HRSA Data Warehouse Report Tool Help

Table of Contents

# Getting Started

Welcome to the HRSA Report Tool

The HRSA Report Tool provides the ability to generate a report using data contained in the HRSA Data Warehouse. The HRSA Report Tool lets users:

- Select A Report Format
- Filter Results
- Choose An Order to Sort The Report By
- Arrange Or Remove Columns
- Summarize Data
- Review the output of the report.

Other Features available on the Report Tool page allow you to run the report, start over at anytime, and get help.
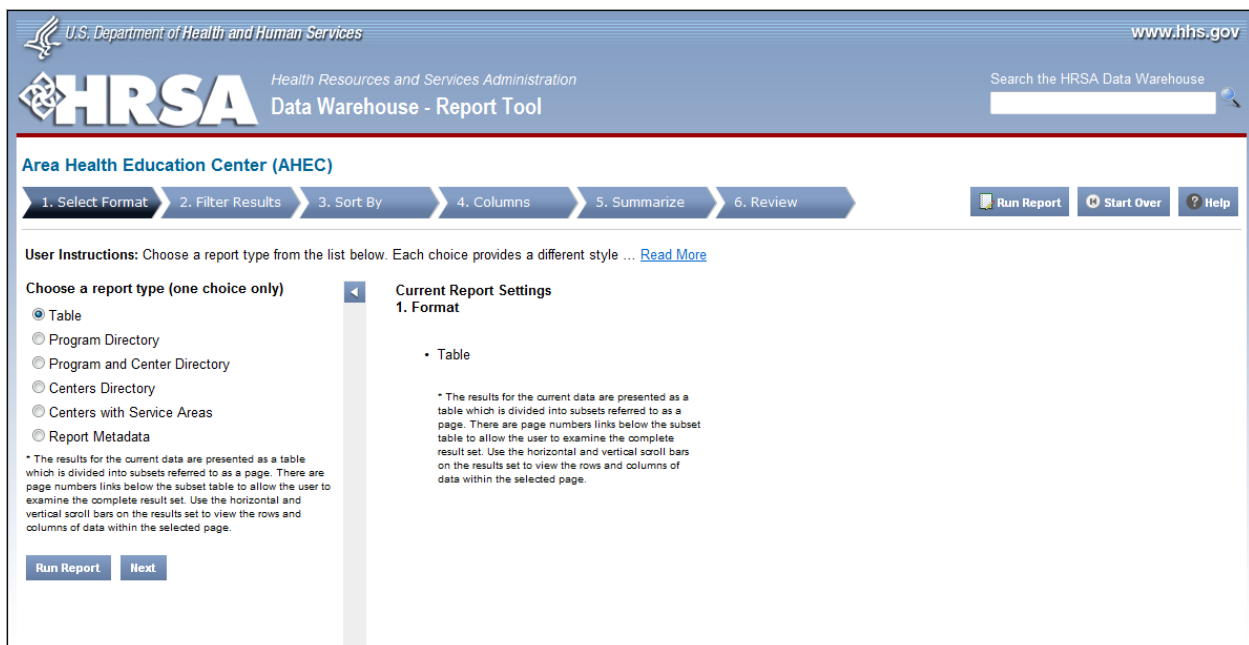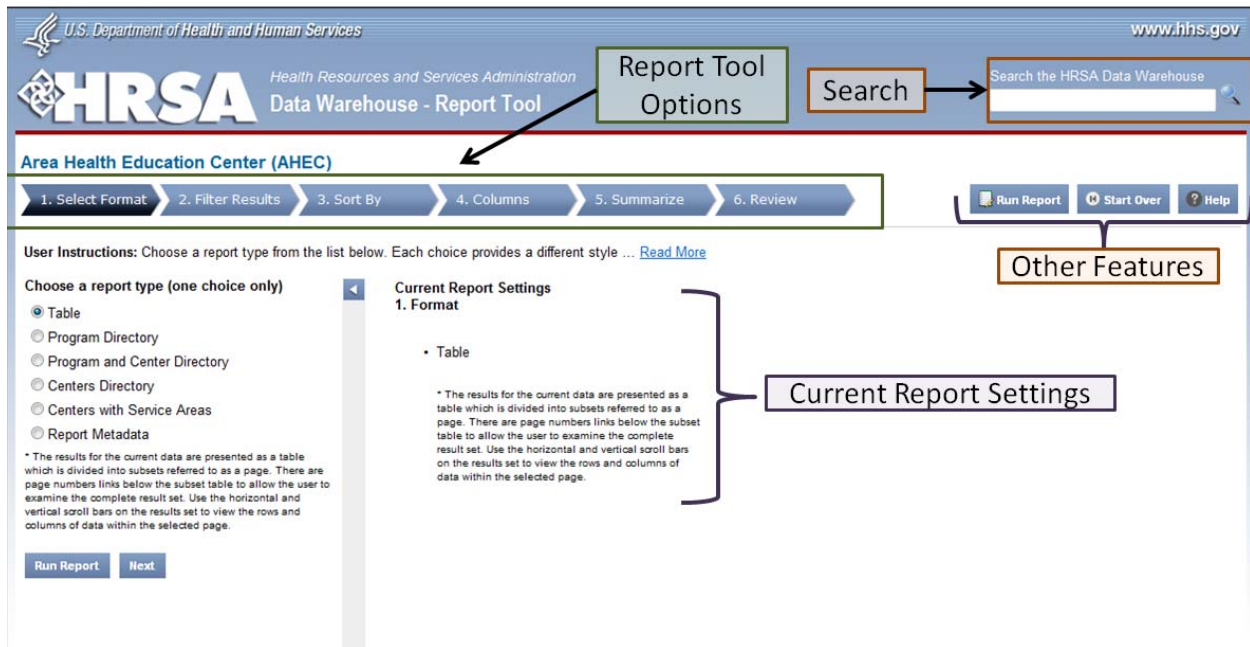

