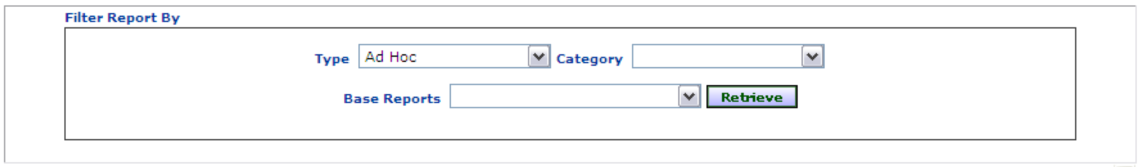
RIFIS
Ad Hoc Reports

To retrieve the entire list of all Ad Hoc Reports, including the Base reports and any additional reports published to your Role, select *Ad Hoc* for the **Type** under Filter Report By and click *Retrieve* to display all the Ad Hoc Reports available to you.

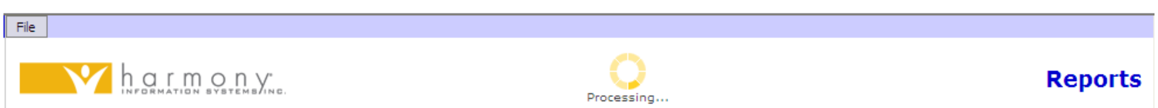


When you click *Retrieve*, the reports that are available to you will appear in a list below the green bar.

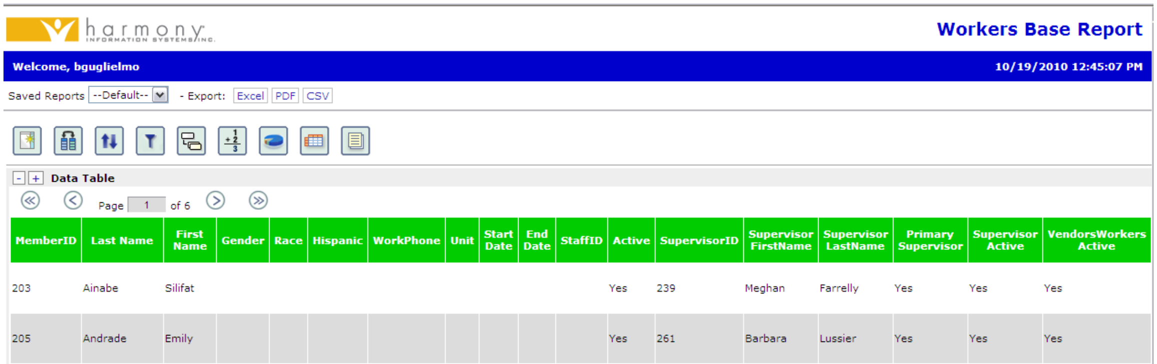
	Report Name	Description
○	Activity Base Report	Activity Base Report
○	Consumer Notes Base Report	Consumer Notes Base Report
○	Consumers Base Report	Consumers Base Report
○	Diagnosis Base Report	Diagnosis Base Report
○	Plan Review Base Report	Plan Review Base Report
○	Plans Base Report	Plans Base Report
○	Provider Facility Base Report	Provider Facility Base Report
○	Relations Base Report	Relations Base Report
○	Workers Base Report	Workers Base Report

Click on the radio button (circle) next to the report name in the list above and click the *Run Report* button.

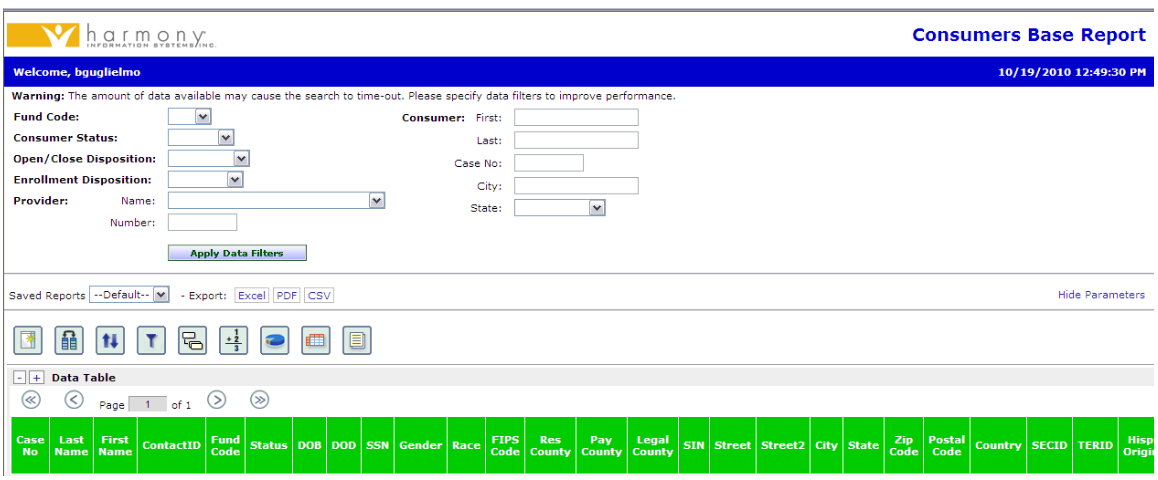
Note: please remember that after each click, the processing icon will appear and then the screen will refresh.



