# Generator Application Tool for OPC Reporting (GATOR) User Guide

For Practice and Patient Level Reporting

*28 February 2020*

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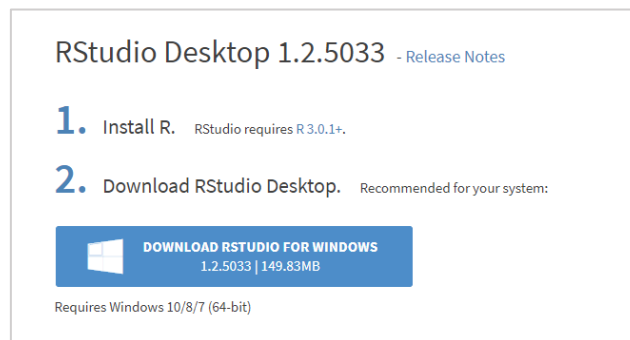Version 1.2
Optimum Patient Care

# Getting Started

**The steps in this section will only need to be completed during the initial setup on your computer.**

## Install Necessary Software

1. Use this link to download R: https://cran.r-project.org/bin/windows/base/
2. Click the Download R for Windows button in the top left corner.
3. Once it is installed, you will need to download R Studio to interact with R using this link:
   https://rstudio.com/products/rstudio/download/#download
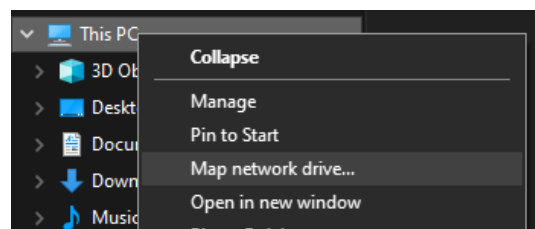4. Use the 'Download RStudio for Windows' button



## VPN Access

You will need to be connected to the OPC VPN in order to run the app as it connects to the database in the background. If you do not already have access to the VPN, please contact the IT department to set that up.
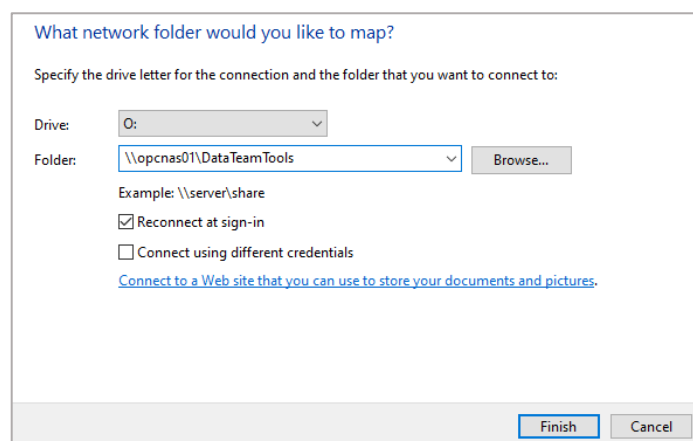
## Map Network Drive

To run the app, you must anchor the NAS drive Data Team Tools folder to your file explorer.

1. To do this, right click on 'This PC' tab and click 'Map network drive…'

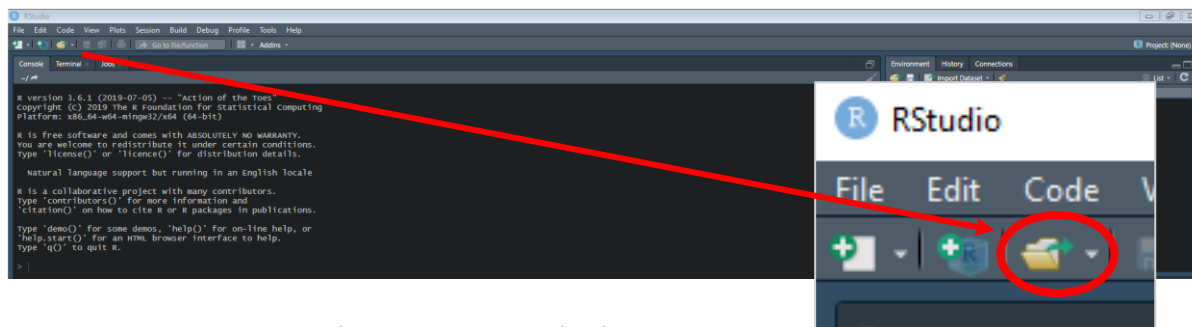\* Note that 'dark mode' was used in this demo so windows will appear black; this does not affect the steps.



