MIDIS OFFICE HOURS

Thursday, February 25, 2021 @ 12pm

How To: Build and Customize Reports

MIDIS Epi: Sam Saycich 406-444-0018 samantha.saycich@mt.gov

Reports- Where to Find Them and What the Sections Mean

Building reports is fast and easy! They are a great way to see a large set of data from MIDIS and can help your team track cases, contact tracing efforts, treatments, symptoms, and more!

1. Log into MIDIS.
2. Select "Reports".

Home | Data Entry | Merge Patients | Open Investigations | **Reports** | System Management

Release 6.0.7-GA Dashboard

There are four different sections you should see: Private Reports, Public Reports, Template Reports, and Reporting Facility Reports.

- Private Reports: These are reports that you have created and personalized and saved to your MIDIS account. **No one else can see these reports or access them**.
- Public Reports:
  - Default Report Section: These are reports that are created by programmers on the back end and are where your report usually saves if you edit it and don't change where you would like to save it.
  - Montana CDEpi Reports: These are reports that the CDEpi builds and personalizes! Feel free to use them, customize them, and save them as your own!
  - Montana LHJ Reports: These are reports that local health jurisdictions make and save.
  - STD Report Section: These are reports that our STD team makes for grant data and analysis.
- Template Reports: This is a great place to start if you want to build and customize your own report.
  - Default Report Section: These are basic reports that were created by programmers on the back end.
  - Montana CDEpi Reports: These are basic reports that were created by CDEpi.

- Reporting Facility Reports: Everything but the Kitchen Sink…. Few straggler reports that I don't think anyone really uses.

Reports- What Is the Difference Between "Run" and "Export"?

- "Run" lets you save a report! **Be very careful using this, because if you just hit "Save" it'll overwrite the report that's previously there**. I recommend selecting "Save as New" if you want to save the report that you built so that way you can use it again later! If you don't want anyone to be able to access the report, you can save it Private in the "Default Report Section"! If you are building a report that you want others to be able to access, save it Public in the "Montana LHJ Reports" section.
  - **Note**- It's useful to be very specific when naming your report so you can find it again, especially if you're saving it publicly! I recommend something along the lines of, "Cascade COVID19 Daily Investigation Report".
- "Export" lets you just run and export the report that was previously saved!

Reports- How to Customize and Save It as Your Own or for Your Public Health Staff to Use

There are plenty of template reports you can choose from to build a report for you or your jurisdiction! Depending on what type of report you're looking to run, there might already be one built out there and saved under Public Reports! The nice thing about reports is that it only grabs data for **YOUR** jurisdiction, so even if another jurisdiction built a report but you like how it looks, you can run it and the report will be populated with your data! You can then use the instructions above to save the report as your own without overwriting that jurisdiction's saved report!

1. Find a report you want to run. You can look in the Public Reports or Template Reports section!Select "Run" next to the report you want to run. In this example, I want to run the COVID Investigation Report.

2. The first tab that comes up is "Basic Filter". This tab is usually optional and differs depending on the initial report that was built! In this example, I'm going to add a date filter to pull investigations that were started between 12/23/2020 and 12/26/2020.

Basic Filter	Advanced Filter	Column Selection

COVID-19 Investigation Report

Time

Date Filtered By: Investigation Start Date ☐ Include NULLs

From: 12/23/2020 🔲
mm/dd/yyyy

To: 12/26/2020 🔲
mm/dd/yyyy

3. The second tab available is "Advanced Filter". This tab lets you apply a ton of great filters on the report. This works like an algebra equation. You can add a condition and it will be added to the advanced criteria list and get as specific as you want!

   a. Make sure you check in the "Basic Filters Selected Plus:" at the bottom of the tab to see if anything was currently selected. If something was selected and you want to remove it, you can select the "<" arrow next to the advanced criteria list. Use "<<" to remove everything in the list. I'm going to remove the "Patient Last Name Not Null" criteria that's already there.

Advanced Criteria List

Click one or more filters in the text area below to move them up or down or to remove them from the Advanced Filter list.

