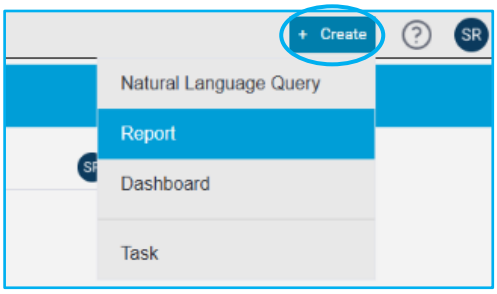
advanced reporting – building reports and dashboards.

This guide will show you the tools you can use to build reports and dashboards in CoolCare's advanced reporting section. While advanced reporting comes with pre-built reports and dashboards, you can create your own to suit your business needs and report on what you want to focus on.

building a report.

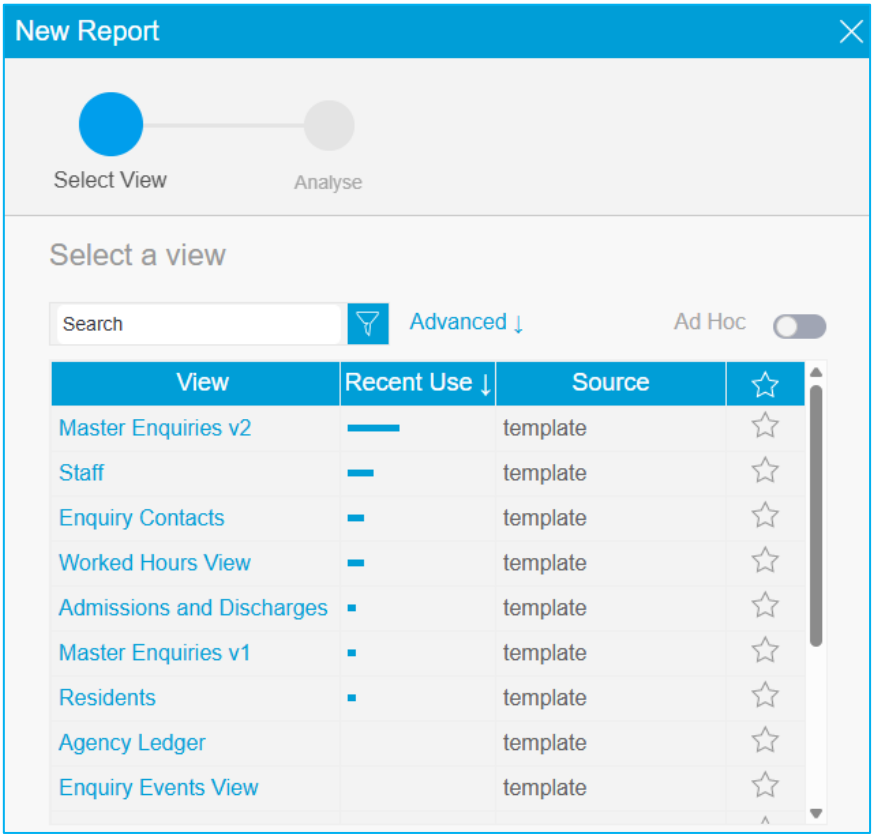
Building a report allows you to choose what data you want to pull from your CoolCare system, put it in the exact format you require, add filters and run calculations, as well as create charts from your data. To start creating a new report:

- Open Advanced Reporting from CoolCare
- Select the **+Create** button at the top right of the page
- Select **Report**



selecting a view.

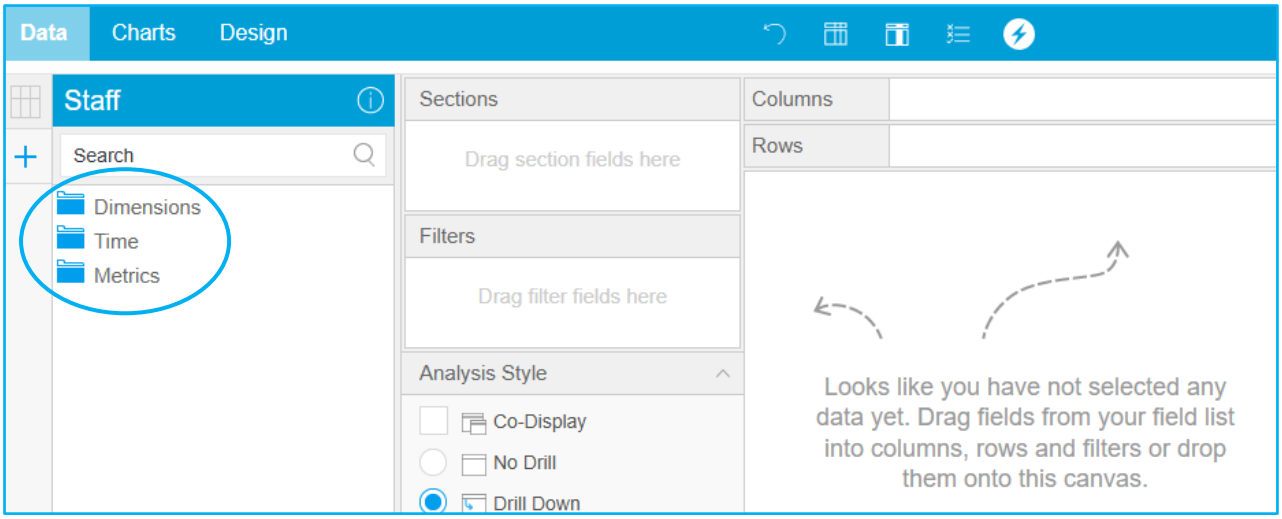
You will then be asked to select a view. Views are the different sets available from your CoolCare system that can be used to create reports. This includes staff data, resident data, enquiry details and much more. Click on the view you want, and the report builder will open.



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columns and rows.

The first thing you'll want to add to a report is which columns and rows it uses, i.e. what data will be included in this report. You can find the fields you want to add on the left-hand side of the page, under the **Dimensions**, **Time** and **Metrics** folders.

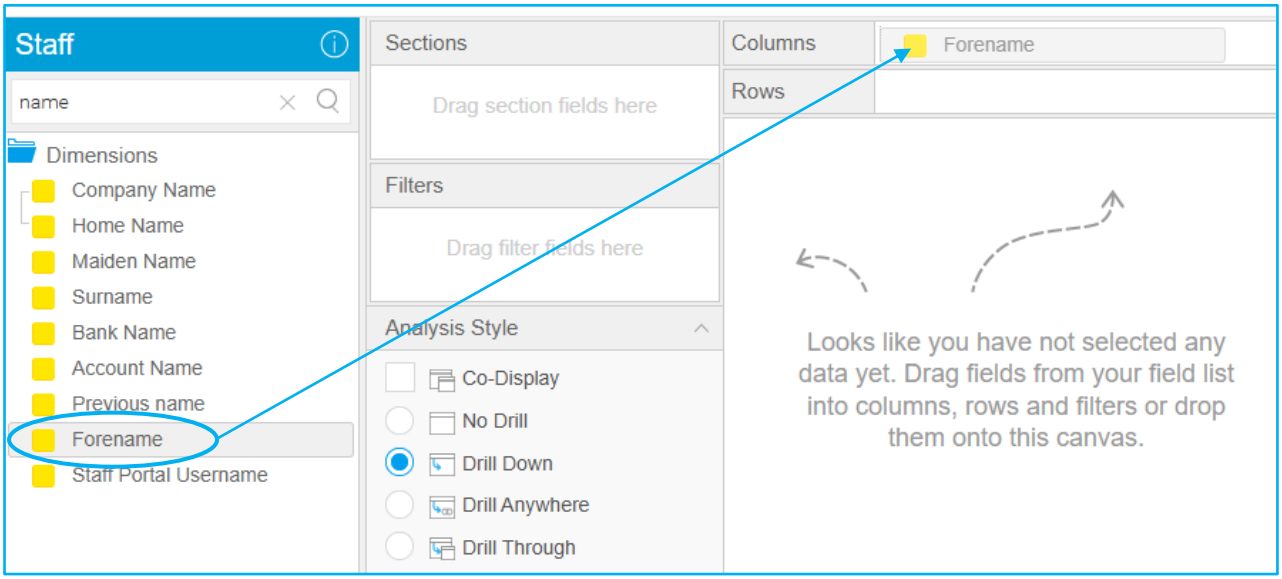


Click on each folder to find the data within them:

- **Dimensions** are text fields, e.g. names, addresses, staff positions.
- **Time** would be any date fields, e.g. date of birth, staff start date, resident admission/discharge dates.
- **Metrics** are number fields, e.g. staff hours, holiday entitlement, resident invoice values.

