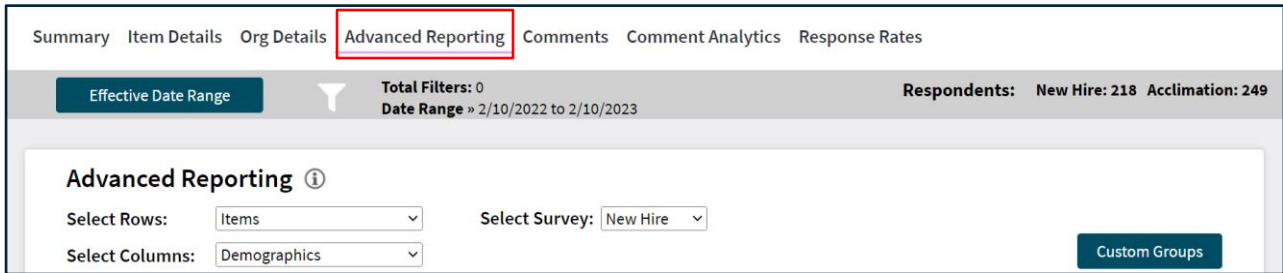


Lifecycle Dual Onboarding – Advanced Reporting Using Custom Groups

The Custom Groups feature in Advanced Reporting allows you to group multiple units or demographics and create reports for that combination of units/demographics. You can create Custom Groups based on the report group and demographic permissions you have. The Custom Groups you create are only visible to you and cannot be seen by other users. Create a Custom Filter

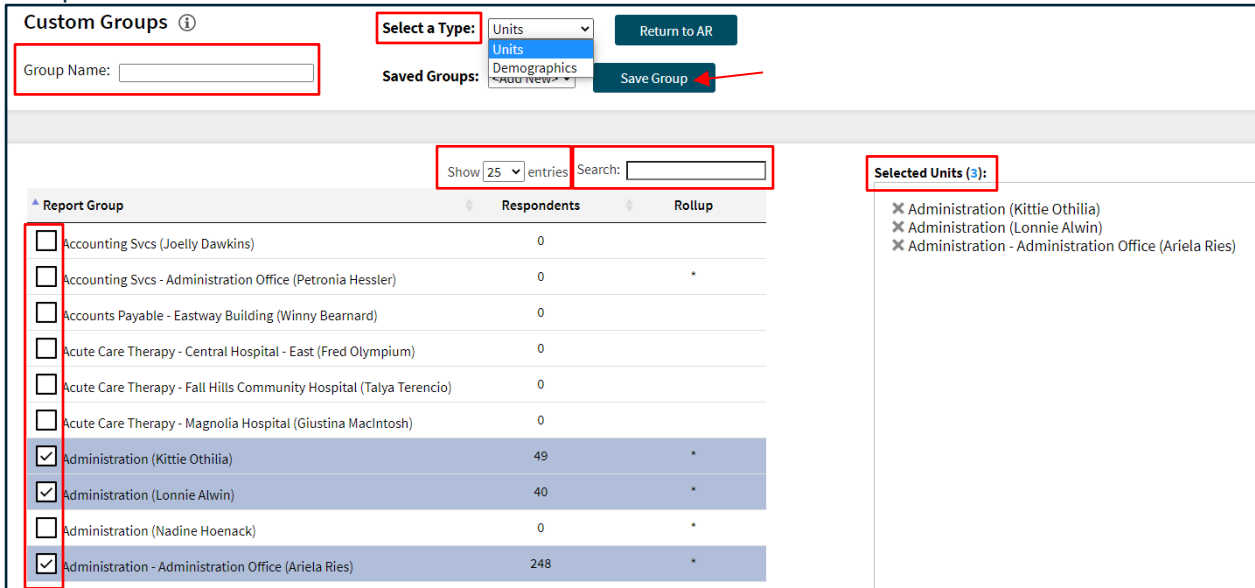
Create a New Custom Group

To create a new Custom group, go to Advanced Reporting and select Custom Groups.



