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USER GUIDE FOR

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In-App Report

Contents

mt | compliance

Glossary

Word Index

Super Admin - This is an employee account level that allows the user to have full access to the system, review the subscription plan information, download the subscription plan invoices, create employees (students, admins, and super admins) & set up permissions for admins.

Admin - This is an employee account level that allows the user to see all locations and departments assigned to them by their default department & location or by another Super Admin, create student accounts, and use all modules unless super admins set permission restrictions.

Data Sets - A data set is a structured collection of related data associated with a unique source and typically covers one topic at a time. MedTrainer uses data sets to compile specific data from our different segments within the system to retrieve the required information for reporting purposes.

Custom Report - A custom report refers to a report that has been customized or cloned by a user. With a custom report, the users will be able to configure filters, columns, and sorting ranges to include and decide how they should be displayed.

Preconfigured Report - These help ensure report consistency and give users a starting point for creating reports. These can include placeholders, calculations, and renamed columns.

In-App Report - is a MedTrainer revolutionary tool for creating reports and viewing data due to its innovative infrastructure to pull data from different data sets(sources), real-time results, and data filtering capabilities.

Dialog - A dialog is a type of modal window that appears in front of app content to provide critical information or ask for a decision. Dialogs disable all app functionality when they appear, and remain on screen until confirmed, dismissed, or a required action has been taken.

Snackbar - Snackbars provide brief feedback about an operation through a message containing a single line of text directly related to the operation performed which will show at the bottom of the screen.

In-App Reporting

This report aims to provide all Super Admins & Admins the ability to create custom reports to pull information from the selected dataset in a simple interface that allows users to utilize it as a primary reporting source.

Note: We are continuously working on updating datasets and reports based on client & business requirements.

Who can access

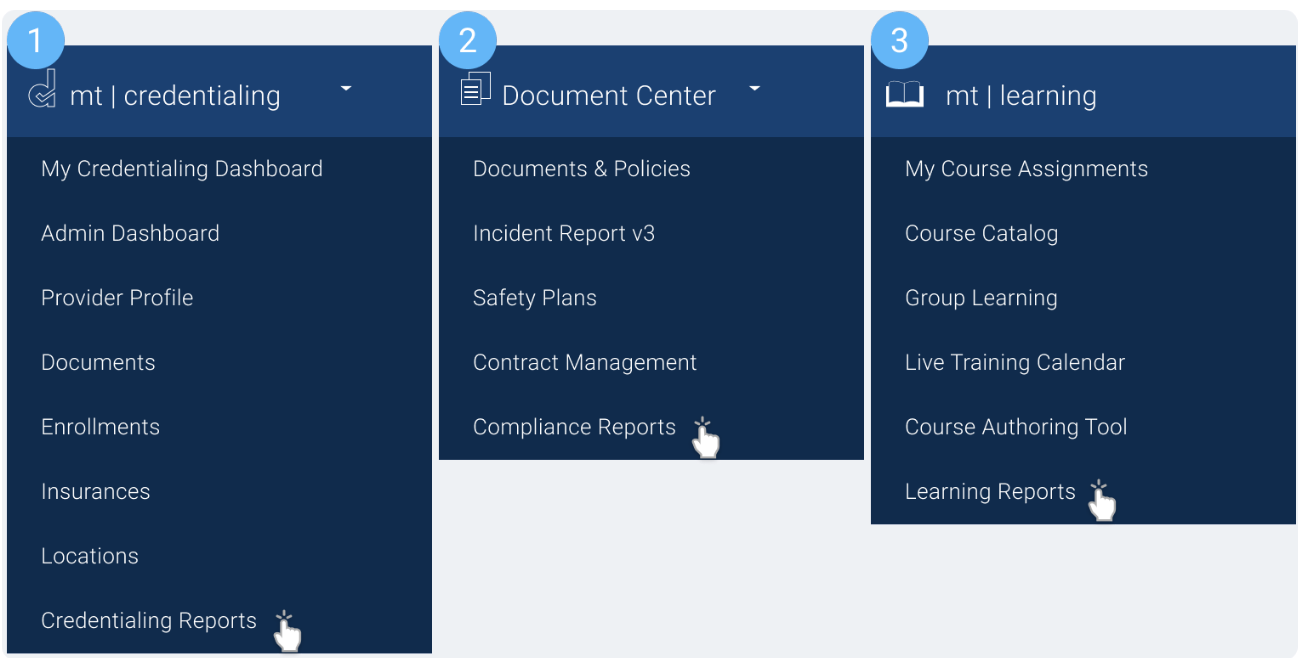
Super Admin & Admin users will be able to create as many custom reports as they require. Each user has viewing & editing capabilities on their own custom reports only, meaning any custom report that has not been created by the user is off-limits as visibility is limited to the report creator.

How to access

Step 1: Log into your MedTrainer account: https://lms.medtrainer.com/

Step 2: Once you are in your account, you may either:

1. Go to **mt|credentialing** menu, scroll to the bottom, and click on **Credentialing Reports**
2. Go to the **Document Center** menu, scroll to the bottom, and click on **Compliance Reports**
3. Go to the **mt|learning** menu, scroll to the bottom, and click on the **Learning Reports**



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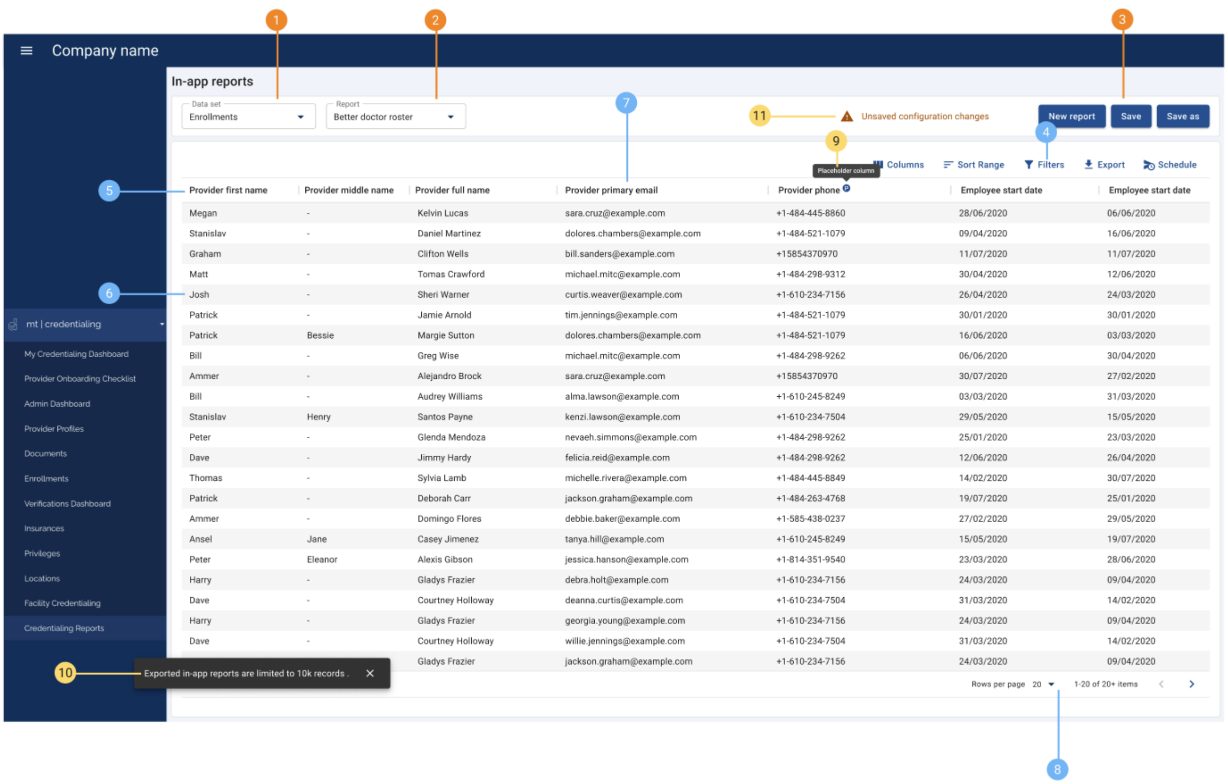
In-app Report Overview

Reports within the In-App reporting tool

Each dataset contains a set of preconfigured reports that users can utilize or modify depending on their needs and requirements. At first, when clicking on the “Select report” drop-down menu the user will only be able to see the preconfigured reports created by MedTrainer, which will be labeled with an MT logo. However, once the user starts saving their own customized reports, those will also be visible in the drop-down menu.

