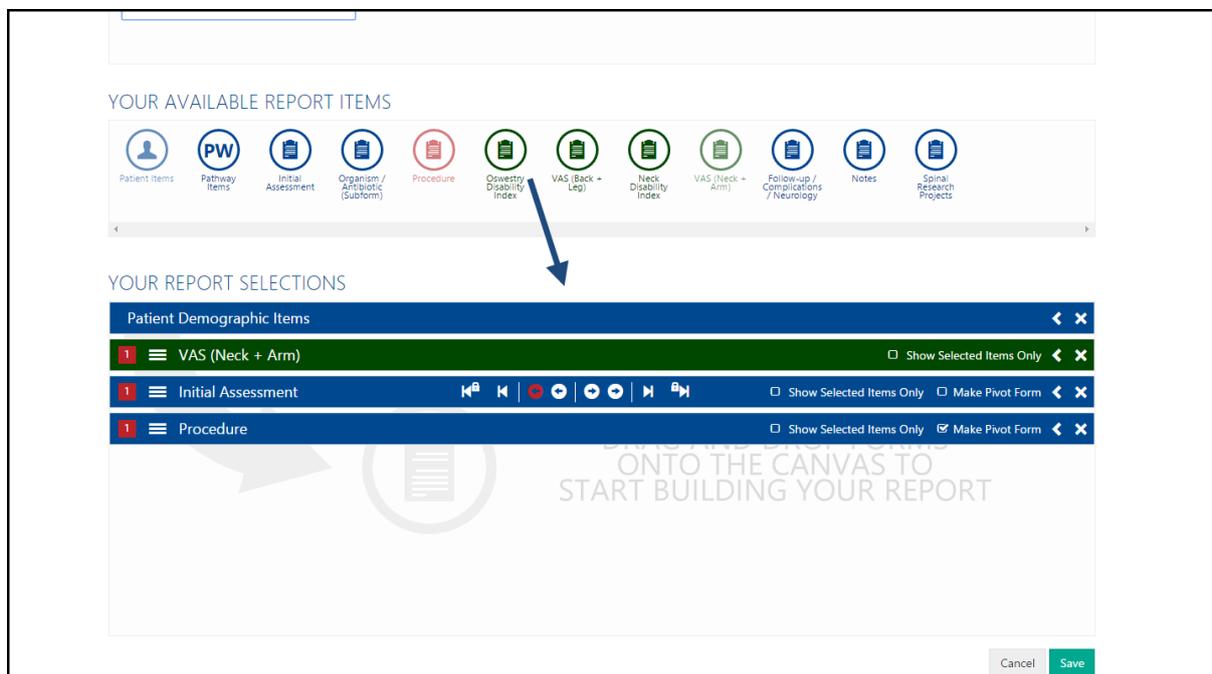
**Make Report Global** – It only affects Pro-ONE users. Clicking **Yes** will allow users who work outside your organisation to see this template.

After selecting a pathway type, these options will appear.



