



Dental Services

# NHS Dental Services

## E Reporting Good Practice Guide

### Amending a Template: Re-naming, amending the report and adding further data

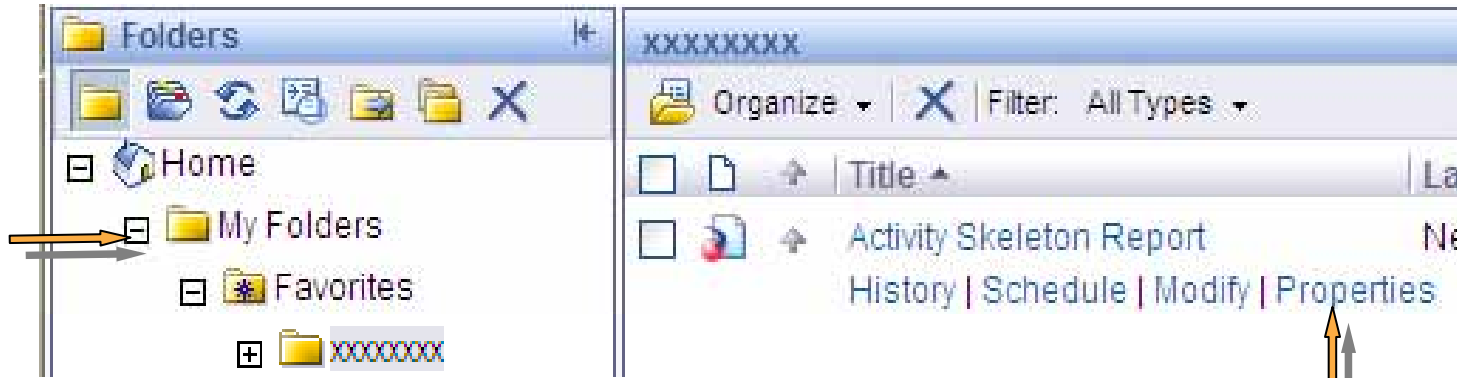
Supporting the NHS, supplying the NHS, protecting the NHS

NHS Dental Services is a service provided by the NHS Business Services Authority

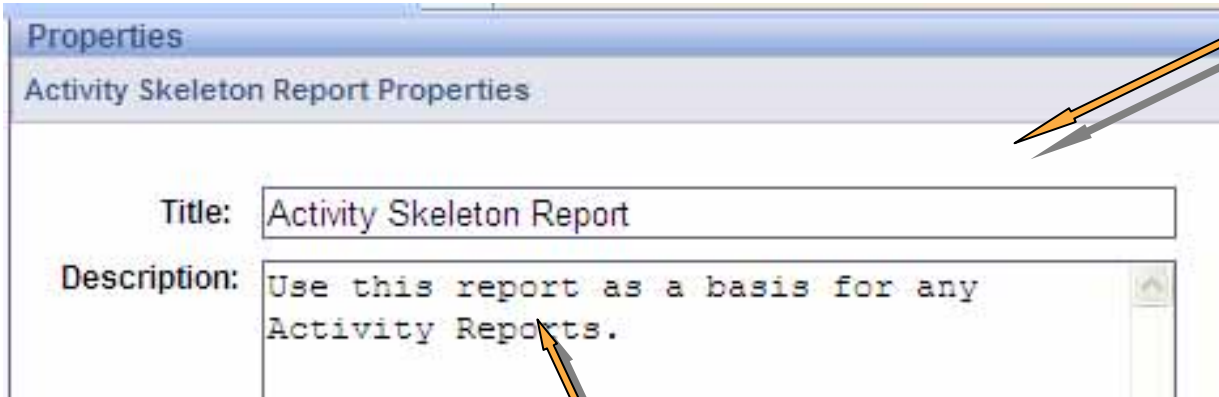


# Changing the name of a report

Open My Folder to find the template that you have saved



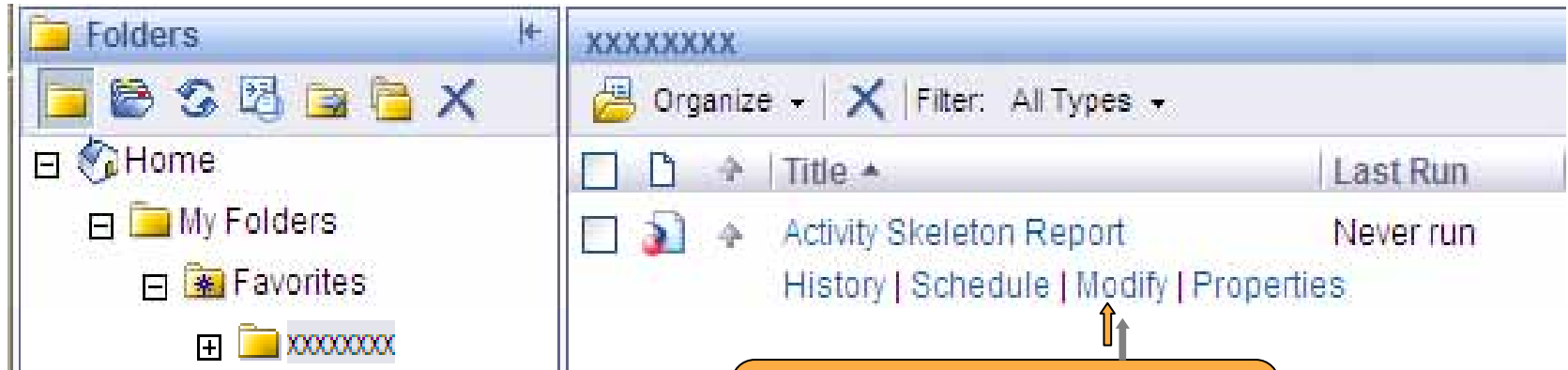
You can change the title by clicking on properties