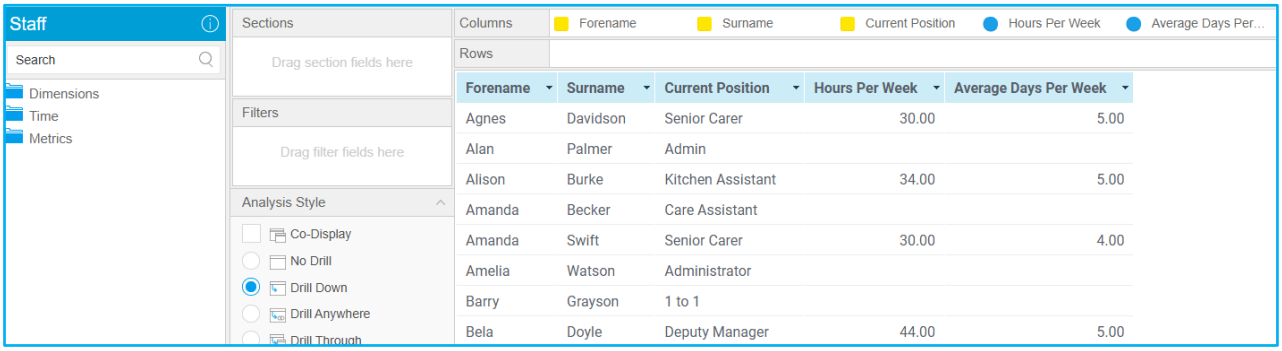
You can also use the search box at the top of this list to search for a specific field.

Once you have found a field you wish to add to your report, you can drag and drop it into the **Columns** or **Rows** areas to the right.



This will add the column to your report and generate a preview based on your CoolCare data.

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Forename	Surname	Current Position	Hours Per Week	Average Days Per Week
Agnes	Davidson	Senior Carer	30.00	5.00
Alan	Palmer	Admin		
Alison	Burke	Kitchen Assistant	34.00	5.00
Amanda	Becker	Care Assistant		
Amanda	Swift	Senior Carer	30.00	4.00
Amelia	Watson	Administrator		
Barry	Grayson	1 to 1		
Bela	Doyle	Deputy Manager	44.00	5.00

Adding the data to columns creates a table report as seen above. The report will sort the data by whichever field is the first column. You can drag and drop the columns to re-order them.

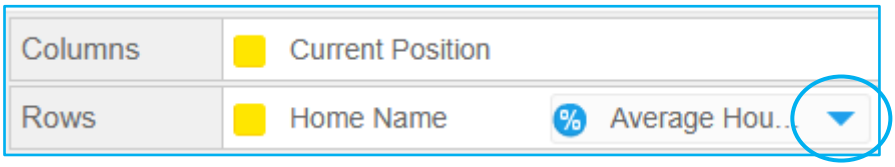
If you use both columns and rows, you can create a cross-table report to report on a metric across two different dimensions, e.g. seeing the average contracted hours for each staff position by home:



Please Note: In order for a cross-table report to function, it requires at least one column dimension, one row dimension, and one aggregated metric. For more information on aggregation, please see the next section below on **Formatting Data.**

formatting data.

You can format the data in your columns and rows in several ways. Hover over a field in your columns or rows and click the down arrow that appears to see the options.



The options include:

- **Aggregation** – Different ways to aggregate the data, usually used for metrics:
  - **Average** – working out the average value
  - **Count** – counting the number of fields that have a value
  - **Count Distinct** - counting the number of unique values (excluding duplicates)
  - **Max** – the highest value in this field
  - **Min** – the lowest value in this field
  - **Sum** – the total of all values in this field
- **Format** – Updating the format of the field in different ways:
  - **Edit** – Opens the format field menu, with options to change how this field displays it's data, such as the field's name, the number of decimal places for a metric, if it rounds values up or down etc.,
  - **Conditional Formatting** – you can set rules to highlight data, such as changing the colour of the text or cell based on the value.
- **Hide Field –** stops this field appearing the report, but is still part of the data, i.e. useful for sorting the report by a certain field without it displaying, such as staff/resident ID.
- **Delete –** removes this field from the report. You can also do this by dragging the field out of the columns/rows back to the left-hand side of the page.

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As you update your report's formatting, the report preview will update automatically.

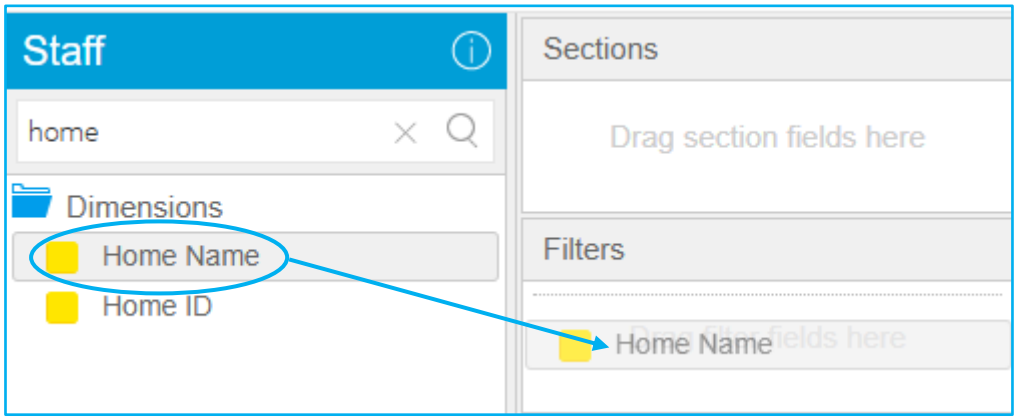
Columns: Current Position
Rows: Home Name | Hours Per Week

Hours Per Week / Home Name	Current Position																	
	1 to 1	Activities	Activities CoOrd	Admin	Administrator	Care	Care Assistant	Care Assistant Night	Carer	Chef	Deputy Manager	Gardener	Home Manager	Kitchen Assistant	Maintenance	RGN	Senior Carer	Senior Carer Night
Care Home Name	0.0	0.0	0.0	0.0	20.0	0.0	30.0	0.0	30.0	0.0	0.0	0.0	36.0	0.0	0.0	20.0	30.0	0.0
Mac's Care Home	0.0	0.0	0.0	21.7	0.0	0.0	0.0	30.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	27.5	0.0
Nova House	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Old Bridge Manor	0.0	0.0	0.0	0.0	0.0	0.0	38.8	0.0	0.0	0.0	0.0	0.0	37.5	0.0	0.0	0.0	40.0	48.0
Sam's Home	0.0	0.0	0.0	0.0	20.0	0.0	34.1	28.0	0.0	0.0	32.0	0.0	39.5	30.0	24.0	24.4	30.9	34.7
Steph's Home	0.0	0.0	37.5	0.0	0.0	0.0	31.1	48.0	0.0	38.0	30.9	30.0	23.3	34.0	27.7	30.0	30.9	0.0

filters.

