

# Reporting Portal Quick Guide



# Northern Light Health<sup>SM</sup>

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Revised 4/10/19

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## Reporting portal description

*Reporting Portal* (DiscernReportingPortal.exe) allows you to run various reports from multiple systems in a single location, streamlining the process and eliminating the need to use multiple applications to generate reports.

Currently in Reporting Portal you can run reports previously found in Explorer Menu, Discern Analytics, or Discern Analytics2.

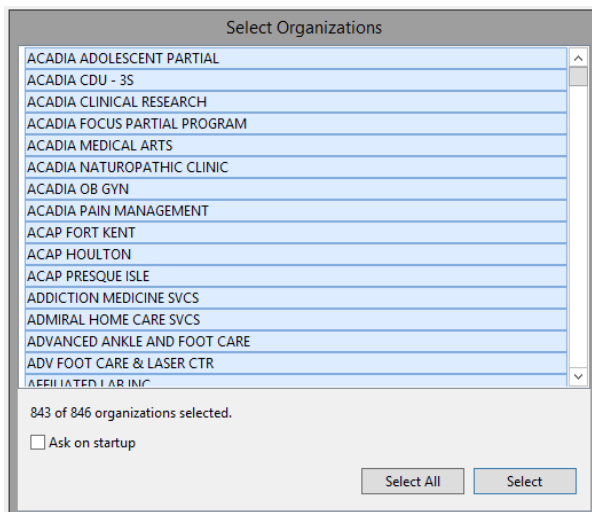
## How to locate the links to the Reporting Portal

There are a couple of ways to access the reporting portal:  [Reporting Portal](#)

- Citrix Store Front/standard app homepage – This will [allow you to run all 4 types of reports](#) that can be found in the reporting portal.
- PowerChart – limited access as you can only run DA, DA2 and CCLs.
- App Bar - limited access as you can only run DA, DA2 and CCLs.
- Any additional quick links created will only run DA, DA2 and CCLs.

## Selecting Organizations

When you log into the Reporting Portal you will be prompted to select organization(s). You can select one or multiple. This is used when running Discern Analytics 2 reports. If you run a Discern Analytics 2 report and don't get the expected information check to see what organization was selected.

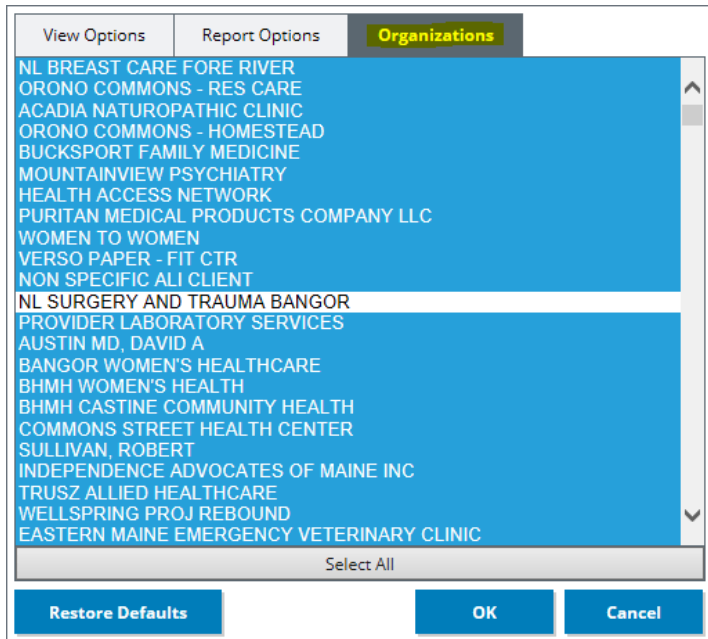


## Changing the Selected Organization

To change the Selected Organization, click on Settings



Click the Select Organizations button.



Select the new organization(s) and click OK. You can also click Select All to highlight all organizations then click OK.

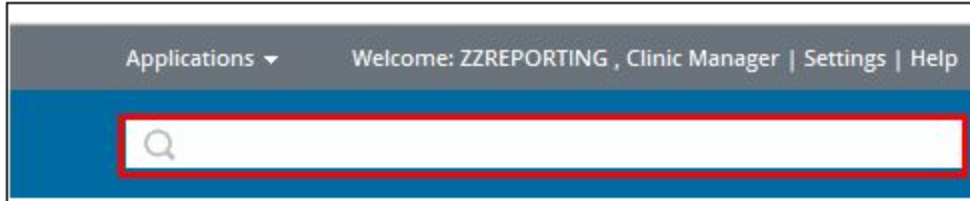
If you run Discern Analytics or Powervision reports, check off the **Show OMF Saved Views** box.

## Finding and Running Reports

When the Reporting Portal is first opened, there will be a **Filters** section, a list of **All Reports** available, a **My Favorites** tab, a **Search** bar to search for Report Names, and application/user **Settings** and **Help**.

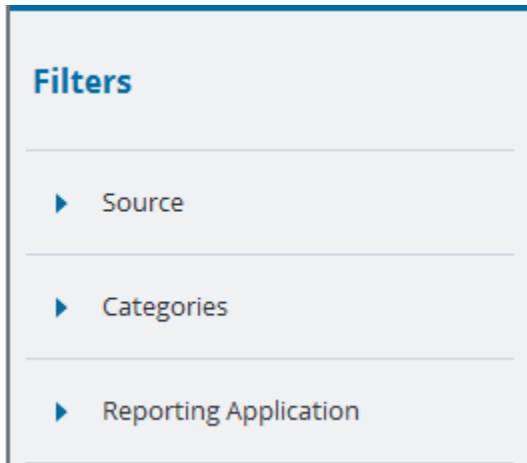
## Searching for a Reports

The search box in the upper right of the screen under the logged-in user's name allows searching by Report Name. Click in the white box to the right of the magnifying glass image, and type a partial term to search for. The report list will filter down as you type, and searches anywhere the term is found – whether at the beginning, middle, or end of a Report Name.