If the report does not have any filtering it will appear immediately as shown here.



If you select a base report that uses filters, no data will initially display. You can specify the values of filter criteria to determine which subset of data should be displayed. After filling in the various filter fields, click on the "Apply Data Filters" button and the data will appear. You can also just click on "Apply Data Filters" to run the report without choosing filter items.



Editing Ad Hoc Reports

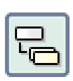
There are 9 icons across the top of the report. These are used to modify the report.

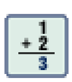

Formula Column

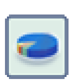

Table Layout


Sort

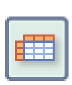

Filter


Group


Aggregate



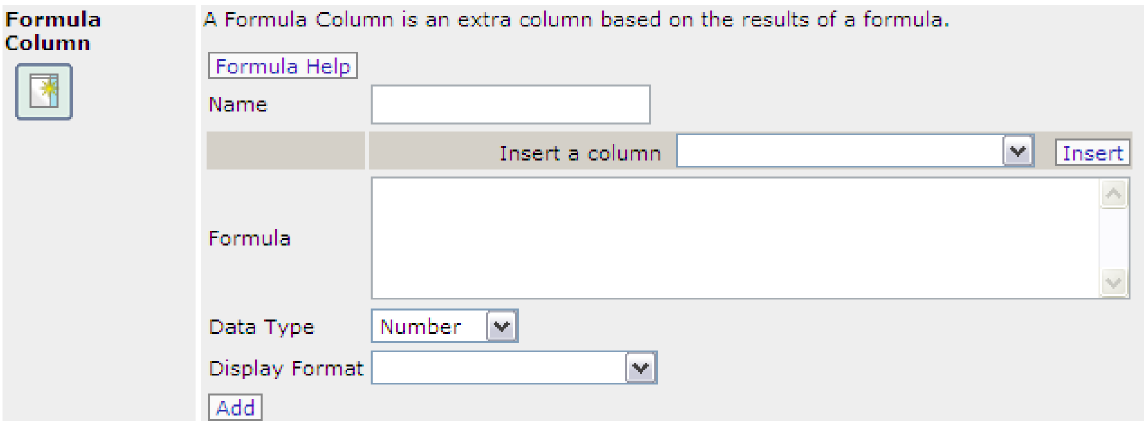
Chart


Crosstab Table

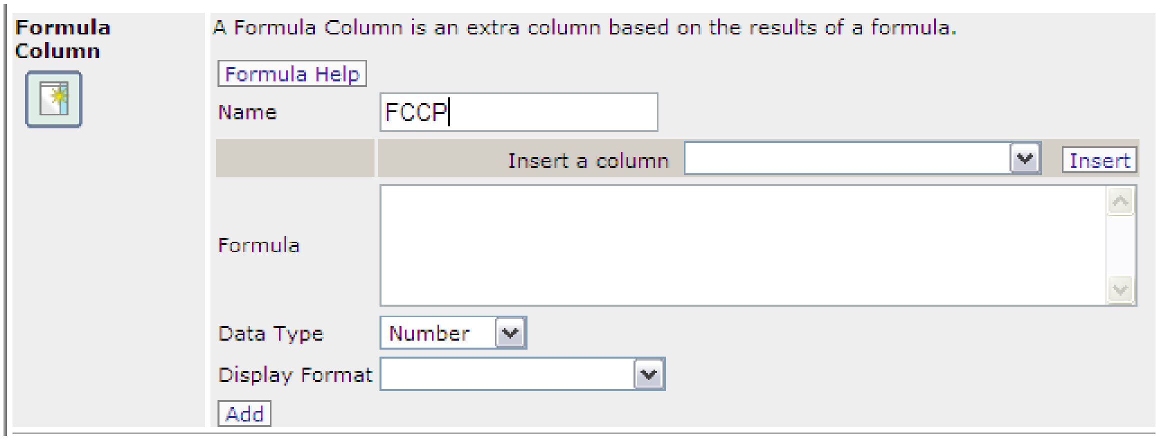

Paging

Add Formula Column

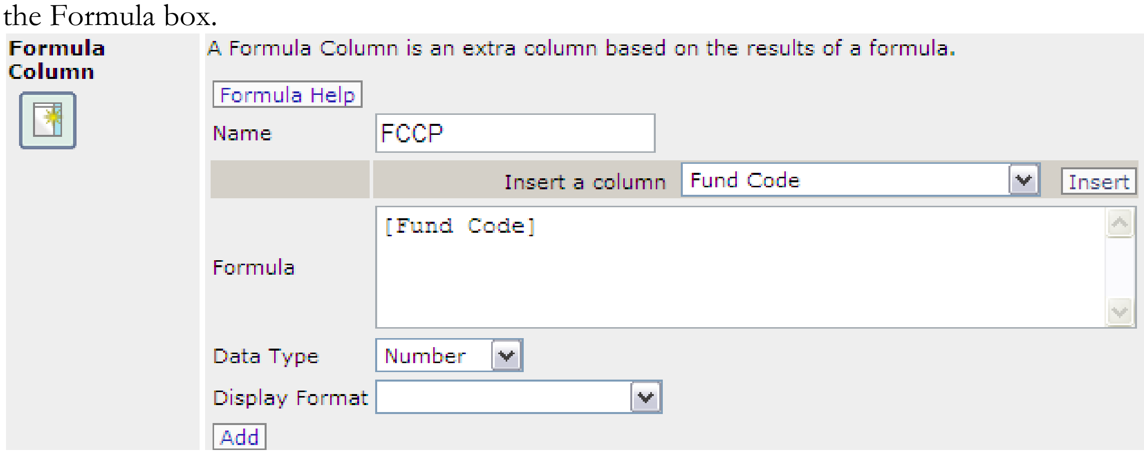
The *Formula Column* allows you to add another column with a calculated formula or to relabel the column heading.