Adding a description can be useful to remind yourself about the report



# Amending a template

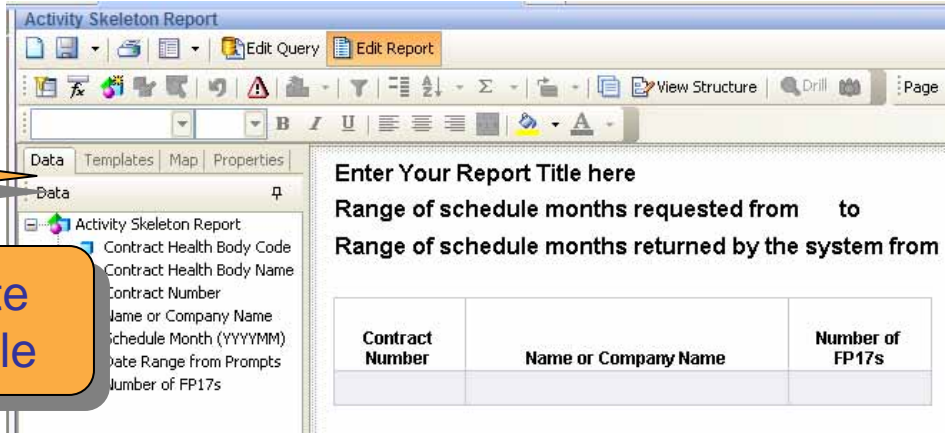


To change a report click on Modify

Business Objects Web Intelligence should load



The template is then visible



# Amending the report

The template opens with Edit Report highlighted, this means you can make changes to the structure of the tables that will be seen in the report output

The screenshot shows a software interface for editing a report. At the top, there are two tabs: 'Edit Query' and 'Edit Report', with 'Edit Report' being the active tab. Below the tabs is a toolbar with various icons for navigation and editing, including a warning icon, a funnel, a list, a sum symbol, a document, and a 'View Structure' button. A page indicator shows 'Page 1'. Below the toolbar is a rich text editor with bold, italic, and underline buttons. On the left side, there is a 'Properties' panel with a tree view showing a report structure with items like 'Body Code', 'Body Name', 'Company Name', and 'Company Prompts'. The main editing area contains the text 'Enter Your Report Title here' followed by 'Range of schedule months requested from' and 'Range of schedule months returned by the system'. Below this text is a table with three columns: 'Contract Number', 'Name or Company Name', and 'Number of FP17s'. An orange callout box with a white border and a shadow points to the title text with the text 'For Example you can change the title of the report'.

Contract Number	Name or Company Name	Number of FP17s



# Amending the report

The screenshot shows the 'Activity Skeleton Report' interface. The title bar reads 'Activity Skeleton Report'. Below it is a toolbar with icons for file operations and report actions, including 'Edit Query' and 'Edit Report'. A secondary toolbar contains various report controls like filters and sorting. The main area displays the report title 'Enter Your Report Title here' and two lines of text: 'Range of schedule months requested from' and 'Range of schedule months returned by the system from to'. Below this is a table with three columns: 'Contract Number', 'Name or Company Name', and 'Number of FP17s'. The left sidebar shows a tree view of the report structure with items like 'Contract Health Body Code' and 'Schedule Month (YYYYMM)'.

Double click on the title

This screenshot shows the same interface as the first, but with the title field 'Enter Your Report Title here' selected. A formula bar is now visible above the main content area, containing the text 'Enter Your Report Title here'. The left sidebar shows a different set of items, including 'Contract Health Body Code', 'Contract Health Body Name', and 'Contract Number'. The main content area shows the title and the start of the two lines of text: 'Range of schedule months requested from' and 'Range of schedule months returned by the system from to'.

A formula bar becomes visible

When the title has been changed click ✓




# Amending the report

Activity Skeleton Report

Edit Query Edit Report

View Str

**You can make the formula bar visible by clicking **

Enter Your Report Title here

Range of schedule months request




Range of schedule months returne

Activity Skeleton Report

Edit Query Edit Report

View

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Data Templates Map Properties    Enter Your Report Title here

