Reporting in AVBS

AVBS User Guide – Provincial Operations

As of March 15th , 2022

Pharmacy Staff: For any guidance and/or technical support, please contact:

📞 1-844-705-1265

✉ AlbertaVaccineBookingSystemSupport@gov.ab.ca

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Privacy Policy

The appropriate collection, use and disclosure of an Albertan's personal health information is the requirement of Alberta's Health Information Act and FOIP Act.

Whenever you see this icon, please ensure that you collect verbal consent from the Albertan for disclosure of their personal health information.

Whenever you see this icon, please ensure that you are correctly entering the information provided by the Albertan (e.g. legal first name, legal last name, Alberta PHN). The search may result in many records containing sensitive information like PI/PHI.

It is your responsibility to access only those records that are necessary to perform your duties. All access is monitored and recorded for compliance and audit purposes.

Whenever you see this icon, please pay attention to the action that is being performed. It is important you follow these instructions.

Please note that following practices are prohibited and against the code of conduct related to the handling of sensitive information (PI/PHI) **unless your role authorizes you to do so:**

- Saving lists locally on computer
- Saving lists on other storage media
- Printing lists
- Taking pictures
- Taking screenshots

Reporting in AVBS: Overview

Objectives:	Navigation of Reporting in AVBS
AVBS Role:	Provincial Operations
Pre-Requisite:	AVBS Admin Profile needs to be configured on AVBS

Note: The term vaccination site used throughout this user guide refers to pharmacies, AHS clinics and physician offices.

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Accessing the Reports

Within AVBS, you will be able to view different types of reports. Access to reports are dependent on what profile you have. You will be able to access the reports from the AHS console Homepage.
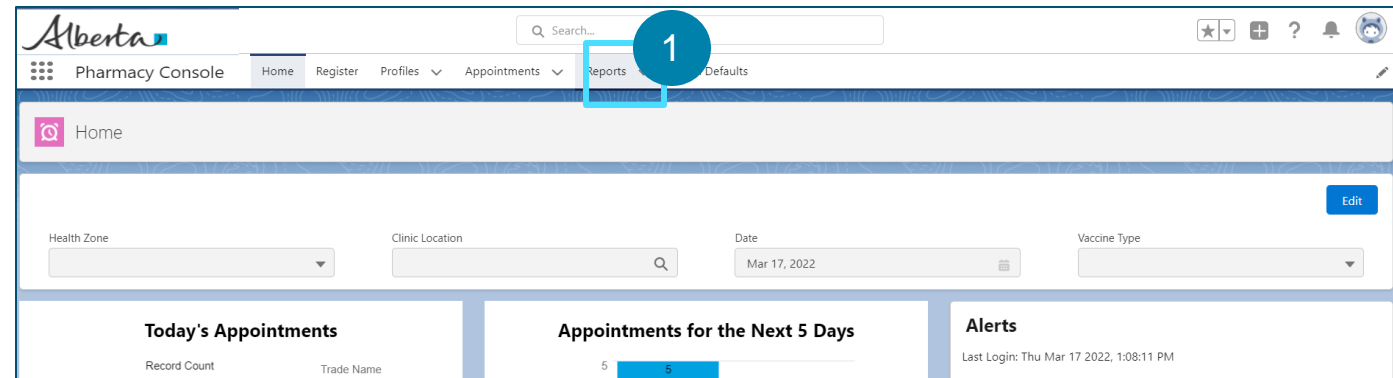
To navigate to reports, use the following steps:

1 Click on the **Reports** Tab

You will be directed to the Reports view.