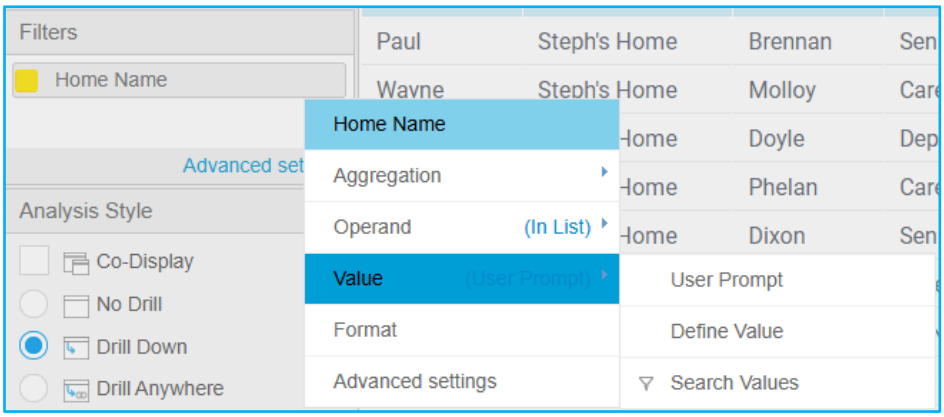
You can use filters to filter the data on your report, allowing you to control what data you see based on the filters you set or can change as you view the report.

To add a filter to your report, simply drag and drop it from the left-hand side of the page to the **Filters** section.



To define how the filter works, hover over the filter and click the down arrow that appears, then select **Value** from the menu. From there you have 3 options:

- **User Prompt** – This allows users viewing the report to select how they filter the report themselves
- **Define Value** – You create a defined value for the report to always filter by
- **Search Values** – You select one of the values in the field for the report to always filter by

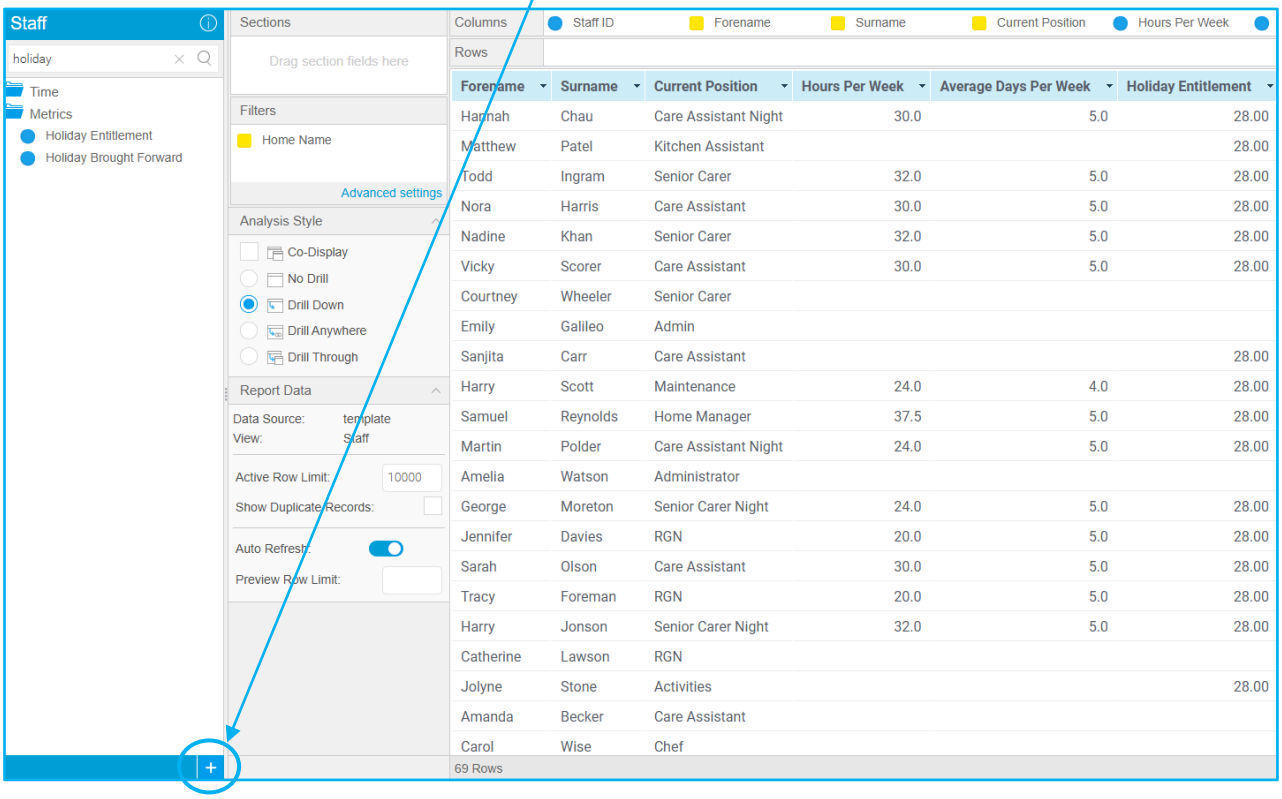


If you use define value or search values, the report preview will automatically update to show the data with the new filter in place. If you choose user prompt, the filter will be available once the report is published.

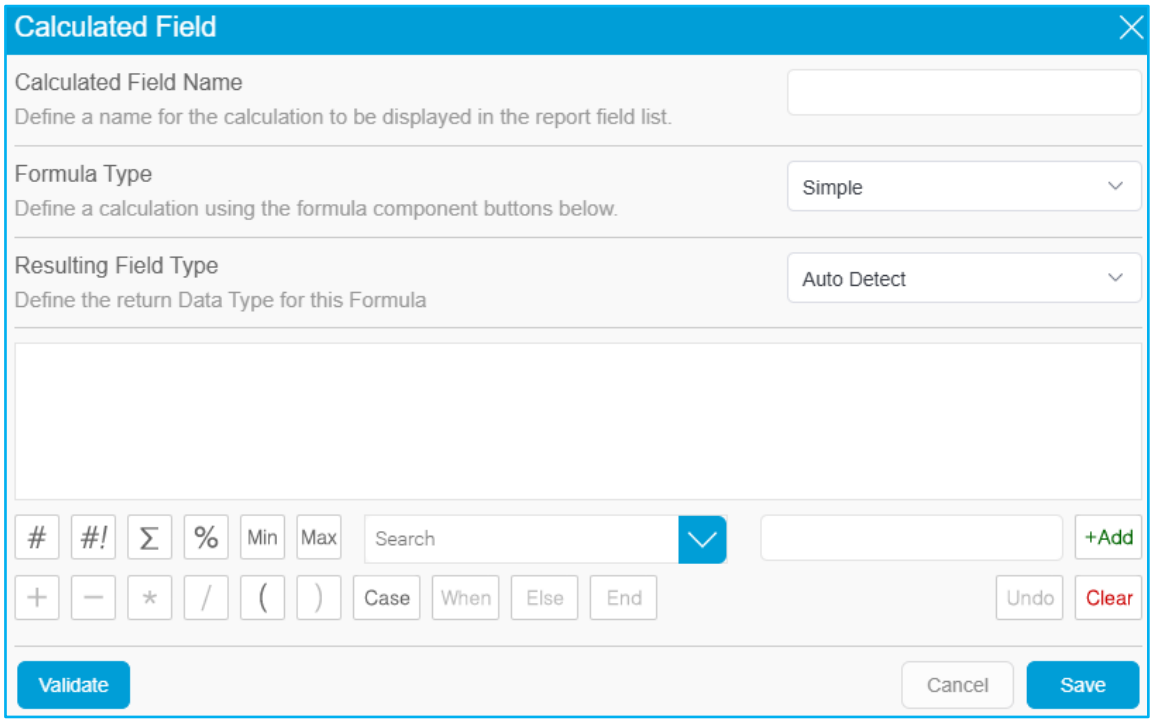
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calculated fields.

