DataPoint User Guide

Creating Exports, Distributing Dashboards, and Distributing Reports –

Novice Functionality

How to Export Reports and Dashboards, Schedule Exports, Print Presentation Reports as A Package, and Navigate the Exports Page

Sentara Health Plans

Contents

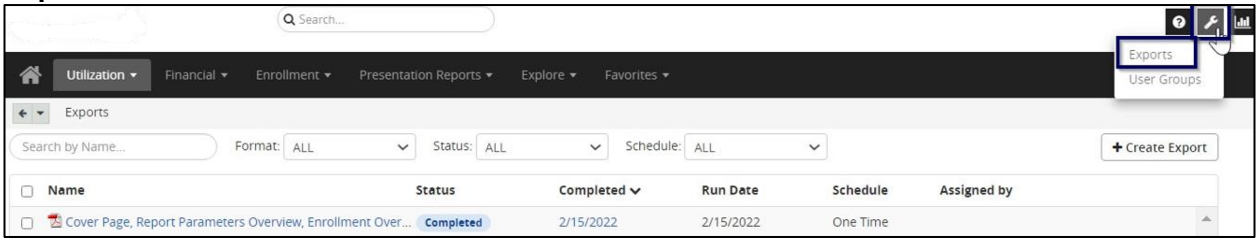
Purpose

The purpose of this user guide is to outline how to:

- Navigate the Export page
- Export a Report or Dashboard
- Print Presentation Reports as a package
- Schedule an Export

Navigating the Exports Page

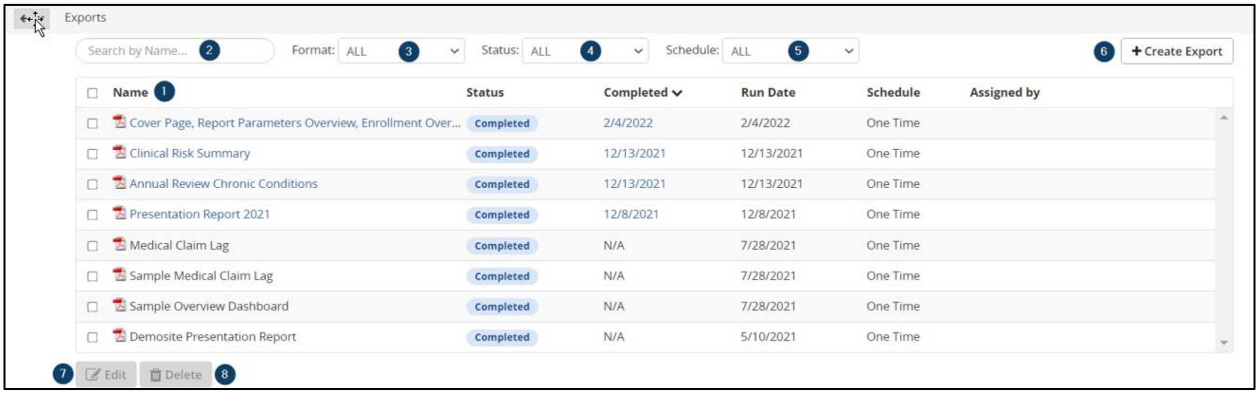
To navigate to the **Exports** page, click the wrench on the top right of the page and click **Exports**.



On the **Exports** page, you can:

1. view all your past exports (until you delete)
2. search your exports using the **Search** box
3. sort by **Format** (Excel, PDF, etc.)
4. sort by **Status**
5. sort by **Schedule**
6. create a new **Export** – this is most used when creating a full presentation report
7. edit your exports – you can edit previous exports
8. delete your exports

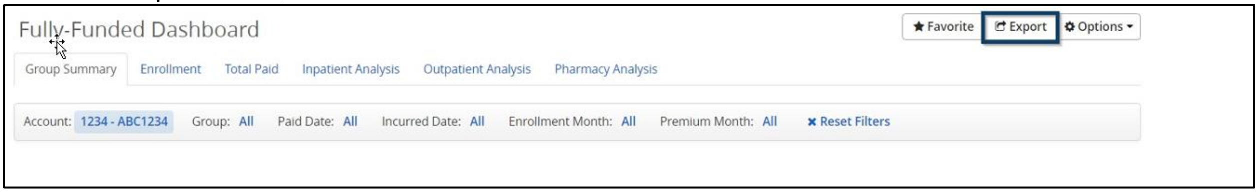
Tip: If a naming convention is long, you can hover over the item to see the full name.



How to Export Summary Reports

After you set your filters, you can export your summary report or dashboard. Click on the **Export** button on the top right.