In-app Report Components



Report detail

1. Data set
2. Select report
3. New report, Save and Save as buttons

Main table

4. Actions bar (Columns, Filters, sort, export, schedule)
5. Table header
6. Table rows
7. Movable Table Columns
8. Table footer

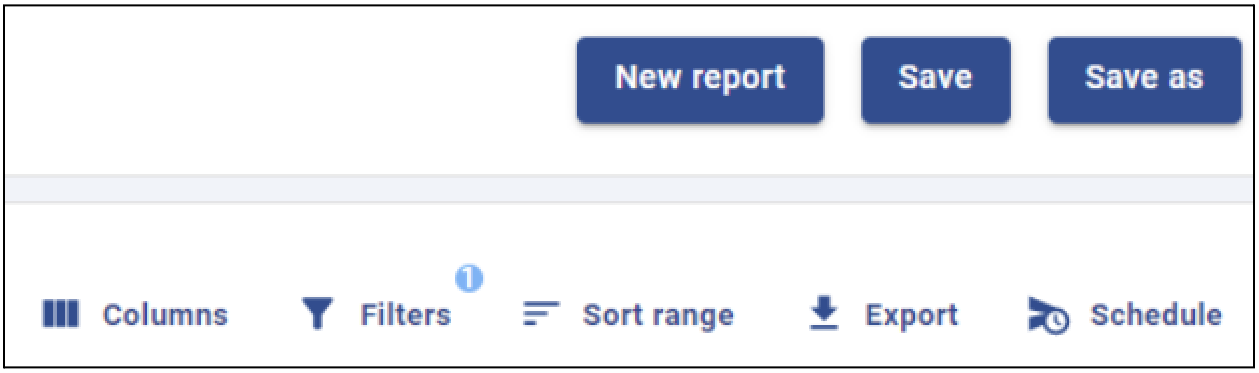
Information alerts

9. Placeholder badge
10. Snackbar
11. Unsaved changes alert

How to set up a custom report

Using the “New report” button.

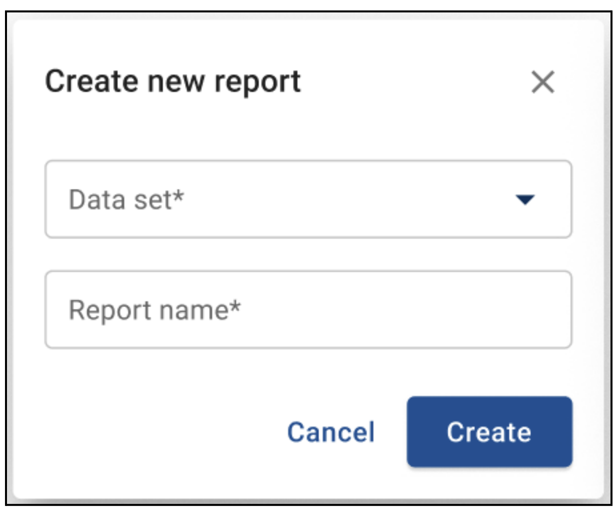
Step 1: Select the “new report” button.



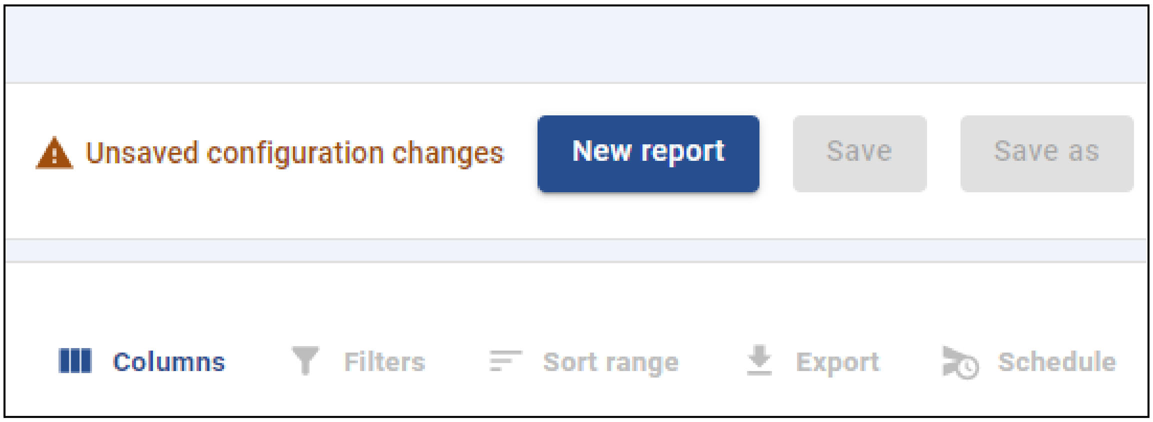
Step 2: Fill in the required fields by

A. Choosing a data set. The dataset will determine the source from which the report will retrieve the information.
B. Naming the new report that is about to be created.

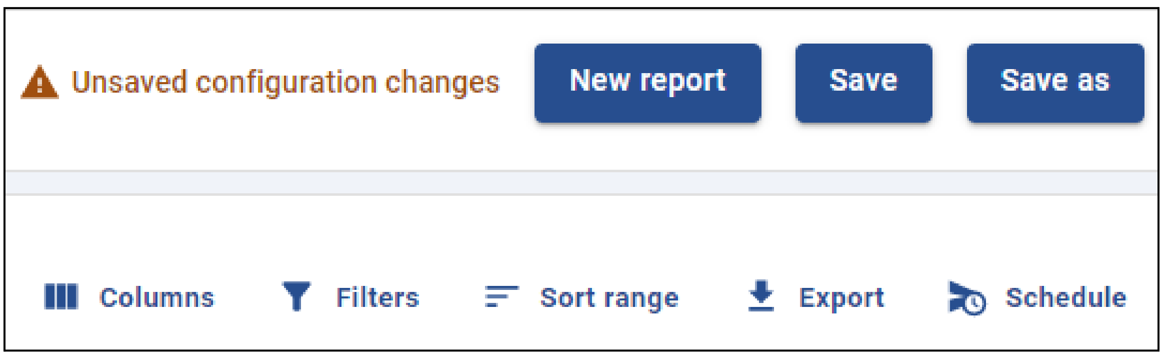
Step 3: Select the “Create” button.



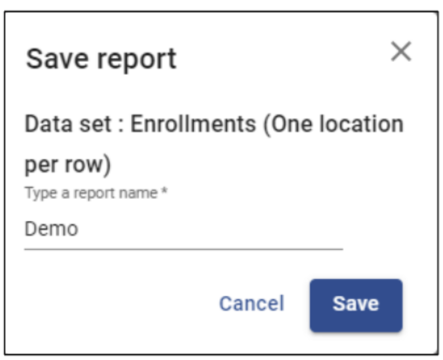
Step 4: Start adding columns to the report through the “Columns” option in order to enable the grayed out options, including the “Save” and “Save as” buttons.

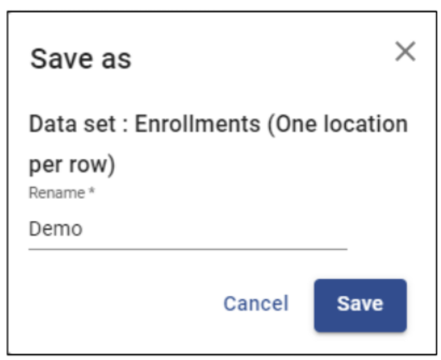


Step 5: After having added some columns to the brand new report, select either “Save” or “Save as” buttons to save the new report.



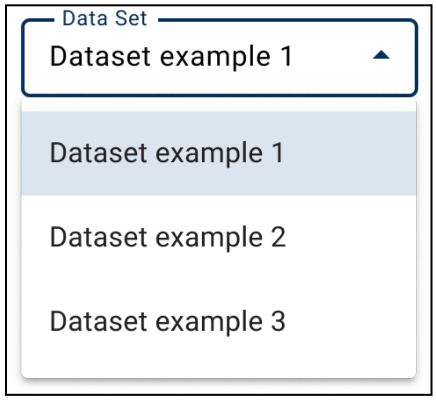
Step 6: Select the “Save” button on either the “Save report” or the “Save as” dialog windows.



