



## CALGB Reporting System

Konnie McCauley  
Information Systems Help Desk  
CALGB Statistical Center  
June 21, 2007

For CALGB Participants Only

## Objectives

This presentation describes the use of the new CALGB Reporting System web application.

You will learn:

- Functions of the Reporting System
- How to use the Reporting System to run, view, and manage reports

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## What is the Reporting System?

A CALGB web application that can be accessed 24/7 from any computer – the application lets you do the following tasks for reports to which you have access:

- View lists of available reports
- Run reports
- Schedule reports to be run one time or many times
- Manage report schedules
- Search for and view reports you've run
- View report descriptions
- Set user preferences

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## Satisfying HIPAA Requirements

Health Insurance Portability and Accountability Act of 1996 (HIPAA) restricts access to protected health information (PHI).

The CALGB Reporting System complies by:

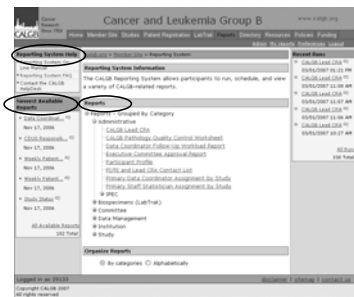
- Requiring secure logins
- Limiting access by role
- Logging out if there is no activity

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## Main Page Functions

- Access Reporting System Help
- View report descriptions
- Select reports to schedule
- Select reports to run and view immediately

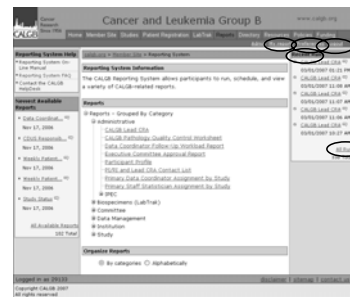


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## Main Page Functions

- See a list of scheduled reports
- See links for recently run reports
- See a list of all reports you have run
- Change your preferences for default report format and scheduling
- Logout



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## Organizing Reports

- Main page lists reports alphabetically or by category
- Click to choose the list type you prefer

[calab.org](#) > [Member Site](#) > [Reporting System](#)

### Reporting System Information

The CALGB Reporting System allows participants to run, schedule, and view a variety of CALGB-related reports.

### Reports

Reports - Listed by Category

### Organize Reports

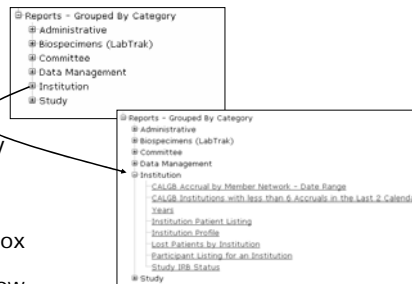
By categories  Alphabetically

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## Expanding Links on the Main Page

- Main page appears initially with report listings unexpanded.
- Click the plus box (+) to expand the link and show all reports.

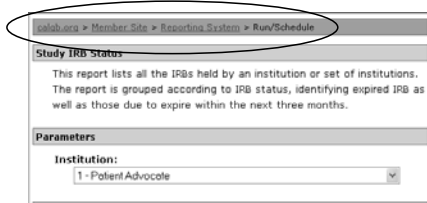


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## Navigation Bar

- Click the navigation bar to move backward through the pages
- Avoid using the browser's Forward and Back buttons



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## Information Icons

Move cursor over information icon to obtain detailed information



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## Report Formats

Reports can be run in any of these formats:

Portable Document Format (PDF)	Report displays in PDF format that can be opened by computers that have Adobe Reader™ installed.
Microsoft Word®	Report displays as a Microsoft Word document and can be opened by computers that have Microsoft Word installed.
Microsoft Excel	Report displays as a Microsoft Excel document and can be opened by computers that have Microsoft Excel installed.
Rich Text Format (RTF)	Report displays in RTF format, a cross-platform format that can be read by most word processors.
Plain Text	Report displays in Plain Text and can be opened by most computers and does not require special software.

## Accessing the Reporting System

- Access the Reporting System from any computer
- Access from a tab on the Member Site next to other CALGB Web Applications like Patient Registration and LabTrak

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## Login

- Enter your CALGB Participant ID into the **User Name** field, and enter your Web Applications Password
- First time users – call CALGB Help Desk (877) 442-2542 to set up account and Web Applications Password

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## Running a Report

Go to Reports heading, expand a report category, click a link.