Caption: Image 1 shows the HRSA Report Tool Main Page.

Navigating the HRSA Report Tool

The HRSA Report Tool window is divided into four areas:

- Report Tool Options
- Search
- Current Report Settings
- Other Features

Caption: Image 2 shows the HRSA Report Tool main page with labels showing where the four different areas Report Tool Options, Search, Current Report Settings, and Other Features are on the page.

Report Tool Options

The Report Tool Options Menu is used to change some aspect of your report, such as the layout (appearance), the scope of the content, the order in which results are presented, how data are summarized, and columns that will be included.

It also provides a way to review the metadata (information about the columns that make up the report output) so that you can better understand the data with which you are working.

As you work with the Report Tool Options Menu , the Current Settings are updated if they are visible. Otherwise, the results are updated whenever you click the "Run Report" button.

- **Select Format:** displays the controls that allow you to select the style in which your results will be displayed.

- **Filter Results:** displays the controls that allow you to filter (limit) the contents of your report to a specific subset of the data, such as only records from a particular State, health care provider discipline, or other value range.

- **Sort By:** displays the controls that enable you to determine how the results will be sorted.
  - **NOTE:** this feature is only available when you have set the Report Format to "Table". The various pre-formatted reports have built-in sorting and grouping logic that cannot be overridden.

- **Columns:** displays the controls that are used to include or exclude columns from the report.
  - **NOTE:** this feature is only available when you have set the Report Format to "Table".

- **Summarize:** displays the controls that make it possible to create instant summaries (counts and totals) of the data. These summaries are always displayed in table form.
  - **NOTE:** this feature is only available when you have set the Report Format to "Table".

- **Review:** displays the Current Settings section, so that you can easily review your Select Format, Filter Results, Sort By, Columns, and Summarize settings in a single place.