2 Within the Reports view, you will be able to see all available reports and select the type from the **side panel**

3 Select the **Report** that you would like to view .

4 *The selected Report will display.*
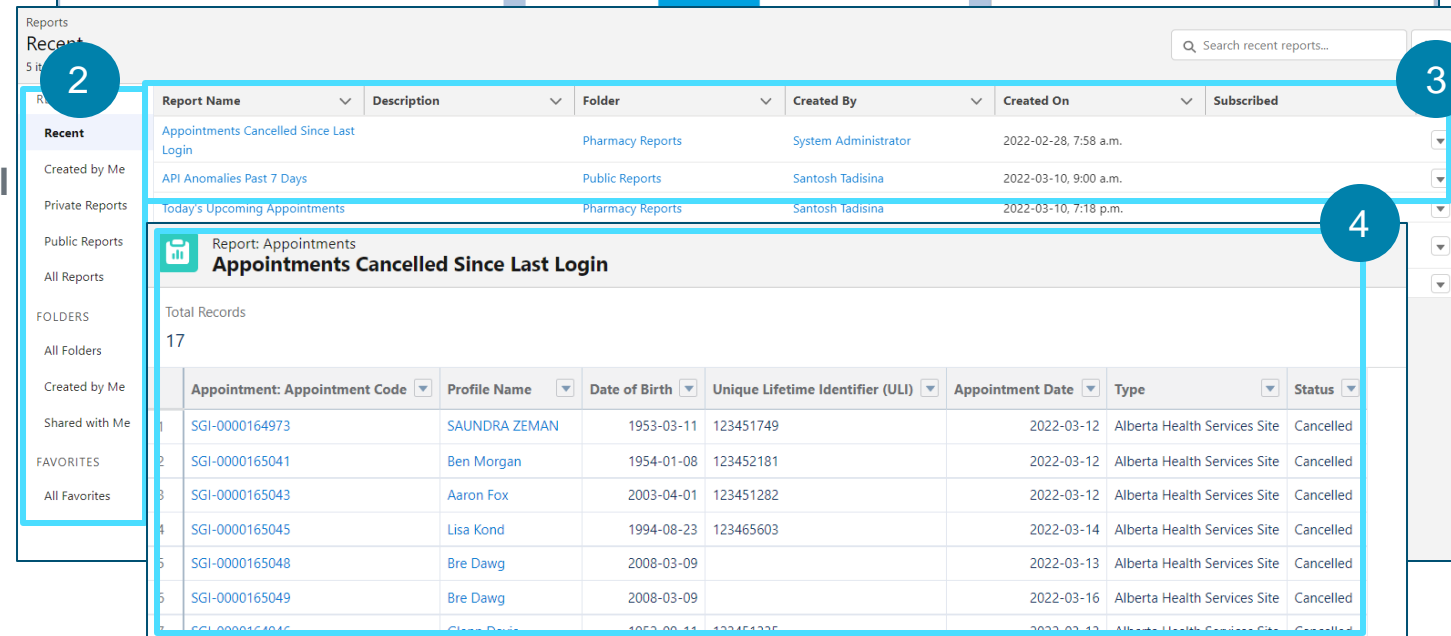
Reports Overview

The following Reports are available within the *All Folders* Folder and are accessible to Pharmacy users with BCH ImmsBC Admin + PPHIS Operations profiles:

Report Name
Dashboard Reports
Pharmacy Operation Reports
Registration Reports

The following Reports are available within the *Dashboard Reports* and are accessible to Pharmacy and AHS Site users with BCH ImmsBC Admin + PPHIS Operations profiles:

Report Name	Description
Appointments for next 5 days	Number of scheduled clients with appointments within the next 5 days
Today's Upcoming Appointments Pie chart	Number of scheduled clients with appointments within the next 5 days as a Pie chart

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Reports Overview (Continued)

The following Reports are available within the Pharmacy Operations Reports and are accessible to Pharmacy users with PPHIS Operations profiles:

Report Name	Description
Appointments for the Next 5 Days	Daily number of scheduled clients (Next 5 Days) by Location and Vaccine Type
Daily Appointments	Total number of 'confirmed' appointments (today), grouped by Vaccine Type
All Vaccine Appointment Report	All Appointments by Location within 28 days
Tomorrow's Appointments	Total number of 'confirmed' appointments (tomorrow), grouped by Vaccine Type
Remaining active time slots for today	Show # of available time slots for Today's Date.