Using calculated fields, you can create new fields for your report based on the data from other fields using formulas and calculations. To create a calculated field, click the **+** icon at the bottom of your fields on the left-hand side of the page.



This will open the calculated field builder, allowing you to define what fields and calculation it will use.

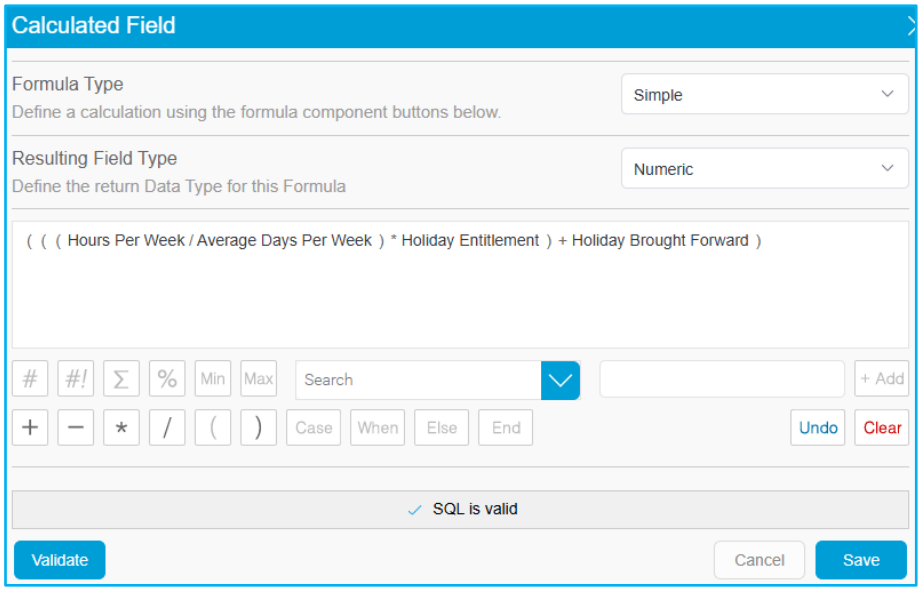


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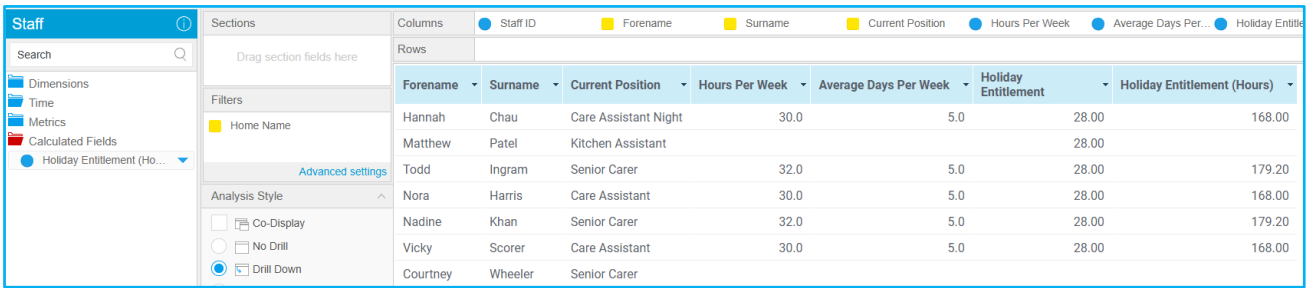
To create the calculated field, you will need to fill out:

- **Calculated Field Name –** the name of the new field you wish to create
- **Formula Type –** how you wish to create the calculation:
  - **Pre-Defined –** some pre-set options to use
  - **Simple –** creating the calculation manually with some simple options
  - **Freehand SQL –** creating the calculation manually using SQL code
- **Resulting Field Type –** the format of the calculated field once created

You can then create the calculation and use the **Validate** button to ensure it works. If it is valid, you can then click **Save** to create the calculated field.

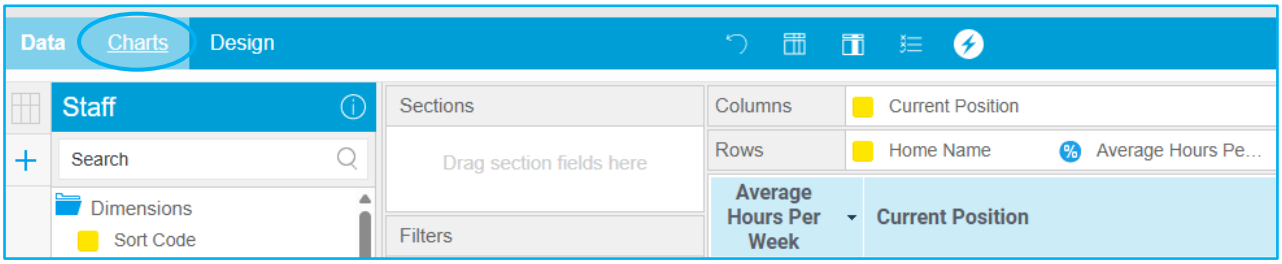


Any calculated fields will appear under their own folder on the left-hand side of the page, where you can then drag and drop to add them to the report.



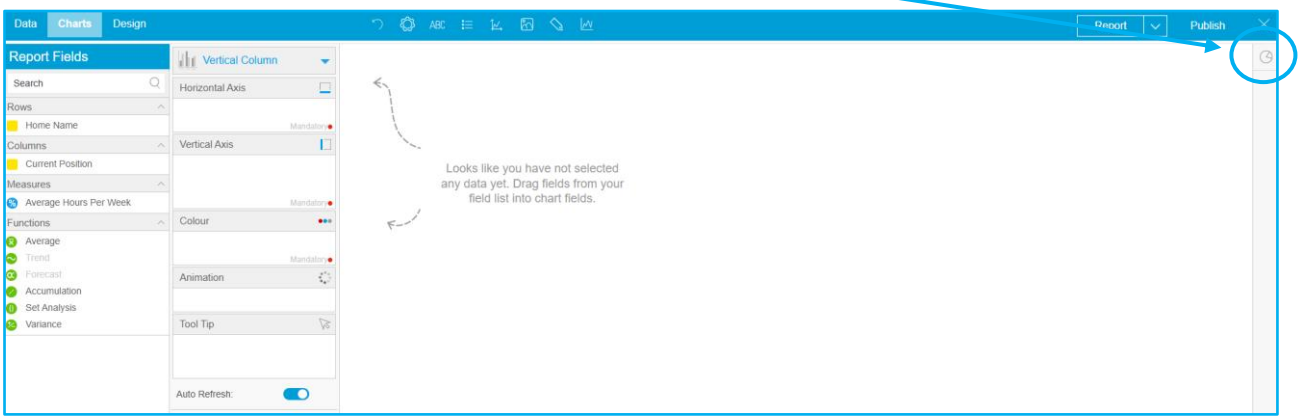
charts.

You can also create chart-based reports using advanced reporting. These can be built as part of the table reports shown above and can have multiple charts in one report. You first need to create a report with both columns and rows (see the *columns and rows* section above for more information). Once you have this, you can click the **Charts** option at the top of the page to go to the chart builder:

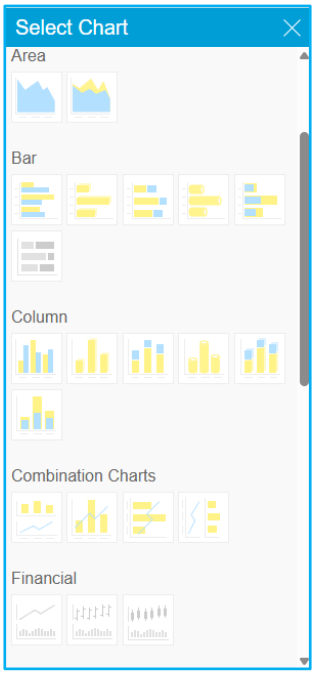


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On the chart builder page, the first thing you'll want to do is select the type of chart you want to create. You can choose the chart by clicking the button on the right-hand side of the page:



This will allow you to select a chart type based on the data you have chosen.