2. Type \\opcnas01\DataTeamTools into the file path and map to the O: drive and click finish:
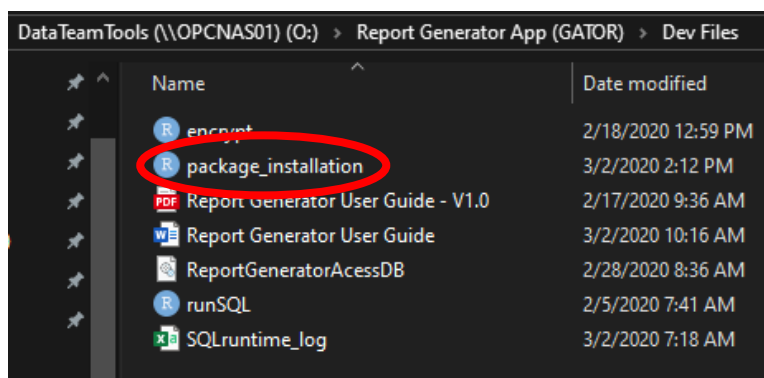
## Install R Packages

In order to begin, you will need to load all the packages into your new version of R Studio. These packages supplement the default functionality of R, adding new functions and design elements. facilitate this, the data team has created a file that will load everything that you will need.

1. Go to the start menu on your computer and open R Studio. The initial screen should look like the image below.
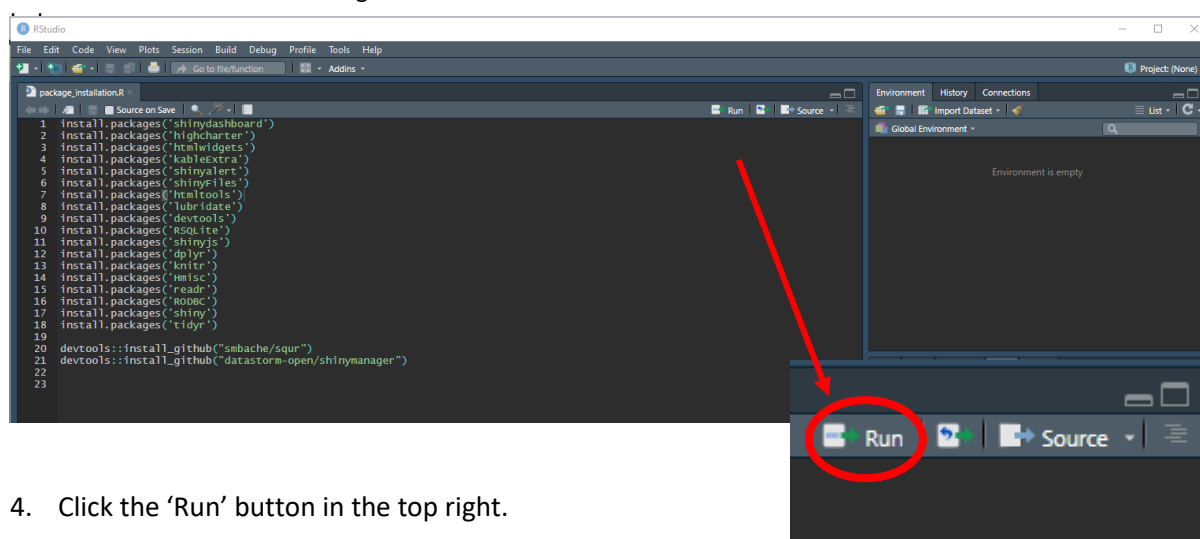