Reports available within the Registration Reports :

Report Name	Description
Reg - Age Cohort	Total number of registrations by Age Cohort
Reg – Reason for Eligibility	Total number of eligible clients by Reason For Eligibility
Reg - Source of Registration	Total number of registrations by Phone, Portal and Web
Reg - Missing PHN	Total number of registrations with Missing PHNs
Reg – Total Number of Registrants by Day	Total number of registrations by Registration Date (Last 90 days)
Reg - Potential Duplicates	Total number of registrations with Potential Duplicates
Reg – Invalid PHN	Report that displays the names of citizens with an invalid PHN

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Report Functionality – How to Filter Reports

Once you open a report, there are a number of features that you can use to customize a report for the specific view that you would like. Below instructions show how to filter the records:

6 Reports can be filtered, by clicking on the **Filter button** on the top right of the screen.

7 A filter panel will then appear and you can set the parameters that you would like to view.

8 Date filters have many pre-set options in the Range drop down (i.e. *Today, Tomorrow, Next 30 days*, etc.).

9 For custom ranges, click the **Customize** link and input your start and end dates.
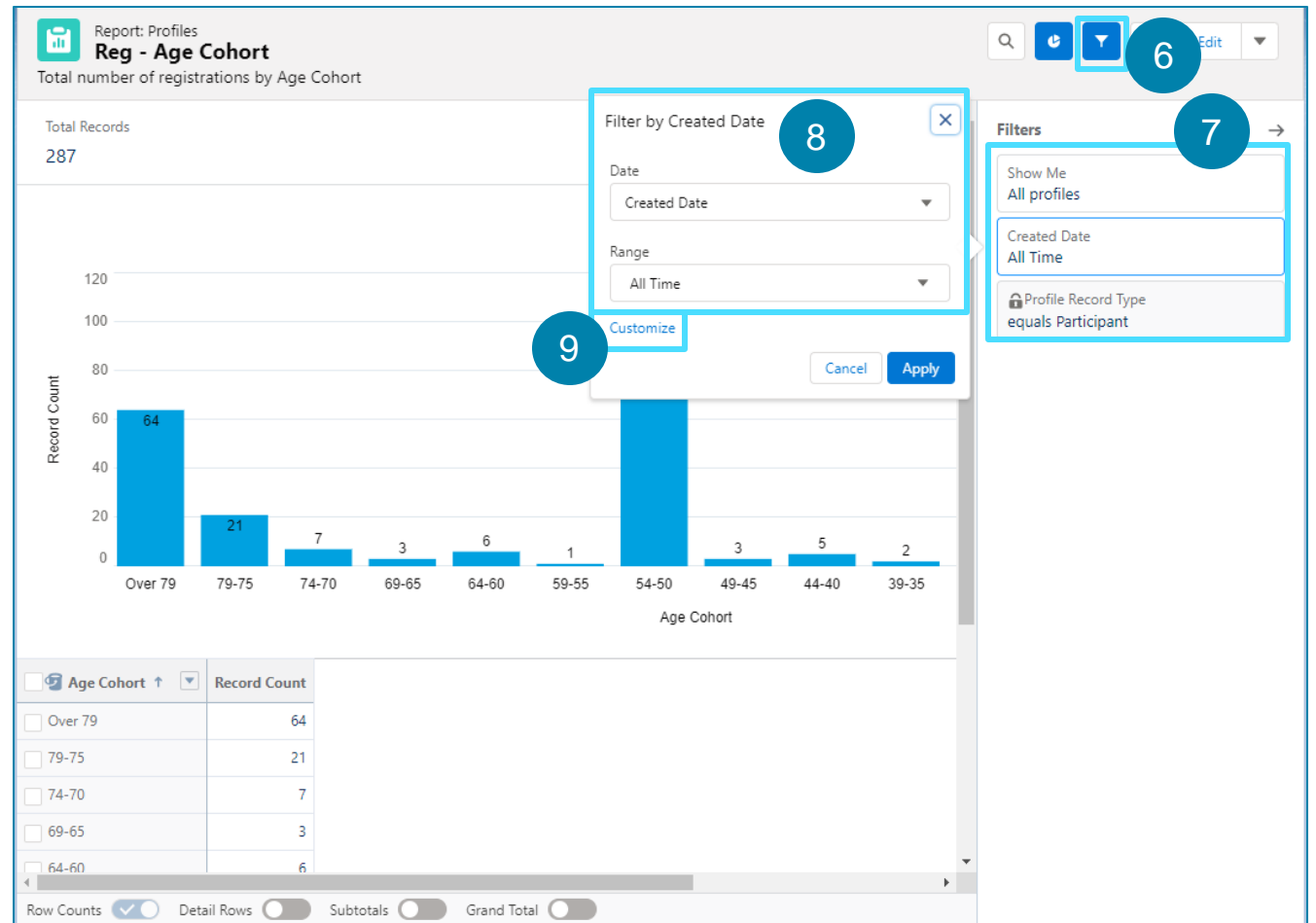
Report Functionality – How to Filter Reports (Continued)