1. Enter the **Name** of the new column.

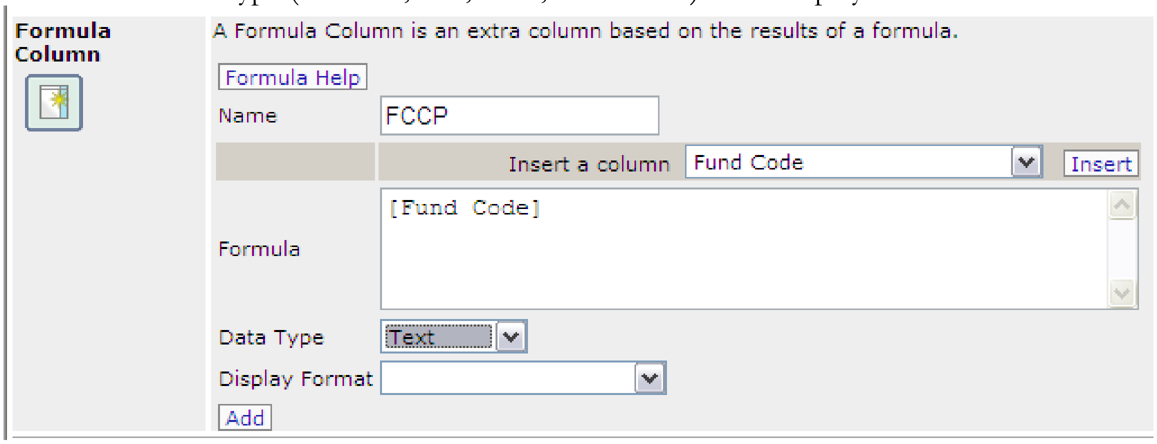


2. Select the column value you wish to use and click Insert. The Column name will appear in the Formula box.



For formulas, enter the operator (plus, minus, times, divided by); then select a second column value and click insert. The formula box should now have a formula in it.

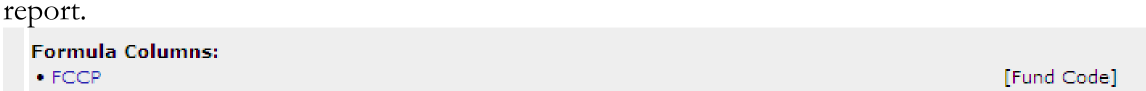
3. Select the Data type (Number, text, Date, Date-Time) to be displayed.



If necessary, select display format.

4. Click *Add.*

5. The window will show the formula you created, with any others you have applied to the report.



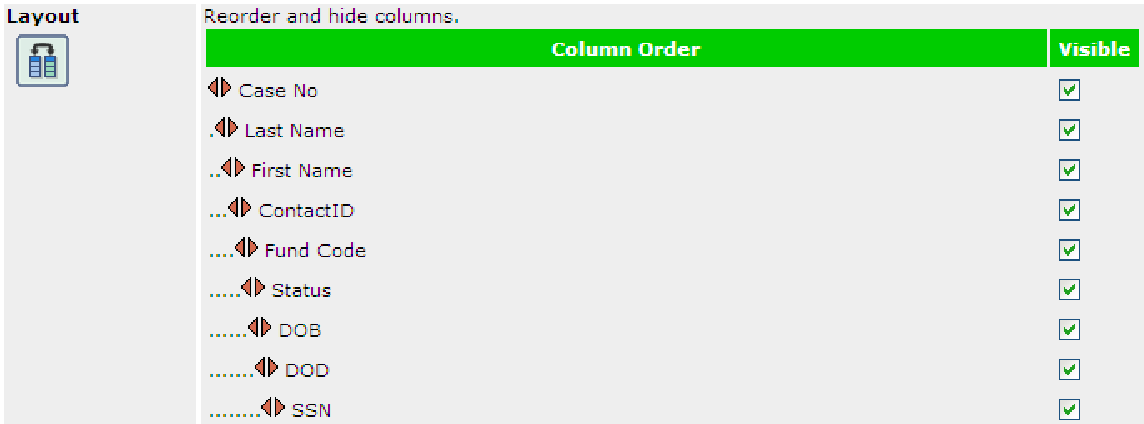
6. A new column will display at the end of the row to present the formula value calculated by the formula.