2. Click the partly opened folder in the top left of your RStudio start screen.

3. In the Data Team Tools folder from the O: drive, open the Report Generator App folder and then open the Dev Tools folder and select **package_installation.R**



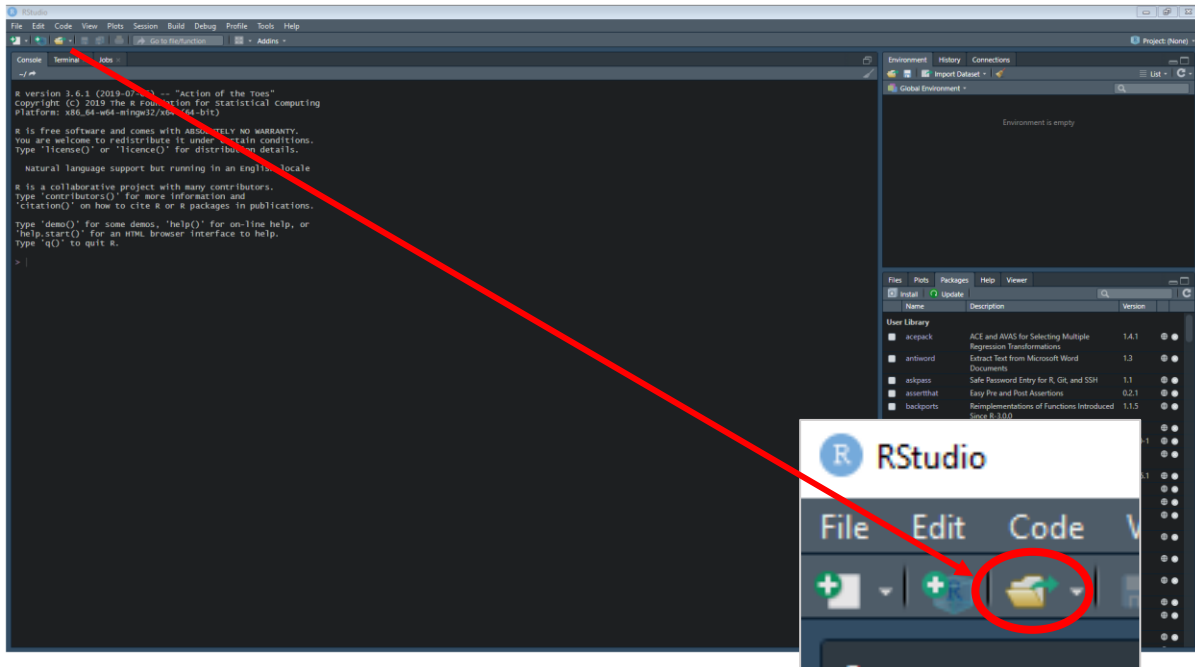The screen will look like the image



4. Click the 'Run' button in the top right.

5. The script will go through and import all the necessary packages for you. You will know that the script is complete when the '>' symbol returns to the bottom of the console. Once done, you may close the file. *** Please do not save any changes if it prompts you upon closing ***