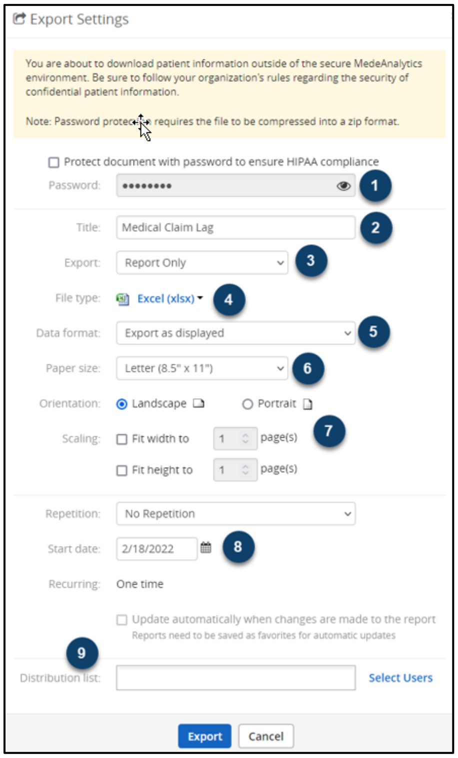
In the example below, the Account filter was chosen.



Complete the required fields in the **Export Settings** box by entering the following details and then click the **Export** button at the bottom of the page.

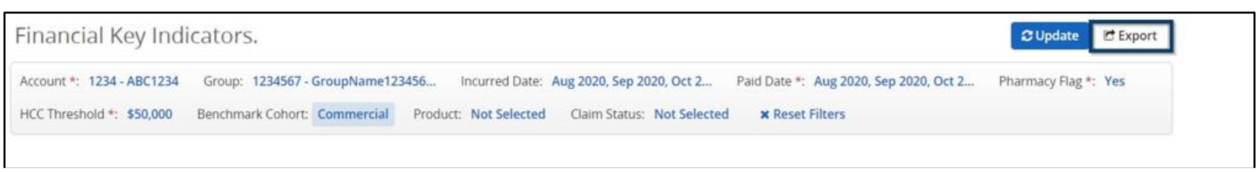
1. **Password** – Create a password to view the export (optional).
2. **Title** – Enter a name for the exported file. **Tip**: Include a date at the end of the file name (e.g., 20220106).
3. **Export** – Use the dropdown to select **Report Only** or **Chart Only**.
4. **File Type** – Choose your preferred file type: Excel, PDF, CSV, or Access. Excel and PDF are used most often. Options for exporting may differ based on report or dashboard.
5. **Data Format** – Use the dropdown to select to export the data as displayed on the screen or with expanded rows that include additional data
6. **Paper size** – If printing, choose your paper size. Otherwise, this will set the document size.
7. **Orientation and Scaling** – Choose the desired formatting for the export if you would like to print it.
8. **Repetition and Start Date** – For reoccurring reports, select a frequency and enter the start date for your reporting. We recommend scheduling after the 15th of each month to account for the monthly upload of data.
9. **Distribution List** – Enter the usernames for people who need to receive the report or choose from the list of users that have access to this tool by clicking **Select Users**.

Tip: Summary Reports are best if exported as an Excel file and Presentation Reports are best exported as a PDF or PPT.



How to Export a Presentation Report

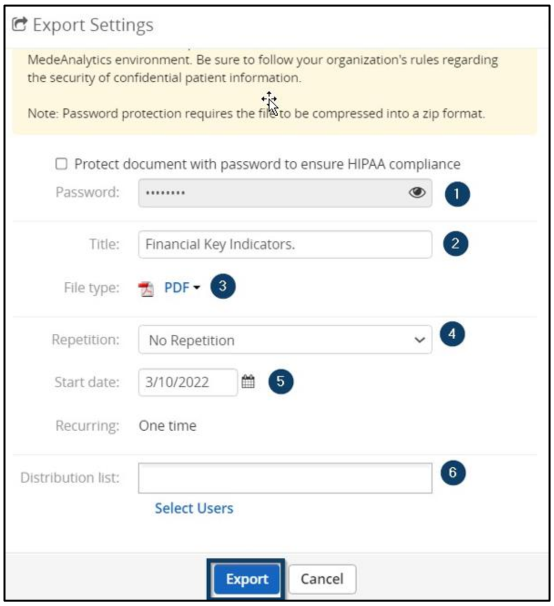
Once you have chosen your filters, click Export on the top right-hand corner.



Complete the required fields in the Export Settings box by entering the following details and then click the Export button at the bottom of the page.