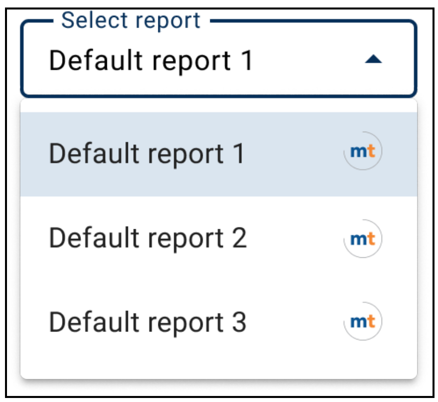


Duplicating preconfigured reports using the "Save as" button.

Step 1: Choose the dataset from the drop-down. The dataset will determine the source from which the report will retrieve the information.

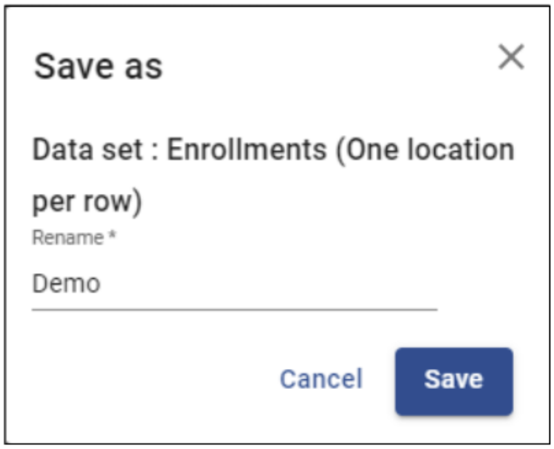


Step 2: Choose a preconfigured report from the "Select report" drop-down.



Step 3: Select the "Save as" button to create a copy of the preconfigured report.

Step 4: Select the “Save” button on the “Save as” dialog window.



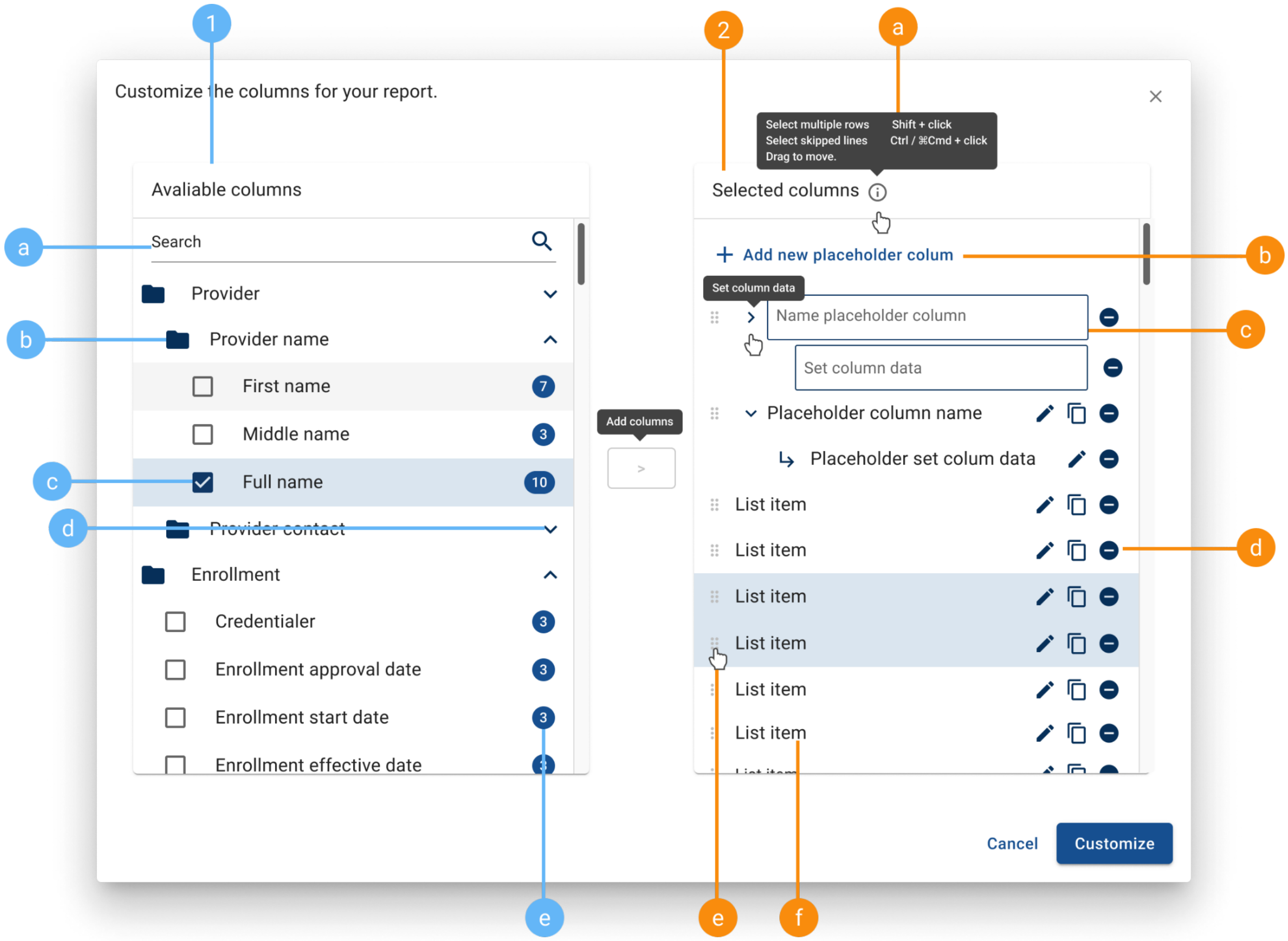
In-app Report Components

Columns

The “Columns” component from the action bars will make a dialog window appear, allowing the user to customize the columns shown on the report.

Column Dialog Components

This will allow users to customize how columns will appear in the report by using the following components:



1. Available Columns .
   a. Search bar
   b. Folders
   c. Checkboxes
   d. Arrow drop-down
   e. Badge count

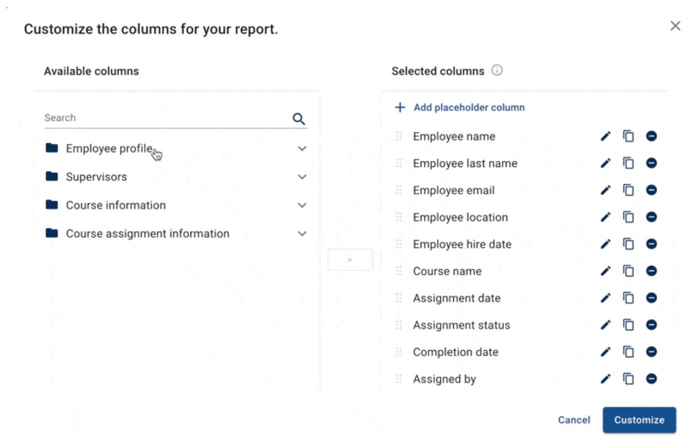
2. Selected Columns .
   a. Tooltips
   b. Add new placeholder column
   c. Text field
   d. Action icons (Edit, Duplicate, Eliminate)
   e. Drag icon
   f. Columns

Available Columns

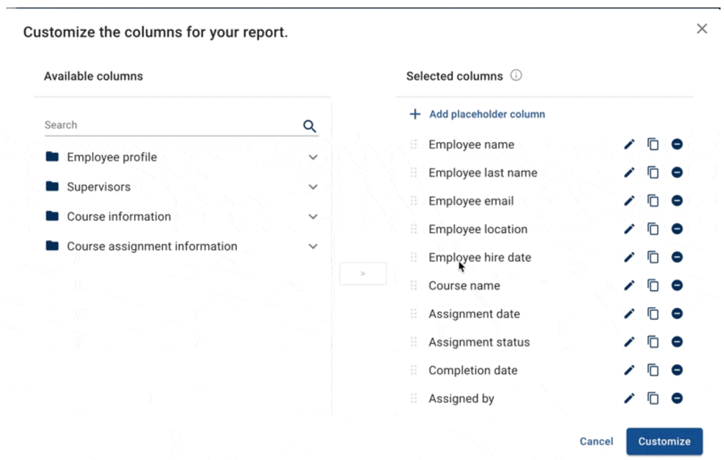
Within this panel, you will find a set of categories based on the selected dataset. The user can click on the arrow drop-downs to expand the dropdown menus in order to view all available columns within the dataset.

