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Reports

Depending on the resources, roles, and user rights with which you are associated, you may have access to various reports. To find out which reports are available to you, in the main menu, click **Report**. The list of reports opens. Alternatively, to see a list of reports with descriptions, in the breadcrumbs, click the arrow on the second chip and, in the menu, click **Report**.

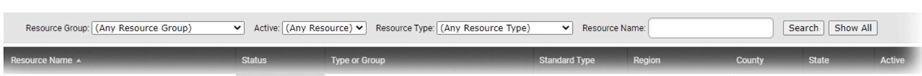
After running most of these reports, they are available for seven days on the Jobs List.

Your reporting options may include:

- Status Reports
- Resource Reports - resources and/or sub-resources; incoming patient notifications
- Event Reports
- Admin Reports
- Form Reports

Search

When a report requires you to select resources, and the list contains more than 15 options, search fields appear at the top of the page. You can filter the list by resource group, resource status (active or inactive), resource type, and/or resource name.



Format

For some reports, the generation process involves choosing an output format, such as PDF. In other cases, the solution automatically generates the file in PDF or (.xlsx) format. For spreadsheet formats, you can use Microsoft® Excel® or a text editor to open the files.

> **Note:** For reports that are generated in the Excel spreadsheet format, EMResource generates .xlsx files and does not support the older .xls format.

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Event Reports

There are two types of event reports, the Event Detail and the Event Snapshot reports. These reports provide summary information and insight into events occurring within a specified period. These reports are available for ad hoc and multi-region events. For multi-region events, the Event Detail report includes all participating regions and resources, while the Event Snapshot shows only the information from your current region. To view snapshot information for all participating regions, you need to run the snapshot report from each region.

The Event Detail report is generated as a PDF file. The Event Snapshot report can be generated as a PDF file or a spreadsheet (.xlsx) file. You can use Microsoft® Excel® to work with the spreadsheet.

To generate an Event Detail report

1. In the main menu, click **Report** and then click **Event Detail**. The *Event Detail Report (Step 1 of 3)* page opens.
2. For **Start Date**, enter the date on which you want the report to begin.
3. For **End Date**, enter the date on which you want the report to end.
4. For **Event Templates**, select the checkboxes for the templates you want to include in the report.
5. Click **Next**. The *Event Detail Report (Step 2 of 3)* page opens.
6. In the *Select Events* section, select the checkbox for each event you want to include.
7. Click **Next**. The *Event Detail Report (Step 3 of 3)* page opens.
8. If appropriate, select the checkboxes for the resources you want to include.
9. Click **Generate Report**. The *Jobs* page opens.
10. Click the report PDF to download it.

To generate an Event Snapshot report

1. In the main menu, click **Report** and then click **Event Snapshot**. The *Event Snapshot Report (Step 1 of 2)* page opens.
2. For **Start Date**, enter the date on which you want the report to begin.
3. For **End Date**, enter the date on which you want the report to end.
4. For **Report Format**, click either **Web Browser (HTML)** or **Excel Report (XLSX)**.
5. For **Event Templates**, select the checkboxes for the templates you want to include in the report.
6. Click **Next**. The *Event Snapshot Report (Step 2 of 2)* page opens.
7. In the *Select an Event section*, select an event. T*he **Snapshot Date and Time should fall between** automatically updates to reflect the time frame of the selected event.*

8. For **Snapshot Date**, enter the date you want to capture.
9. For **Snapshot Time**, enter the **Hour** and **Minutes** you want to capture.
10. Click **Generate Report.** The report opens or is downloaded.

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Form Reports

With the appropriate permissions, you can generate two form reports:

- Form Detail, showing every instance that form was completed during the specified date range, and including when activated, who submitted it and when, who it was delivered to, and more.
- Form Summary, including when activated, who completed it and when, who acknowledged it and when, read receipt information, and more.

When generating these reports, you can set specific filters to narrow your results based on a participating user or resource as well as a date range. In addition, you can generate the detail report in PDF or as a spreadsheet that you can open using a text editor or Microsoft® Excel®. The summary report can only be generated in Excel report format (.xlsx).

