Reporting Portal Overview for Management

Summary: The Discern Reporting Portal provides a user-friendly interface to run various types of reports from multiple systems within a single location.
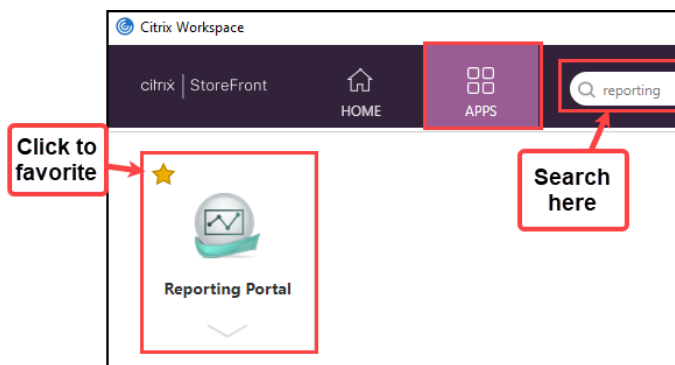
Support: Ambulatory Informatics at 231-392-0229

Reporting Portal Navigation

Opening the Application

1. *Discern Reporting Portal* can be accessed through Citrix StoreFront or by clicking on the Discern Reporting Portal toolbar icon in PowerChart.
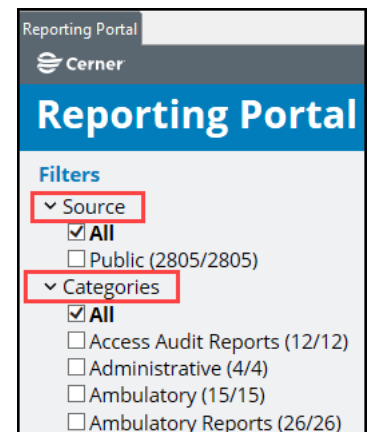
   Citrix StoreFront: **PowerChart:**


Filtering the Report List

- Report lists may be filtered by Source or Category.
  - Filtering by Category will allow you to narrow down to specific reports by owner group and/or folder setup.

Searching for a Report

1. Search for a specific report using the search field in the upper right corner of the application. Type the Report Name or part of the name to filter the search.
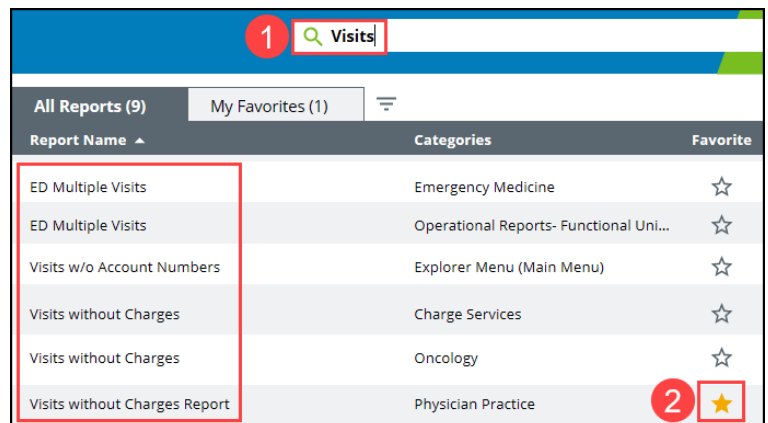
Creating a Favorite

2. Click the star icon next to a specific report in the report list to save the report as a favorite and add it to the My Favorites tab for quick access to the report in the future.

Report Description and Additional Details

1. Selecting a report will provide more information about the report.
2. The Support Reference Number may be needed to provide to support if an issue is encountered.

Running Reports

1. Select the report from the All Reports or My Favorites tab report list to open the report details.
2. Click Run.

- **Note:** Based on the type of application report (Business Objects or DA2), there may be an additional log in screen, or criteria selection.

Business Objects Reports

1. When the SAP BusinessObjects login window opens, log on using the correct username and password.
   a. **Note**: This is a unique username and password separate from your Munson Healthcare system account.
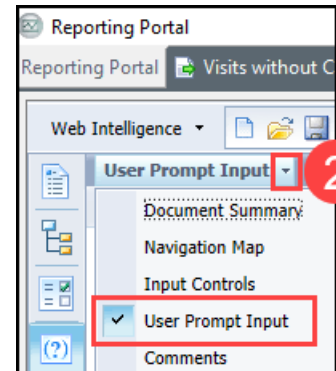
2. Click the drop-down arrow and select **User Prompt Input**.