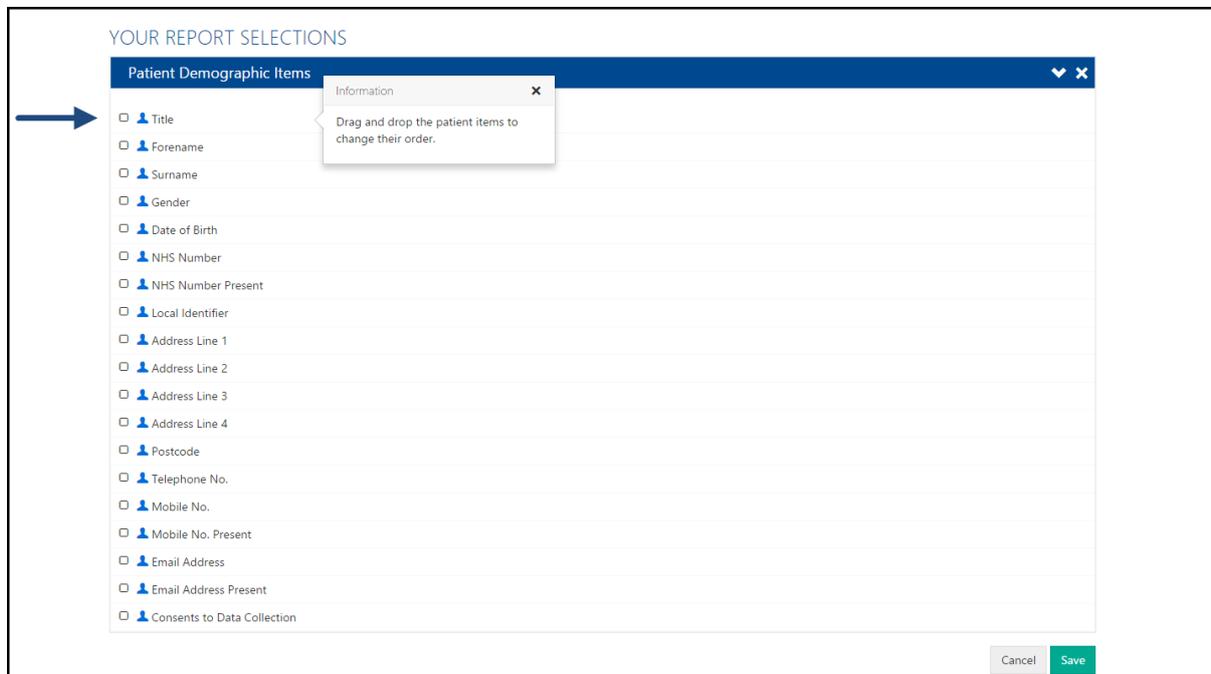
In Blue are standard forms. In Red are procedure forms. In Green are forms with score components.

Click and drag the icons containing the report items to the canvas below. To remove them, click the X on the right hand side.



Tick the boxes of the items you would like to run the report on. Only ticked items will be shown in your report.

-  Form questions have a Q symbol
-  Demographic options have a person symbol



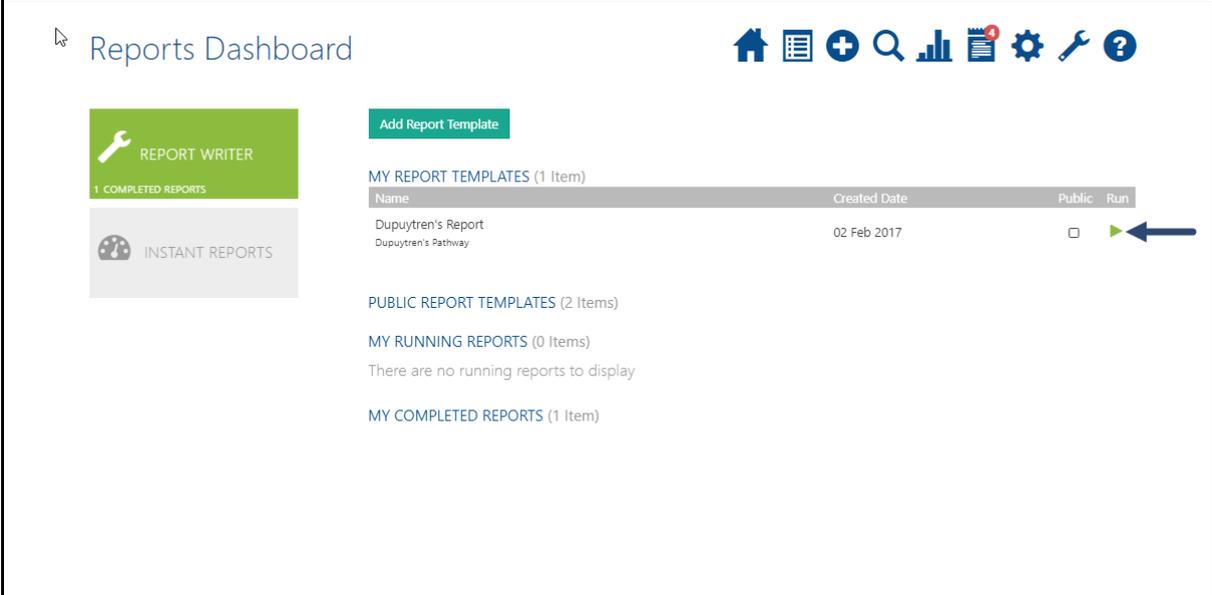
The screenshot shows a web interface titled "YOUR REPORT SELECTIONS". At the top, there is a blue header bar labeled "Patient Demographic Items" with a dropdown arrow and a close button. Below this is a list of 20 items, each with a checkbox and a person icon. The items are: Title, Forename, Surname, Gender, Date of Birth, NHS Number, NHS Number Present, Local Identifier, Address Line 1, Address Line 2, Address Line 3, Address Line 4, Postcode, Telephone No., Mobile No., Mobile No. Present, Email Address, Email Address Present, and Consents to Data Collection. A blue arrow points to the first item, "Title". A tooltip box is open over the "Title" item, containing the text "Information" and "Drag and drop the patient items to change their order." At the bottom right of the list, there are two buttons: "Cancel" and "Save".