Primary	Active	Generic Text2	Start Date	FCCP
Yes	Yes		5/4/2010	NRI
Yes	Yes		5/19/2010	NRI

7. Follow steps 1-6 to add new formulas.

Table Layout

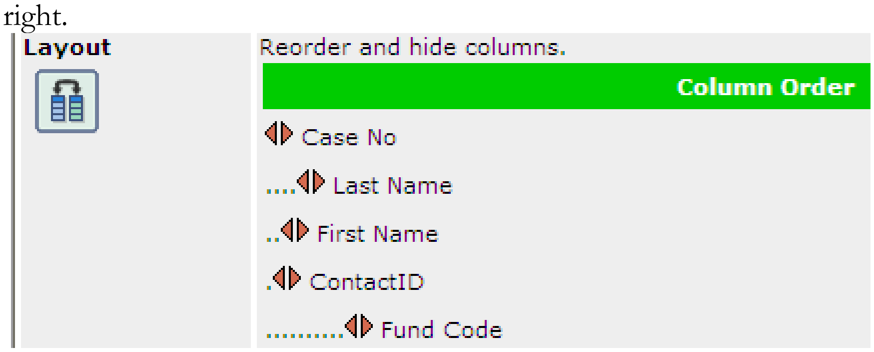
This icon controls how the report will look. You can choose the order by which the columns display and you can hide columns so they do not display.



1. To hide a column, un-check the box under the **Visible** column.

2. When your selection(s) are complete, go to the bottom and click **OK**. This will put your choices in effect.

3. To **reorder** the columns, click on the arrows next to each column name. Click the left arrow to pull the column to the left, and click on the right arrow to move the column to the right.

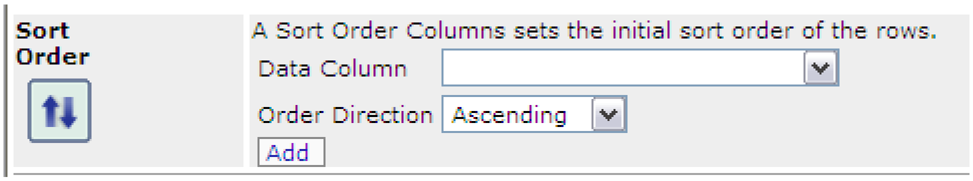


4. As you click on the arrows the other columns will shift accordingly.

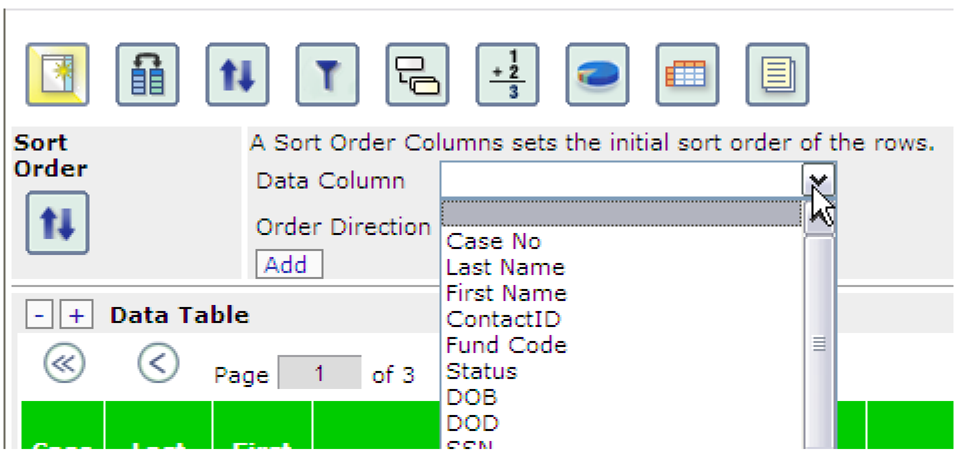
5. Notice that once you click **OK**, the system will re-sort the list and put the list in revised order based on your selections. The data table will also show the columns in the new order.

Sort Table

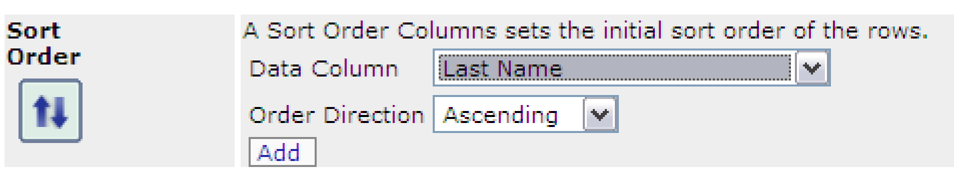
The *sort* icon allows you to sort the table by columns.



1. Click on the **Data Column** box and pick the column you wish to sort.



2. Select **Order Direction.** Click *Add.*



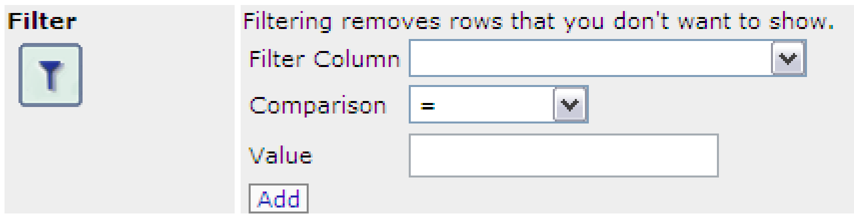
3. The system will apply the sort as you have requested.