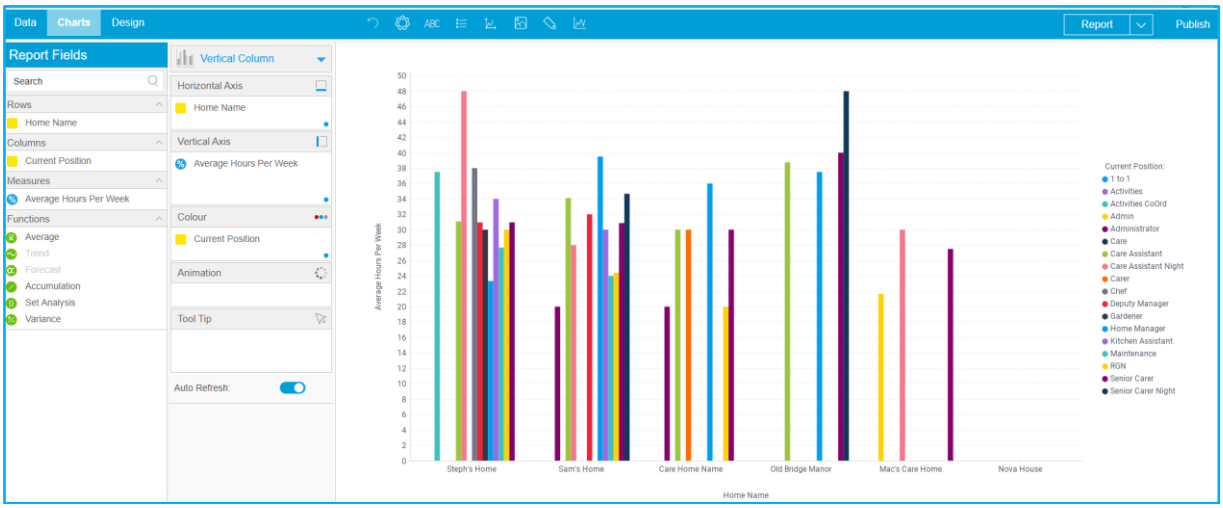


There are multiple types and options available:

- **Analytical –** Different charts to analyse data such as scatter graphs, histograms etc.,
- **Area –** Charts for showing change over time
- **Bar –** Charts for comparing metrics
- **Column –** Like bar charts, but vertical rather than horizontal
- **Combination –** Charts combining bar/column with line graphs
- **Financial –** Specific charts for financial figures over time
- **Line –** Charts for showing change over time
- **Map –** Charts that can show data by geographic location
- **Meter –** Charts for measuring a metric against targets
- **Pie –** Charts for showing metrics as part of a whole
- **Special Purpose –** Specialised charts for specific purposes

Please Note: Some chart types may be unavailable depending on the data you've selected to report on.

Once you have chosen your chart type, you can then build the chart with the data you have. Like building a regular report, you create the chart by dragging your data fields into the fields of the chart builder. The mandatory fields will depend on the data you are using and the report you want to build. Once all mandatory fields are filled in, the page will show a preview of the chart.



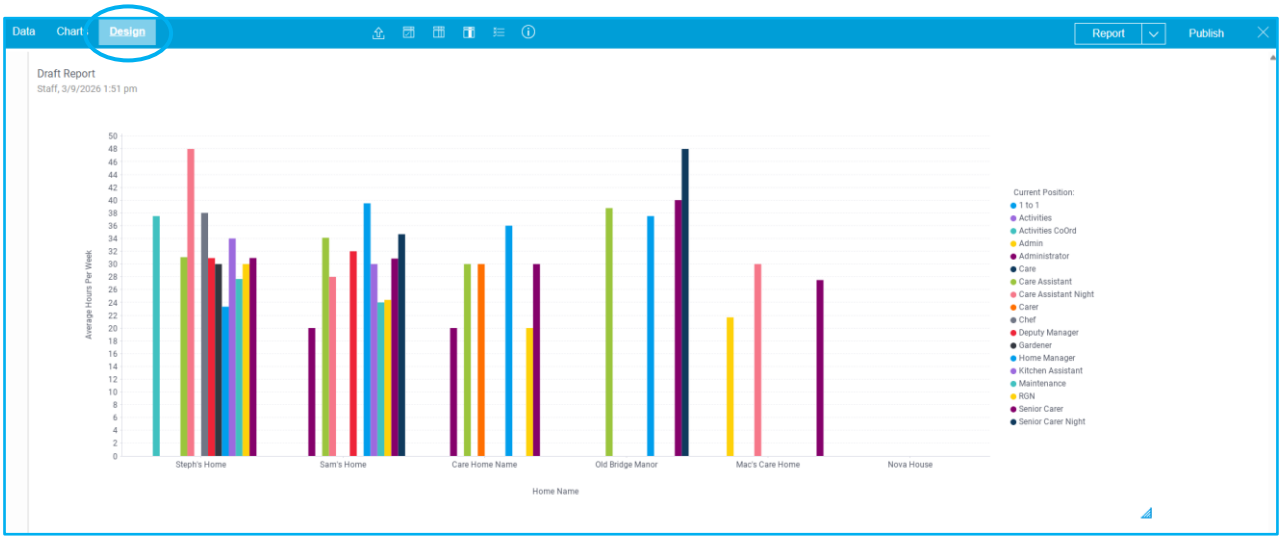
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To create multiple charts for one report, click the **+** icon at the bottom-right corner of the chart builder page.



report design.

The design tab on the report builder allows you to preview your report and update its format. Select the **Design** option at the top of the report to see this page.



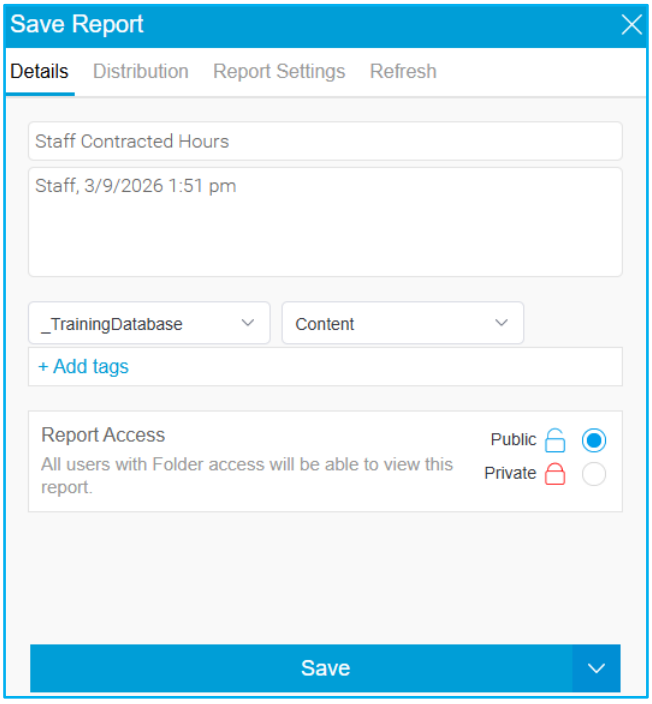
Here you can re-size your charts, enable or disable the table of your report, update the design and formatting of the report as well as the formatting of individual columns, and enable conditional formatting using the options at the top of the page.

publishing your report.

Once your report is built, you can publish it for other users on your advanced reporting system to see.