## Running a Report - Run/Schedule Page

- Report name and description under the **Navigation Bar**
- **Parameters** – vary according to the report selected
- **Comment** – to be appended to report information

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## Running a Report - Run/Schedule Page

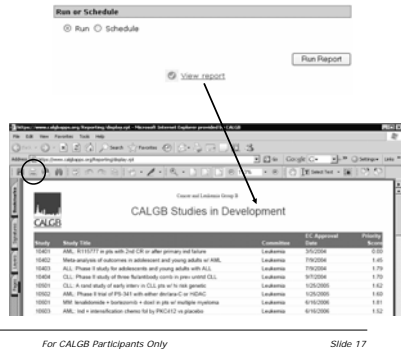
- 1) Select the **Report Format** by clicking the button next to the format name.
- 2) Under **Run or Schedule**, click to select **Run**.
- 3) Click the **Run Report** button.

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## Viewing and Printing the Report

- Click **View Report** link appears in format requested
- Click **Print** icon to print or **File→Print**



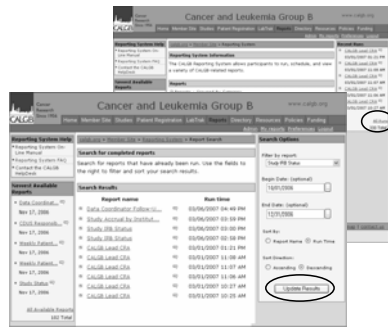
## Five More Ways to View Reports

- **Recent Runs** (Main page) – shows reports you have run recently
- **Recent Runs of this Report** (Run/Schedule page) – shows up to five runs of this report only
- **All Runs of this Report** (Run/Schedule page) – shows all runs for the specified report (appears only if more than five reports have been run)
- **My Reports** – (all pages) shows scheduled and recently run reports
- **All Runs** (Main page) – shows the results for all reports

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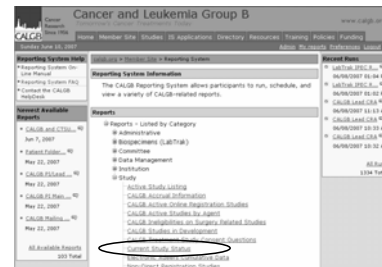
## Searching Report Results

- 1) Click **All Runs**
- 2) Select for report and run dates
- 3) Specify sort order (name or run time)
- 4) Click **Update Results**



## Scheduling a Report

Click a link in the listing of available reports



## Scheduling a Report - Run/Schedule Page

- 1) Select **Report Parameters** if any
- 2) Add a **Comment** (optional)

Lead CRA distribution > Member Site > Research System > Run/Schedule

**Current Study Status**  
This report shows all studies with a particular status at the time of printing, grouped by committee.

**Parameters**  
Status: Completed

**Comment (Optional)**  
Here you can attach a comment to the report. The comment can be a reminder about how you will use the report, the context in which you ran it, or can serve any other purpose you find helpful. The comment will appear in the popup that displays when you move your cursor over the report's information icon.

Lead CRA distribution

## Scheduling a Report - Run/Schedule Page

- 3) Click to select the **Report Format**
- 4) Click to select **Schedule**. Page refreshes and displays scheduling options.

**Comment (Optional)**  
Here you can attach a comment to the report. The comment can be a reminder about how you will use the report, the context in which you ran it, or can serve any other purpose you find helpful. The comment will appear in the popup that displays when you move your cursor over the report's information icon.

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**Report Format**  
 Portable Document Format (PDF)
  Microsoft Word
  Microsoft Excel
  Rich Text Format (RTF)
  Plain Text

**Run or Schedule**  
 Run
  Schedule

Run Report

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## Scheduling a Report - Run/Schedule Page

- 5) Click to select a scheduling frequency.

**Run or Schedule**  
 Run
  Schedule

**Scheduling Options**  
 Once
  Daily
  Weekly
  Monthly
  First Monday of Each Month
  Last Day of Each Month
  Every N Months

Date when schedule will begin  
 Scheduled time: [HH] [MM] [AM/PM]

Schedule Report

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## Scheduling a Report - Run/Schedule Page

- 6) Set the date and time for the schedule to start:
  - Click to display date selection calendar.
  - Click the date the schedule will start.
  - Use drop-down menus to select Scheduled time in hours, minutes, and AM/PM.