Enter Your Report Title here



Range of schedule months requ

Range of schedule months retrurr

Contract Health Body Name

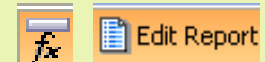
Contract Number

Name of Company Name

**When the formula bar is visible  is highlighted **

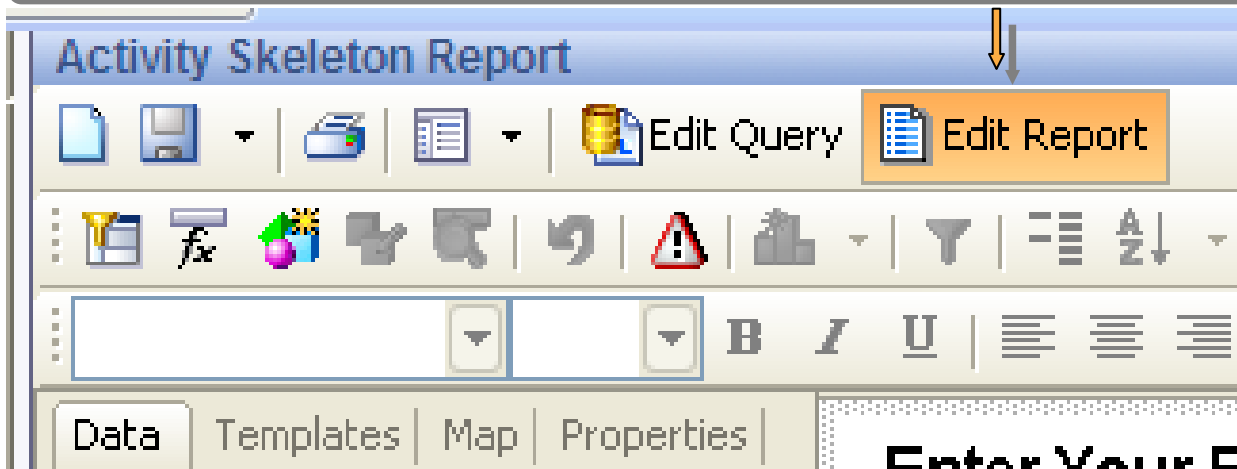


When something is active it will be highlighted:

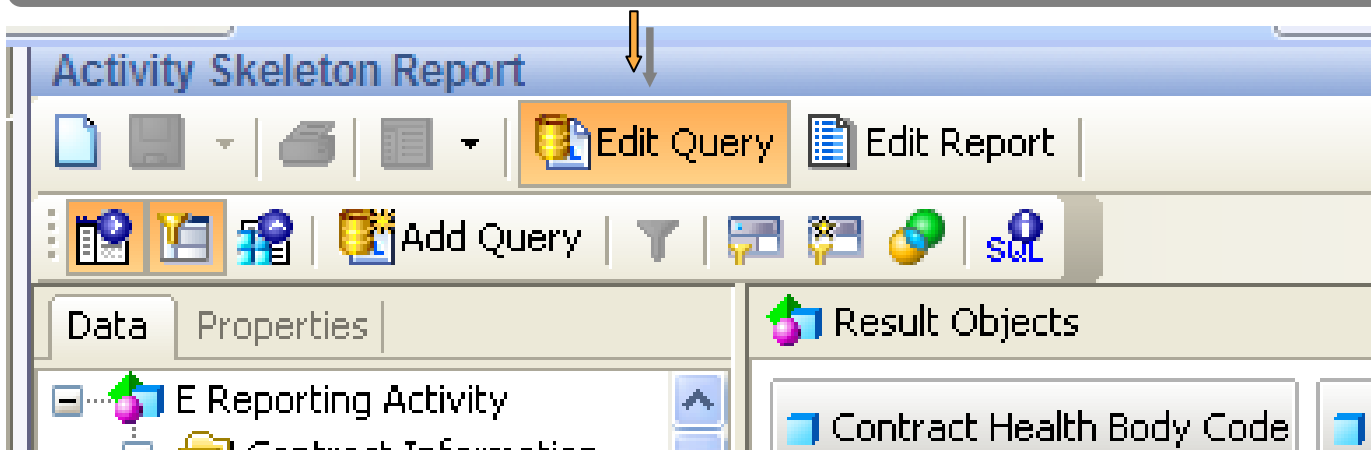


# Amending a template

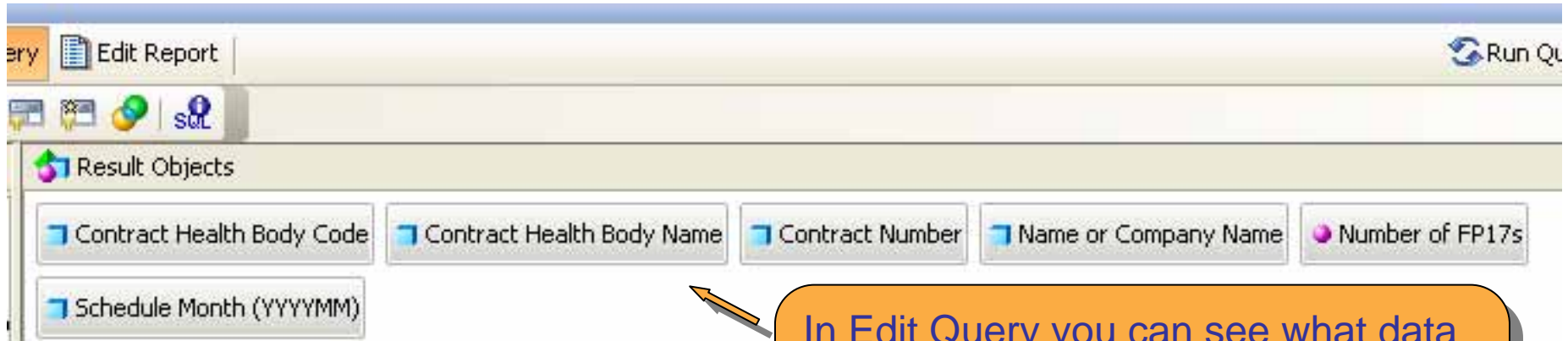
If you want to change the data in the report you need to switch from Edit Report