- Select the **Publish** button at the top-right corner of the report builder
- Name your report
- Save the report to **Contents** instead of **Drafts**
    - You can save to drafts if you are still building the report and just wish to save it
- Set the report access to either **Public** or **Private**

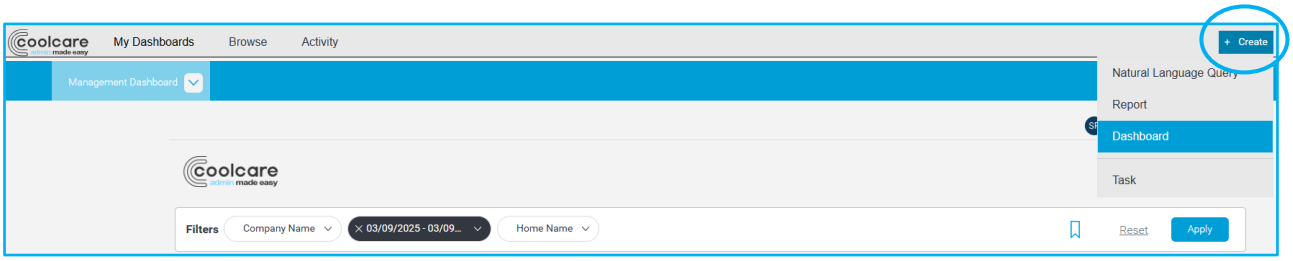
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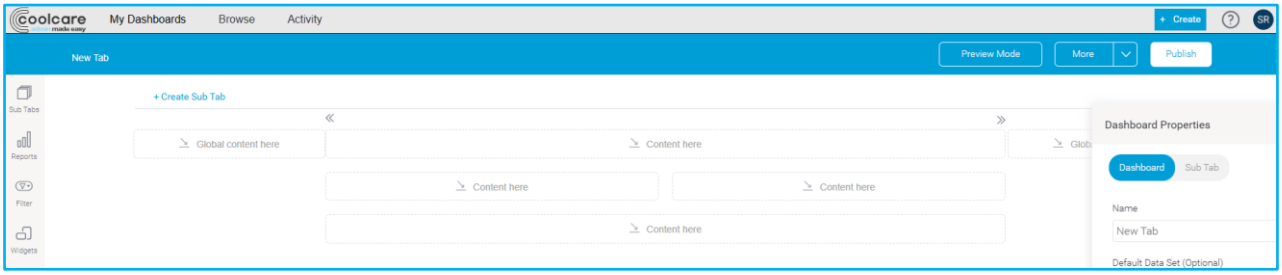
Click **Save** to publish the report. This will save the report to your content and allow other users to view it through the **Browse** section as well as add this report to any dashboards they create.

building a dashboard.

A dashboard can be made of multiple reports all on one page, with multiple filters to filter all reports on the dashboard in the same way. To create a dashboard, click the **+Create** button at the top-right corner of the page and select **Dashboard**.



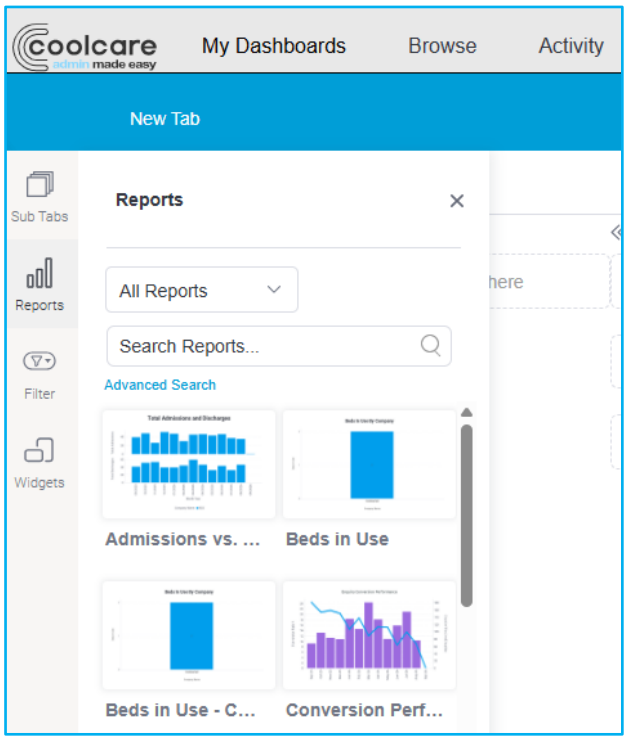
Give the dashboard a name and select a layout to use. Optionally, you can select a default data set, meaning the dashboard will only be able to include reports using the chosen view. Once selected, click **Create** to open the dashboard builder.



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adding reports.

You can add reports to your dashboard by selecting the **Reports** tab on the left-hand side of the dashboard builder. This will bring up a list of reports in your system to browse and search.



Find the report you want, then drag and drop it onto the dashboard. Depending on the layout selected, you can freely put the report wherever you want or drop it into one of the pre-defined areas.



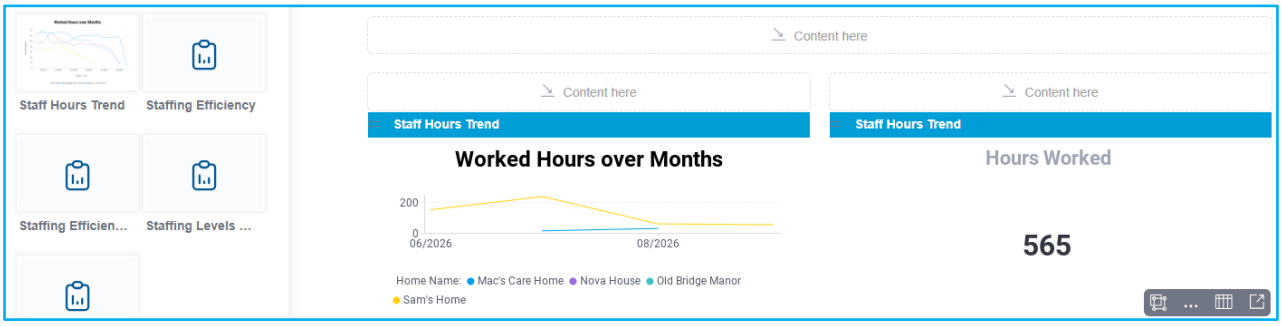
Once the report is on the page, you can drag the yellow borders around it to resize it.

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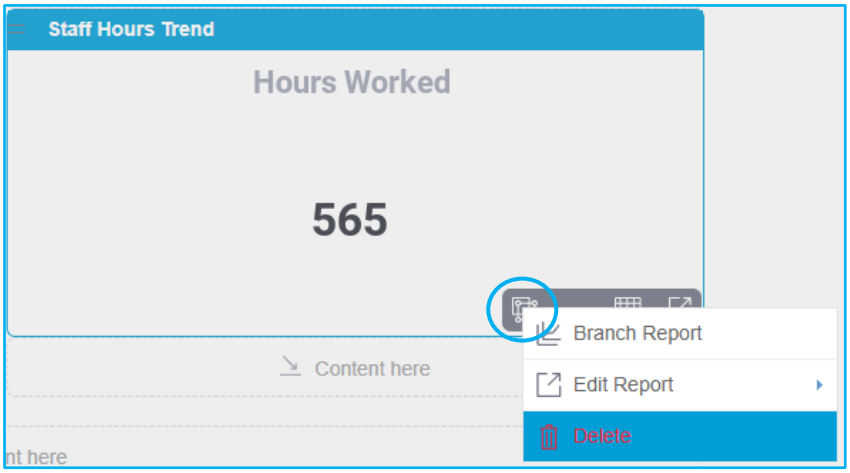
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You can add multiple reports to your dashboard and even use the same report multiple times if it has different charts created for it.



