

Updated: June 25, 2011

Custom Report Queue

Summary:

In addition to the many pre-defined reports in the Report Menu as appropriate for your user role, you may request a custom report from the HSPnet Support team. A custom report may be needed when the required data ...

- Isn't included in an existing pre-defined report or wizard;
- Exceeds your HSPnet access rights – for example an agency-wide report on behalf of your manager or director
- Involves multiple agencies or organizations, such as all nursing schools in a city or region.

Background

Each user has ready access to data that is within his or her HSPnet access rights, via the pre-defined reports or wizards that are available in the Report Menu. For example a Placing Coordinator can generate a list of all placements within her allowed educational programs, and a Receiving Coordinator can build a preceptor listing for her allowed sites and disciplines.

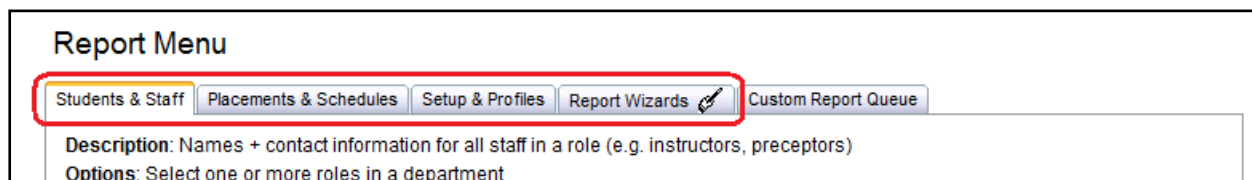
When a pre-defined report or wizard cannot provide the data required, the HSPnet Support team can develop a customized query and deliver enhanced data to a user within their access rights. For example, a detailed list of preceptor names and placement hours can be provided to a Placing Coordinator for the purpose of preceptor recognition activities, as per the National HSPnet Policies on permissible uses of HSPnet data.

For data that exceeds a user's regular access rights – e.g. for a committee review of capacity utilization across multiple regions -- a custom report can be delivered upon agreement of the agencies that contributed the data to share their information.

For more information about access to data from HSPnet, please see Policy 3.6 of the National HSPnet Policies on the website <http://www.hspcanada.net/resources/policies.asp>.

Requesting a Custom Report

1. Before submitting a request for a custom report, be sure to view and test the pre-defined reports and wizards that are already available under **Reporting** → **Report Menu**:



The screenshot shows a web interface titled "Report Menu". At the top, there are five tabs: "Students & Staff", "Placements & Schedules", "Setup & Profiles", "Report Wizards" (with a pencil icon), and "Custom Report Queue". The "Custom Report Queue" tab is highlighted with a red box. Below the tabs, there is a description: "Description: Names + contact information for all staff in a role (e.g. instructors, preceptors)" and options: "Options: Select one or more roles in a department".

2. Visit the **Custom Report Queue** to view a list of reports that were previously submitted – you can toggle between a view of Pending reports (not yet generated by HSPnet Support) or Completed reports (report was delivered):

Create Date	Due Date	Agency	User	Status	ID
May 11/11	May 10/11	UBC	Tcr, Dev	Pending	2

3. Click Add **+** to submit a new request:
 - a. In the Custom Report Request window, select a Report Type from the dropdown; this will refresh the screen to display a set of options that are suitable for that type of report.

- b. Complete the mandatory fields (marked *****) for the selected report type.

NOTE - for all report types, you must describe the intended Purpose and proposed Audience or distribution of the report, so we may apply the guidelines of the National HSPnet Policies on access to data.

Custom Report Request

User: Gabriel Tremblay

Agency/Dept: University of BC / Nursing

Report Type: Sites/Services *

Purpose for this report - please describe how the report will be used:
Preceptor recognition - thankyou letters

Audience/distribution of this report - please describe how the report will be shared w
Dean of nursing and placing coordinators in Nursing Department plus course leaders.

- c. If required, use the dropdown to identify whether the data to be included is within your access rights (in this example, from “My educational programs”) or if approval is required (the data includes “Other educational programs” that are outside of your access rights).
 - d. Enter a Term or time period if applicable, and enter a target date for delivery of the report. Please allow as much lead time as possible; a minimum of 2 to 4 days is required, or longer if a new query must be built.
 - e. If required, select one or more programs, sites, etc. for the report. In the above example of a report based on Sites and Services, you would select one or more Receiving Agencies, then a list of sites to be included.
 - f. For Comments, provide additional detail to justify the report, or indicate if a similar report has been provided in the past to assist with identifying the correct query.
 - g. Once all required fields are completed, click **Save** to submit the request to HSPnet Support.

- Your Custom Report Queue will be updated to display the new Pending request. Click a column header (e.g. [Due Date](#)) to sort a list of requests.

Create Date	Due Date	Agency	User		Status	ID	+
May 11/11	May 10/11	UBC	Tcr, Dev		Pending	2	
Dept: Nursing , Type: Students							
Jun 7/11	Jun 30/11	UBC	Tremblay, Gabriel		Pending	4	
Dept: Nursing , Type: Sites/Services							
Comments: We requested the same report last year on May 19.							

- Click to view the details of your request, or to update or revise it, or you can click to cancel or delete a request if no longer needed.
- If HSPnet Support has questions or needs additional detail or justification before generating the report, they will contact you via email and place a Hold on your report by marking it to indicate your request is "Awaiting more information from user".

Downloading Completed Reports

You will receive an automated email from HSPnet when your report is uploaded and available in your Custom Report Queue.

- View your Custom Report Queue and toggle to view your Completed reports:

Current View

Agency: Dept: User:

Report Status: Pending Completed Show Details

Created:

Create Date	Due Date	Agency	User		Status	ID	+
May 11/11	May 11/11	UBC	Tcr, Dev		Completed	Excel document (10 KBytes)	1
Dept: Nursing , Type: Placement Requests							

- View the uploaded report by clicking the [xxx document](#) link; this will download the file over an encrypted (secure) connection to your local computer.

Things to Remember

- Refer to the National HSPnet Policies if you have questions about the permitted uses of HSPnet data.

If you have any questions or need assistance with using this feature, please don't hesitate to contact us.

HSPnet Team
Health Sciences Placement Network
support@hspcanada.net
www.hspcanada.net