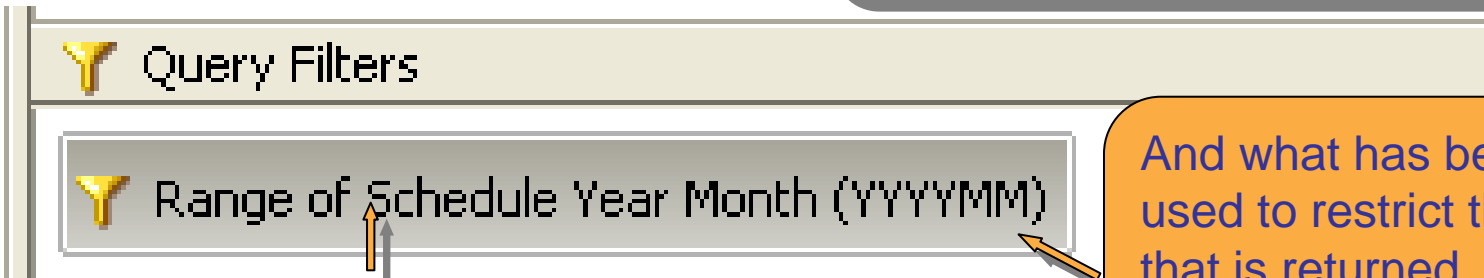
...to Edit Query



# How data is extracted



In Edit Query you can see what data will be returned (i.e. populate the tables), these are called the Results Objects



In this example the data is restricted to a certain time period which is entered by the user when the report is refreshed

And what has been used to restrict the data that is returned...these are called the Query Filters






# How data is extracted


## Result Objects

 Contract Number

 Name or Company Name

 Number of FP17s

Result objects with the symbol  are known as dimensions , which consist of character-type data such as names, descriptions, codes or dates.

Result objects with the symbol  are known as measures , which consist of numeric data that is the result of calculations on data in the database. For example, the measure object Number of FP17s, is a count of all FP17s (adjusted for amended FP17s)

# How data is extracted

## Result Objects

Contract Number     Name or Company Name     Number of FP17s



In this simple example: the number of FP17s for each contract number (together with the name or company name attached to that contract) will be returned. The data is restricted to a certain time period which is entered by the user when the report is refreshed and GDS/PDS Contracts only.



## Query Filters

And

Range of Schedule Year Month (YYYYMM)

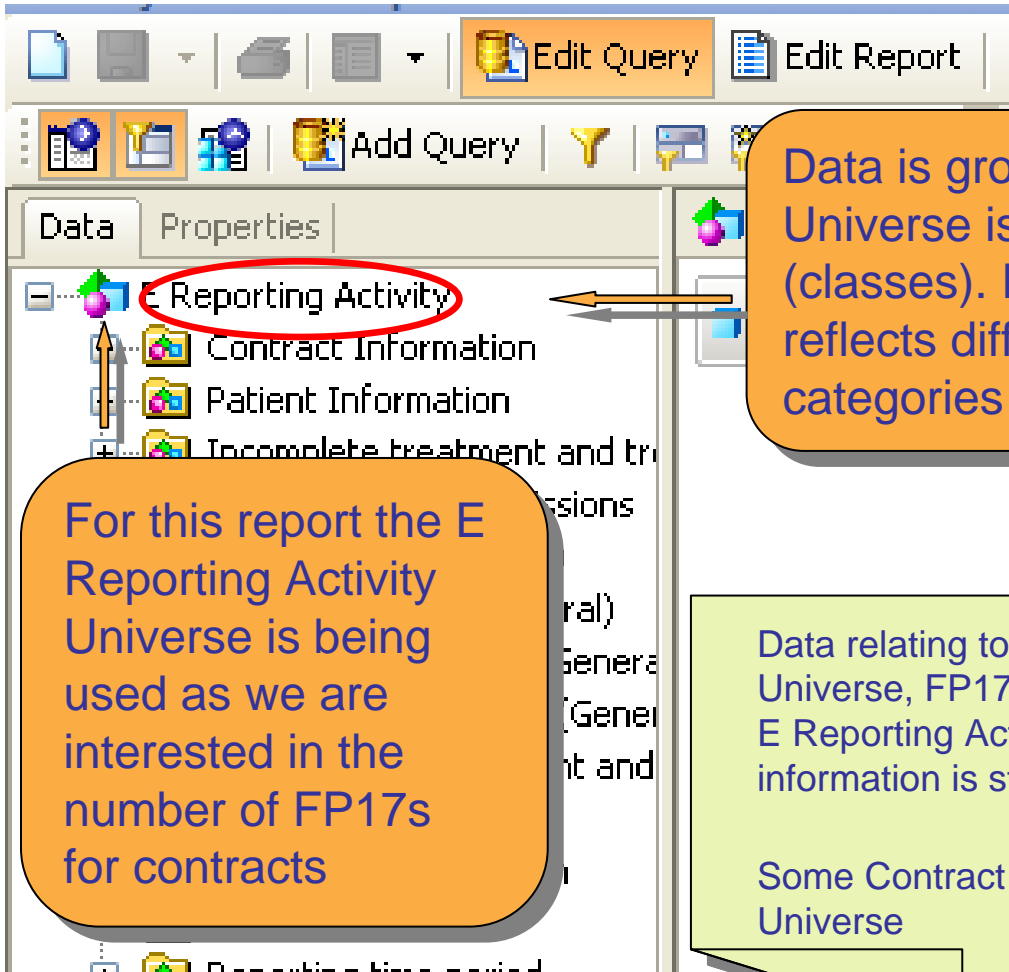
GDS and PDS Contracts Only (Filter)



A template/report should always have a dimension and measure i.e. a name of something, the count of how many there are and a filter restricting the time period of data that is returned



# How data is stored



Data is grouped in Universes: a Universe is a logical group of data (classes). It gives access to data that reflects different operations or categories of data.

