ADVANCED GRAPHIC GROUP REPORT INSTRUCTIONS

HEALTHSTATUS ASSESSMENT SOFTWARE
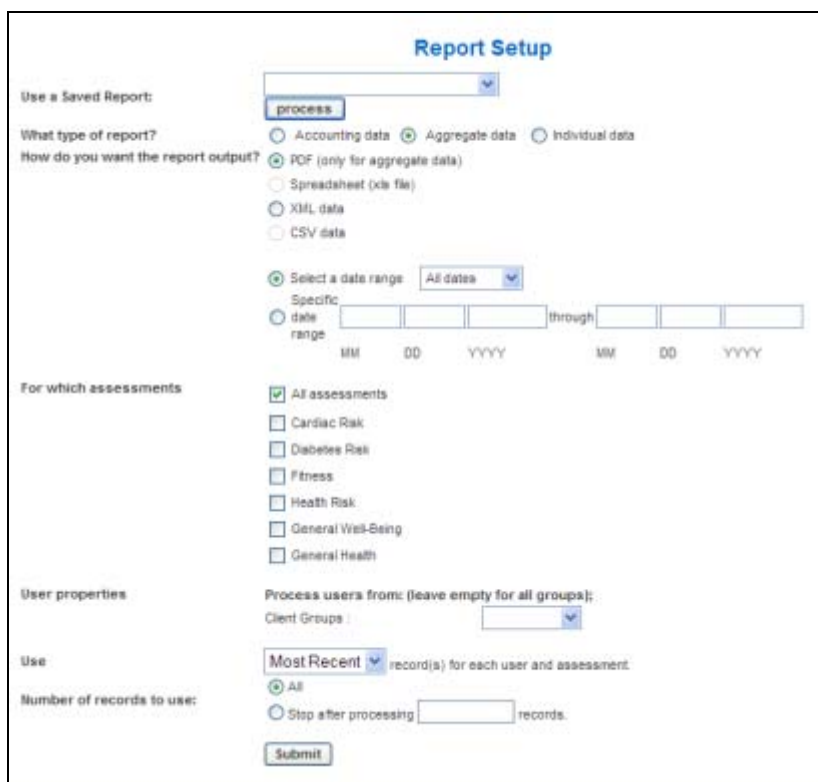## HEALTHSTATUS.COM, INC.

INSTRUCTIONS

OVERVIEW

The Advanced Graphic Group Report Generator allows you to create sophisticated reports based on the data created and saved by the HealthStatus Assessment software. You can run accounting reports which will tally the number of assessments and members. Aggregate reports total the information of your member population and returns information in pie charts and summary records. Individual data reports can be run that will provide you with individual records or reports for each member.

Each type of report can be restricted to run only specific assessments, specific dates and specific groups. These criteria can be saved and run again without having to make all the selections each time.

The reports can be output in a variety of formats including PDF, spreadsheet, XML and CSV files. Some formats are not available for all types. The generator can email reports directly to those who need to see them.

If the make install program completes without errors (report any errors to HealthStatus), and you successfully make the configuration file changes, open your web browser and login with your administrator login. You will have a link to go to the admin screen or run group reports directly from your assessment records page, it will look something like this:

The report setup screen

REPORT SETUP SCREEN

USE A SAVED REPORT
Previously saved reports will be listed in the dropdown box, once you select previously saved report click the process button and the report will be generated.

WHAT TYPE OF REPORT?
You can generate three different types of reports, accounting data will give you information on the number of users and assessments taken; aggregate data will give you sum totals for your population; individual reports will provide data for each person.

HOW DO YOU WANT THE REPORT OUTPUT?
Each type of report has different output options, not all reports are available in all formats. PDF files are the portable document format that can be read with Acrobat Reader. Spreadsheet files, create native Microsoft Excel spreadsheets, these spreadsheets usually have multiple worksheets within. XML data is a special markup language that can be used with many different programs, this is a good choice for your technology team to use if you want the output created differently than the already

created PDF reports. CSV files are comma separated values, which can be used by many database programs to import data, this format is best used by people with technical skill.

DATE RANGES

Select the dates you want the report restricted to. The drop down box has several common time periods such as last year, this year, last month and so on. These work very well when you are saving report definitions as the date is always relative to the current date. You can also specify a specific date, make sure you click the radio (circle) button to enter the specific date range.

FOR WHICH ASSESSMENTS?

Select the assessments that you want data reports run on. You can select the all assessments box, or pick one or several specific assessments. Checking the box makes it selected and data from that assessment that meets all the other restriction criteria will be processed.

USER PROPERTIES

Some clients are adding grouping information to the membership information. This grouping information can be used to restrict the report output. You may have several drop down boxes depending on your configuration. Selecting a choice will restrict the report to only using records that match the selection.

USE RECORDS

Some members may have completed one or more of the assessments multiple times. Use this option to select which record(s) you want to use, your options are: all for all records use this wisely as someone that takes the assessment many times can skew results in smaller groups. Most recent, for the last assessment record that meets your criteria. Oldest, is the first assessment they took that meets the other criteria specified. Using most recent or oldest assures that no more than one record for each member will be used for each assessment type.

NUMBER OF RECORDS TO USE.

If you have a large population you may want to limit the number of records used the first time you run a report to make sure that you are getting the results you expect. Depending on the speed of your server and database it may take several minutes and possibly hours for a report to be generated. A good number to restrict to is 200 members.