Basic Filters selected plus:

Patient Last Name Not Null
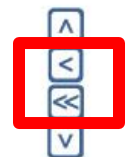
b. You can add different criteria by selecting a field, selecting logic (ex. equals, not equals, between, etc.), and then selecting the value you want and hitting "Insert".

COVID-19 Investigation Report

Statements

Field: Logic: Value:

| Patient Current Sex | Equals | Female
Male
Unknown |

[Insert]

c. If I want to add a filter that looks at males between the ages of 20-30 and females between the ages of 40-50, I would want to build an equation that looks like this: ((Patient current sex "Male") AND (Patient Age Reported 20,30)) AND ((Patient Current Sex "Female") AND (Patient Age Reported 40,50)). You want to utilize the parentheses so that MIDIS knows which criteria to keep together. I was able to build this equation in the advanced criteria list like this:

Advanced Criteria List

Click one or more filters in the text area below to move them up or down or to remove them from th

Basic Filters selected plus:

```
(
Patient Current Sex Equals "Male"
AND
Patient Age Reported Between 20 and 30
)
AND
(
Patient Age Reported Between 40 and 50
AND
Patient Current Sex Equals "Female"
```

4. The last tab available is "Column Selection". This tab really lets you build the report and select what columns you want to be exported from the report! "Available Columns" shows you a list of all columns that are available to be built into your report! "Selected Columns" shows you a list of columns that you selected from the "Available Columns" tab. These columns will be part of the report you built and will be in the export!
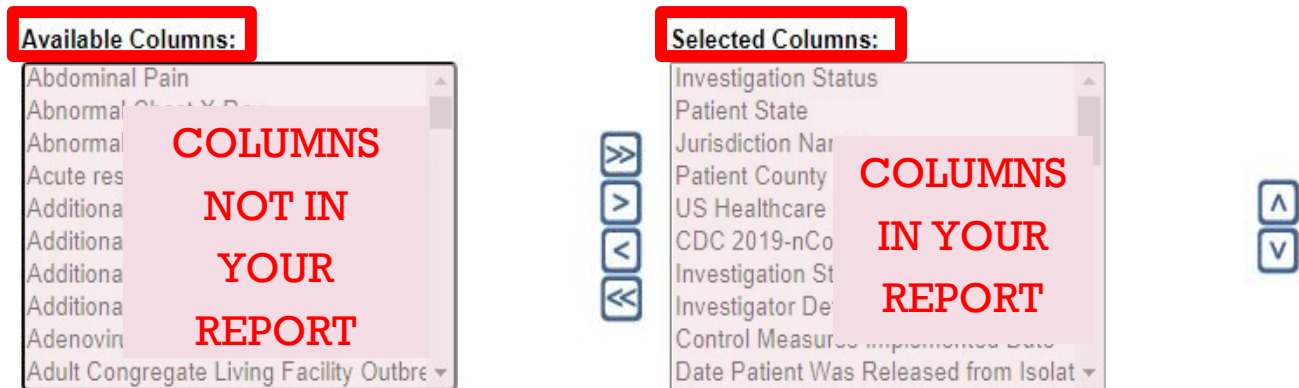
5. You can use the arrows between "Available Columns" and "Selected Columns" to move columns.
   a. **>>**: This will move all "Available Columns" over to your "Selected Columns" and these will all be in your report! This is not recommended as there are usually a bunch of columns and it makes the report congested.
   b. **>:** If you select a column in "Available Columns" and select ">", it will move the column over to "Selected Columns" for your report!
   c. **<:** If there is a column in the "Selected Column" that you don't want in your report, select the column name and then hit "**<**" to move it back over to "Available Columns" so it's not in your report anymore.
   d. **<<:** If you want to start fresh, hit this button and it will move everything in your "Selected Columns" over to your "Available Columns" and give you a clean slate!
6. You can use the arrows to the right of "Selected Columns" to organize the order that the columns will appear in the report! Just select a column and use the "Up" and "Down" arrows to arrange your columns how you see fit!
7. <mark>**The final step is to either run, export, or cancel the report! See the top of page 2 for an explanation of which one to select!**</mark> 😊