Search

Search: This allows you to look for anything contained in the HRSA Data Warehouse

Current Report Settings

Current Report Settings
1. Format   Change

- Table

    * The results for the current data are presented as a
    table which is divided into subsets referred to as a
    page. There are page numbers links below the subset
    table to allow the user to examine the complete
    result set. Use the horizontal and vertical scroll bars
    on the results set to view the rows and columns of
    data within the selected page.

2. Filters   Change

Center HHS Region
- Region I
- Region II
- Region III

3. Sort Order   Change

Center Name - Asc

The Current Report Settings section lists the current selections from the features of the Report Tool Options

This part of the Report Tool is used to either:
- Display the Report Data (in the format you have selected)
- Display the Report Metadata
- Provide a "One-Stop" Review of the Current Report Settings

Other Features

Run Report   Start Over   Help

Run Report: The run report button generates a report based on the criteria selected.

Start Over: The start over button clears all selections and allows the user to start anew.

Help: Click this button to access the online help (this help document) for the HRSA Report Tool.

Technical Support

Technical support for the HRSA Report Tool and the HRSA Data Warehouse is available from the **HRSA Contact Center**.

HRSA Contact Center
Phone: 1-877-GO4-HRSA (1-877-464-4772)
E-mail: CallCenter@HRSA.Gov

Hours of Operation: Monday through Friday 9am to 5:30pm EST (except Federal Holidays).

Creating a Report

How to Create a Report

When the Report Tool is started the report tool option menu is shown. Each feature expands when clicked to expose the controls that are associated with it.

Report Tool Options Menu

| 1. Select Format | 2. Filter Results | 3. Sort By | 4. Columns | 5. Summarize | 6. Review |

Use the Report Tool Options Menu to create a report:

- Step 1. Select Format
- Step 2. Filter Results
- Step 3. Sort By
- Step 4. Columns
- Step 5. Summarize
- Step 6. Review

Each of these features is described in detail in this section of this guide.

Step 1. Select Format

1. Select Format

The Select Format feature of the Report Tools Options Menu determines how the output of a report is shown. Choose a report type from the available formats to select the one you want to see.

Choose a report type (one choice only)

- ○ Table
- ○ Program Directory
- ○ Program and Center Directory
- ○ Centers Directory
- ○ Centers with Service Areas
- ○ Report Metadata

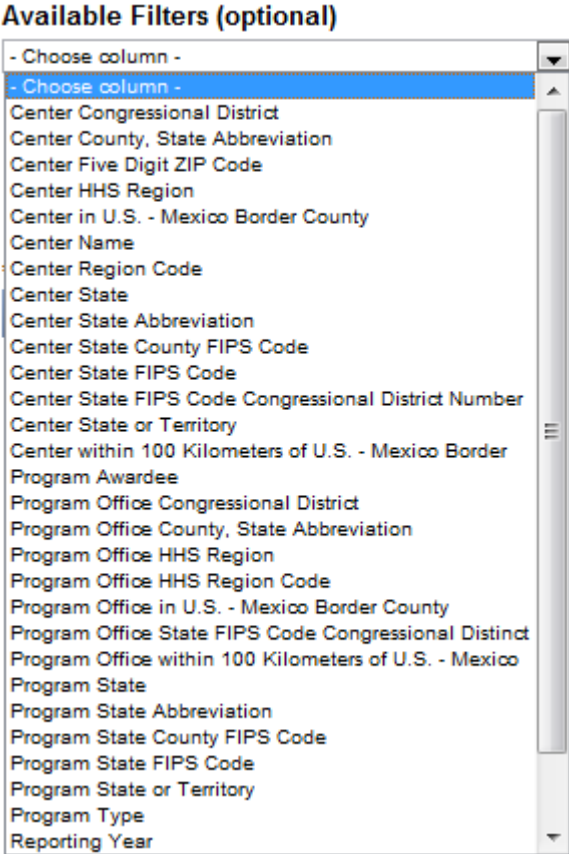| Run Report Button | ← Run Report Next → | Next Button |

- After choosing your desired format, select the "Next" or one of the buttons on the Toolbar on the top to continue refining your options.

