Emory Gynecology and Obstetrics QGenda Basic Reports Guide

Basic reports can easily be run under the View or Statistics tabs (see below). More detailed reporting capabilities are available under the Admin tab.

View Tab - to view the schedule (page 2)

Legend

- 1. Locked a shift was requested and approved
- 2. Note: the shift assignment has a note attached; the note can be viewed by hovering over the assignment

Selecting a Date Range- The default is always the current week with Monday as the start date

- Select the start date by clicking in the box and selecting a date on the calendar
- Select the range you wish to see using the drop down boxes
- Select the View By drop down box you wish to use
- Once you've made your selections, click "Go"

Staff Box and Task Box

- The drop down box allows you to select the Staff/Task filter you wish to print, export, or view on the screen.
- Next to each staff/task are three icons:
 - Flighlight: when turned on, the person of interest will appear throughout the schedule in a bright blue color
 - o Show: shows that person on the scheduling screen. The icon at the top of the list will show all
 - Hide: hides that person on the scheduling screen. The icon at the top of the list will hide all.
- If you'd like to view the entire schedule, choose the "All Staff" staff filter and "All Tasks" task filter

Reports - click on the Reports Printing & Exporting Button

- Format: choose type of export file (PDF or Excel)
- Report By: Staff, Task, or calendar by task/staff formats available
- Show Staff By: how provider names will display on your report
- Show Tasks By: how task names will display on your report
- Show Notes: Choose "yes" to see any notes associated with each task

Statistics Tab - to report based on a time period, person(s), task(s) (page 3)

Data Range and Report View

- Select the start and end dates you wish to display; you must click on a day inside the calendar
- View by: changes the view of the schedule in the middle screen
 - a. There are expanded view options in this tab; spend some time exploring these
 - b. Some Common "View By" Option Examples are on page 4

Staff Filters

 Check the boxes next to names of people you wish to see statistics for, or choose a staff filter from the dropdown menu (each division has a staff filter)

Inclusion Criteria

- Always check the box under Physical Actual (see diagram)
- Always leave the boxes for Physical Tracked and both under "Credit" unchecked
- To include pending requests in the totals check the "Include Pending Requests" box
- To view the information summed by day of the week check the "Sum by Day" box