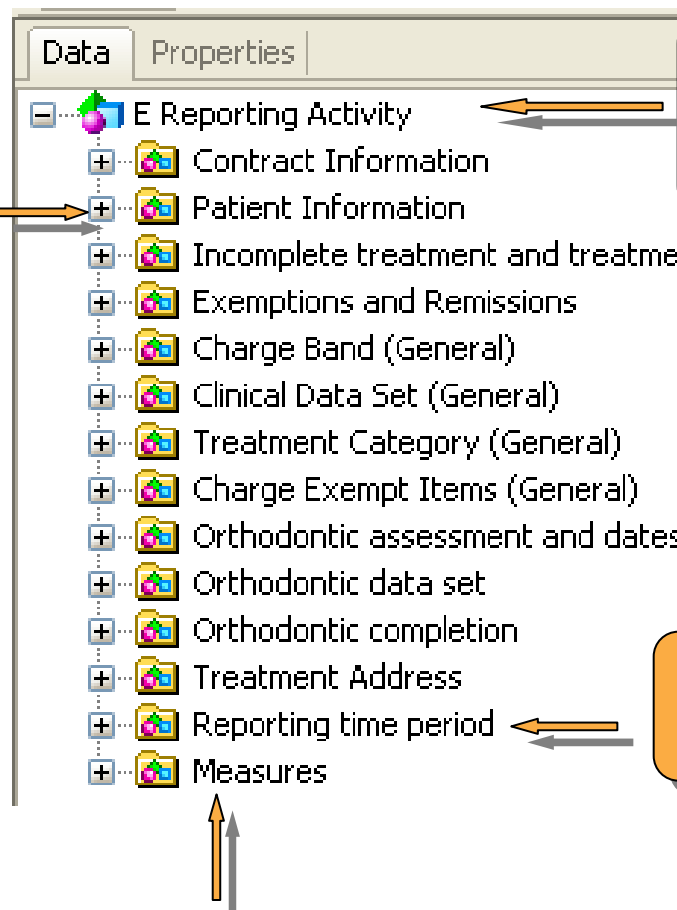
For this report the E Reporting Activity Universe is being used as we are interested in the number of FP17s for contracts

Data relating to finance is stored in the E-Reporting Finance Universe, FP17s that have been processed are stored in the E Reporting Activity Universe and general contract information is stored in the E Reporting Contracts Universe.

Some Contract information is also included in the Activity Universe



# How data is stored



Click on the expand button to see what data can be used

The E Reporting Activity Universe is ordered by sections of the FP17 form

All time periods are stored in the folder Reporting Time Period

All measures (such as the number of FP17s, UDAs, Patients) are stored in the Measures folder



# Adding data to a template

To add more data to a report must be in Edit Query mode

The screenshot shows a software interface with a top toolbar containing buttons for 'Edit Query' (circled in red) and 'Edit Report'. Below the toolbar is a 'Data' pane with a tree view under 'E Reporting Activity'. The tree view includes the following items: Contract Information, Patient Information, Incomplete treatment and tr, Exemptions and Remissions, Charge Band (General), Clinical Data Set (General), Treatment Category (Genera, Charge Exempt Items (Gener, Orthodontic assessment and, Orthodontic data set, Orthodontic completion, Treatment Address, Reporting time period, and Measures. To the right of the 'Data' pane is a 'Result Objects' pane containing 'Contract Number'. At the bottom of the interface is a 'Query Filters' section.

Click on the expand button to select the data to add



# Adding data to a template

The screenshot shows a software interface with a 'Data' tab and a 'Properties' tab. The 'Data' tab displays a hierarchical tree structure under 'E Reporting Activity'. The 'Patient Information' folder is expanded, and 'Patient Adult or Child' is selected. A tooltip is displayed over this selection, containing the following text:

**Patient Adult or Child**  
Type:string  
Is the patient an adult (18 or over at date of acceptance) or a child. Values are 'Adult' and 'Child'. Derived from patient age range.

At the bottom of the interface, there is a 'Query 1' field with the text: 'Is the patient an adult (18 or over at date of acceptance) or a child. Val'

By hovering your mouse over the title of the data , a short explanation will appear

A short explanation of the data appears at the bottom of the screen when the title is clicked on



# Adding data to a template

The screenshot displays a software interface with two main panes: 'Data' on the left and 'Result Objects' on the right. The 'Data' pane contains a list of fields, including 'Claim Source', 'Late Submitted FP17', 'Number of FP17s', 'Number of Patients T', 'Number of Radiograp', 'Number of Bridge Uni', 'Number of Teeth for', 'Number of Teeth for', and 'Number of Teeth for'. The 'Result Objects' pane contains 'Contract Number', 'Name or Company Name', 'Number of FP17s', and 'General Claim UDA'. Arrows indicate the movement of data from the 'Data' pane to the 'Result Objects' pane. A callout box explains that data can be added by double-clicking the name or by drag-and-drop.