SUBMIT

Once you have completed these questions click submit and you will be taken to a screen specific to the type of report and format you selected.

ACCOUNTING REPORT DETAILS

DETAIL REPORTING

Checking these boxes will give you daily and or monthly reports of the total number of each type of assessment taken.

FILE NAME

You can enter a specific file name here, otherwise the default name will be used. If a file exists it will be overwritten without warning.

EMAIL REPORT

Check this box and enter one or several email addresses for the report to be sent to. Separate multiple emails with a semi-colon (;).

SUBMIT

Once you have completed these questions click submit and you will be taken to the final check screen.

Aggregate File Details

⊙ **All aggregations**

○ **Selected Aggregations**

☐ Age/Sex of Group	☐ Alcohol Use
☐ Risk Levels	☐ Blood Pressure
☐ Achievable Levels	☐ Breast self exams
☐ Preventable Diseases	☐ Cholesterol
☐ Modifiable Risk Factors	☐ Depression & Stress
☐ Cardiac Risk Results	☐ Exercise
☐ Diabetes Risk Results	☐ Mammograms
☐ Fitness Assessment Results	☐ Pelvic exams
☐ Well-being Assessment Results	☐ Prostate exams
☐ Total Assessments	☐ Seatbelt use
	☐ Smoking Status
	☐ Weight
	☐ Personal History
	☐ Family History

Footer text: _____

File name: _____

☐ **Save report parameters:**

Report name: _____

☐ **Email report:**

Email Addresses: _____

[Submit]

AGGREGATE REPORT DETAILS

ALL AGGREGATIONS

Checking this circle(radio button) will generate a report showing all the available aggregate output.

SELECTED AGGREGATIONS

Checking this circle(radio button) will generate a report showing only the aggregate report pages you check output. This allows you to create a shorter or more focused report.

FOOTER TEXT:

You can enter your own footer that will be printed at the bottom of every page, the footer can be up to 150 characters in length. This can be used to print the group name, your company name or anything else you want. It can also be left blank.

FILE NAME

You can enter a specific file name here, otherwise the default name will be used. If a file exists it will be overwritten without warning.

SAVE REPORT PARAMETERS

If you plan on running this same report on a regular basis you can check this box and enter a name for this report. Then when you run the report generator again, this will appear in the drop down box "Used a saved report" on the first page.

EMAIL REPORT

Check this box and enter one or several email addresses for the report to be sent to. Separate multiple emails with a semi-colon (;).

SUBMIT

Once you have completed these questions click submit and you will be taken to the final check screen.

INDIVIDUAL REPORT DETAILS (FOR PDF OUTPUT)

OUTPUT TEMPLATES

Select the report you want printed for each individual that meets your criteria. These will be saved one report in each file, with a file for each individual. Your system administrator will help you with steps to retrieve these files.

SUBMIT

Once you have completed these questions click submit and you will be taken to the final check screen.

INDIVIDUAL REPORT DETAILS (FOR SPREADSHEET OUTPUT)

PREDEFINED FIELD GROUPS

Select the data you want output to your spreadsheet. See the list of field groups in the appendix.

EMAIL REPORT

Check this box and enter one or several email addresses for the report to be sent to. Separate multiple emails with a semi-colon (;).

SUBMIT

Once you have completed these questions click submit and you will be taken to the final check screen.

Graphic Group Report Query Check

From your input:

Creating an Aggregate data report, with output in PDF format.

All users WHERE site LIKE 'healthstatus/hs1/%' will be processed.
Assessments for HRA, GHA, CRC, DRC, FIT, and GWB taken this month will be processed

Process now

GRAPHIC GROUP REPORT QUERY CHECK (ALL REPORTS)

FROM YOUR INPUT:
This will be a summary description of what report is about to be run. Since processing can sometimes take a long time it is a good idea to check what you will be creating. If the summary is not what you wanted, click the back button on your browser to get to the original input screen and start over. Other things to check, watch your dates that the beginning date is not later than the end date, or that you have a begin date in the future. Also mistakes like printing a diabetes report when you selected the fitness assessment will give you pretty bad results.

PROCESS NOW
Once you have reviewed the summary click process now and the system will begin generating your report.

```
Report being generated as a .pdf file.

Getting the user list
filtering

5865 matching user records were found.
Details retrieved.
Have the list, 284 assessments, processing begins.

Setting data counters
processing data - 50 users completed
                100 users completed
                150 users completed
                200 users completed
                250 users completed

Data counters are set,
General Health assesments = 109
Health Risk assesments (original) = 104
Cardiac Risk assesments = 109
Diabetes Risk assesments = 66
Fitness assesments = 34
General Well Being assesments = 54

preparing data for output

PDF prep

creating graphs - 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24
generating PDF

Report completed

PDF output file is written. Click here to view
```

REPORT PROCESSING

REPORT BEING GENERATED

Depending on the report you selected various information will be reported as it is collected.

CLICK HERE TO VIEW

Clicking the link will allow you to immediately view the report provided you have the necessary software (Adobe Acrobat Reader, Microsoft Excel, etc.) loaded on your computer. If you selected individual reports a message telling you where the files are located will be displayed.

KNOWN ISSUES
- nothing identified

TO DO
- exclusion criteria (not equal to)
- field groups utility

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