- If you are finished customizing your report you may select the "Run Report" button to display your report
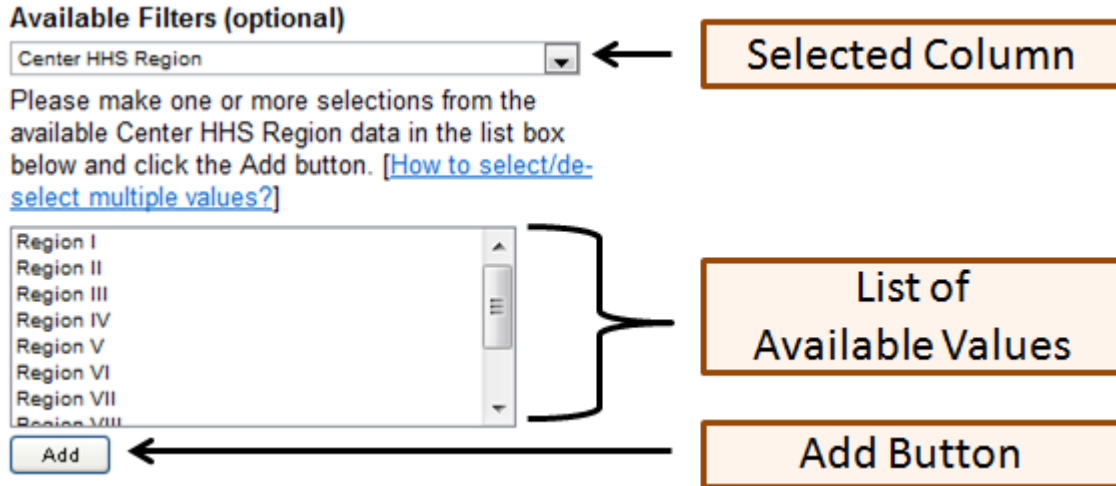
Step 2. Filter Results

2. Filter Results

The Filter Results feature of the Report Tools Options Menu is used to control the scope of the data that will be included in your report. Use the "Available Filters" drop-down list to select a column from which you want to choose values (e.g. State, County, Discipline).

Available Filters (optional)