Case No	Last Name	First Name	ContactID	Fund Code	Status
57380	Andrews	Braydan	54350	NRI	Active
57376	Bucko	Johnny	54313	NRI	Inactive
57542	Candace	Lou	54761	NRI	Active
57518	Clown	Bozo	54680	NRI	Active

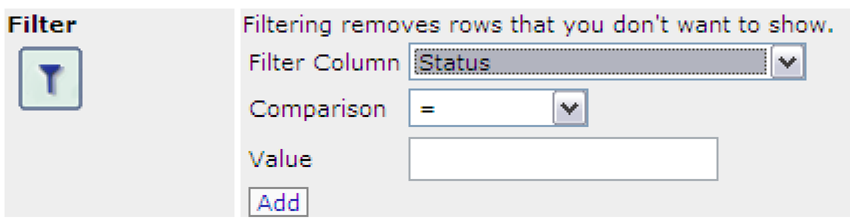
4. Repeat this process to add additional columns. You can also Sort Columns by clicking on the tile in the green header. Clicking once will sort the records by selected Column in Ascending order; a second click will sort the records by select4ed Column in Descending order. Clicking the column title will perform the requested sort without recording the use of the Sort filter.

Filter Rows

The Filter feature allows you to remove row values that you do not want to be shown.

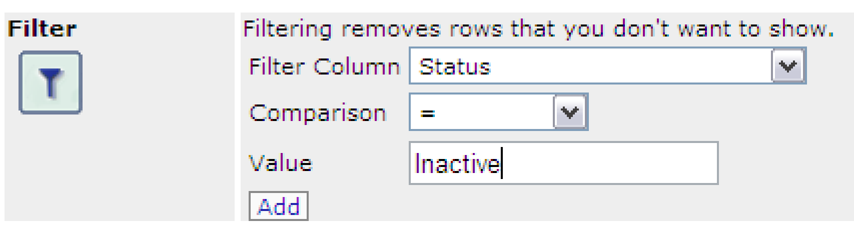


1. Select the **Filter Column** value.



2. Select the **Comparison** value. You can choose *equals, less than, less than or equal to, greater than, not equal, starts with, or contain.*

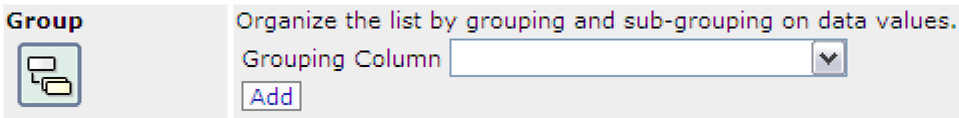
3. Type in **Value**. Click *Add.*



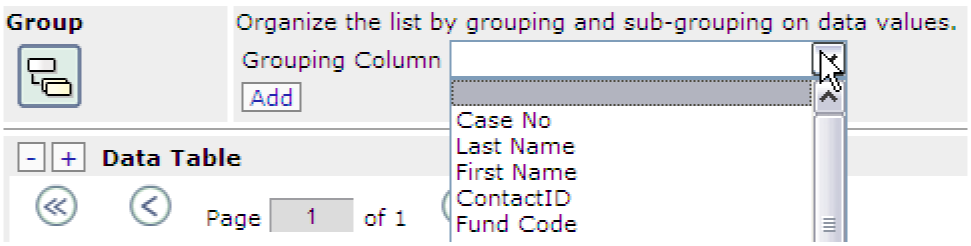
The Data Table will now show only the rows that meet the filter criteria.

Group Values

The *Group* feature allows you to organize the table by grouping and sub-grouping data values.



1. Select the Grouping Column Value. Click *Add*.

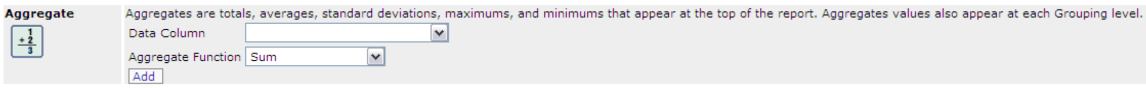


2. The column value selected will become the first column, and the records are now grouped by the selected criteria. In this example, the records are grouped by Gender.

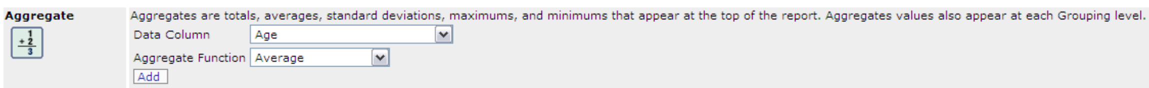
Gender	Case No	Last Name	First Name	ContactID	Fund Code	Status	DOB	DOD	SSN	Race
Female										
	57500	Day	Pam	54607	NRI	Inactive	1/5/2005		999-02-0270	Other
	57366	Devil	January	54303	NRI	Inactive	10/31/1997		666-66-6666	Multi-racial
	57494	Garmendiz	Lilliam	54601	NRI	Inactive	11/20/1984		584-86-8281	Multi-racial

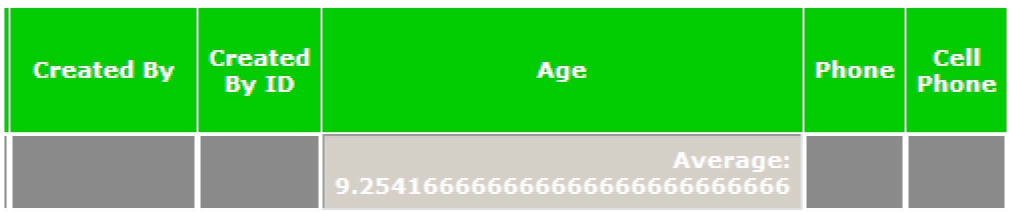
Aggregate Data

The *Aggregate* feature allows you to retrieve totals, averages, standard deviations, maximums, and minimums that appear at the top of the report.