Custom Group by Units

Enter a Group Name (be sure use a unique naming convention to avoid multiple reports having the same name) and select the Type: Units. Check the boxes next to the Report Groups you want to include. As you make your selections, the names of the Report Groups you choose will appear to the right under Selected Units. The number in parenthesis is the number of units you selected. The number of respondents appears as a column in the report group table on the left. You may view 25, 50, 100, or 200 groups at one time. Use the Search box to look for a specific report group. When you have made all your selections click Save Group.



Custom Group by Demographics

Enter a Group Name and select the Type: Demographics.

Custom Groups ⓘ

Group Name:

Select a Type: Units Units **Demographics** Add New

Return to AR

Save Group

Next, select the Demographic dropdown to make your selection. Under Options, check the boxes next to the demographics you want to include. As you make your selections, your choices will appear to the right under Selected Demographics. The number in parenthesis is the number of demographics you selected. You may view 25, 50, 100, or 200 groups at one time. Use the Search box to look for a specific demographic. When you have made all your selections click Save Group.

Custom Groups ⓘ Select a Type: Demographics Return to AR

Group Name: Save

Demographic: Age (15)

Select All

Show 25 entries Search:

Options

- Under 18 years
- 18 to 24 years
- 25 to 29 years
- 30 to 34 years
- 35 to 39 years
- 40 to 44 years
- 45 to 49 years
- 50 to 54 years

Selected Demographics

Age (4)

- X 18 to 24 years
- X 25 to 29 years
- X 30 to 34 years
- X 35 to 39 years

Once a Custom Group by Demographic is saved, it is also available in Custom Filters. Similarly, Custom Filters will be available in Custom Groups (Demos).

Edit or Delete a Custom Group

To edit an existing Custom Group, select a Type, then select the custom group you wish to edit under Saved Groups. To edit, select the pencil icon, make your changes by selecting or deselecting the check boxes and select Update Group/Filter or Delete Group/Filter. To delete the group select Delete Group/Filter.

Custom Groups ⓘ Select a Type: Demographics Return to AR

Saved Groups: All Non-Full Time (3) ✎ Update Filter Delete Filter

Custom Filter Name:

Demographic:

Select All Show 25 entries Search:

Options

Under 18 years

18 to 24 years

25 to 29 years

Selected Demographics

Employment Status (3)

- Part-Time
- Casual, Temporary, PRN or Per Diem
- Leave of Absence

Note: When editing Custom Groups by Unit, select the group from the drop down, make changes, and select Update.

Custom Groups ⓘ Select a Type: Units Return to AR

Group Name: **Saved Groups:** Falls Hills Nursing Admin (4) Update Group Delete Group

Show 25 entries Search:

Report Group	Respondents	Rollup
<input checked="" type="checkbox"/> Nursing Admin - Fall Hills Community Hospital (Adelle Yate)	15	*
<input checked="" type="checkbox"/> Nursing Admin - Fall Hills Community Hospital (Carmela Junie)	0	
<input checked="" type="checkbox"/> Nursing Admin - Fall Hills Community Hospital (Rayna Lorenz)	0	*
<input checked="" type="checkbox"/> Nursing Admin - Fall Hills Community Hospital (Suzette Catie)	14	*

Selected Units (4):

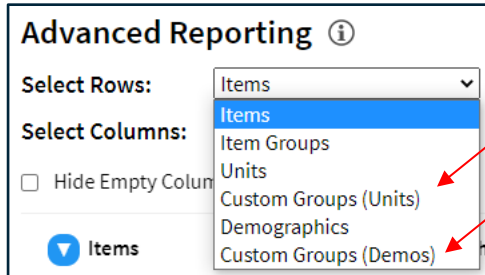
- Nursing Admin - Fall Hills Community Hospital (Adelle Yate)
- Nursing Admin - Fall Hills Community Hospital (Carmela Junie)
- Nursing Admin - Fall Hills Community Hospital (Rayna Lorenz)
- Nursing Admin - Fall Hills Community Hospital (Suzette Catie)

Using Custom Groups

After creating the desired Custom Group(s), return to Advanced Reporting by selecting Return to AR and build a report using those Custom Groups.

[Return to AR](#)

In Advanced Reporting, you will see Custom Groups (Units) and Custom Groups (Demos) as options.



Once you make a selection you will see your Custom Groups for units or demographics appear in the dropdown.