To add the data either double click on the name

Or "drag and drop" the data from the Data into the query

The data will be added to the Results Objects



# Adding data to a template

The screenshot shows a software interface with a menu bar containing 'Edit Query' and 'Edit Report'. Below the menu bar is a toolbar with icons for 'Query', 'Filter', 'Report', 'Help', 'Data', and 'SQL'. The main area is titled 'Result Objects' and contains four items: 'Contract Number', 'Name or Company Name', 'Number of FP17s', and 'General Claim UDA'. On the left side, there is a sidebar with a search icon and the text 'ed FP17' and 'P17s'. Two arrows point from callout boxes to the 'Number of FP17s' and 'General Claim UDA' items.

The data will be added to the Results Objects

Therefore now we will return the number of FP17s and UDAs for each contract

To remove data from the query :  
Highlight it in the results query and press delete on your keyboard  
Or  
Drag and drop it from the Results objects back to the Data list

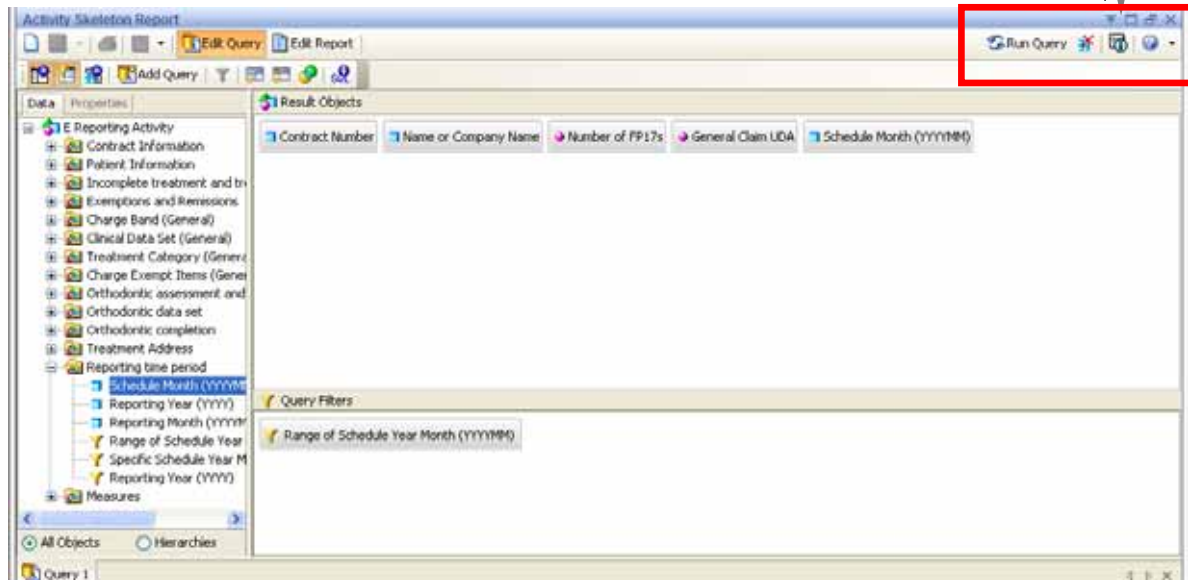




# Adding data to a template



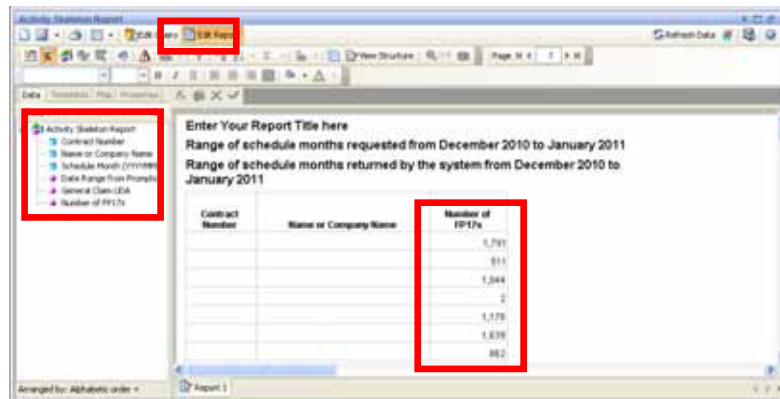
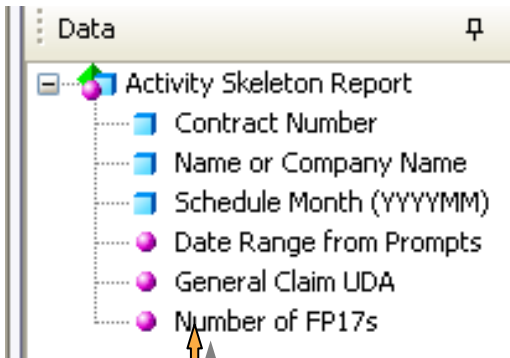
When all the data you require has been selected click on Run Query and enter the prompts as requested