10 If you click the **Customize** link, you are able to set a custom range for your data.

You are able to select the Start Date and End date for your data range.

11 Click **Apply.**

Note: These changes will not be saved. You will need to repeat them the next time the report is opened.

Report Functionality – How to Edit Reports

Reports cannot be edited directly. To edit a report, you must first create a copy of the report you wish to edit and save it into a private folder. Below are instructions showing how to create a copy of a report:

12 Click on **Save As** from the drop-down menu at the top right of the screen of the report you wish to edit.

13 Enter the **Report Name**.

The Report Unique Name will auto populate.

14 You may enter a **Report Description**.

This is not a mandatory field.

15 Click **Save**.

A success banner will display indicating that the report was saved.

Report Functionality – How to Edit Reports (Continued)

Once you have made a copy of the report you would like to edit and saved it in your private folder, you may edit the report by following the steps below:

16 Click **Edit**.

Edit the fields of the report as necessary.

17 Once edits are made, click **Save**.

A success banner will display indicating that the changes have been saved.

Report Functionality – How to Toggle and Customize Charts

Once you open a report, there are several features that you can use to hide or customize the chart:

18 Use the **Toggle Chart** Button to make the graph at the top of the report hide or unhide.

19 Use the **Chart Properties** button to customize the chart.

19a Control the appearance of your chart using the several options.

Note: These changes will not be saved. You will need to repeat them the next time the report is opened.

Report Functionality – How to Customize Data Table and Refresh Data

Once you open a report, there are several features that you can use to customize the data table and refresh the results:

20 Customize the table by clicking the dropdown ▾ beside a column name.
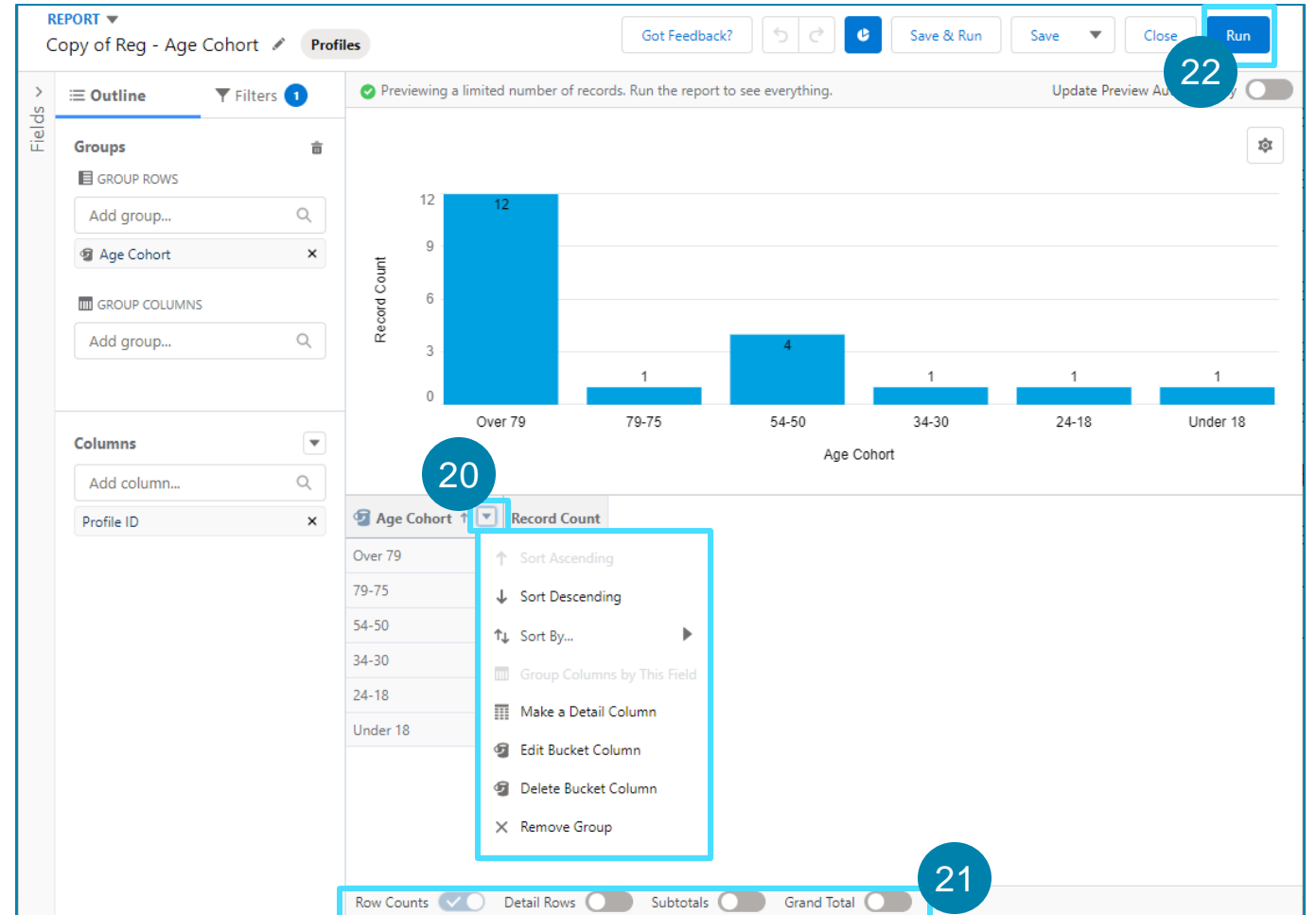
Several options are displayed here including sorting, making, editing and deleting the column.

21 You are also able to adjust the view of the subtotals and grand totals from the bottom toolbar.

Note: These changes will not be saved. You will need to repeat them the next time the report is opened.

22 Before viewing reports, click on **Run** at the top of the screen. This will update the information.

The Report view will display.

Report Functionality – How to Search Report Table and Drill Down

Once you are in a report, there are several features that you can use to search within the report table and drill down to specific records:

23 Click the **search button** 🔍 to open the search bar.

24 Enter text in the **Search Bar** to highlight specific records in the report table, for example, Age.

The selected Age will then be highlighted.

25 Click on the **checkbox** beside the Age Cohort that you would like to see more information on.

When you click in the checkbox, the drill down button will appear in the top right corner.

Report: Profiles
Copy of Reg - Age Cohort
Total number of registrations by Age Cohort