-  Scores values have a green symbol

When chosen all items to report on, click **Save**. These items can be moved and dragged into a different order, which will match how it appears on the Excel spreadsheet.

## Running a Report

Click the green arrow to run the report across a time period and group of patients. The time period relates to the pathway creation date - so any pathways created between the two dates you choose will show in the report.



Reports Dashboard

REPORT WRITER  
1 COMPLETED REPORTS

INSTANT REPORTS

Add Report Template

MY REPORT TEMPLATES (1 Item)

Name	Created Date	Public	Run
Dupuytren's Report Dupuytren's Pathway	02 Feb 2017	<input type="checkbox"/>	

PUBLIC REPORT TEMPLATES (2 Items)

MY RUNNING REPORTS (0 Items)  
There are no running reports to display

MY COMPLETED REPORTS (1 Item)

Choose which patients to view, the options are:

- 'All Patients' - all patients under the organisation (this is only available to users with this permission)
- 'My Patients' - all patients you are the owner of
- 'All Patients I Have Access To' - all patients you are the owner of and all patients that you have explicitly been given access to
- 'All Patients of Users I Delegate For' - all the patients belonging to all the clinicians I am a delegate for

Click **Run Report**. The running form appears in the completed forms section but the spinning arrow shows it is not yet complete. Large reports may take a while to complete.

Reports Dashboard

REPORT WRITER  
2 COMPLETED REPORTS

INSTANT REPORTS

Add Report Template

MY REPORT TEMPLATES (1 Item)

Name	Created Date	Public	Run
Dupuytren's Report Dupuytren's Pathway	02 Feb 2017	<input type="checkbox"/>	

PUBLIC REPORT TEMPLATES (1 Item)

MY RUNNING REPORTS (1 Item)

Name	Start Date	End Date	Scope	Status
Dupuytren's Report Dupuytren's Pathway	01 Jan 1900	31 Dec 2099		

MY COMPLETED REPORTS (2 Items)

Name	Start Date	End Date	Completed Date	Scope	
Reports completed today					
Dupuytren's Report Dupuytren's Pathway	01 Jan 1900	31 Dec 2099	06 Apr 2018		
Dupuytren's Report Dupuytren's Pathway	01 Jan 1900	31 Dec 2099	06 Apr 2018		

To view the data, click the green download button. Please Note: **Downloading this file will save patient identifiable data to your computer's hard drive. I am aware of my responsibility in holding such information and would like to continue.** Data is automatically saved to your downloads folder regardless on if you save the spreadsheet.

Once into Excel the data can be filtered by highlighting the column headings and then selecting Data tab then Filter icon. At this point all the columns can be filtered and different responses selected to manipulate the data according to the information you are trying to obtain i.e. filtering by a type of implant or by a specific type of operation.