How to transfer columns from **Available Columns** to **Selected Columns**

Option 1: If the user wants their transferred columns to be positioned at the top of the 'Selected Columns' column list, they must select a column from the 'Available column' panel by clicking on the checkboxes beside them. Once all selections have been made, click on the right caret icon > located in the middle so those selections are transferred and displayed correctly in the Selected Columns panel.



Option 2: If the user wants their transferred columns to be positioned below a specific column in the 'Selected Columns' panel, they must start by choosing the column from the 'Selected columns' column list by pressing Ctrl / ⌘Cmd + click on your keyboard and then select a column from the 'Available column' panel by clicking on the checkboxes beside them. Once all selections have been made, click on the right caret icon > located in the middle so those selections are transferred and displayed correctly in the Selected Columns panel.



The user will be able to quickly identify the categories that have already been added from the 'Available Columns' onto the 'Selected Columns' by the badge count number 7 displayed on the right.

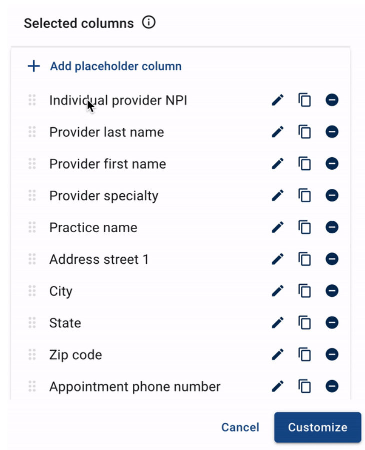
Selected Columns

This panel will summarize your current column selections and let you edit how these will be displayed on the report's main table.

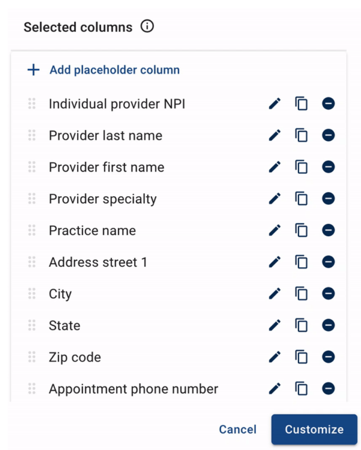
The user will have the ability to sort the order by dragging and dropping the columns. You can accomplish this in three different ways;

1. Select one row — Click & hold
2. Select multiple rows — Shift + click
3. Select skipped lines — Ctrl / ⌘Cmd + click

and finally just drag to move.



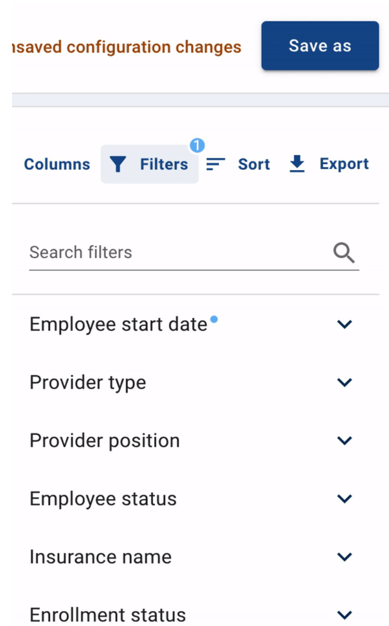
The user can also modify the columns by clicking any action icons. The action icons allow the user to edit the column name, duplicate the column and eliminate the column.



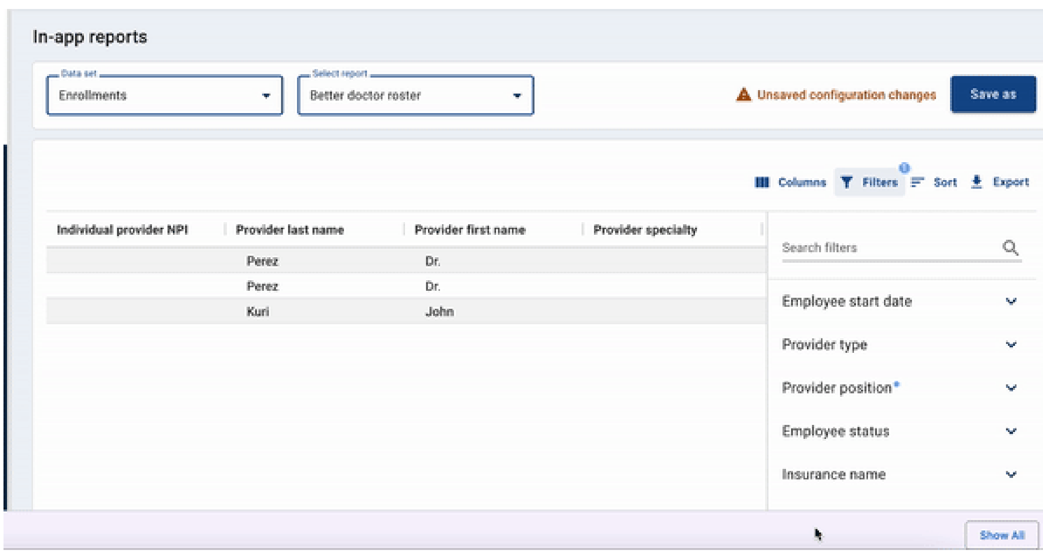
Once the user has successfully made all the configurations within the Columns panel, they can click on the 'Customize' button for the report to display the results based on the customizations made. If the user decides not to continue with the changes, they can simply click on the 'Cancel' button.

Filters

The filter panel offers many options for the user to filter data in real-time. To easily locate a filter option, the user can use the search bar to search for filters or scroll until they find the required option.
To select an option, the user must click on the arrow drop-down ⌄ to expand. We currently have two filter types; check box listed menu or date picker. Depending on the filter type the option will either show a **checkbox listed menu** from which the user can search using the search bar and select one or multiple options or a **date picker** that will allow the user to select empty dates, custom selected dates or choose from the predetermined date ranges provided as options.



Check box listed menu

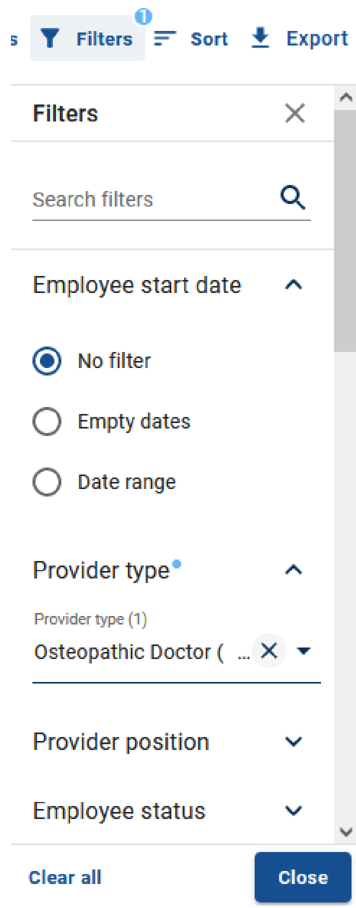


Date Picker

Removing an applied filter

1. If the user wants to remove a selected option from the checkbox listed menu, they can simply click on the 'X' button next to the selected option.
2. If the user wants to remove the date picker filters from a specific category, they can simply click on the radio button that says "no filter."
3. If the user wants to remove all filters applied, they can simply click on 'Clear all' to remove any date picker and/or checkbox listed filters.

Once the user selects the required filters to be applied, they can either click on the 'Close' button located on the bottom right or click on the **X** button located on the top right of the filter panel.
The displayed blue indicator, will make it easy to identify which filter option is currently being applied to the report.
The user will also know the total number of filter options used for filtering since the total number will be displayed in the badge count icon on top of the 'Filter' button.



Sorting

Sorting will allow the user to apply an ascending or descending order to any columns that have the ability to do so.

Click on the 'Sort' icon, and the multi-sort dialog will emerge. The multi-sort dialog will allow the user to sort up to 3 columns simultaneously. Each sorted column can be set to sort ascending or descending.