Total Records
287
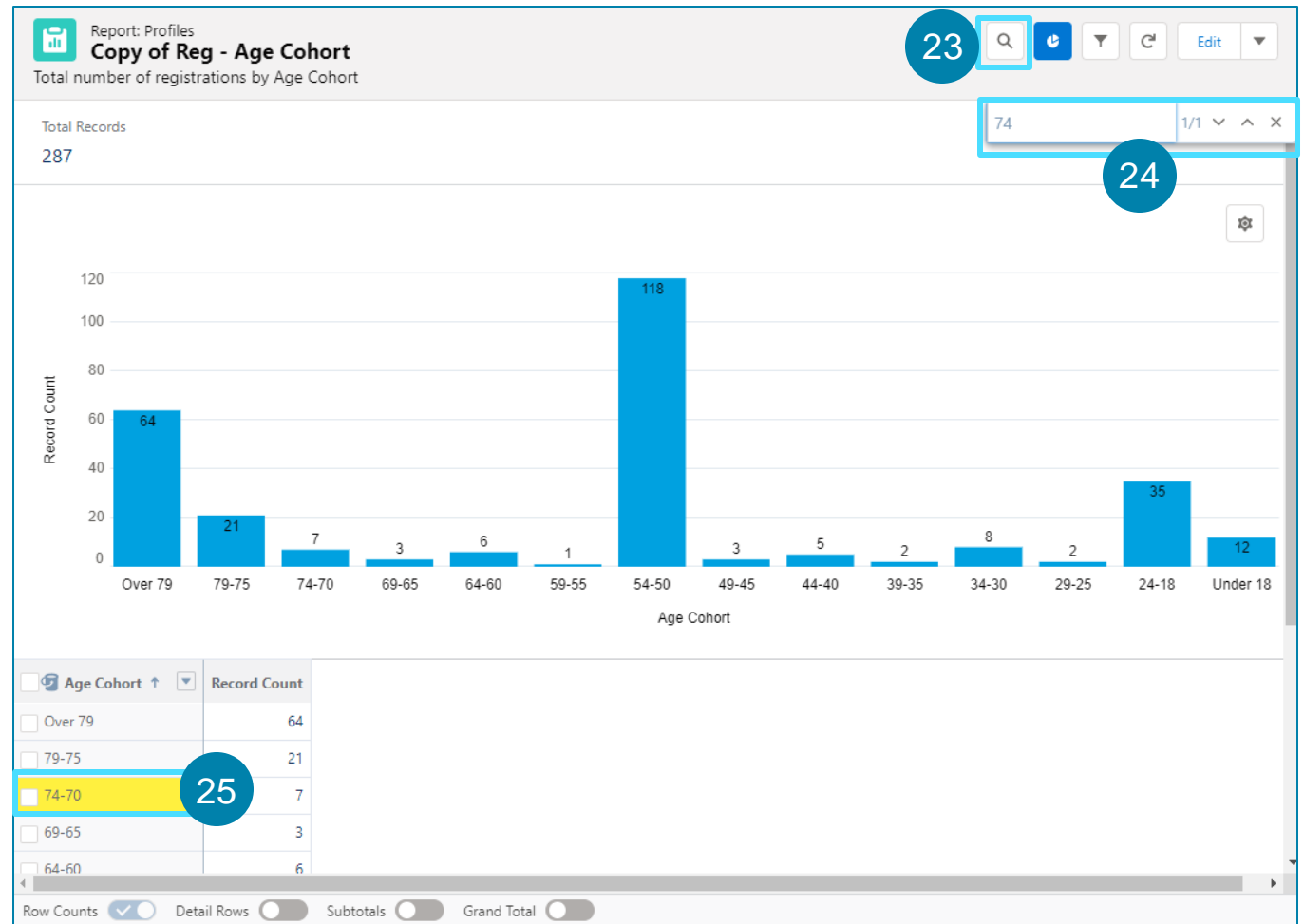
Report Functionality – How to Search Report Table and Drill Down (Continued)

26 Click on the **Drill Down** button on the top right of the screen to get more information on a particular Age Cohort.

27 You will then need to confirm that you would like to filter by the Age Cohort. Click **Apply**.

You will then be able to see a more detailed view of the Age Cohort that you selected.

Note: These changes will not be saved. You will need to repeat them the next time the report is opened.