**You are now ready to run the app!**
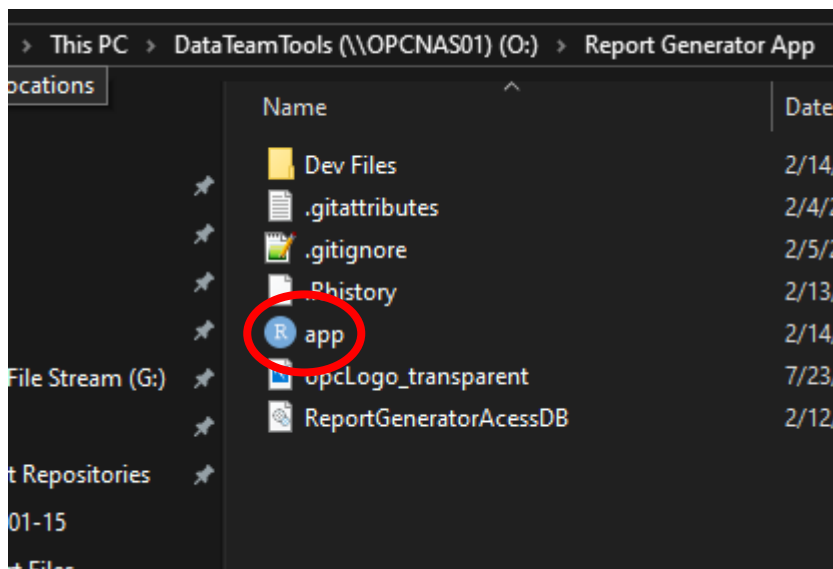
# Using the App

## Open the Report Generator

1. Open R Studio as explained in the Install R Packages section on the previous page. The initial screen should look similar to the screen below.
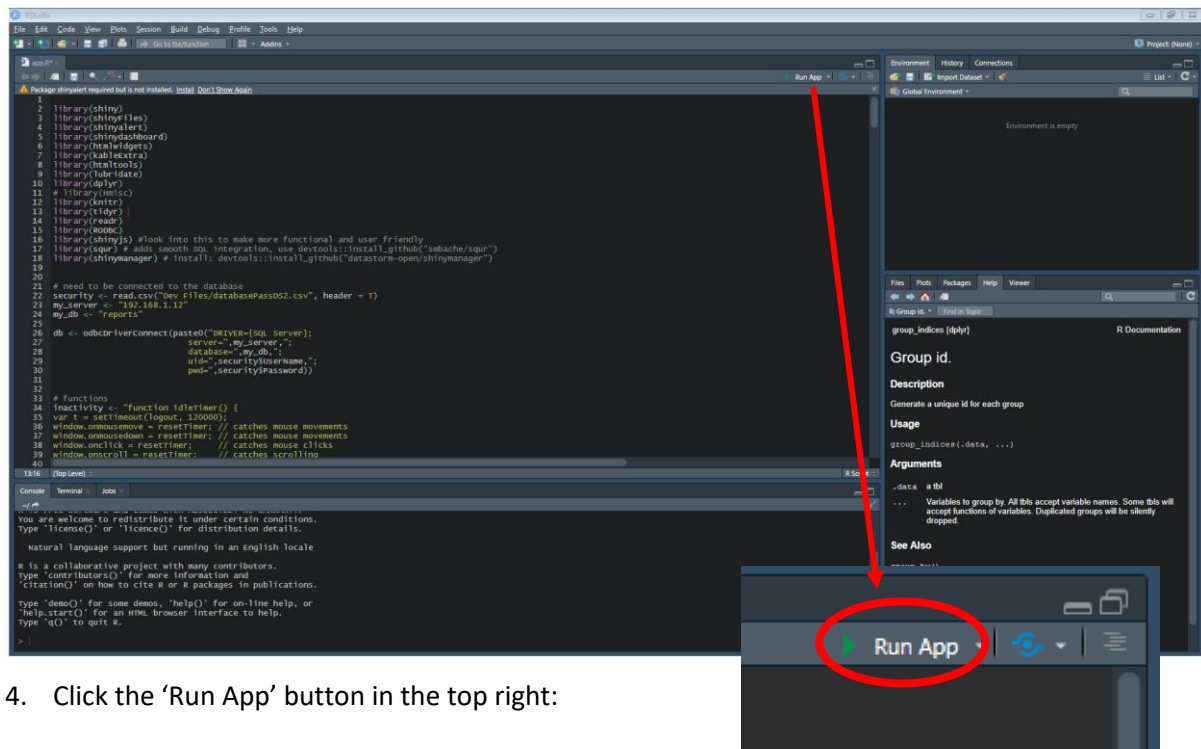