To generate a Form Detail report

1. In the main menu, click **Report** and then click **Form Detail**. The *Form Detail Report* page opens.
2. In **Start Date** and **End Date**, enter the date range that you want to include in the report.
3. For **Report Format**, click **Web Browser** (HTML) or **Excel** (XLSX).
4. In the **Form** list, select the form.
5. If appropriate, click Filter and select the filter you want to apply.
6. Click **Generate Report**. Your report opens or downloads.

To generate a Form Summary report

1. In the main menu, click **Report** and then click **Form Summary**. The *Form SummaryReport* page opens.
2. In **Start Date** and **End Date**, enter the date range that you want to include in the report.
3. For **Report Format**, click **Web Browser** (HTML) or **Excel** (XLSX).
4. In the **Form** list, select the form.
5. Click **Generate Report**. Your report opens or downloads.

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Status Reports

Status reports provide specific information about the statuses being reported by resources in your region during a specific period. These reports are generated mainly as PDF and CSV files. CSV files can be opened and edited with spreadsheet solutions, such as Microsoft® Excel®, or text editors.

After running most of these reports, they are available for seven days on the Jobs List.

To generate a Status Summary report

1. In the main menu, click **Report** and then click **Status Summary**. The *Status Summary Report* page opens.
2. In **Start Date** and **End Date**, enter the date range for the report.
3. For **Report Format**, click PDF or CSV.
4. Click **Next Step**.
5. Select the checkboxes for the resources you want to include.
6. Click **Next Step**.
7. Select one or more status types.
8. Click **Generate Report**. The *Jobs* page opens.
9. Click the report to download it.

To generate a Status Detail report

1. In the main menu, click **Report** and then click **Status Detail**. The *Status Detail Report* page opens.
2. In **Start Date** and **End Date**, enter the date range for the report.
3. For **Report Format**, click PDF or CSV.
4. In the **Status Type** list, select the type.
5. Click **Next**. The second page opens.
6. Select the checkboxes for the resources you want to include.
7. Click **Generate Report**. The *Jobs* page opens.
8. Click the report to download it.

To generate a Status Reason Summary report

1. In the main menu, click **Report** and then click **Status Reason Summary**. The *Status Reason Summary Report* page opens.

2. In **Start Date** and **End Date**, enter the date range for the report.
3. For **Report Format**, click PDF or CSV.
4. Click **Next**. The second page opens.
5. Select the checkboxes for the resources you want to include.
6. Click **Next**. The third page opens.
7. In the **Status Type** list, select the type.
8. Click **Next**. The fourth page opens.
9. Select the **Status Reasons**.
10. If you want to include regional information, select the **Regional Aggregate Information** checkbox.
11. Click **Generate Report**. The *Jobs* page opens.
12. Click the report to download it.

To generate a Status Reason Detail report

1. In the main menu, click **Report** and then click **Status Reason Detail**. The *Status Reason Detail Report* page opens.
2. In **Start Date** and **End Date**, enter the date range for the report.
3. For **Report Format**, click PDF or CSV.
4. Click **Next**. The second page opens.
5. Select the checkboxes for the resources you want to include.
6. Click **Next**. The third page opens.
7. In the **Status Type** list, select the type.
8. Click **Next**. The fourth page opens.
9. In the **Status Reasons** list, select the reason.
10. Click **Generate Report**. The *Jobs* page opens.
11. Click the report to download it.

To generate a Status Snapshot report

> **Note:** This report uses the 24-hour time format.

1. In the main menu, click **Report** and then click **Status Snapshot**. The *Status Snapshot Report* page opens.
2. In **Report Date**, enter the date.
3. In the **Hour** list, select the hour.

4. In the **Minute** list, select the minute.

5. Click **Generate Report**. The report is automatically downloaded.

To generate a Monthly Status Assessment report

> **Note:** EMResource allows you to select the current month for this report; however, if you do this, the report results will be zero (0). To generate meaningful data, you must select a month in the past.

1. In the main menu, click **Report** and then click **Monthly Status Assessment**. The *Monthly Status Assessment* page opens.

2. In the **Month** list, select the month.

3. In the **Year** list, select the year.

4. For **Report Format**, click HTML or CSV.

5. Select the checkboxes for the resources you want to include.

6. Click **Next**. The second page opens.

7. In the **Status Type** list, select the type.

8. Click **Next**. The third page opens.

9. Select the checkboxes for the **Statuses** you want to include.

10. Click **Generate Report**. The report opens or downloads.