- Choose column -

- Choose column -
Center Congressional District
Center County, State Abbreviation
Center Five Digit ZIP Code
Center HHS Region
Center in U.S. - Mexico Border County
Center Name
Center Region Code
Center State
Center State Abbreviation
Center State County FIPS Code
Center State FIPS Code
Center State FIPS Code Congressional District Number
Center State or Territory
Center within 100 Kilometers of U.S. - Mexico Border
Program Awardee
Program Office Congressional District
Program Office County, State Abbreviation
Program Office HHS Region
Program Office HHS Region Code
Program Office in U.S. - Mexico Border County
Program Office State FIPS Code Congressional District
Program Office within 100 Kilometers of U.S. - Mexico
Program State
Program State Abbreviation
Program State County FIPS Code
Program State FIPS Code
Program State or Territory
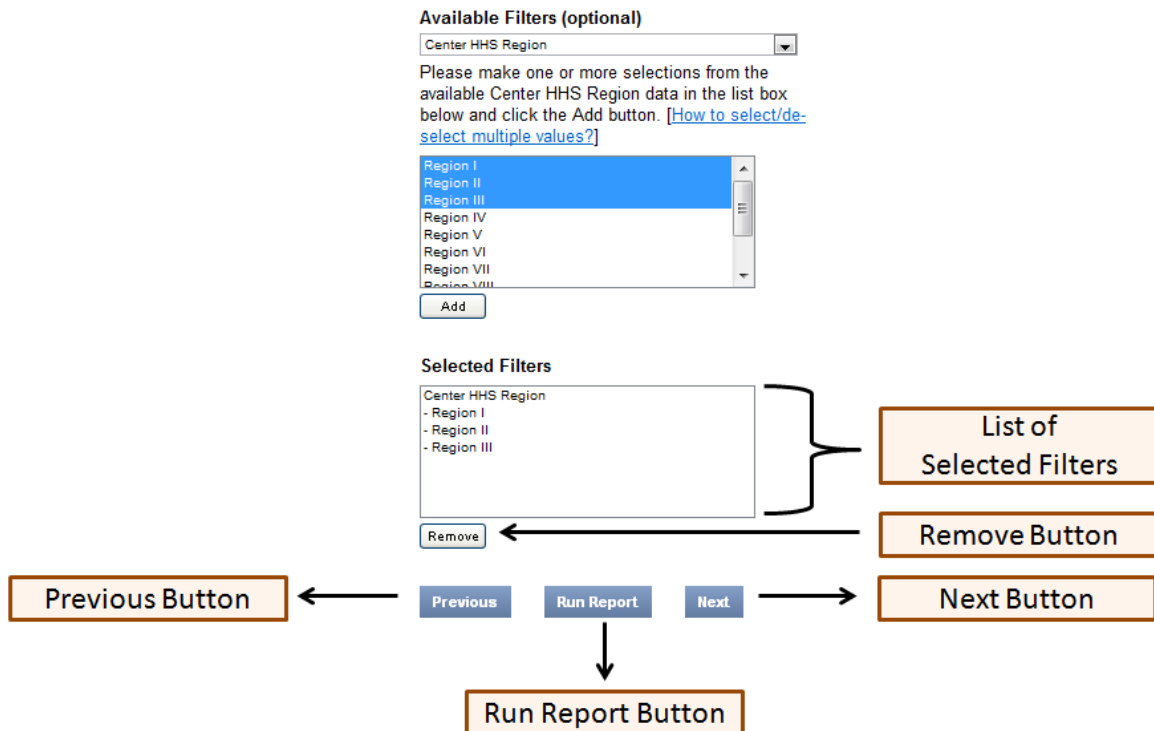Program Type
Reporting Year

The specific list of columns will vary, depending on which report you are using. After you have selected a column, you will see a list of the values in that column, as in the example below.

Available Filters (optional)

Center HHS Region ⬇️ ← **Selected Column**

Please make one or more selections from the available Center HHS Region data in the list box below and click the Add button. [How to select/de-select multiple values?]

Region I
Region II
Region III
Region IV
Region V
Region VI
Region VII
Region VIII

} ← **List of Available Values**

Add ← **Add Button**

After you have defined the selection, click the "Add" button to put the condition into effect.

Once you have added a condition it is shown in the "Selected Filters" summary at the bottom of the Filter controls, as in the example below:

Available Filters (optional)

Center HHS Region ⬇️

Please make one or more selections from the available Center HHS Region data in the list box below and click the Add button. [How to select/de-select multiple values?]

Region I
Region II
Region III
Region IV
Region V
Region VI
Region VII
Region VIII

Add

Selected Filters

Center HHS Region
- Region I
- Region II
- Region III

} ← **List of Selected Filters**

Remove ← **Remove Button**

Previous Button ← Previous | Run Report | Next → **Next Button**

↓

Run Report Button

If you change your mind and want to remove a filter condition, click the condition to be removed from the "Selected Filters" list, and then click the "Remove" button to remove it. If you click an indented value (shown with a dash in front of it), only that value is removed. If you click an un-indented item, all of the indented values beneath it are removed.

NOTE: Within any individual column, you can select multiple values. Data in that column that have any one of the values you choose will be included in the report, provided they meet all of the conditions you impose on other columns (see the note below). In the example above, any data from any of the three selected HHS Regions would be included. See the Reference section for help on how to select multiple values from a list.

NOTE: Filter conditions on multiple columns are cumulative. That is, each filter you specify is added to all of the others. In order for data to be included in the report it must meet *all* of the conditions you specify.

NOTE: Data in the drop-down list of values for any given column are themselves limited by examining the data that meet the current items in the "Selected Filters" list. Thus, you may not always see the same items in a list of values.