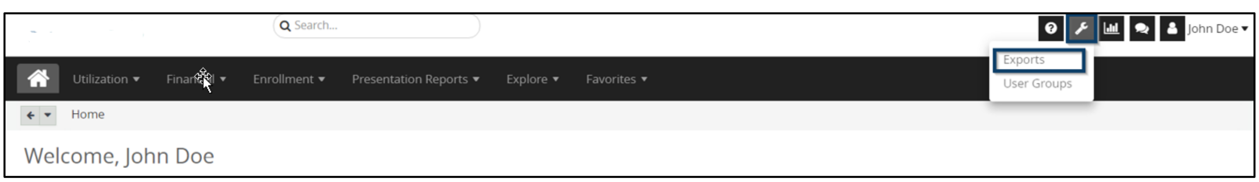
1. **Password** – Create a password to view the export (optional).
2. **Title –** Enter a name for the exported file. **Tip**: Include a date at the end of the file name (e.g., 20220106).
3. **File Type –** Choose your preferred file type: PDF or PowerPoint. Options for exporting may differ based on report or dashboard.
4. **Repetition** - Refer to the Advanced Filtering User Guide for more information on Repetition and scheduling of a Presentation Report.

5. **Start Date –** Enter the start date for your reporting. Like Repetition, we will discuss Start Date in a separate user guide.
6. **Distribution List –** Enter the usernames for people who need to receive the report or choose from the list of users that have access to this tool by clicking **Select Users**.

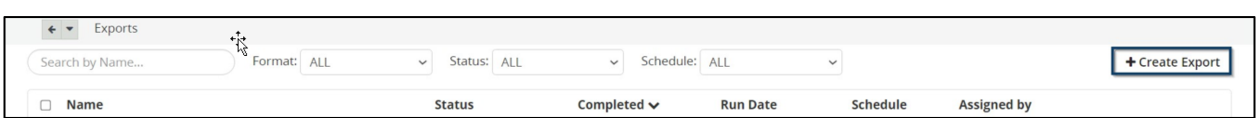


Printing Presentation Reports as a Package

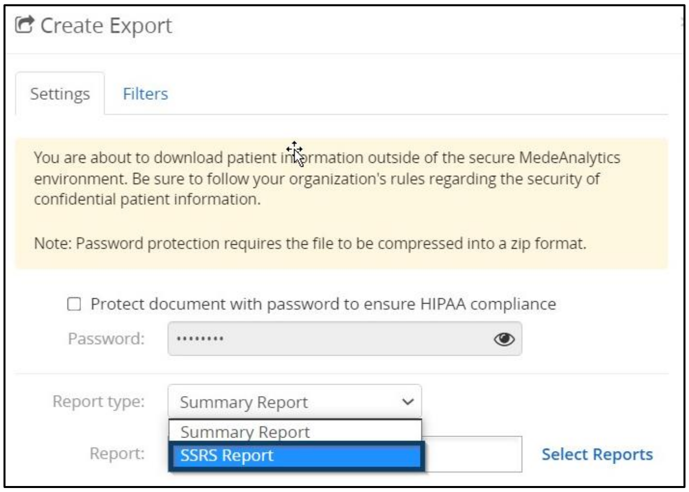
As reviewed in the Presentation Reports User Guide, you can export multiple presentation reports at once as part of a package. To start, click the **wrench icon** on the top right of the screen, and select **Exports**.



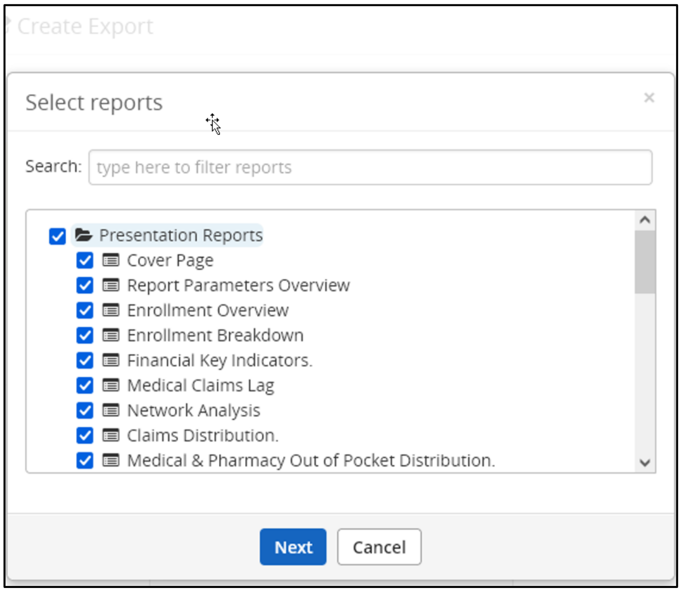
On the **Exports** page, click **Create Export** on the right-hand side.