Reports Dashboard

REPORT WRITER  
3 COMPLETED REPORTS

INSTANT REPORTS

Add Report Template

MY REPORT TEMPLATES (1 Item)

Name	Created Date	Public	Run
Dupuytren's Report Dupuytren's Pathway	02 Feb 2017	<input type="checkbox"/>	

PUBLIC REPORT TEMPLATES (1 Item)

Name	Created By / On	Run
Knee Pathway Knee Pathway	ADMINISTRATOR, Reports 06 Apr 2018	

MY RUNNING REPORTS (0 Items)

There are no running reports to display

MY COMPLETED REPORTS (3 Items)

Public Report Templates are available to use. These are templates prepared by other site users or Amplitude Staff and only require running and downloading.

## Advanced Options

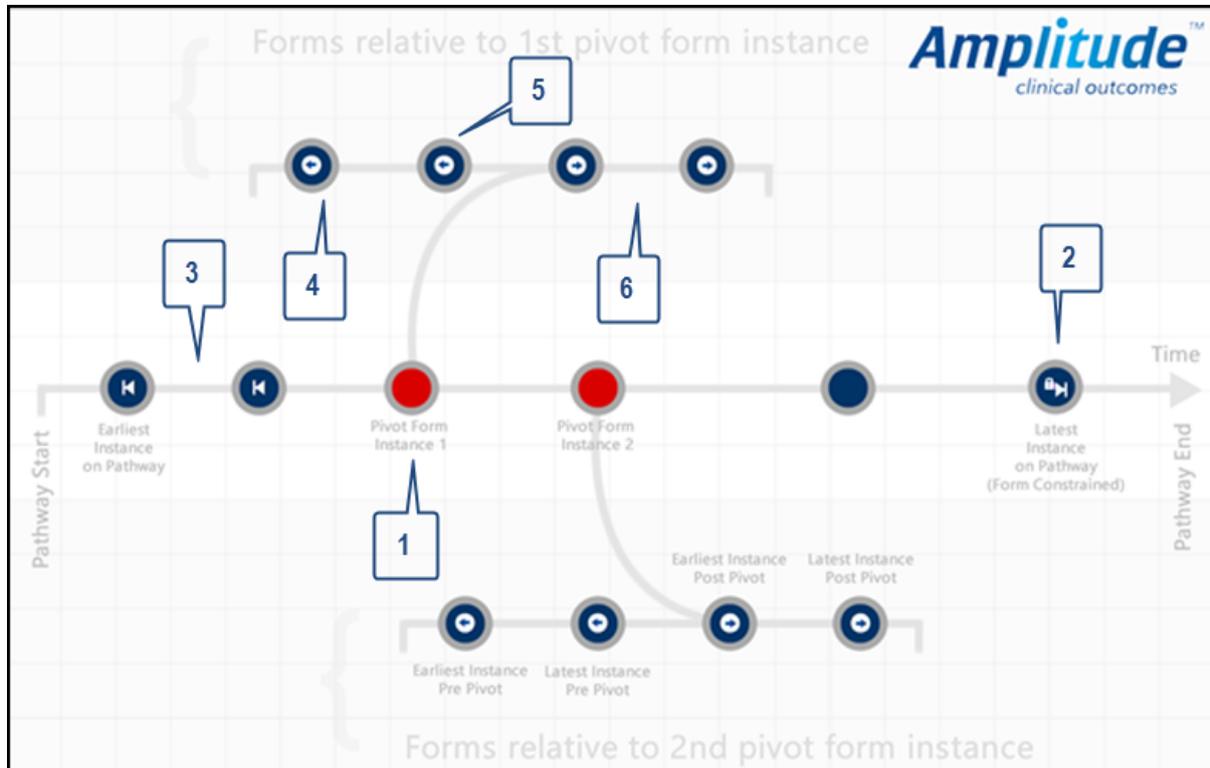
The screenshot displays a software interface for report selection. At the top, under 'YOUR AVAILABLE REPORT ITEMS', there is a horizontal scrollable list of report types: Patient Items, Pathway Items (PW), Initial Assessment, Organism / Antibiotic (Subform), Procedure, Oswestry Disability Index, VAS (Back + Leg), Neck Disability Index, VAS (Neck + Arm), Follow-up / Complications / Neurology, Notes, and Spinal Research Projects. Below this is the 'YOUR REPORT SELECTIONS' section, which features a toolbar with icons for navigation and filtering, and a list of items with checkboxes. Callouts 1 through 7 point to specific features: 1 points to the 'Make Pivot Form' checkbox; 2 points to the 'Completed By' checkbox; 3 points to the 'Initial Assessment' report type; 4 points to the 'Completed Date' checkbox; 5 points to the 'Initial Assessment' report type; 6 points to the 'Completed Status' checkbox; and 7 points to the 'Show Selected Items Only' checkbox.