For example, if you select State as the first filter condition, you will see all of the States in the dataset. However, if you first set a filter for HHS Region II and then select State as a second filter condition, you will only see the States that are in that Region in the list of State values.

NOTE: Filter conditions are not applied to the current output until you click the "Run Report" button. This allows you to set several conditions at a time, without having to wait for the results to be updated after each one.

Step 3. Sort By

The Sort By feature of the Report Tools Options Menu is used to control the order in which the report data are presented.
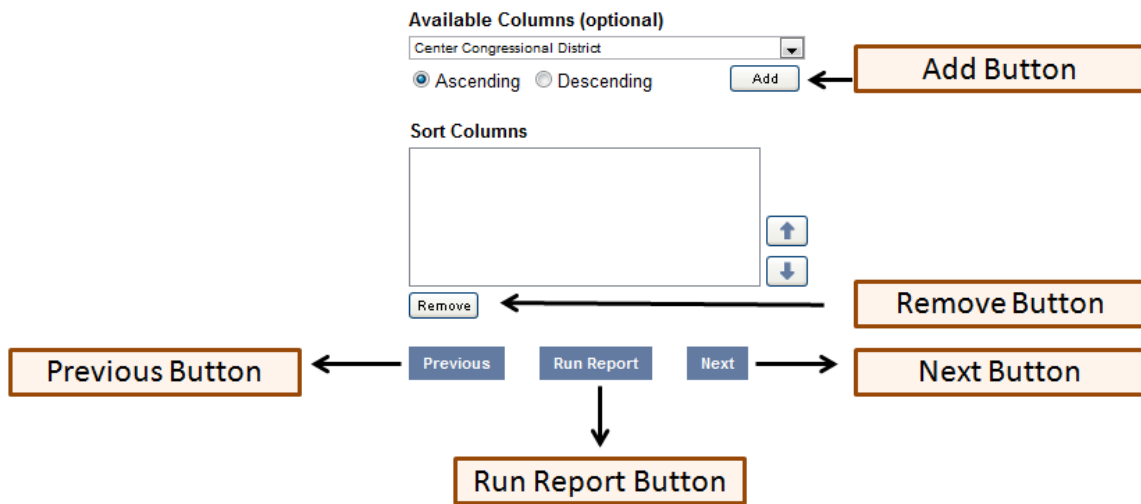
Use the Available Columns drop-down list to select a column to sort by, and choose either Ascending or Descending from the options beneath the list.

Click the "Add" button to include your selection in the Sort Columns list.

TIP: You can reverse the selected sorting order for any column you have already selected by clicking on it in the Sort Columns list, changing the Ascending / Descending selection, and clicking the "Add" button.

To change the order in which sorts take place without having to remove an item and re-add it, click an item and then click the up and down arrows to the right of the Sort Columns list to move it within the list.

Click any item in the Sort Columns list and then click the "Remove" button to remove it from the sorting selections.

The results of your sorting selections are not applied to the report output until you click the "Run Report" button. You can make several sorting selections and then either apply and view the results, or you can choose to work with the other features of the Selection Manager first.

NOTE: Sorting selections you make are cumulative, and are applied in order from the top of the list to the bottom. In some cases this will affect the order and in other cases it will not. (Sorting first by county name and then by State name, for example, would still bring the data back in county name order - all of the counties named ABC would be grouped together regardless of which state they were in - whereas sorting first by State and then by County would cause the data to be displayed sorted by State name first and then by county name within each State.)