1. Choose the **Data Column**. Then choose the **Aggregate Function**. In this example, we selected *Age* as the Data column and the Aggregate Function is *Average*. Click *Add*.



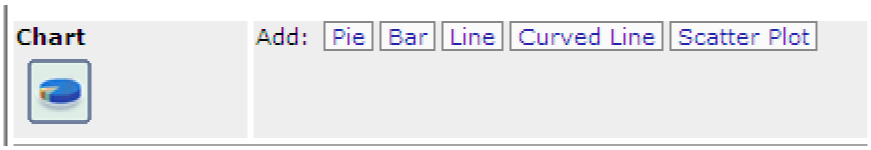


Created By	Created By ID	Age	Phone	Cell Phone
		Average: 9.254166666666666666666666		

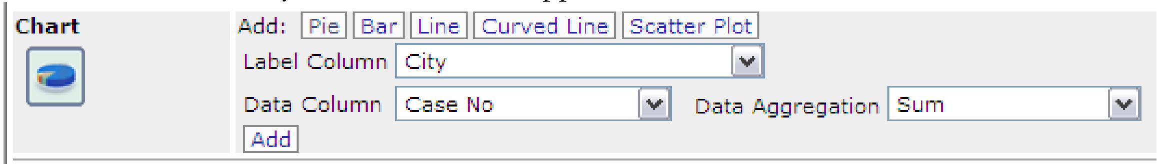
Note: if you would like to count the number of unique values in a column, as opposed to the number of times a value appears in the data, be sure to select *Distinct Count* as the Aggregate Function.

Chart Data

The Chart feature allows you to add Pie, Bar, Line, Curved Line, or Scatter Chart.

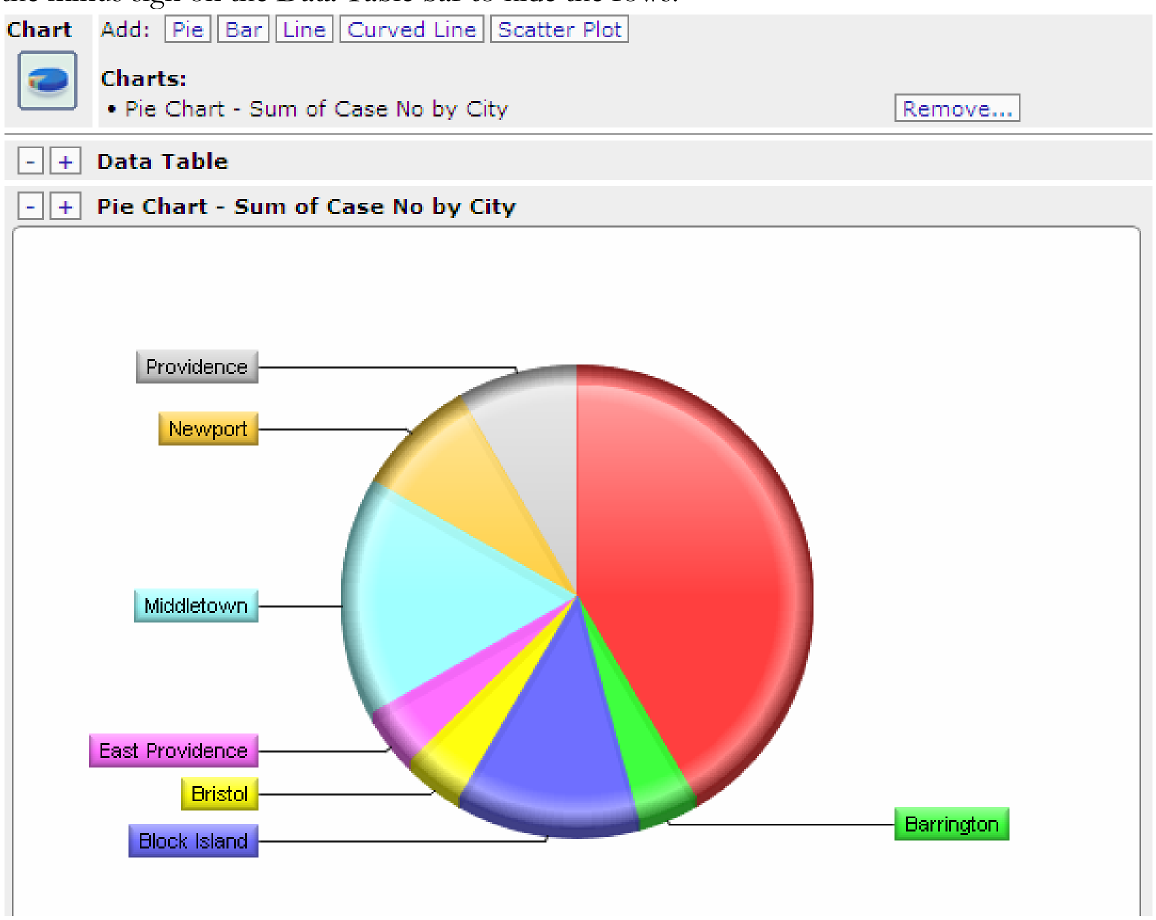


1. Choose the type of chart you want. Choose the Label Column. Next, choose the Data Column. NOTE: Only certain values will appear in the Data column.