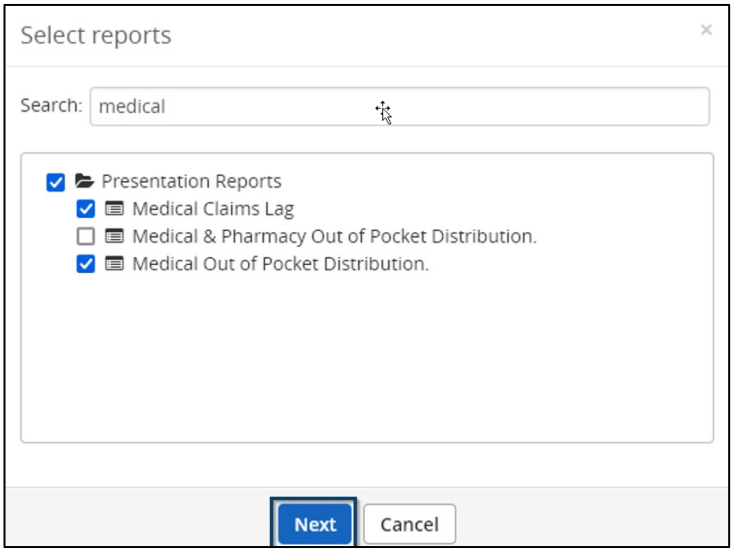
A display box will appear. On the **Settings** tab, select **SSRS Report** from the **Report type** field, and then click **Select Reports**.



You can click on **Presentation Reports** to view all the available reports. Click the check box next to **Presentation Reports** to select all the reports, or you can select each individual report you want to appear in your Presentation Report Package.



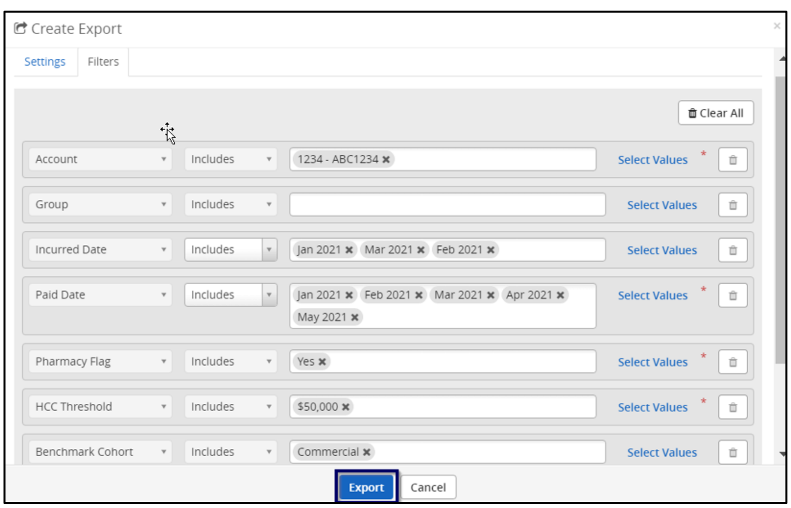
You can also search reports by typing in the **Search** field and selecting the reports you wish to include. Once you have chosen the reports, click **Next**.



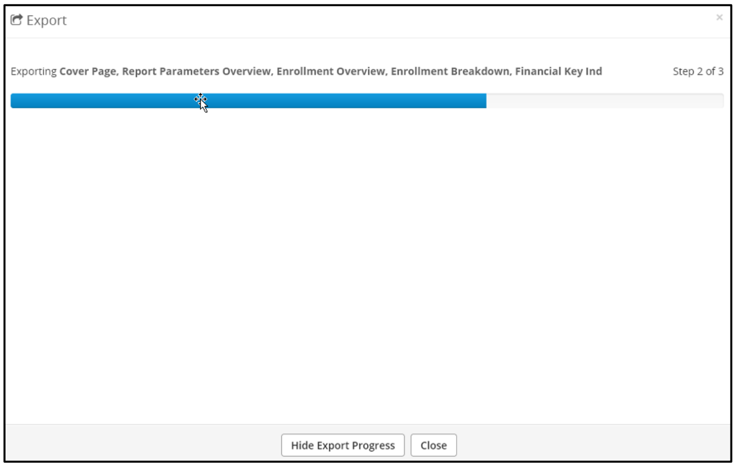
Once you complete the Settings tab, click on the Filters tab. Complete or validate the appropriate filters for this Presentation Report Package. Tip: Some filters may have carried over from previous filtering.

While this looks different, you will follow the same steps as outlined in the ***How to Pull Presentation Reports*** section in the **Presentation Reports User Guide**.

The example below is for a fully-funded account. If you were working with a self-funded account, only paid date would need to be completed and not incurred date. Refer to the filtering section for date parameters.



Click the blue **Export** button to begin the exporting process.
Tip: You can click the **Hide Export Progress** button to close the window and continue working in the tool while the export finishes processing.



You will receive a notification when the exporting process is complete, and your report is ready to view and download.

You can return to the **Exports** page to check on your status and view reports at any time.

How to Schedule Summary Reports, Presentation Reports and Dashboards

We will review how to schedule summary reports, presentation reports and dashboards in the Advanced Filtering User Guide.