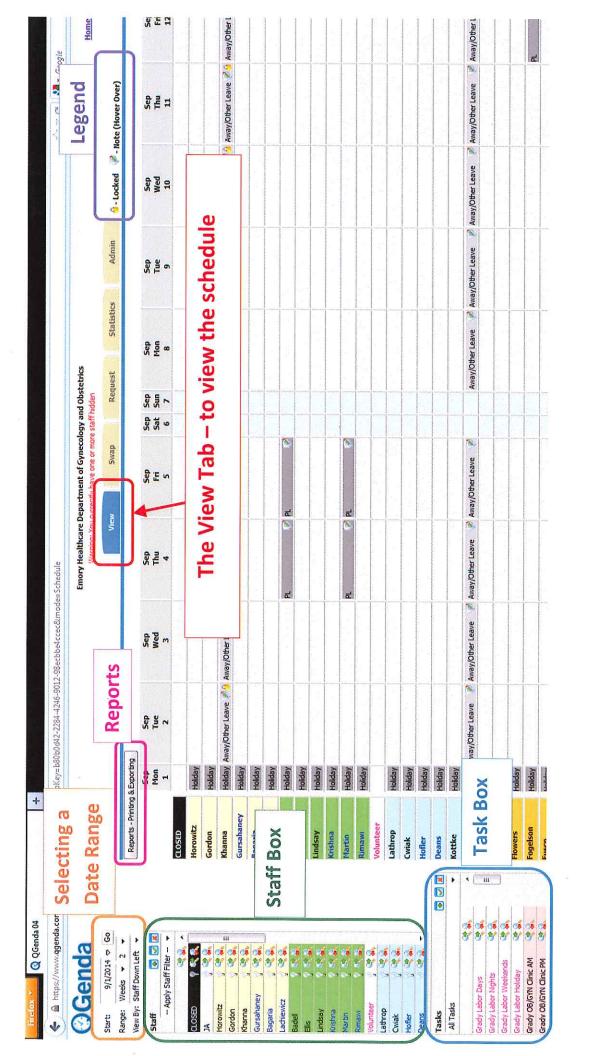
Task Filters

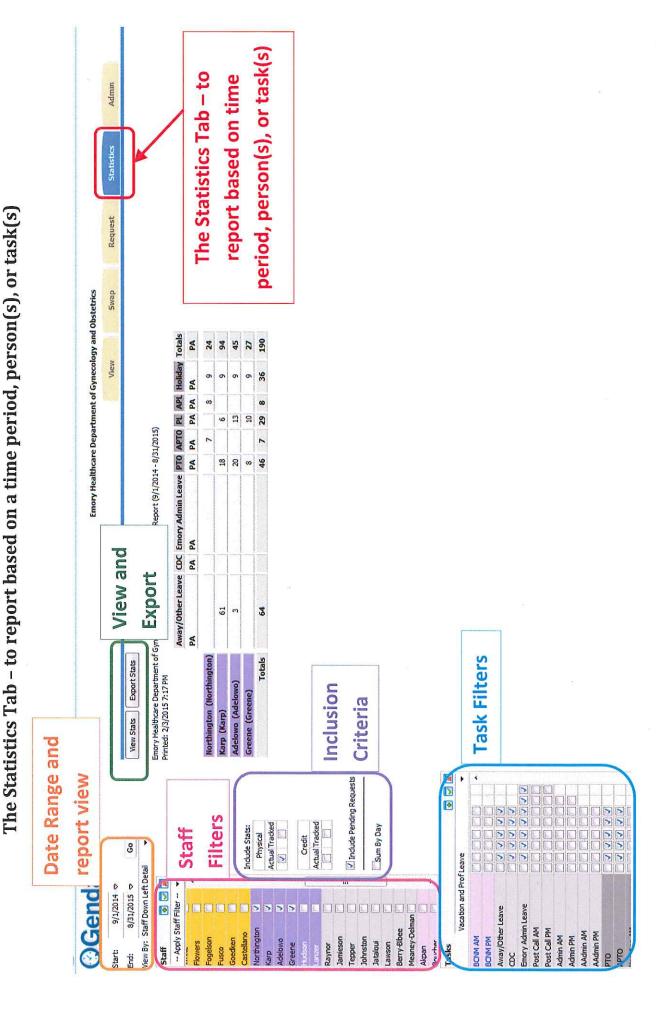
- Check the boxes next to tasks based on which task(s) and day(s) of the week you want to display
 - To uncheck all boxes use the dropdown to select "—Apply Task Filter—"
 - o The "Vacation and Prof Leave" filter will automatically select all away tasks
 - All boxes can be checked and unchecked
 - o Check the "All" columns at the top to view all tasks for that day of the week
 - o Check the first "All" column in each row to easily view that task for all days of the week

View and Export (to print)

- Click the View Stats button to refresh the middle table any time you change filter selections
- Export Stats will export the middle screen to Microsoft Excel

View Tab - to view the schedule





Statistics Tab – Common "View By" Option Examples

Staff Down Left Detail

	Away/Other Leave	CDC	EHC Admin	PTO	PTO	PL/CME	PL/CME	Holiday	Totals
	PA	PA	PA	PA	PA	PA	PA	PA	PA
Horowitz (Horowitz)			2			1	10000	9	12
Gordon (Gordon)	15				9		6	9	39
Khanna (Khanna)	9			9		5		9	32
Totals	24		2	9	9	6	6	27	83

Tasks Down Left Detail

	Horowitz	Gordon	Khanna	Totals
	PA	PA	PA	PA
Away/Other Leave (Away/Other Leave)		15	9	24
CDC (CDC)	en .			
EHC Admin (EHC Admin)	2		4	2
Vacation (PTO)			9	9
РТО (РТО)		9		9
Professional Leave (PL/CME)	1	-	5	6
Professional Leave (PL/CME)		6		6
Holiday (Holiday)	9	9	9	27
Totals	12	39	32	83

List by Staff Detail

Horowitz, Ira	(Hore	owitz)		PA
9/1/2014	Mon	Holiday (Holiday)		1
11/27/2014	Thu	Holiday (Holiday)	12.00	1
11/28/2014	Fri	Holiday (Holiday)		1
12/24/2014	Wed	Holiday (Holiday)		1
12/25/2014	Thu	Holiday (Holiday)	- 6184	1
1/1/2015	Thu	Holiday (Holiday)		1
1/13/2015	Tue	EHC Admin (EHC Admin)		1
1/19/2015	Mon	Holiday (Holiday)		1
1/20/2015	Tue	Professional Leave (PL/CME)	7.51	1
2/10/2015	Tue	EHC Admin (EHC Admin)	0.00	1
5/25/2015	Mon	Holiday (Holiday)	372 713	1
7/3/2015	Fri	Holiday (Holiday)	Sall	1
			Total	12

List by Task Detail

PA	(PL/CME)	Leave	Professional
1	Horowitz, Ira (Horowitz)	Tue	1/20/2015
1	Khanna, Namita (Khanna)	Thu	2/5/2015
1	Khanna, Namita (Khanna)	Fri	2/6/2015
1	Khanna, Namita (Khanna)	Fri	3/27/2015
1	Khanna, Namita (Khanna)	Thu	7/16/2015
1	Khanna, Namita (Khanna)	Fri	7/17/2015
6	Total		