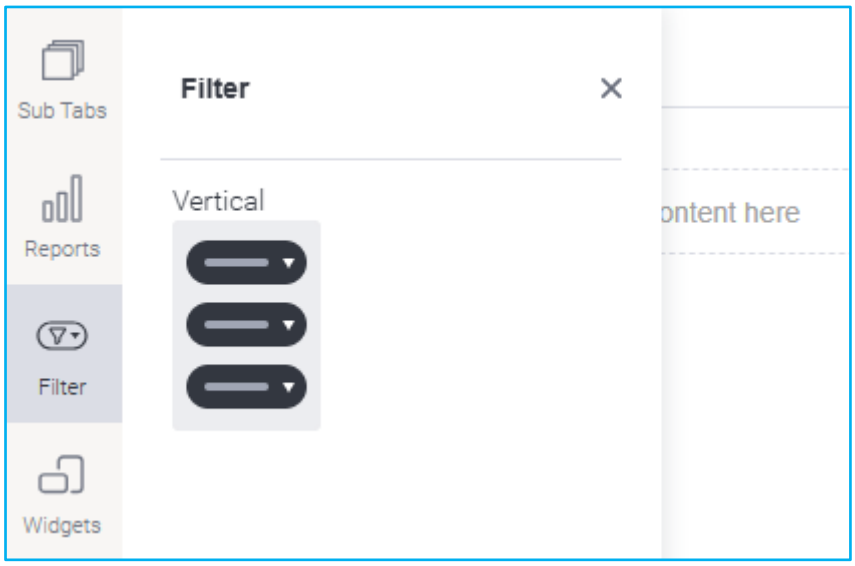
If you wish to remove a report from your dashboard, select the **Transform** icon at the corner of the report and select **Delete**.



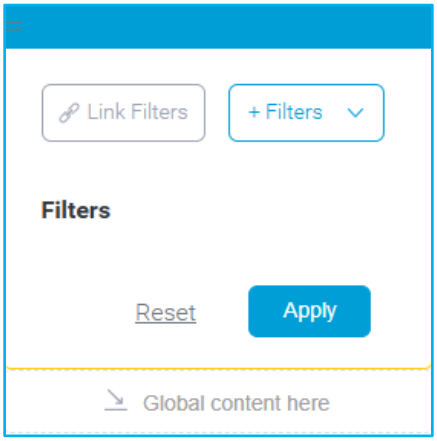
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adding filters.

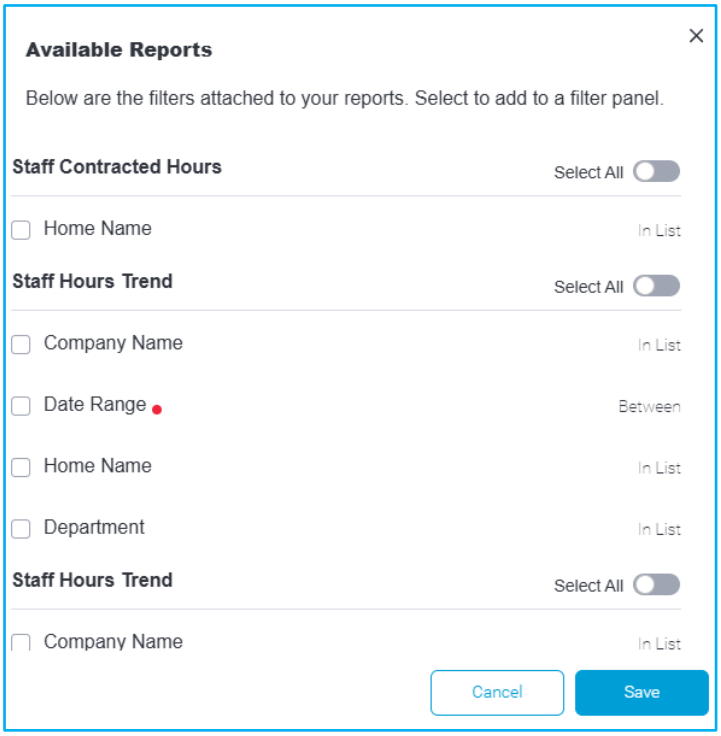
Filters can be added to your dashboard to filter all reports the same way. Select the **Filter** tab on the left-hand side of the page and drag the filter you wish to use onto the dashboard.



Once the filter is on the dashboard, you'll need to select which filters you want the dashboard to use. Click the **+Filters** button to see what filters are available.

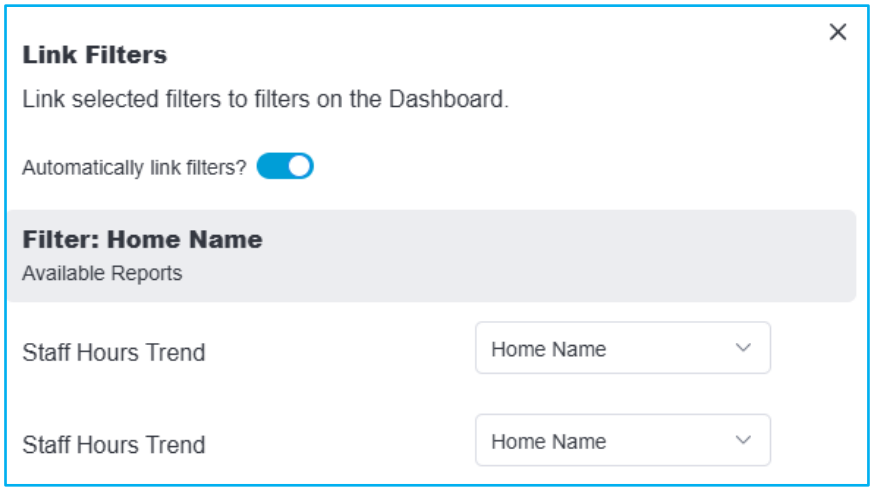


This will open a list of filters available to use from the reports you have added to the dashboard. If the list shows no filters, it means no filters are available on the reports you have chosen to display on this dashboard. For more information on adding filters to reports, see the *Filters* under *Building a Report* earlier in this guide.



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Once you've chosen a filter, the dashboard will attempt to link the filters from all the reports to filter the same way. However, if you are using reports from different views, it will require you to link them manually, choosing which data in the report should filter when using the dashboard filter.



Once the filter is added, it will appear under the filters tab you added to the dashboard.

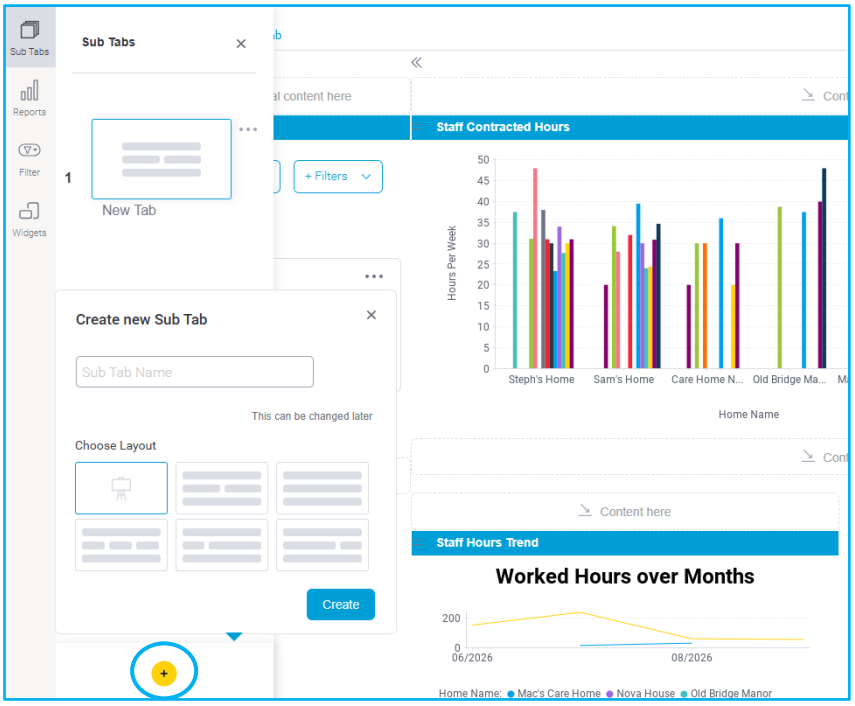


You can add multiple filters to the dashboard, allowing you to filter all the reports in multiple ways.