2. Click the partly opened folder in the top left of your RStudio start screen.

**3.** In the Data Team Tools folder from the O: drive, open the Report Generator App folder and select **app.R**

*Note: once you've opened the **app.R** file once, RStudio will likely remember this and keep it open for you in the future. There is no need to do Steps 2 and 3 in this case.*
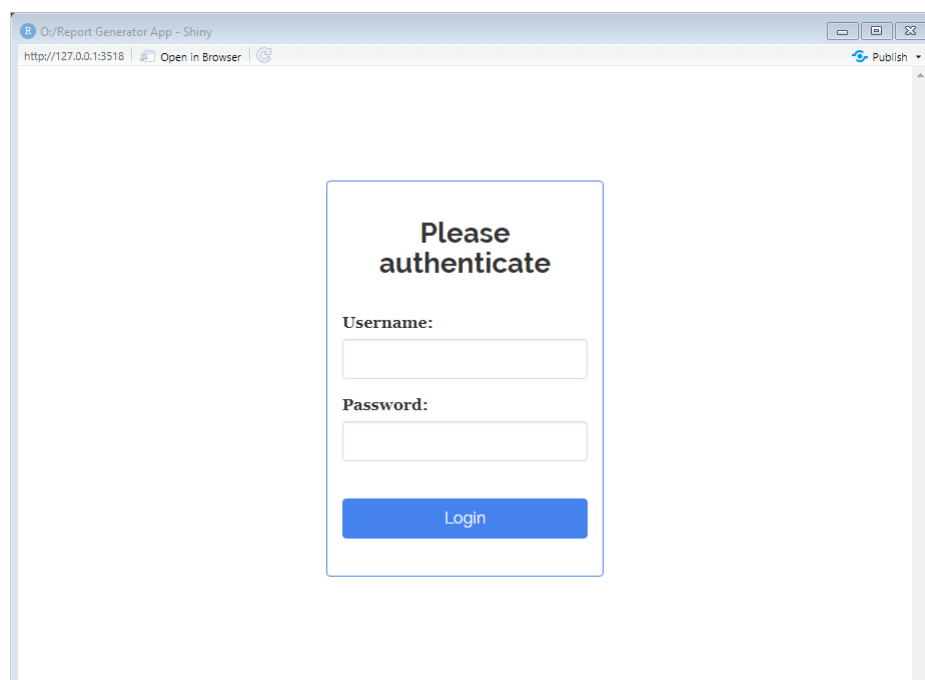
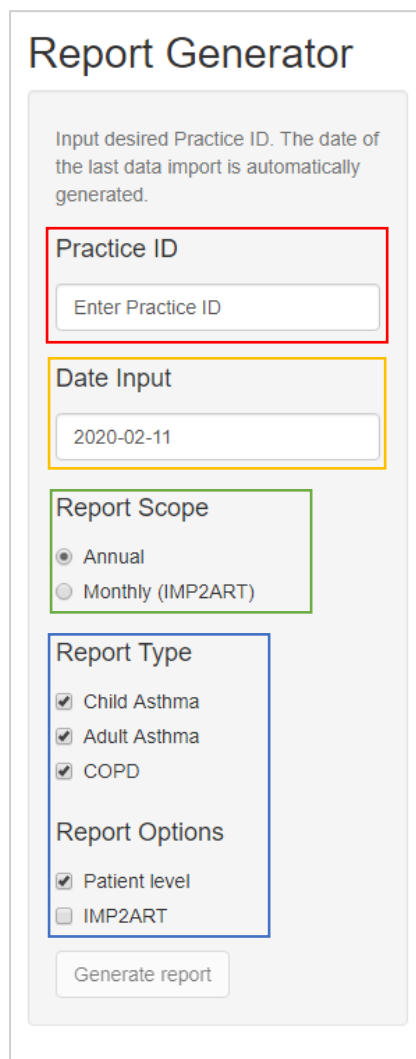Your screen should look like the screen below:



4. Click the 'Run App' button in the top right:

After clicking the 'Run App' button, a window should open that looks like this:



5. Enter your username and password. This will unlock the Report Generator. Please contact the data team if you do not have a username and password.