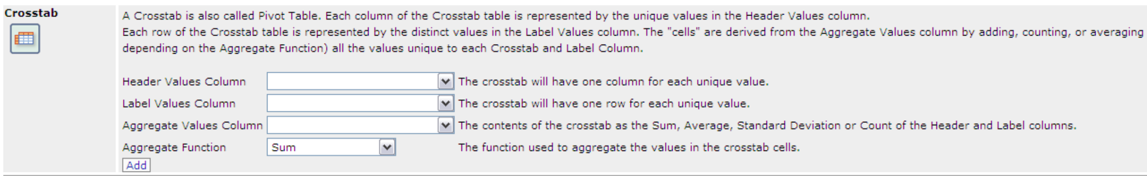
2. Select the Data Aggregation. Options include Sum, Average, Standard Deviation, Count, Distinct Count, Minimum and Maximum.

3. After entering the Label Column, Data Column and Data Aggregation function, click *Add*. You can then scroll down to the bottom of your screen to view the chart or you can click the minus sign on the Data Table bar to hide the rows.



Build Crosstab Report

A Crosstab is also called Pivot Table. Each column of the Crosstab table is represented by the unique values in the Header Values column.


Crosstab

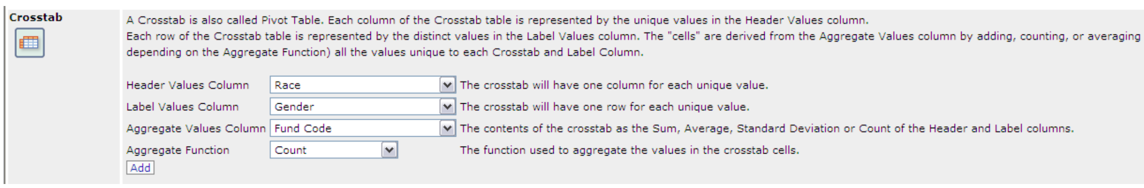
A Crosstab is also called Pivot Table. Each column of the Crosstab table is represented by the unique values in the Header Values column.
Each row of the Crosstab table is represented by the distinct values in the Label Values column. The "cells" are derived from the Aggregate Values column by adding, counting, or averaging depending on the Aggregate Function) all the values unique to each Crosstab and Label Column.

Header Values Column		The crosstab will have one column for each unique value.
Label Values Column		The crosstab will have one row for each unique value.
Aggregate Values Column		The contents of the crosstab as the Sum, Average, Standard Deviation or Count of the Header and Label columns.
Aggregate Function	Sum	The function used to aggregate the values in the crosstab cells.

Add

1. Each row of the Crosstab table is represented by the distinct values in the Label Values column. The "cells" are derived from the Aggregate Values column by adding, counting, or averaging (depending on the Aggregate Function) all the values unique to each Crosstab and Label Column.

2. Fill in the Values for **Header Values Column, Label Values Column, Aggregate Values Column and the Aggregate Function.** Click *Add.*


Crosstab

A Crosstab is also called Pivot Table. Each column of the Crosstab table is represented by the unique values in the Header Values column.
Each row of the Crosstab table is represented by the distinct values in the Label Values column. The "cells" are derived from the Aggregate Values column by adding, counting, or averaging depending on the Aggregate Function) all the values unique to each Crosstab and Label Column.

Header Values Column	Race	The crosstab will have one column for each unique value.
Label Values Column	Gender	The crosstab will have one row for each unique value.
Aggregate Values Column	Fund Code	The contents of the crosstab as the Sum, Average, Standard Deviation or Count of the Header and Label columns.
Aggregate Function	Count	The function used to aggregate the values in the crosstab cells.

Add

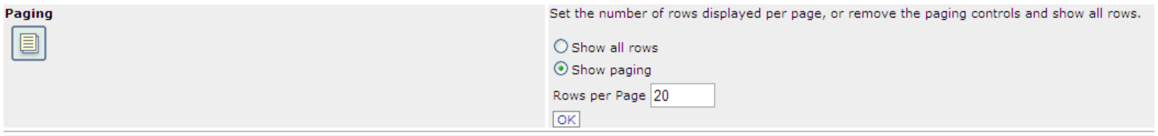
3. Scroll down to the bottom of your screen to view the Crosstab table.