3. Click on **Advanced.**

4. The prompt window will display. A new report may be created to run, or a previously ran report may be selected.

5. **To create a new report**:
    a. Click on each Prompt category under Prompts Summary and select the desired criteria.
        ▪ **Note**: Click on each prompt, even if there is a green check mark.
    b. Click on **Select Clinic(s).**
        i. Select the clinic name and click the right arrow button.
        ii. Repeat for each clinic needed to be added to the report.
        iii. Use the search field and binocular icon if needed to search for the clinic name.
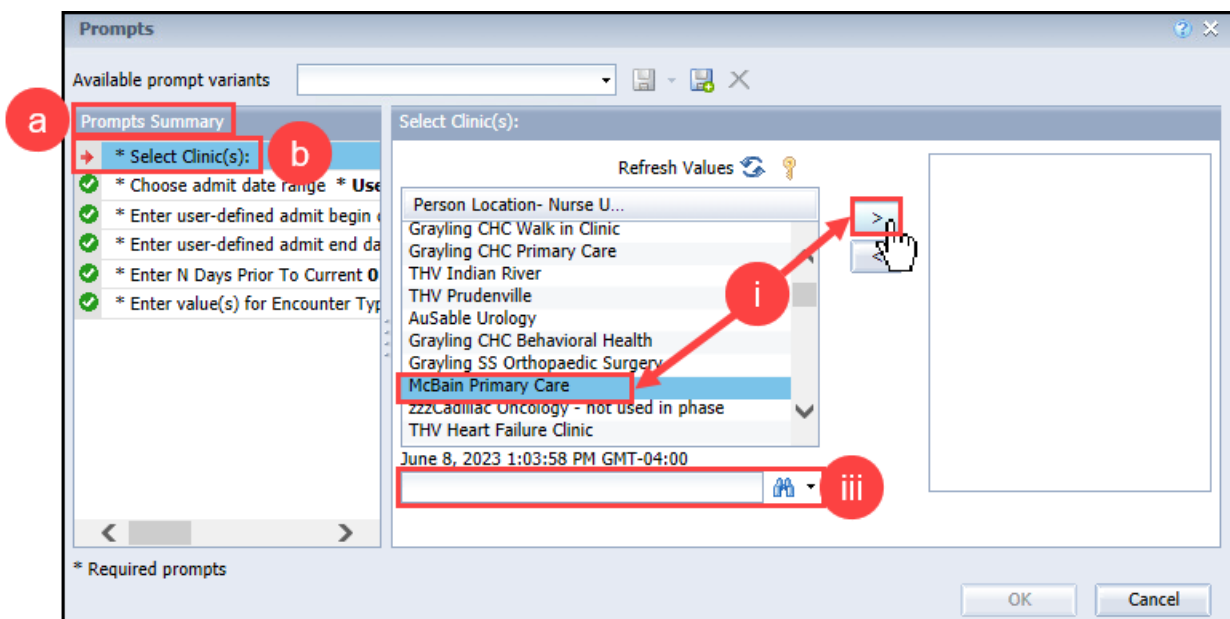
c. Click on **Choose admit date range**.
   i. Click on the search binocular icon.