## Using Filters

Filters allow you to narrow down the list of reports displayed.



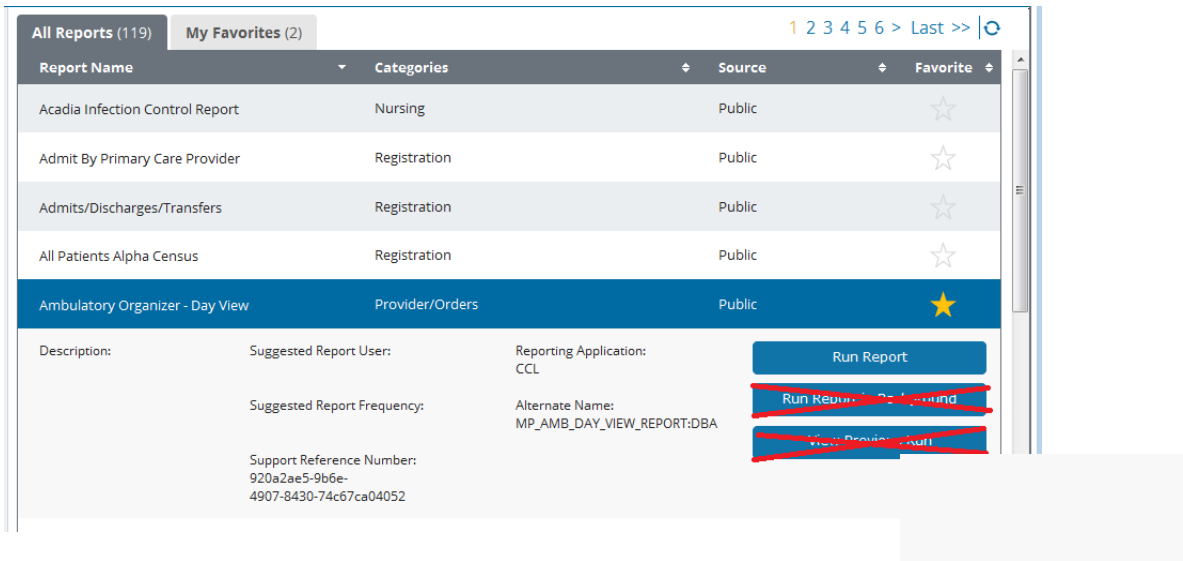
**Source** – This filter allows the user to filter between Public (most reports are here), and Personal reports.

**Categories** – This is the predefined folder structure similar to what existed in Explorer Menu.

**Reporting Application** – This filter can be added by navigating to Settings in the upper right corner of the Reporting Portal, and choosing "Show Reporting Application Filter". This will allow the user to filter between CCL Reports (formerly in Explorer Menu), Discern Analytics/Powervision, Discern Analytics 2.0 (DA2) and PowerInsight application-specific reports if needed. The selections will vary based on your security.

## Running a Report

To run a report, click anywhere in the bar that contains the report name. The bar will expand to show options such as **Run Report**, Run Report in Background (not available), and View Previous Run (not available). From here, click on "**Run Report**".

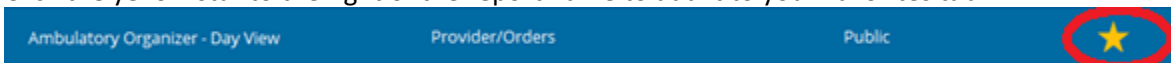


Most reports will have some sort of prompt. Note that reports previously run in Explorer Menu will now have a Facility prompt in addition to the other prompts. Fill in the prompts as you normally would. Click on Run Report.

To close the report click the X next to the report name at the top of the screen to close that tab.

### Add a Report to the Favorites Tab

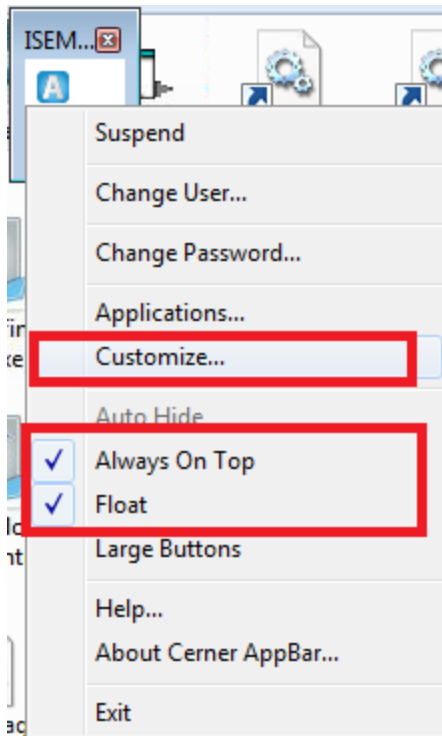
Click the yellow star to the right of the report name to add it to your Favorites tab.



### How to Customize Application Bar

**Step 1:** To add the Reporting Portal icon to the app bar – click on app bar icon.

**Step 2:** Check Allow Floating and Large Buttons



**Step 3:** Select Customize

**Step 4:** Select Buttons Tab – The list of applications is alphabetical...scroll to see Discern Reporting Portal. Place black check mark next to Discern Reporting Portal and Click OK.

## Running the same report multiple times

If you need to run a CCL report multiple times for different parameters/units/MOs. When running the report, the first report check the box at the bottom left of your prompt, “Return to prompts on close of output” and then execute the report.