# Adding data to a template



When the query is run, the report view will be shown



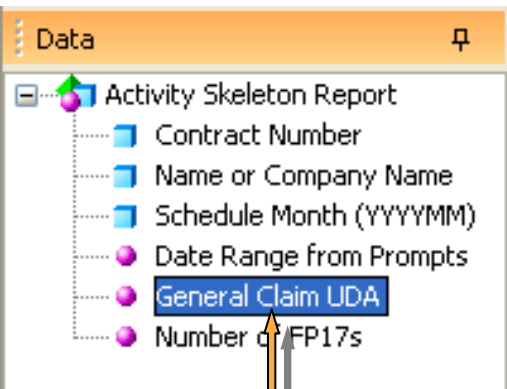
The data returned in the query

Notice that when we amend a template the data we have added to the query will not automatically be added to the report

Contract Number	Name of Company Name	Number of FP17s
		1,781
		511
		1,944
		2
		1,178
		1,639
		882



# Adding data to a template



To add the UDA data, left click on the name so it is highlighted, whilst still holding down the mouse button, drag it to the report

Enter Your Report Title here

Range of schedule months requested from December 2010 t

Range of schedule months returned by the system from Dec  
January 2011

Contract Number	Name or Company Name	Number of FP17s
		1,781
		511
		1,944
		2
		1,176
		1,639
		862



# Adding data to a template

Range of schedule months requested from December 2010 to January 2011

Range of schedule months returned by the system from December 2010  
January 2011

Contract Number	Name or Company Name	Number of FP17s
		1,788
		511
		1,944
		2
		1,176
		1,636
		862

The data needs to be inserted into the report in the correct place. The thick blue line will indicate where the data will be placed. When happy with this release the mouse and the data will appear

General Claim UDA

Drop here to insert a cell

# Adding data to a template

In this case the data will be inserted in a column after Number of FP17s


Contract Number	Name or Company Name	Number of FP17s
		1,781

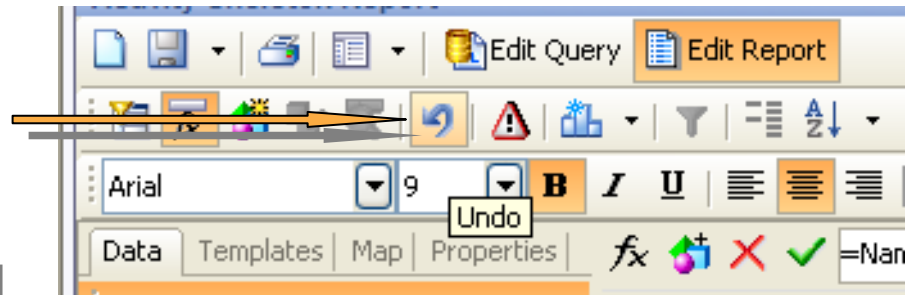
General Claim UDA

Contract Number	Name or Company Name	Number of FP17s
		1,781

General Claim UDA

In this case the data will be inserted in a column before Number of FP17s

If a mistake is made, you can click on undo  and try again



There is only one undo, therefore you must click it before doing anything else



# Adding data to a template

Enter Your Report Title here

Range of schedule months requested from December 2010 to January 2011

Range of schedule months returned by the system from December 2010 to January 2011

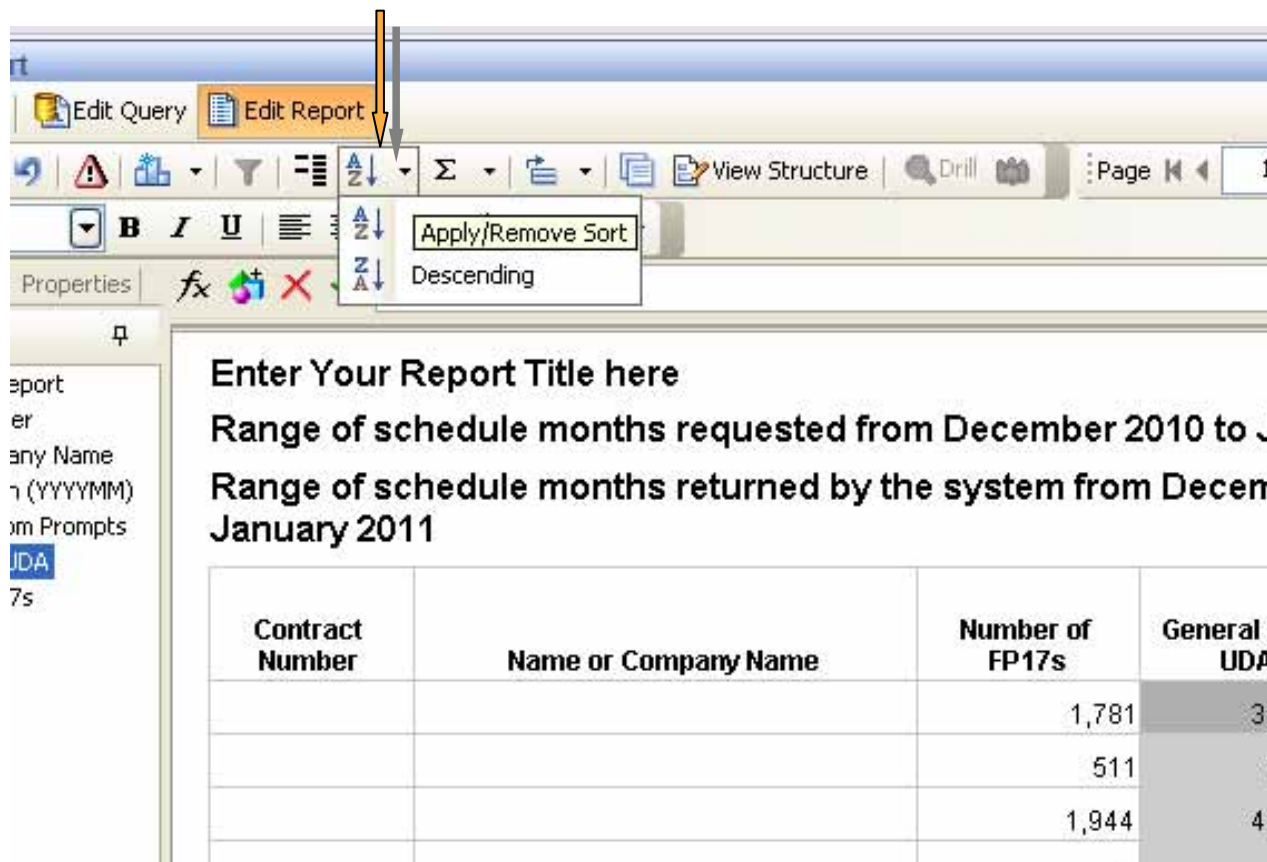
Contract Number	Name or Company Name	Number of FP17s	General Claim UDA
		1,781	3,763.25
		511	1,258.4
		1,944	4,410.15
		2	15
		1,176	2,633.3
		1,639	3,569.3
		862	1,781.95