   ii. Select the desired date range.
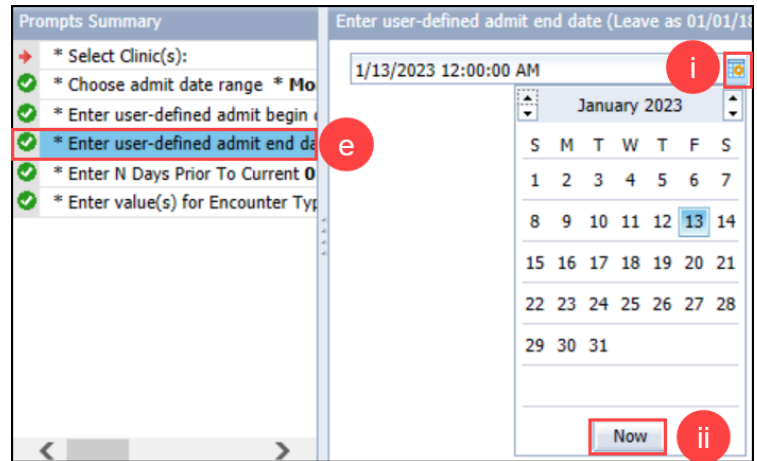   iii. Click the right arrow to add the selected date range to the box on the right.
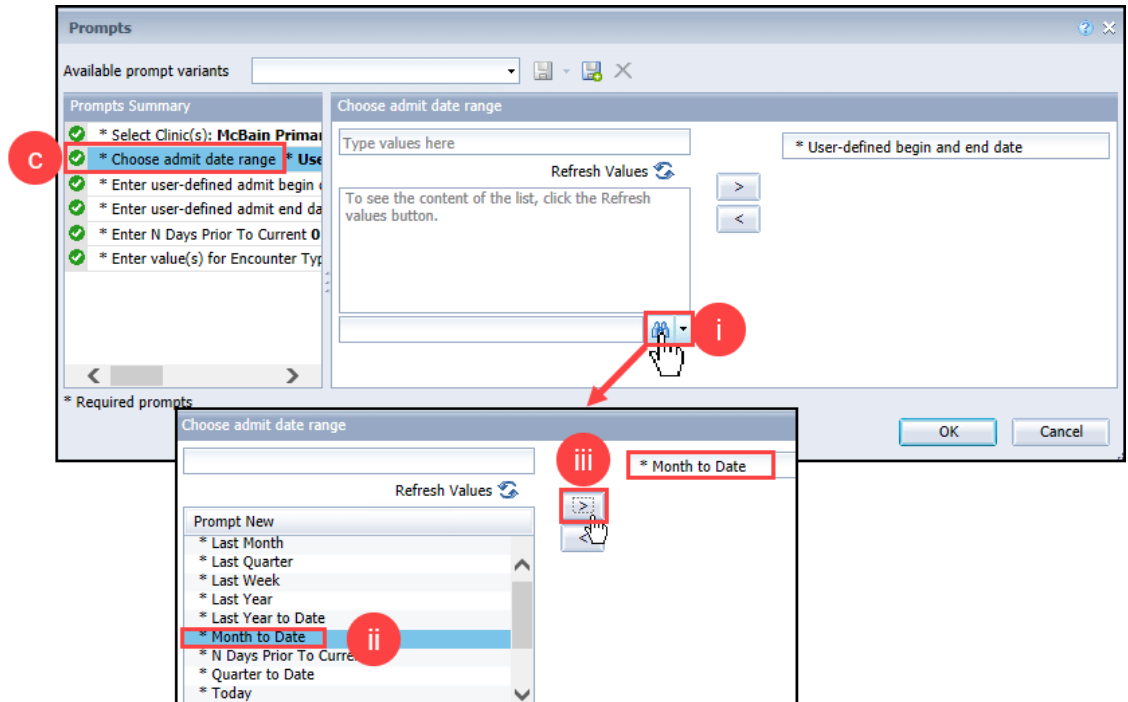
d. Select **Enter user-defined admit begin date**.
   i. Click on the calendar icon and select the correct begin date for the report. (This does not change automatically based on the report range selected, it must be manually entered).
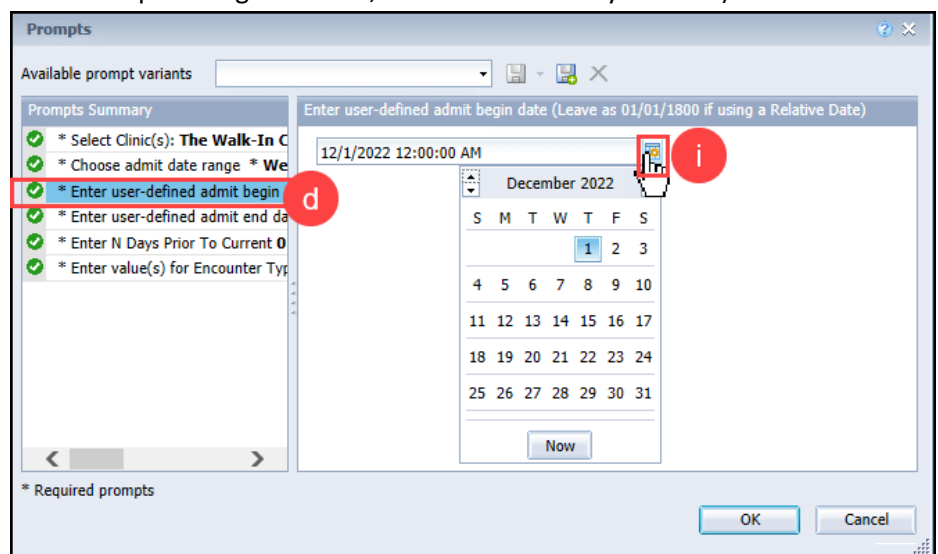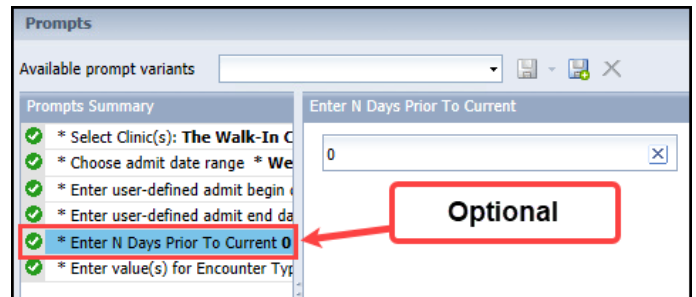
e. Select **Enter user-defined admit end date**.
   i. Click on the calendar icon and select the correct end date for the report.
   ii. Click the Now button to select the current date and time as the end date.