- + Crosstab - Race by Gender on COUNT of Fund Code

Gender	Other	Caucasian/White	American Indian/Alaskan Native	Asian	Multi-racial
Male	12	2	1		1
Female	6	1		1	

Set Report Paging

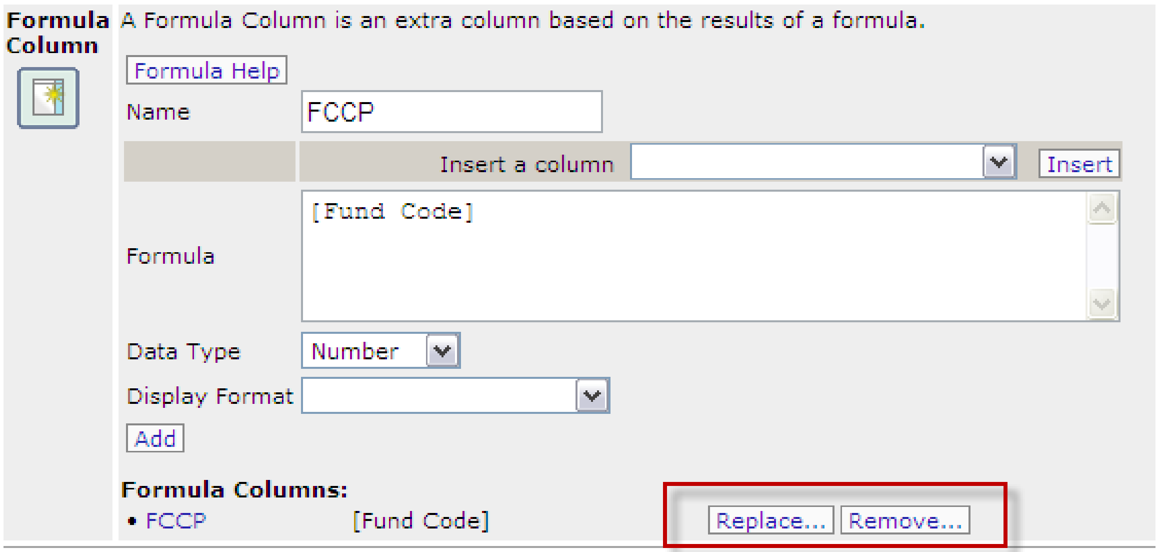
The Paging feature allows you to set the number of rows displayed per page, or remove the paging controls and show all rows.



There can be a very large number of rows in the table. It is recommended that the use of the "show all rows" feature be limited, as the browser may time out or the system may slow down if the number or rows consumes the available memory or system resources.

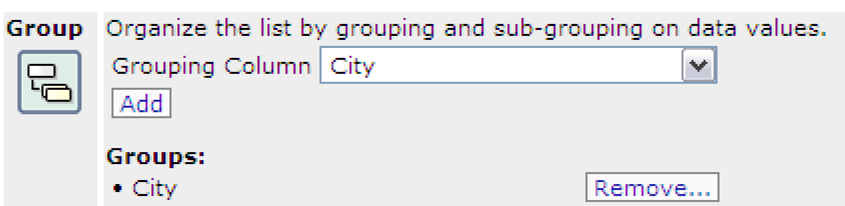
Replace/Remove Feature

For **Formula column, Sort and Filter**, once these have been added to the report, you have the option to Replace or Remove the feature. To Remove, click the Remove button. Click OK when prompted. The new feature added will be removed.



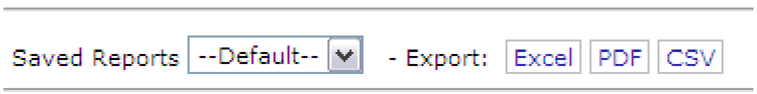
To make changes to a feature, edit information and click Replace.

For Filters, Group, Aggregate, Chart, and Crosstab, the Remove option is the only available option.
In order to make changes, you will have to Remove the feature and then create a new one.

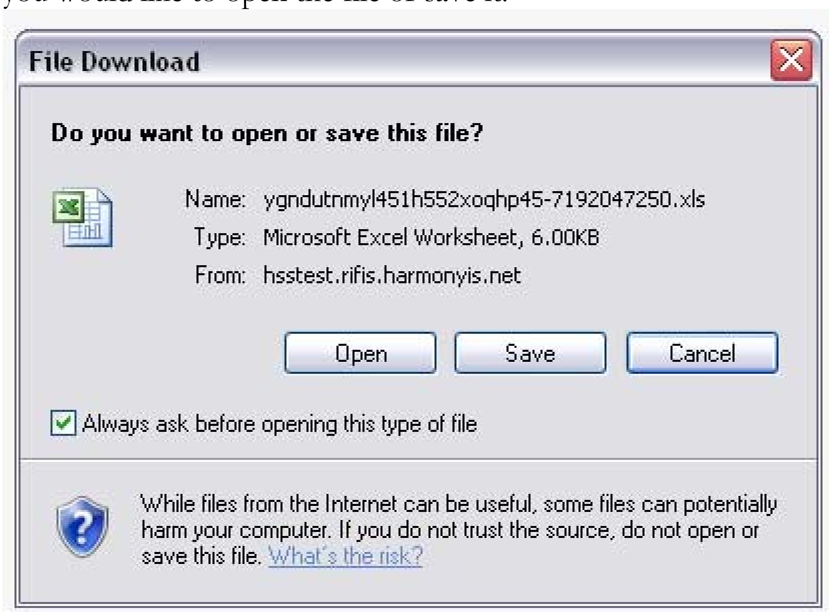


Export Report

The report can be exported to Excel, PDF, or CSV file. Click on the link next to **Export**.



For Excel and CSV formats, the system will export the file to Excel. You will be asked if you would like to open the file or save it.



Note: Do not export and save the report on c:\ drive (hard drive) of laptop or office workstation. *Always* save on protected server drive.

For .pdf, the system will convert the report and display it in your browser. You can then save the report, print it, or review it in Adobe Acrobat.