The user will have to select the column they'd like to sort from the drop-down, then select if it'll sort ascending or descending, and finally, they can then click on the "Sort" button to apply changes or click on the "Add another sort column" to add more. To delete a sort range, the user must click the 'trash bin' icon.

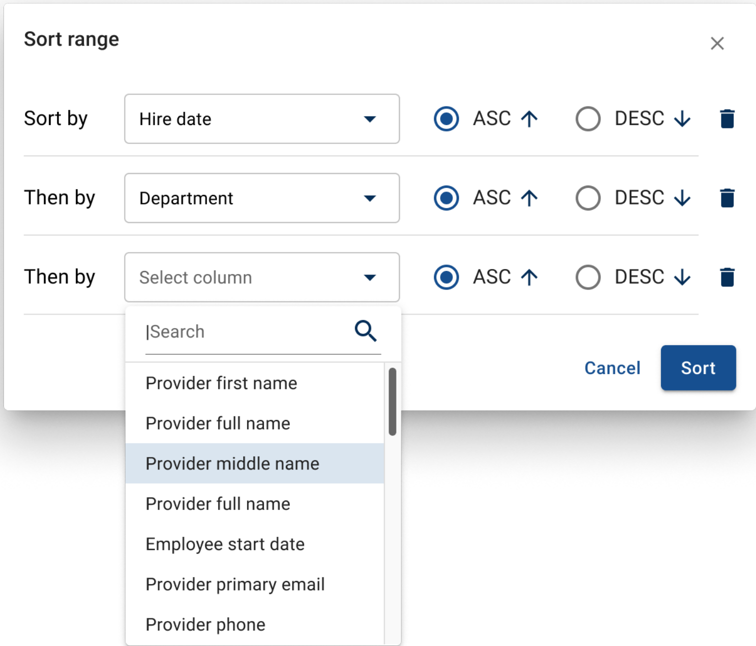
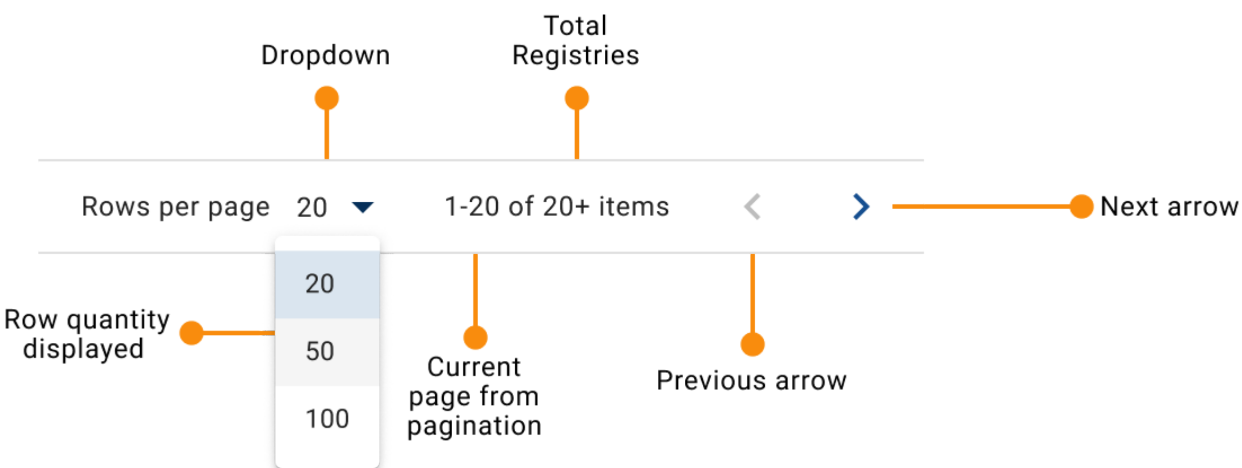


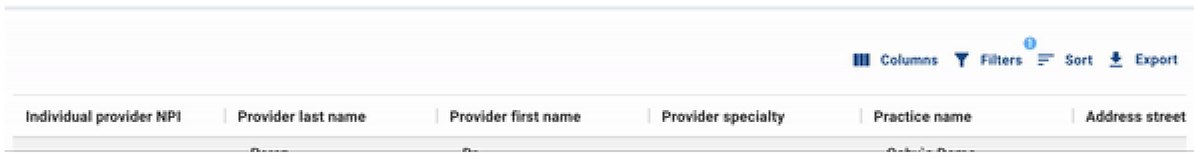
Table Footer

The footer can be found in the bottom right corner of the main table. This is used to visualize the total registries that have been retrieved as a result of the filters and columns added to the report, the user will be able to determine how many rows will be visible per page and can also click on the next and previous arrows to change from page to page.



Movable columns within the report's main table

The in-app report has the capability of not only sorting the column order through the [‘Selected Columns’]() panel inside the ‘Column Dialog,’ but also, the user can move these around within the report's main table. In order to do this, the user must click, hold and drag the column sideways until finally dropping it in the required position.



Save & Save As

Once the user has applied edits to a report, the system will alert the user to store the unsaved changes.
⚠ Unsaved configuration changes.

If they decide to proceed with the changes, they will have 2 options to save them:

Option 1 - ‘Save as’
Both **custom** and **preconfigured reports** will allow the client to make as many duplicates as they require by utilizing the ‘Save as’ button. There are 2 ways to go about duplicating a report.

1. Select the dataset > Select the report > Click on Save As > Name the report > Apply changes > Save
2. Select the dataset > Select the report > Apply changes > Click on Save As > Name the report > Save

Note: The option to save the report as ‘Save As’ will allow the user to create a copy of the report selected, the original version will remain unaffected, and the new clone can now be customized. This option will be enabled for all reports.

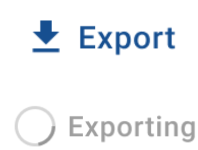
Option 2 - ‘Save’
Users will only have the ‘Save’ option available for **custom reports.** The ‘Save’ option will not generate a copy of the report. If a custom report is opened and edits are made, when saving the report, all those changes made will overwrite the previous version.

Note: We will constantly continue to add preconfigured templated reports for the users to review, clone, and make their own.

If the user does not want to save any of the changes, they can refresh the screen or click out of the In-app report module to revert to the initial state of the report.

Export

If the user wants to export the report, they can click on the ‘Export’ button and choose to either export as a CSV or Excel. Once an option is selected, the report will start

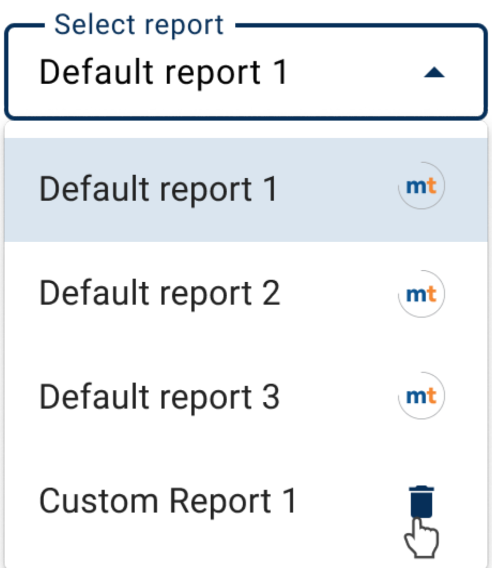


downloading and the system will inform process completion by changing the loading 'exporting' button back to it's original state.

Note: Given that the In-app report is intended for operational reporting only, it has an export file limit of 10k records. If the exported report surpasses the limit, the system will notify the user and only export 10k records.

Delete

Step 10: The user also has the option to delete any of their custom created reports by opening the 'Select report' drop-down menu and clicking on the trashcan icon. As soon as this icon is clicked, a dialog window will appear cautioning the user about their irreversible action and asking for an additional confirmation to proceed. The user must then click on the "delete" button to complete the process.