f. Enter N Days Prior to Current is **optional**.
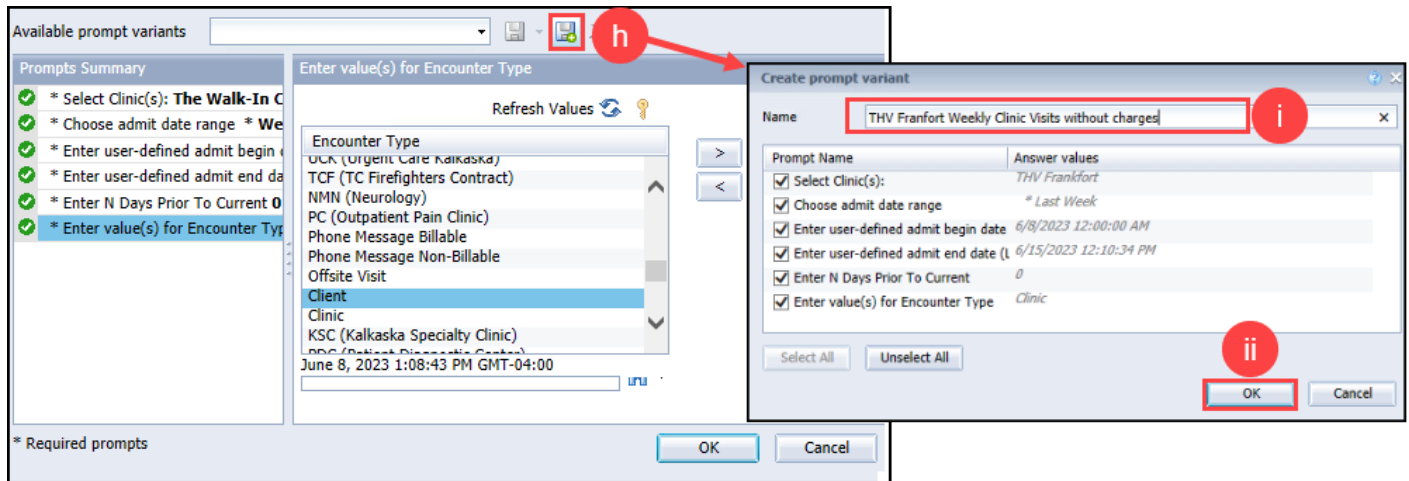