Step 4. Columns

The Columns feature is used to add columns to or remove columns from the report when it is in Table view. This feature also determines which columns will be exported from your table.
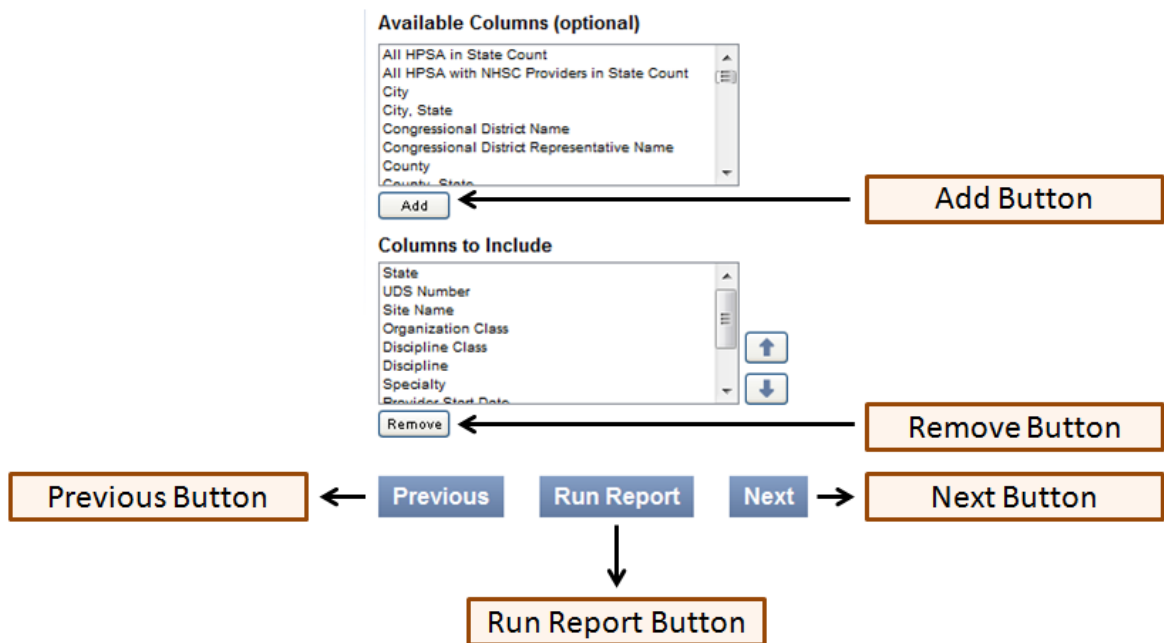
The Available Columns list shows all of the columns available in the data set. Select as many columns as you like and, when you are ready, click the "Add" button to add them to the Columns to Include list. (**NOTE**: For additional information on how to select multiple items from a list, see the "Working With Lists" topic in the Reference section.)

To change the order in which columns are displayed in the table without having to remove an item and re-add it, click an item and then click the up and down arrows to the right of the Columns to Include list to move it within the list.

To remove items from the Columns to Include list, click on them and then click the "Remove" button.

When you are finished adding, removing, and arranging the columns click the "Run Report" button to update the Table view. (**NOTE:** this feature does not apply to the formatted report views.)

Step 5. Summarize

5. Summarize

The Summarize feature is used to create totals and counts of the data within a report. If the data contain numeric columns (e.g. provider FTE assignments or awarded grant dollars) the numeric columns are totaled. If the data do not contain numeric columns then the data are counted.