The number of UDAs has now been added



# Sorting the data


The number of UDAs per contract can be sorted. Highlight the column of data you want to sort , then click on 



The screenshot shows a software interface with a report titled "Enter Your Report Title here". The report content includes "Range of schedule months requested from December 2010 to J" and "Range of schedule months returned by the system from Decem". Below the text is a table with the following data:

Contract Number	Name or Company Name	Number of FP17s	General Claim UDA
		1,781	3,763.25
		511	1,258.4
		1,944	4,410.15

The interface also shows a toolbar with a sorting icon (A-Z) highlighted, and a dropdown menu with options "Apply/Remove Sort" and "Descending".

If a column is sorted, when that column is selected, then the sort button will be highlighted to indicate that a sort has been used 

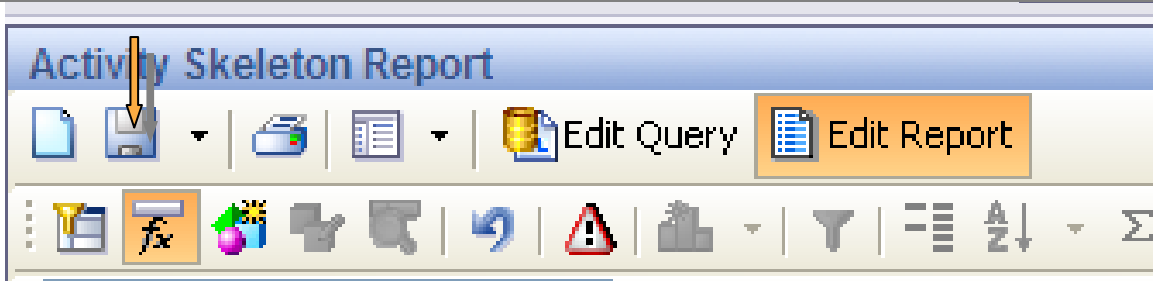
To remove the sort just click on the button again.

If no sort is applied then the data is sorted on the first column in the report

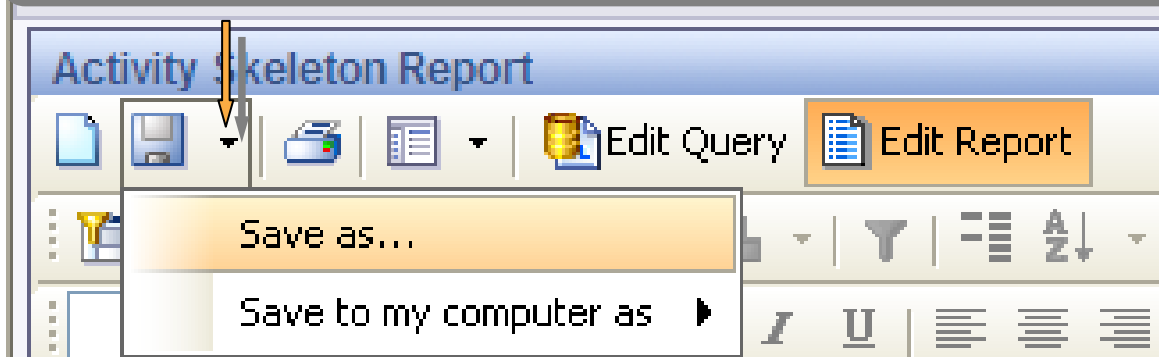


# Saving the amended template

Click the icon to save the template with its existing name



Click the arrow and select Save as, you will then be asked to choose where you want to save the template and can rename it if appropriate



This is to save the template and not the results when the report has been run. To save the results click save to my computer as.

