



DAGMEC Training Manual for Residency Management Suite (RMS) by New Innovations

TOPIC: Custom Reports

LOCATED: Personnel Data > Reports > Custom Reports

IMPORTANCE: Optional – Convenient way to make data in RMS available to use in other software programs and/or formats.

Custom Reports in RMS are helpful to extract data to be used in other software programs (Word or Excel). Most data in RMS can be extract in this reporting mechanism, or by the “extract data” function (See Extract Data). The custom report function uses a *query* system. Setting up the report is sometimes cumbersome, but you can save that report, give it a name, and run the report as often as necessary. Each time you run the report, it goes back to the RMS database and queries for up-to-date information. Departments can create mailing lists, merge documents or spreadsheets with the data.

You can also use this function to create a spreadsheet of certain information to provide to organizations or individuals that do not use RMS. For example, a group of your residents rotate to Hospital X, which is not a DAGMEC member hospital. They need some basic information about the residents (name, PGY year, social security number, medical school, etc.) You can set that custom report up with the required fields and save it as “Hospital X Report.” Every time you need to run the report, it will be populated with the most current information in RMS. You can convert it to Excel, delete the rows or columns that are not needed, and send it to the requesting hospital. There are dozens of uses for custom reports – never “retype” data that is in RMS. Let the software do the work for you!

From the Custom Reports screen, the steps to create a report are:

- (1) Select the *fields* you want to appear in your report. Save the report giving it a unique name.
- (2) Use the *filter* option. To filter the database you have to set up some rules. That is the most confusing part of using this function. If you want your list to be only PGY 2’s – that’s easy. You filter by “status equal to PGY 2.” If you want the report to include all residents in your program, you have to set the filter to “status equal to PGY 1” or “status equal to PGY 2” or “status equal to PGY 3”, etc. In this case, don’t use the word and because then you are asking the database to find a resident this is a PGY 1 and a PGY 2. Your report will be empty. Once correct, Save.
- (3) Use the *order by* option. This allows your report to be alphabetical by resident, or numerical by status type, etc.
- (4) View the report. Does it have all the data you need? If not, go back to *fields or filter* and make adjustments. Once the view has all the data you need, Save again.
- (5) Click the “generate text file” button at the bottom of the view page. Follow the instructions to save the text file.
- (6) Open the text file in your other program (i.e. Excel) and then you can use your Excel functions to sort, delete, etc. Save the new document in the correct format (i.e. Excel, not Text).