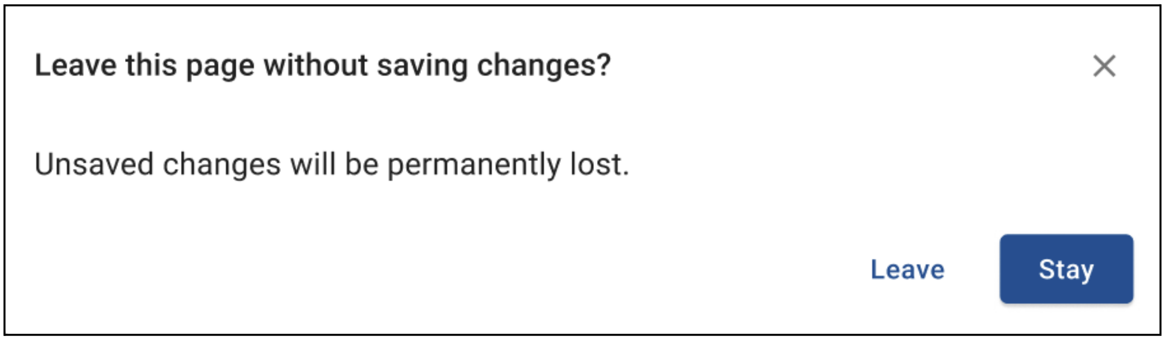


Warning dialog windows

These messages will appear in order to prevent the user from losing unsaved changes by accidentally performing different actions without saving the changes first.

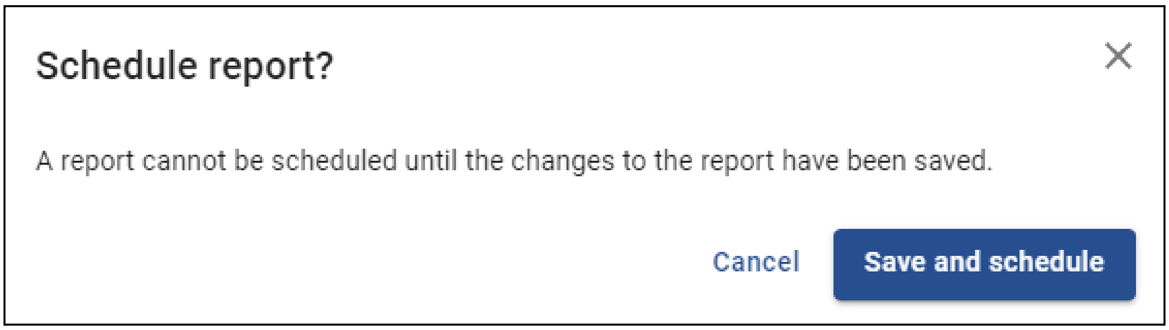
The "Leave this page without saving changes?" warning dialog window will appear when the current report the user is editing has unsaved changes and:

- The user tries to switch to a different dataset
- The user tries to switch to a different report
- The user tries to create a new report



The “Schedule report?” warning dialog window will appear when the current report the user is editing has unsaved changes and:

- The user tries to schedule the report

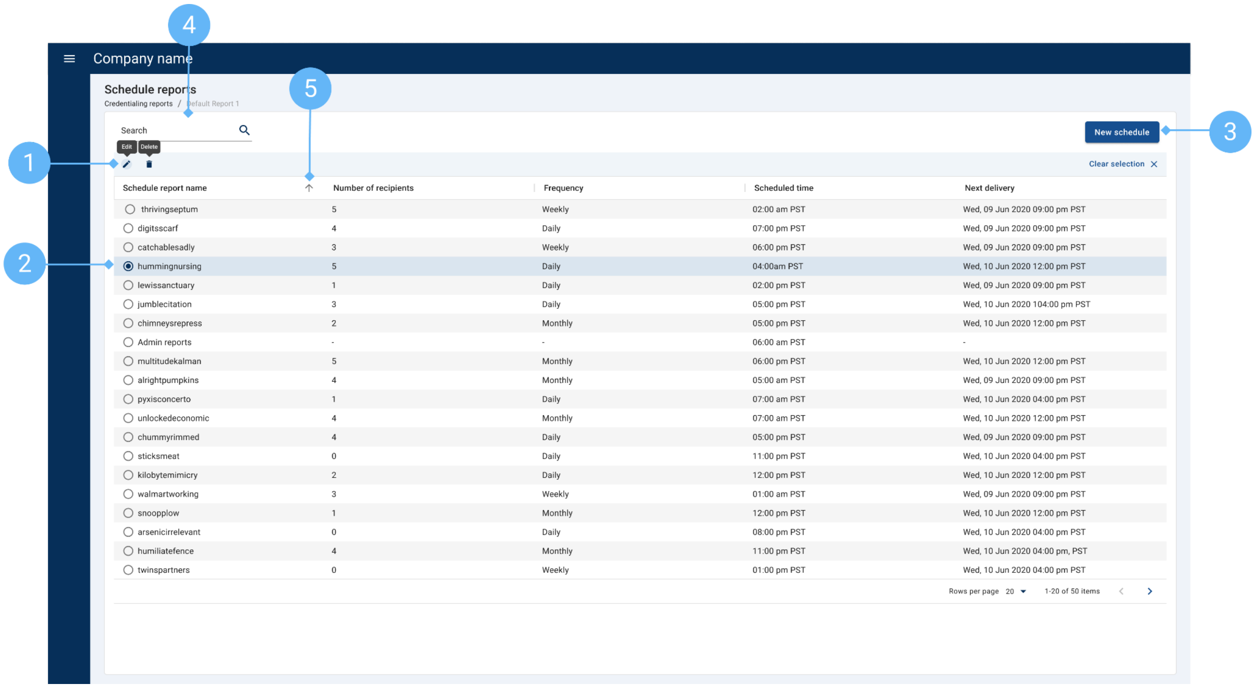


How to schedule a report

Scheduling a report will allow the user to arrange streamlined report delivery for all of their custom and/or preconfigured reports. The user will be able to set external or internal recipients, delivery time and frequency.

In order to schedule a report, the user must have already selected the pertinent dataset and report before clicking on the ‘Schedule’ button. Once it's clicked, the page will load and consequently admit the user to the ‘Scheduled reports’ page.

Scheduled Reports Components

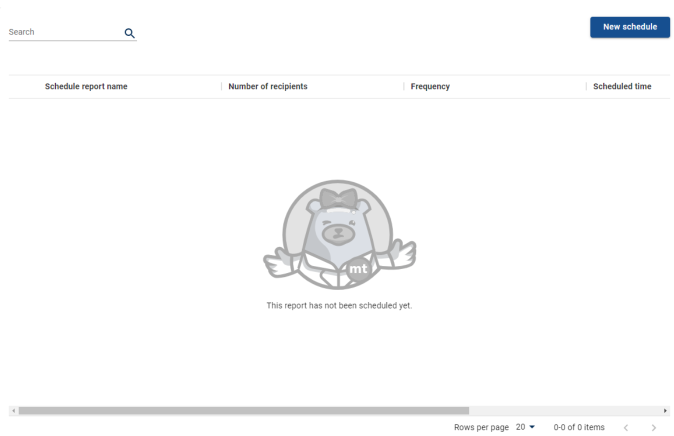


Schedule report name	Number of recipients	Frequency	Scheduled time	Next delivery
thrivingseptum	5	Weekly	02:00 am PST	Wed, 09 Jun 2020 09:00 pm PST
digitsscarf	4	Daily	07:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
catchablesadly	3	Weekly	06:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
hummingnursing	5	Daily	04:00am PST	Wed, 10 Jun 2020 12:00 pm PST
lewissanctuary	1	Daily	02:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
jumblecitation	3	Daily	05:00 pm PST	Wed, 10 Jun 2020 104:00 pm PST
chimneysrepress	2	Monthly	05:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
Admin reports	-	-	06:00 am PST	-
multitudekalman	5	Monthly	06:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
alrightpumpkins	4	Monthly	05:00 am PST	Wed, 09 Jun 2020 09:00 pm PST
pyxisconcerto	1	Daily	07:00 am PST	Wed, 10 Jun 2020 04:00 pm PST
unlockedeconomic	4	Monthly	07:00 am PST	Wed, 10 Jun 2020 12:00 pm PST
chummyrimmed	4	Daily	05:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
sticksmeat	0	Daily	11:00 pm PST	Wed, 10 Jun 2020 04:00 pm PST
kilobytemimicry	2	Daily	12:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
walmartworking	3	Weekly	01:00 am PST	Wed, 09 Jun 2020 09:00 pm PST
snoopplow	1	Monthly	12:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
arsenicirrelevant	0	Daily	08:00 pm PST	Wed, 10 Jun 2020 04:00 pm PST
humiliatefence	4	Monthly	11:00 pm PST	Wed, 10 Jun 2020 04:00 pm, PST
twinspartners	0	Weekly	01:00 pm PST	Wed, 10 Jun 2020 04:00 pm PST

Scheduled reports main table .