There are several different options on some of the forms. Below is a brief description.

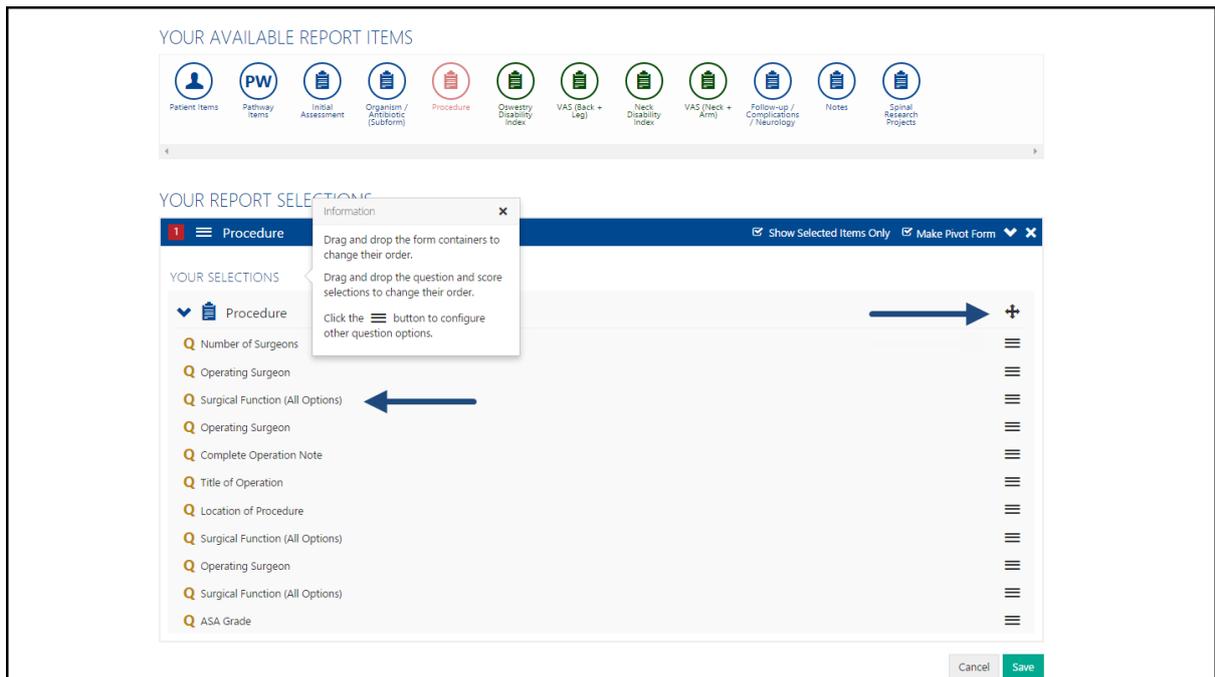
1. **Make a Pivot Form** – A pivot form is a form which all other forms can be chosen around. For example, your patients may have five completed notes forms on their pathways and to pick the one most relevant for your report, you would like to see their results pre and post op. By making a form a pivot form, this puts a marker in at that point and allows you to separate which forms are pre-op and which are post-op. There can be more than one pivot form but only one pivot form of the same form type. For every instance of a pivot form, a new row in MS Excel is generated.
2. **Earliest Instance on a Pathway (Form Constrained)** – This is the earliest point on the pathway that this form was given, regardless of whether the question was answered.
3. **Earliest Instance on a Pathway** – This is the earliest point on the pathway that these questions are answered regardless of whether they appear in the same form.
4. **Earliest Instance Pre-Pivot** – This will take the selected questions from the form that occurred furthest post -pivot.
5. **Latest Instance Pre-Pivot** – This is the form closest to the pivot form before the pivot form was created.
6. **Post-Pivot options** – These options are identical to their Pre-Pivot counterparts.