g. Select **Enter value(s) for Encounter Type**.
   i. Click the binocular search icon.
   ii. Select the Encounter Type to include in the report.
   iii. Click the right arrow to add the selection to the box on the right.
      • Repeat as needed to select multiple Encounter Types.
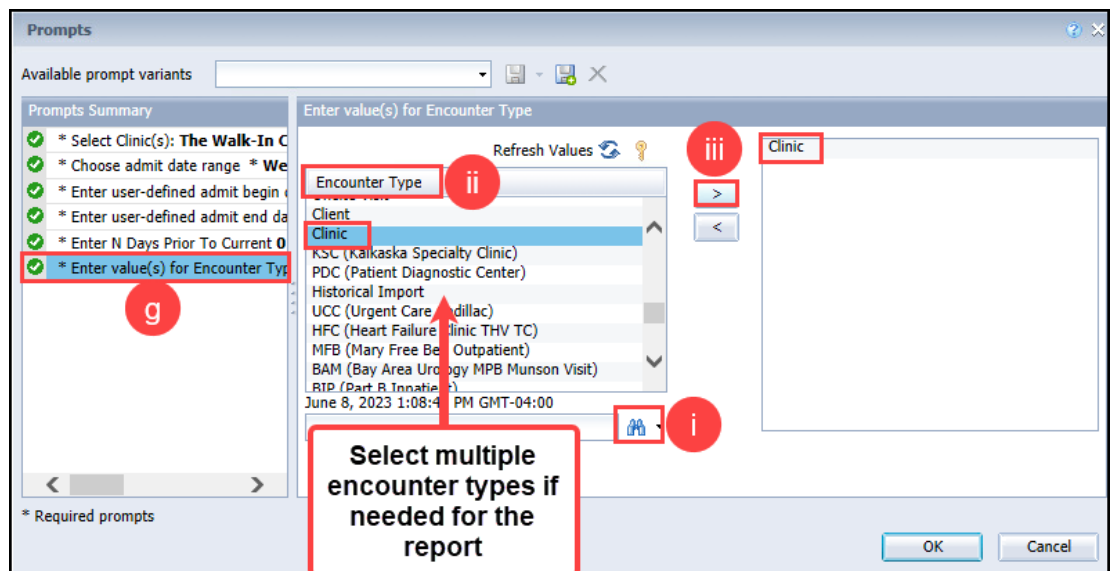
h. Save the report by clicking the **floppy disc icon** with the +.
    i.   Enter an appropriate desired report name.
    ii. Click OK.

6. **To run a report**:
   a. Select the correct report from Available prompt variants by clicking the drop-down arrow and selecting the desired report.
        i.   If any prompt criteria need to be updated, click on the Prompt Summary needed and update the criteria selections.
    b. Click **OK**.
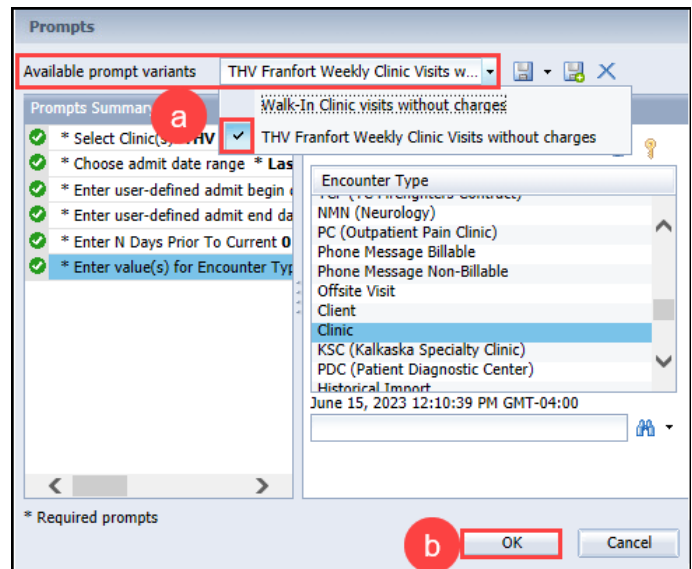
7. Once the report opens, multiple tabs display on the bottom of the screen. Click on each tab to view the information included.