**Run or Schedule**  
 Run
  Schedule

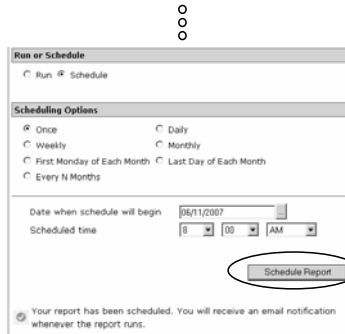
**Scheduling Options**  
 Once
  Daily
  Weekly
  Monthly
  First Monday of Each Month
  Last Day of Each Month
  Every N Months

Date when schedule will begin  
 Scheduled time: 11/11/2007 11:15 AM

Schedule Report

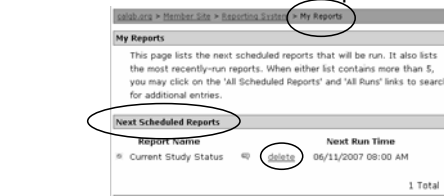
## Scheduling a Report - Run/Schedule Page

- 7) Click **Schedule Report**. Confirmation message appears at the bottom of the page. Email notifies you when report is available for viewing.



## Viewing a List of Scheduled Reports

- 1) Click **My Reports**.
- 2) View schedule under **Next Scheduled Reports** heading.
- 3) Delete the scheduled report by clicking the **delete** link next to the report name.



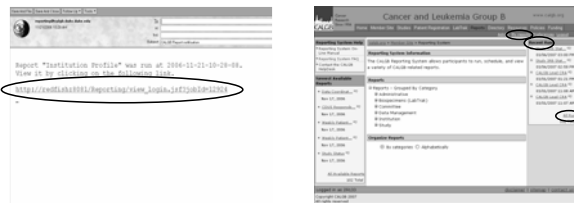
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## Four Ways to View Scheduled Reports

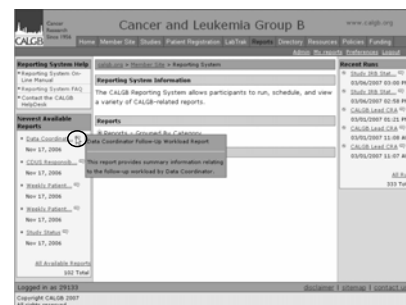
After a scheduled report has run, you can view it by:

- Clicking the **report link** in the email notification
- Clicking the link in the Reporting System application under **Recent Runs, All Runs, or My Reports**



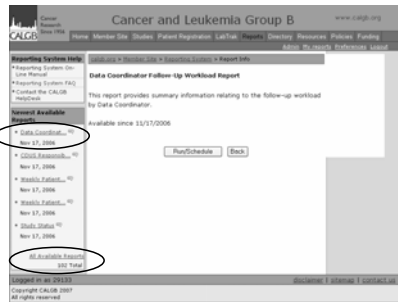
## Viewing Report Descriptions - Two Ways

Move cursor over Information Icon in **Newest Available Reports** and view the popup.



## Viewing Report Descriptions – Two Ways

- Click a link under **Newest Available Reports** – view Report Info page. Click **Run/Schedule** to run, or **Back** to return to main page
- Can do the same for **All Available Reports**

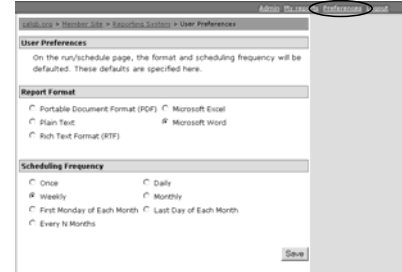


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## Setting User Preferences

- Click the **Preferences** link
- Select new defaults to appear on the Run/Schedule page
- Click Save



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## Summary

This presentation described the functions of the CALGB Reporting System and detailed the use of the system to:

- Run reports
- View reports
- Search report results
- Schedule reports
- Manage scheduled reports
- View report descriptions
- Set user preferences

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## Resources

- *CALGB Reporting System User Guide*
  - Click **Resources** tab on the Member Site, then click Clinical Research Associates, or
  - Click the **Training** tab on the Member Site, scroll to *Technical Documentation for IS Applications*
- CALGB Help Desk
  - Phone (877) 442-2542 or (877) 44-CALGB
  - Email: [calgb-support@calgb.duhs.duke.edu](mailto:calgb-support@calgb.duhs.duke.edu)

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