This diagram explains it more clearly. The centre line is shows the position of forms in relation to the pathway duration. The red pivot forms so how the forms can be chosen around this point. Without a pivot form, this limits choosing forms to only choosing the last or first item along the pathway.

**Note:** Score forms do not have pivot options, all instances of the selected score forms will be shown in the report.



**7. Show Selected Items Only** – When selected, only those items that have ticked in the form are viewable. Unticking this option and the full list is viewable. Items can be ordered when this is selected.



## Question Options

When selected items only is chosen, left click on the three lines on the right-hand side to bring up the question options. Once done, click **Apply** to save these changes.

**Reporting Column Name** – This can be changed and in doing so, will change the name of the column in MS Excel and the name of the question in this form.

**Data Type** – This changes the data type in MS Excel to either a date or number depending on your selection. This would be regarded, for example, performing an auto sum function needs to be in number format.

**Create Excel Named Range from distinct answers** – When this is selected, it will create a new column on a new worksheet with the title you enter below. This column will contain a list of all the distinct answers to the question you have selected.

The screenshot shows a software interface with a list of questions under the heading 'YOUR SELECTIONS'. The questions listed are: EQ-5D, MOBILITY, SELF-CARE, USUAL ACTIVITIES (eg. work, study, housework, family or leisure activities), PAIN/DISCOMFORT, EQ5D, ANXIETY/DEPRESSION, VAS Text, and Best Health Today. A 'Question Options' dialog box is open on the right side of the screen. The dialog box has a title bar 'Question Options' and a close button 'X'. It contains the following text: 'Report Section: Please select one box in each row below. Please indicate which statement best describes your own health state today.' Below this, there are two fields: 'Reporting Column Name' with a text input field containing 'MOBILITY' and a blue arrow pointing to it from the 'MOBILITY' question in the list; and 'Data Type' with a dropdown menu showing 'Default' and a blue arrow pointing to it from the 'MOBILITY' question. There is also a checkbox labeled 'Create Excel Named Range from distinct answers' which is currently unchecked. At the bottom right of the dialog box is a green 'Apply' button. At the bottom of the main interface are four buttons: 'Save As Copy' (green), 'Delete' (red), 'Cancel' (grey), and 'Save' (green).

## MS Excel Templates

There is the option to export information into a prepared excel spreadsheet.

Click **Choose File** and select which file you would like the data to appear in. Please enter the name of the worksheet on your file that you would like the data saved into. When the report is downloaded, it will automatically save to the data to this sheet on this excel file.

REPORT OPTIONS

**Name**

**Pathway Type**

**Report Access Type**

**Make Report Global**

**Excel Template Upload**  
Select a Microsoft Excel file to use as a custom report template.

Demonstration.xlsx

**Excel Worksheet Name**

Information

Specify the name of the Microsoft Excel worksheet where the report data should be saved to.

The worksheet name you specify here must correspond **exactly** with a worksheet in your uploaded spreadsheet.

If you have any further queries, please contact the customer support desk on 0333 014 6363 or via email at [customer.support@amplitude-clinical.com](mailto:customer.support@amplitude-clinical.com).