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sub tabs.

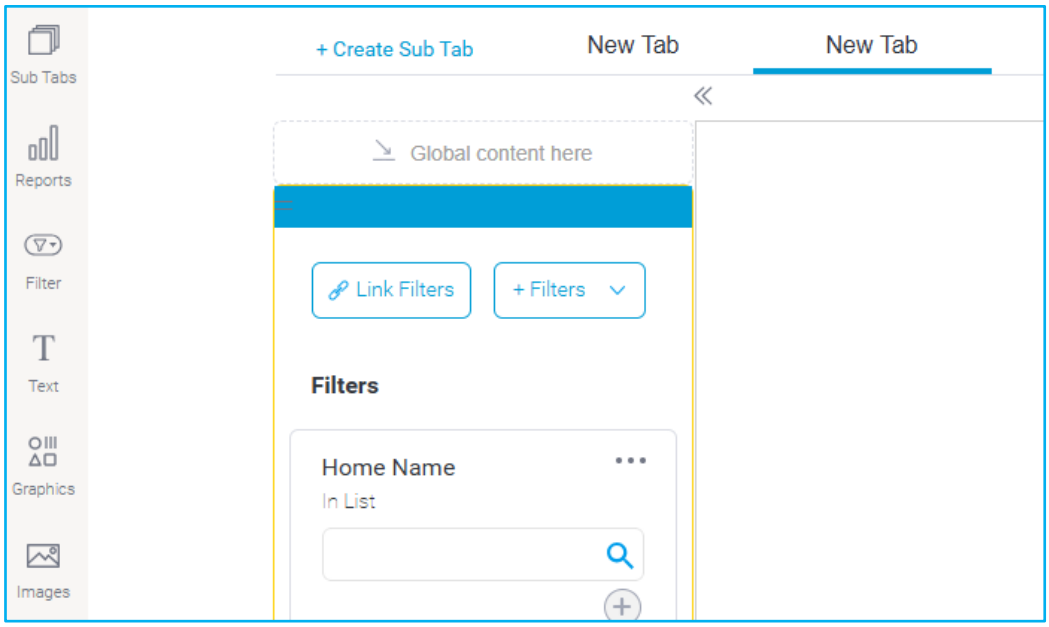
A dashboard can also have multiple sub-tabs, different pages under the same dashboard to show even more reports and content. To add a sub tab, select the **Sub Tabs** tab on the left-hand side of the page and then the **+** icon at the bottom of the sub tab list.



You can then name the sub tab and choose its layout, allowing you to build another page of reports and filters for your dashboard.

dashboard design.

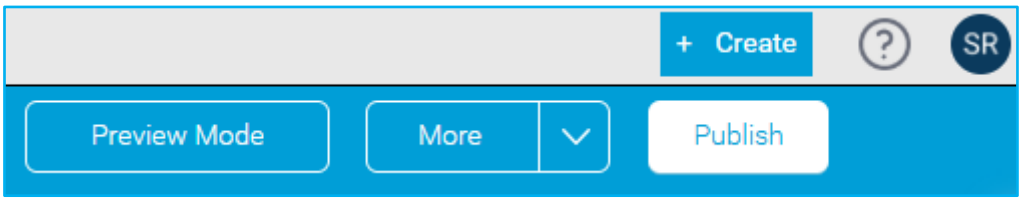
If you choose the canvas layout when creating a dashboard or sub tab, you will have additional options to customise the layout and design of the dashboard. On the left-hand side of the page, you'll find tabs to add text, graphics and images to your dashboard, allowing you to fully design the dashboard to suit your company's needs and branding.



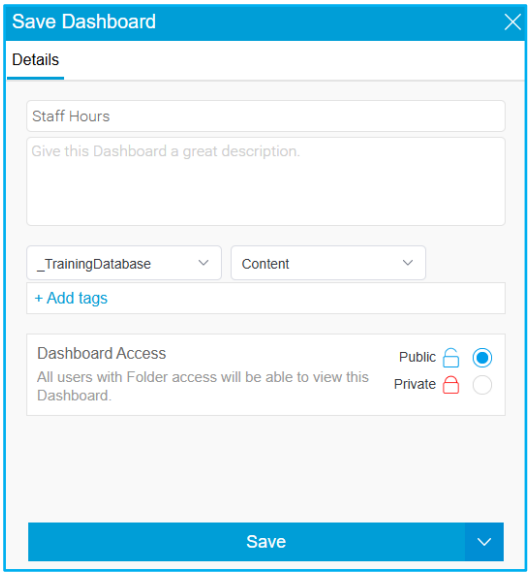
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publishing your dashboard.

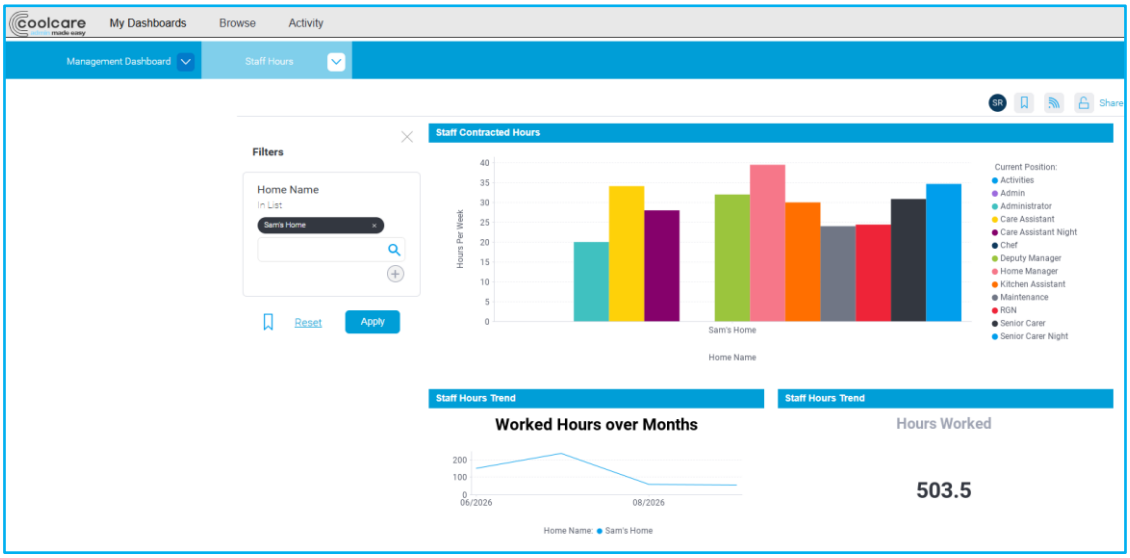
Once your dashboard is complete and you want to make it available to other users on your advanced reporting system, click the **Publish** button at the top-right corner of the dashboard builder.



- Name your dashboard
- Save the dashboard to **Contents** instead of **Drafts**
    - You can save to drafts if you are still building the dashboard and just wish to save it
- Set the dashboard access to either **Public** or **Private**



Click **Save** to publish the dashboard. This will save the dashboard to your content and allow other users to view it through the **Browse** section as well as add this dashboard to their favourites, allowing them to view it on the **My Dashboards** page.



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