HSIAR
Analytics to Action

Tutorial: Summary Reports

HealthIdeas

BRITISH COLUMBIA | Ministry of Health

For this tutorial, you will create a query that answers the following question:

How many females aged 15 to 44 and 55 - 59 currently live in the Vancouver Island Health Authority?

This example introduces you to a set of criteria that you will have to define in most of your queries:

1. Identify the question
2. Identify the report category
3. Choose the appropriate report
4. Pick the parameter values
5. Run the report
6. Edit the report, if required

1   Identify the Question

The first step in building a Healthideas query is to break down your question into the selection criteria that you need to use when running the report. In this tutorial, we will use the following criteria for our query:

Gender:	Female
Age:	15 - 44 and 55 – 59
Year:	2006/2007
Geographical Level:	Health Authority Area
Region:	Vancouver Island Health Authority

2   Identify the Report Category

Do This: Navigate to the Healthideas Summary Reports page. Review the report categories available.

This question asks about population demographics, so the report to run will be contained in the "BC Population" report category. (Note that all reports in the "BC Population" report category provide population counts by gender, as well as total population counts.)

3 Choose the appropriate report in the Healthideas Summary Reports page

Do This: Click on the plus sign to the left of the "BC Population" report category to show the list of reports available.

Each report category has a number of reports available. For this tutorial, you will select the "BC Population" category.

Do This: Under the dropdown menu that now appears, choose "BC Population by Region and Age."

You should run the "BC Population by Region and Age" report because you want to look at both specific age groups and specific regions.

4 Pick the parameter values you wish to apply for your report

Recalling the selection criteria from Step 1 above, you need to enter the appropriate values for the parameter selections in your report.

Client Geographic Area is available at three levels:

- Health Authority Areas (HA)

- Health Service Delivery Areas (HSDA)

- Local Health Areas (LHA)

For this report, you want results for the whole Vancouver Island Health Authority (VIHA), so you should select to report at the HA level. (Note that this is the normally the default value for Client Geographic Area.)

As mentioned previously, BC Population Reports show population by gender, so you do not need to filter the gender.

The year parameters default to the current year. For this report you must choose 2006/2007.

Do This:

1. Click on the "Select" button next to "Fiscal Years".

2. In the small pop up window that appears, scroll down to the bottom of the list. Clear the check box with the check mark in it. Select the check box next to "2006/2007"

3. Click "OK" at the top of the pop up.

You do need to set the report to show data only for VIHA.

Do This:

1. Click on the "Select" button next to "Client Health Authority Areas."

2. In the small popup window that appears, select "04 Vancouver Island" and click the OK button in the Parameter Value Selection

The popup window will close and you will be returned to the Report Wizard. Note that next to "Client Health Authority Areas" the Report Wizard shows 04 Vancouver Island as selected.

You also need to select the client age groups to report (15-44 and 55-59).

Do This: Click on the "Select" button next to Age Groups.

A popup window will appear, showing 5 year age groups listed with checkboxes next to them.

Do This: Select the following checkboxes:

- 15-19 years
- 20-24 years
- 25-29 years
- 30-34 years
- 35-39 years
- 40-44 years
- 55-59 years

Click the OK button at the top of the pop up.

The window will close and you will be returned to the Report Wizard. Note that now under "Age Groups" the Report Wizard states "7 Values selected".

5   Run the report in the desired format

There are five options available:

- **PDF** generates the report as a PDF document suitable for printing.
- **HTML** generates the report as a web page.
- **Excel** generates the report in an Excel spreadsheet.

- **RTF** generates the report as RTF, a format suitable for MS Word.

- **SQL** shows the SQL query that runs in the database to get the data for the report.

Since you want your report to report specifically on the female population only, a format suitable for row editing would be the most appropriate format in this instance. Excel would be the best choice here.

Do This: Click on the "Excel" button.

The report will be generated as an Excel file.

What happens next depends on the configuration of your browser and your PC. You might have the option of saving the report or opening it. If you choose "Open," the report will be opened in a new window. If you choose "Save," you can save the report to a location on your computer or LAN drive. The report might automatically open in a new window. It might open in Excel. If the report is open in a new window you can save it using the buttons provided by the browser, or using "Save As..." under the File menu.

Do This: Whatever happened after running the report, save it to your computer or LAN drive and open it in Excel.

The spreadsheet will open up in Microsoft Excel (Note that if you already have Excel open, you may need to bring the window to the foreground on your computer screen to see the report.)

6   Edit the report

You now edit the spreadsheet to show only the female population. The report template is formatted to use merged cells. In order to remove columns from a table, you will need to separate merged cells.

Do This:

1. In the Excel report, click on the purple heading cell labelled "Age Group." It should be at or near cell B28.

2. Select the table of data. Depending on your version of Excel, you might be able to "Select All" or you might have to drag over the table. The last cell is at or near cell R35.

3. Right click in the selected cells. In the popup menu that appears pick **Format Cells**... Click on the **Alignment** tab. Clear the tick box for "**Merge Cells**" to separate the selected merged cells; you will probably have to click twice. Click OK.

4. Select a blank column or columns to delete. The first of these appears just to the left of the Age Group column. It starts at or near cell C28 and ends at or near cell D35.

5. Right click on the selected columns

6. Choose "Delete..." Select "Shift cells left," and click OK.

7. Repeat from step 4 until the blank columns are removed.

8. Select the other columns you would like to delete from the table. In this example, these are the columns labelled Male, Male % Population, Total Population and Total % Population. They start at or near cell M28 and end at or near cell R35.

9. Right click on the selected columns

10. Choose "Delete..." Select "Shift cells left," and click OK.

11. To restore the border on the left hand edge of the data table, select the last column of the data table. It starts at or near cell F28 and ends at or near cell F35.

12. Right click on the selected column.

13. Choose "Format cells..."

14. Go to the **Border** tab.

15. In the diagram of the cells in the middle of the dialog box click on the left edge so the diagram now has a border on all sides and one across the middle. Click OK.

16. Resize the column widths as desired.

7 Save the report

You can now save the report to a location on your computer or LAN.

Do This:

1. In Excel, go to **File** > Save As...
2. In the dialogue box that pops up, choose the location you wish to save your report in under the "Save in:" dropdown menu.
3. Change the name of your report from the default "BCPopGeoAgeGrp1.xls" to something meaningful to you.
4. Click the **Save** button to save the report.
5. Exit the Excel application
6. If there is a blank browser window left open from the report generation, you may wish to close this window.

8   Return to the Report Menu, initiate a new report and clear all parameter settings (Optional)

Now that you have entered a custom set of parameters by selecting specific age groups and Health Authority, Healthideas will retain your current parameter selection for subsequent report runs in this session. This might not be the desired behaviour. In this step, you will return to the Summary Reports main menu, prepare to run a new report (Hospital Services Workload for BC) and reset all your parameter settings to their defaults.

Do This:

1. Click on the "Report Menu" button at the top right of the Report Wizard.

2. Click on the blue triangle to the left of the "Hospital Services Workload" report category to expand the list of reports available.

3. Click on "Hospital Services Workload for BC" to bring up the parameter list for this report.

Since you chose age groups 14-44 and 55-59 in your previous report, these values will be selected by default when you prepare to run this new report. For the purposes of this tutorial, you want to reset all parameters to their base defaults.

Do This: Click on the "Reset Parameters" button next to the "Prepare Report Run" button.