1. Actions bar (edit, delete, clear selection)
2. Selected row
3. New Schedule
4. Search
5. Sort

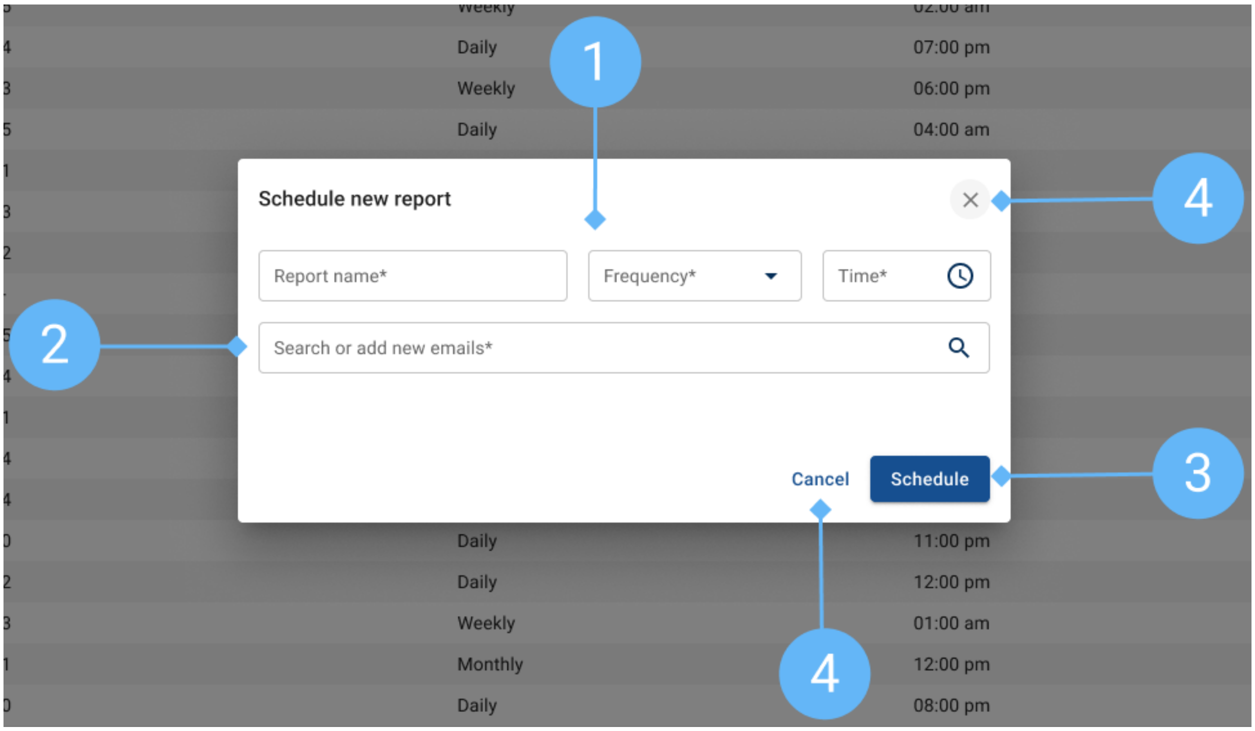
Initially the ‘Scheduled reports’ page will exhibit a bare main table where the only supplied choice is the ‘New schedule’ button that will allow the user to create a new schedule to the report.



New schedule

Step 1: Click on the 'New schedule' button.

Step 2: A 'Schedule report' configuration dialog will appear from which the user can name the scheduled report, set the frequency (daily, weekly, monthly), set the delivery time, add internal or external recipients and finally click on the call to action button to finish the scheduling process.

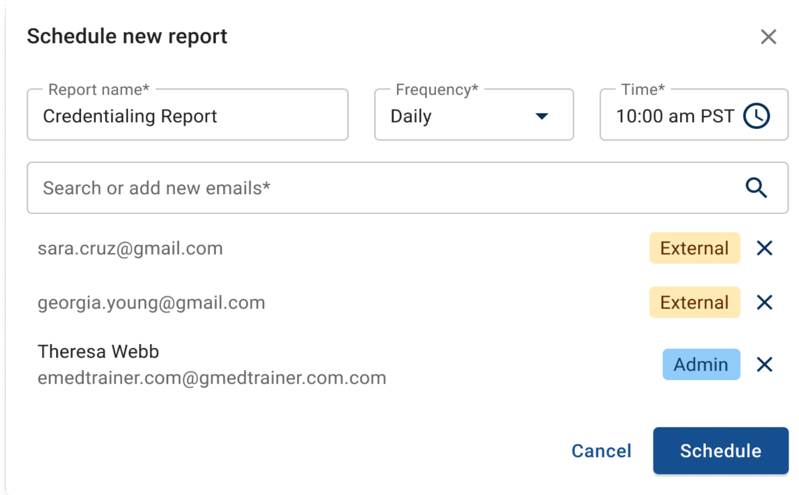


Schedule new report .

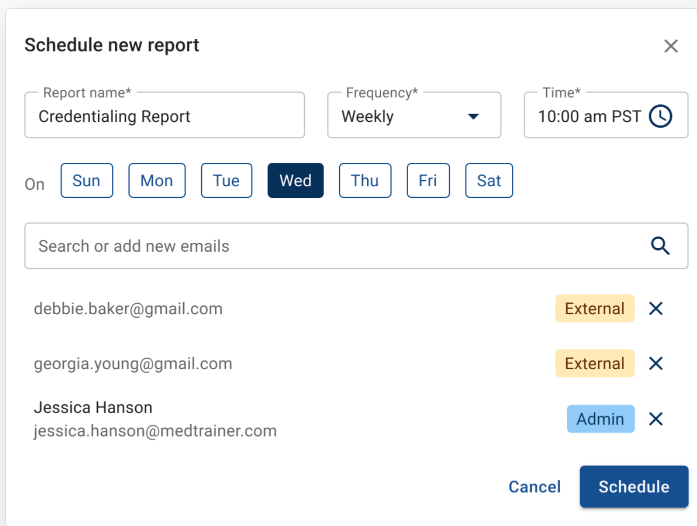
1. Schedule report configuration dialog
2. Schedule report recipients
3. Call to action button
4. Close dialog or cancel schedule

Setting frequency options

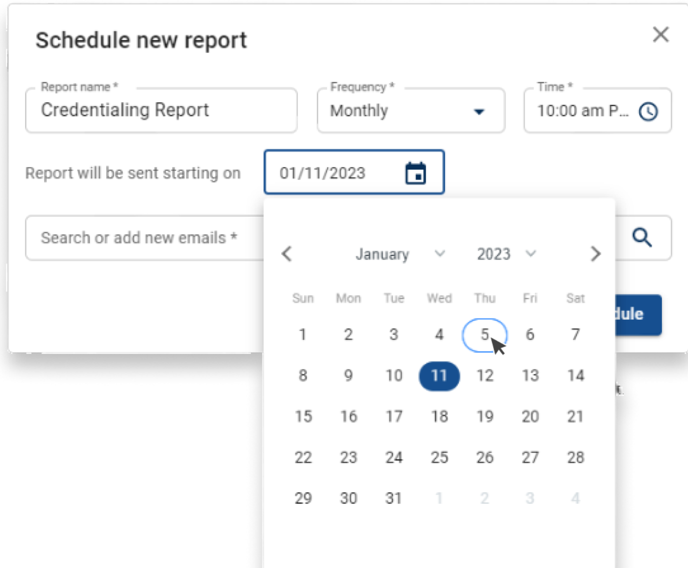
Option 1: Daily frequency will send the report on a daily basis. In order to use this option the user must select ‘Daily’ from the ‘Frequency’ drop-down and select the preferred time from the ‘Time’ drop-down.



Option 2: Weekly frequency will send the report on a chosen day of the week on a weekly basis. In order to use this option the user must select ‘Weekly’ from the ‘Frequency’ drop-down, select the preferred time from the ‘Time’ drop-down, and choose a day of the week.