# Running the Report Generator



1. **Enter the practice ID**

2. **The date of the practice's last extraction will automatically be filled** in for you, but you may edit this if desired. The app will present an error if the date selected occurs after the last extraction.

3. **Select the scope of the report:** annual or monthly. Note that if monthly is selected, the date will automatically change to the first day of the month selected. This is due to the way the reports are ran, but the month that will be evaluated for the report will be displayed in text to the left of the selection options for reference.

4. **Select which reports that you would like to run**: all report type options are selected by default, including patient level. The IMP2ART option will be automatically selected if an IMP2ART related report has been generated for this practice in the past. If this is the first IMP2ART report for your selected practice, you will need to check this box manually.

Note: An additional option **Reload Data?** will appear if it is detected that the selected practice's data is already in the report space. By default, it is unchecked to decrease the load on the server and the time to generate reports. A message will pop up to let you know when the system is using the already loaded data. In general, unless changes have been made to underlying SQL scripts, it is unnecessary to check this box.

5. Select **Generate Report**: progress bars like the ones below will appear to let you know what stage the report is at. Note that this option will not be available if a valid practice ID and date have not been provided. Each report takes approx. 60-90 minutes.

# !IMPORTANT!

When generating **annual** reports, only one practice can be run at a time, two people cannot run the reports for two different practices at the same time. This will cause the reports to error, and the app will automatically close.
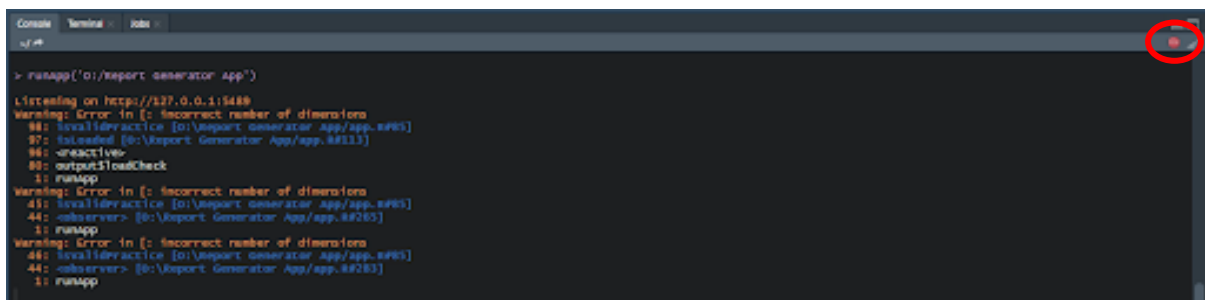
## Troubleshooting

There are two types of errors that may occur in the app:

1. **Non-fatal errors:** these errors will be displayed on the right side of the app in text: invalid practice Ids or invalid date inputs. Once the data input is updated, these errors will resolve automatically.
2. **Fatal errors:** these errors will cause the app the automatically close to prevent data corruption. This could be due to someone trying to run the report generator at the same time as you or due to an error in the underlying code. These errors will require intervention from the data team to resolve.

### Handling Fatal Errors

Fatal errors should be reported to the data team. The R Studio console will report the error as displayed below. Please copy and paste these error messages in your email when reporting an error.

It is important to note that after these fatal errors, you will need to **select the stop icon** (🛑) at the top right of the console window insider R Studio in order to fully stop the program and begin using the app again. You will not be able to restart the app until this is done.