Use the "Available Columns" drop-down list to determine what grouping and sorting will be applied to the data during summarization. The data are automatically sorted within each defined group, according to the setting of the Ascending and Descending options beneath the drop-down list.
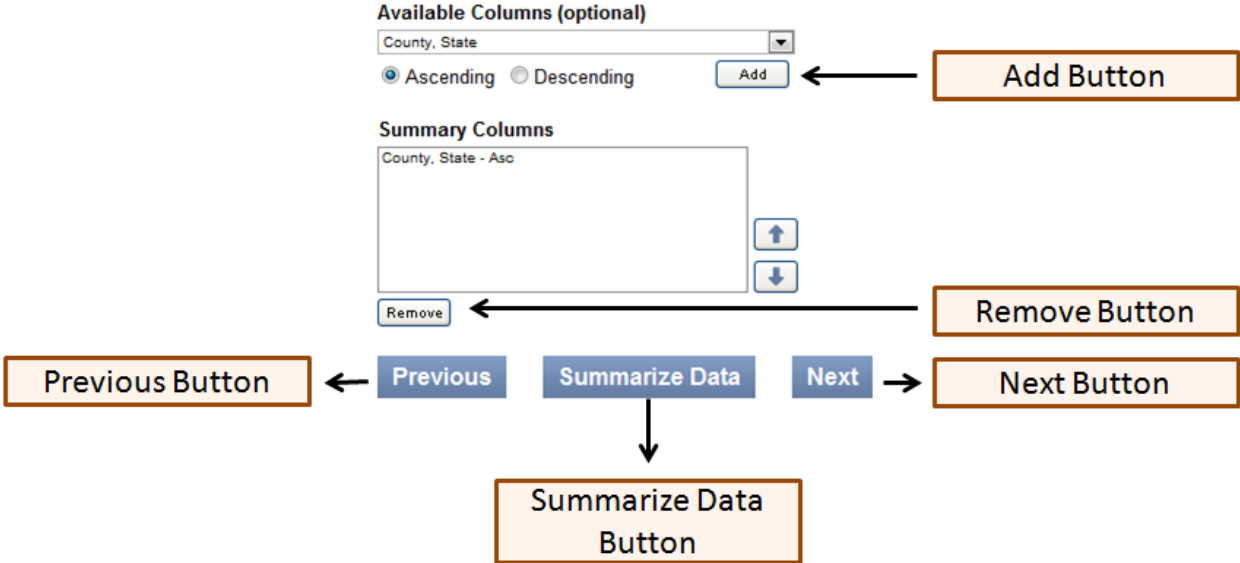
The current selections are shown in the "Summary Columns" list below "Available Columns" the drop-down. You can change the order of the grouping by clicking an item in the list and then clicking the up and down arrows to the right of the Summary Columns to move it.

To remove an item from the Summary Columns list, click on it and then click the "Remove" button.

To view the summarized data, click the "Summarize Data" button. The sample shown below illustrates how summary data are presented.

County, State	Provider FTE	Primary Care Provider FTE
Autauga County, AL	0.250000	0.250000
Baldwin County, AL	4.000000	2.000000
Barbour County, AL	1.000000	1.000000
Bibb County, AL	2.150000	2.150000
Blount County, AL	2.000000	2.000000
Bullock County, AL	0.150000	0.150000
Butler County, AL	0.250000	0.000000

Caption: Table 1 shows a sample of generated summary data.

Step 6. Review

The Review feature allows users to inspect their selections and make changes prior to generating a report.

To refine your selections select the "Change" button.

When you are ready to generate the report click "Run Report" button in other features to see the results of your selection.

Current Report Settings
1. Format

[Change]

• Table

* The results for the current data are presented as a table which is divided into subsets referred to as a page. There are page numbers links below the subset table to allow the user to examine the complete result set. Use the horizontal and vertical scroll bars on the results set to view the rows and columns of data within the selected page.

2. Filters

[Change]

Center HHS Region
- Region I
- Region II
- Region III

3. Sort Order

[Change]

Center Name - Asc

4. Table Columns

[Change]

Center City
Center Address
Center Congressional District
Center Congressional Representative
Center Congressional Representative Website

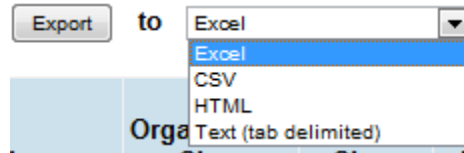**5. Summary Columns**

[Change]

No Selection

Change Buttons

Caption: Image 3 illustrates what the Review feature looks like and denotes the Change buttons.

Export a Report

How to Export a Report

To send your formatted results to a file that you can save, choose a file format and click the "Export" button located above the Formatted Results viewer.

Choose Open to view the file immediately, Save to save it to your computer, or Cancel to do nothing with it.

NOTE: Generating very large files may take a considerable time. You should not click "Export" again while the file is being created. That will cause a second copy to be generated.