8. The report information may be saved, printed, or exported to a spreadsheet using the toolbar icons.
9. Report information may be filtered or navigated using the toolbar options. Hover over the toolbar icons for more information on what each icon is used for.
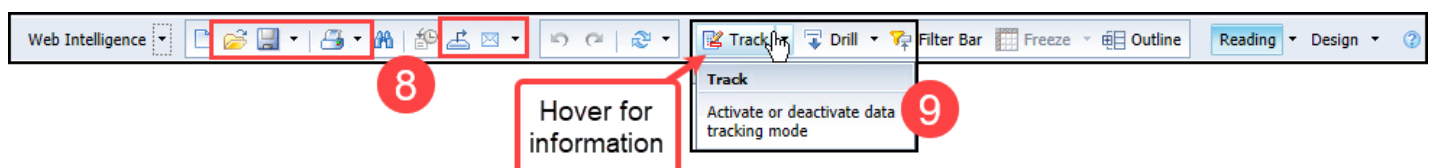
Discern Analytics 2.0 (DA2) Reports

1. The Discern Prompt window displays when Run is selected for a DA2 report. The prompt selections may differ based on the report chosen.
2. Select the appropriate report prompt criteria.
3. Click Execute.
4. The report information will display and may be saved or printed using the toolbar icons.
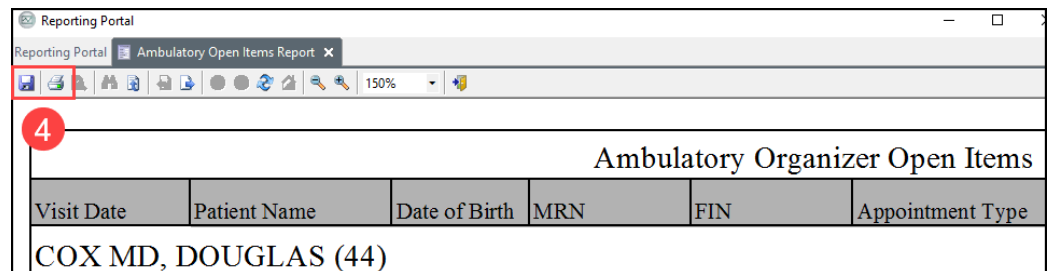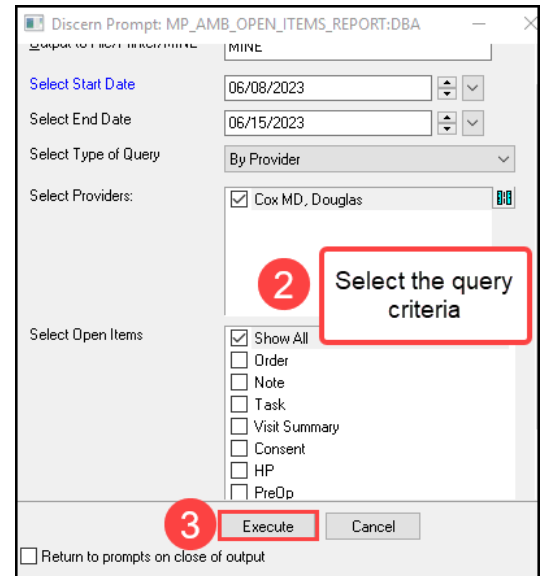
CCL Application Reports

1. If the report is a CCL application report, there are additional run buttons.
   o
   o **Run in Background** runs the report in the background to allow the performance of other activities.

Navigation Tips

1. Multiple reports may be open at one time using the tabbing functionality of the application.
2. Simply run two or more reports without closing the reports to create a tab for each report. This allows quick and easy navigation through multiple reports.
   a. Click on the Reporting Portal tab to navigate back to the list of reports and to run additional reports.
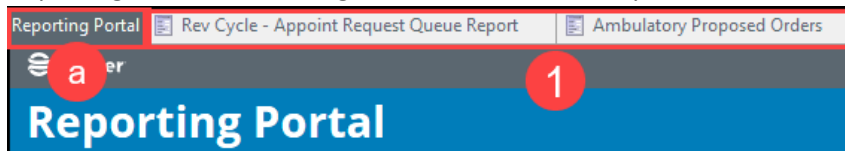
Application Settings

1. To access the Discern Reporting Portal application settings, select Settings in the top right corner of the application.
2. Select or deselect setting options as needed and click OK.