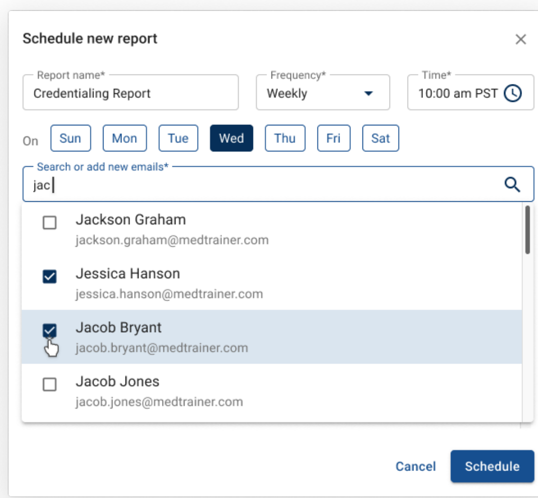
Option 3: Monthly frequency will send the report on a monthly basis. The scheduled report will continue to run on the specific day selected.
In order to use this option the user must select 'Monthly' from the 'Frequency' drop-down, select the preferred time from the 'Time' drop-down, and user can either select a starting date by clicking on the calendar or using the default start date which will be the user's present date.



Adding recipients to the email list

The user will be able to send the scheduled report to employees with an Admin or Super Admin level in Medtrainer and/or external emails.

Search & send reports to Admins & Super Admins. In order to locate a specific employee within Medtrainer, the user must input characters that either match the employee's name or email. The matched results will display on a drop-down list from which the user can select from one to multiple employees by clicking on the check boxes.
Note: The system won't let the user search for employees that do not have an "active" status, therefore, they won't be able to receive scheduled reports either.



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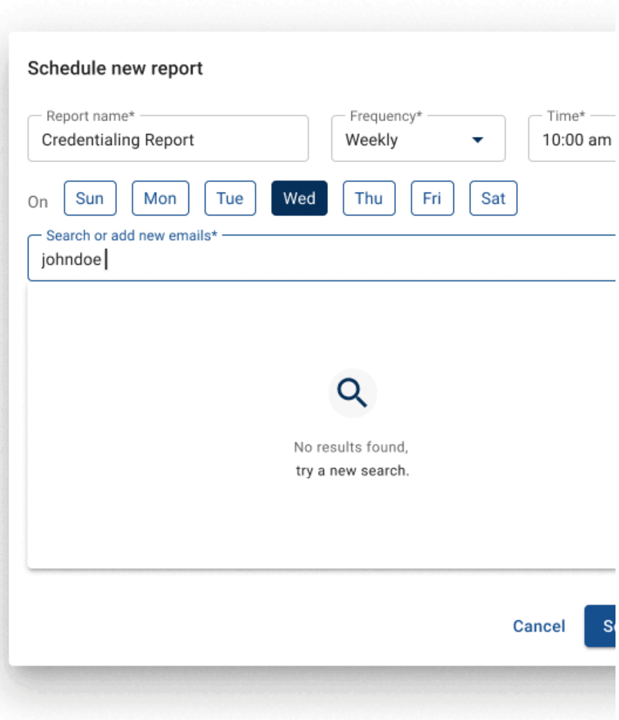
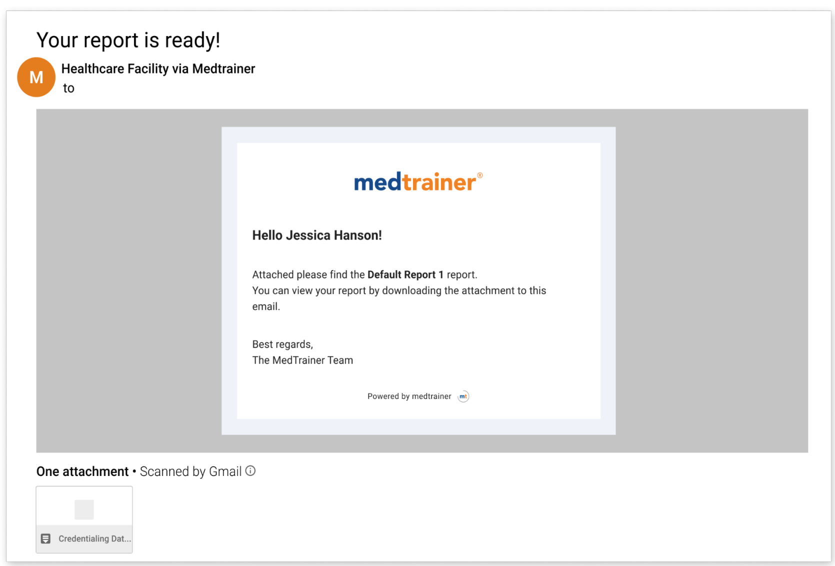
Add external emails to recipient list. Once the user starts typing, the system will initiate a search based on the characters entered. If there are no matches, the system will ask the user to try a new search since no results were found. The user may continue to type until eventually writing out the complete external email address, which then the system will recognize as a real email and ask the user if they would like to add it as an external user to the recipient list.



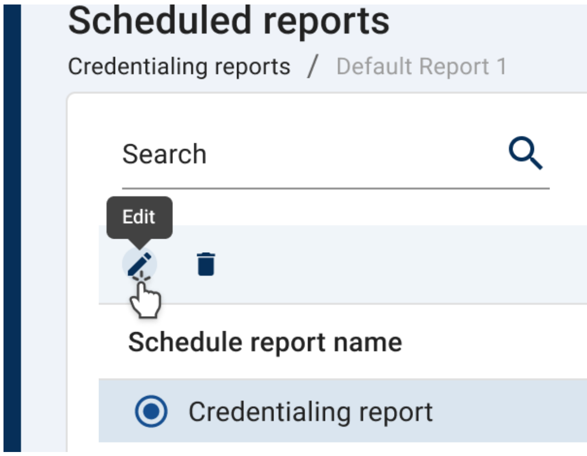
Note: Here's an example of how the recipients will receive their scheduled reports



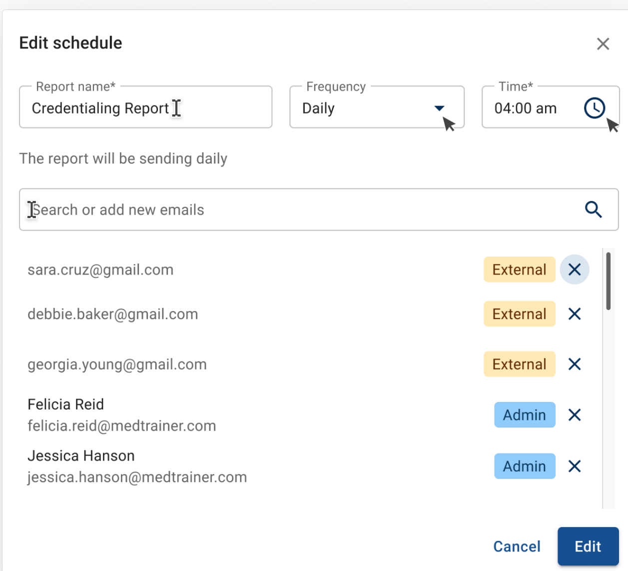
Editing & Deleting Scheduled Reports

In order to have the option of editing or deleting a scheduled report there must be atleast one scheduled report on the scheduled reports main table.

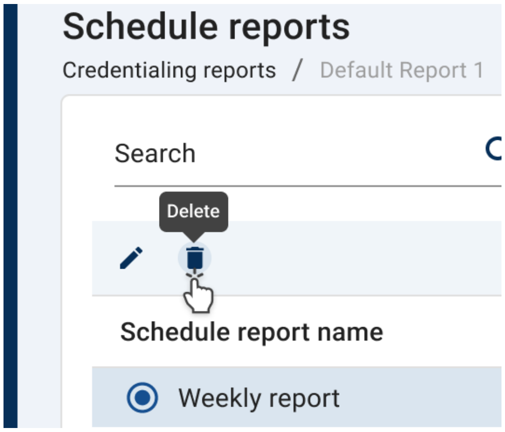
Step 1: In order to edit, user must find the scheduled report they want to modify, click on the radio button located beside the scheduled report's name and click on the 'Edit' pencil icon.



Step 2: The 'Edit schedule' dialog window will pop-up and allow the user to make the required changes.



Step 3: In order to delete, user must find the scheduled report they want to remove, click on the radio button located beside the scheduled report's name and click on the 'Delete' trashcan icon.



Step 4: As soon as this icon is clicked, a 'Delete schedule' dialog window will appear cautioning the user about their irreversible action and asking for an additional confirmation to proceed. The user must then click on the "delete" button to complete the process.