Report Functionality – How to Export
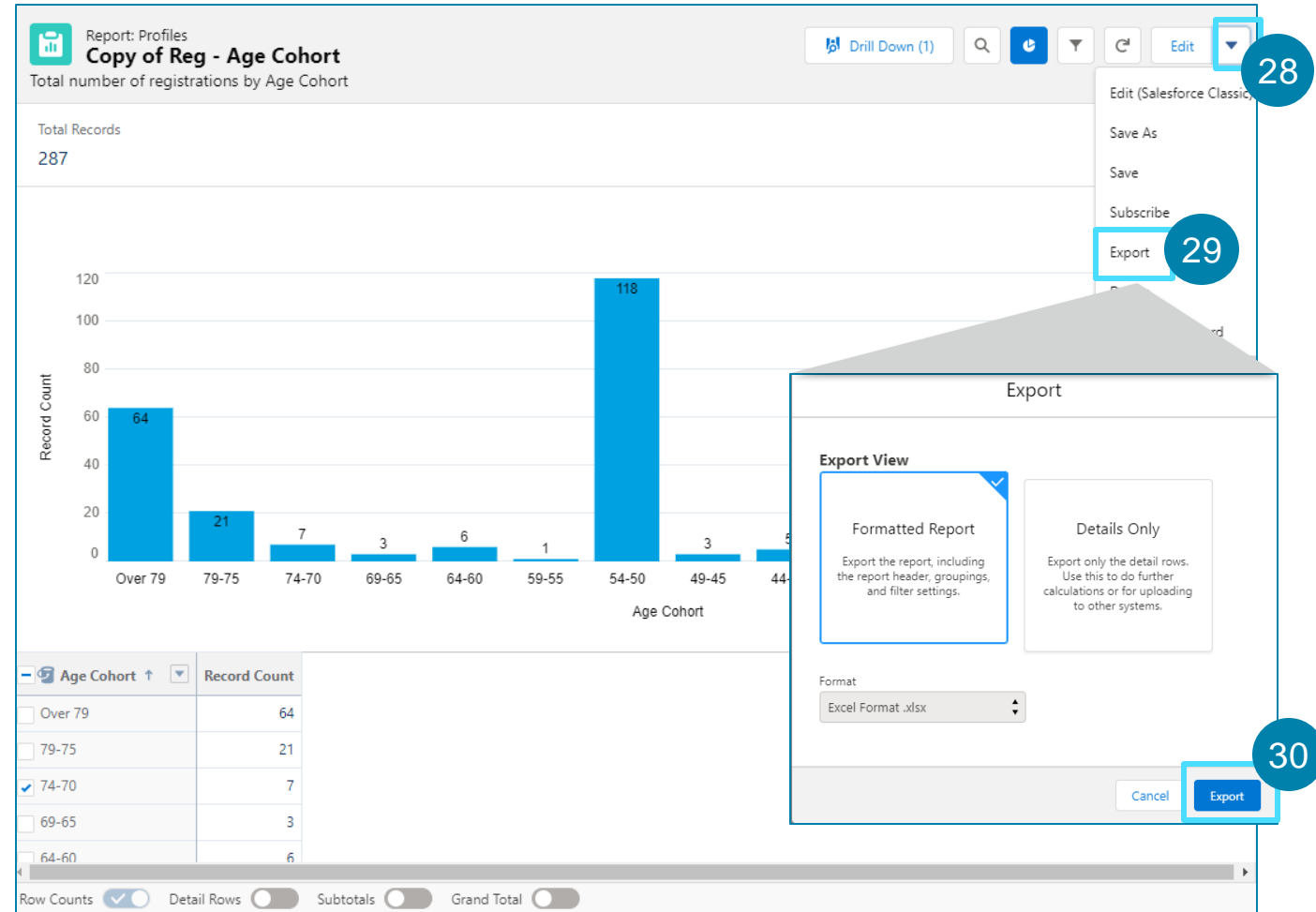
The final feature within the reports relates to the ability to export and download the reports. Use the following steps to export the report:

28 In the top right of the screen, click on the ⏷ **drop-down** button.

29 Select **Export** from the list.

You are able to export in two formats, the formatted report or the details only report. See next page for differences between the two types.

30 Click **Export**.

Report Functionality – How to Export (Continued)

30a If you choose the **Formatted Report**, you will be able to download the report into an Excel format.

The export will appear as it is in Salesforce, with the report header, groupings, and filter details.

30b If you choose the **Details Only** view, the information will be displayed in either Excel format or .csv.

The Details Only exports each detail row without formatting and is useful for doing further calculations in a spreadsheet.

Copy of Reg - Age Cohort

As of 2021-08-06 07:54:22 Mountain Standard Time/MST • Generated by Michele User Guide Test

Filtered By
Show: All profiles
Profile Record Type equals Participant

Age Cohort ↑	Record Count
Over 79	64
79-75	21
74-70	7
69-65	3
64-60	6
59-55	1
54-50	118
49-45	3
44-40	5
39-35	2
34-30	8
29-25	2
24-18	35
Under 18	12

30a

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Start Date	Location: Profile Name	Status
2021-04-04, 9:00 a.m.	Aggie Hall	Confirmed
2021-04-04, 9:00 a.m.	Aggie Hall	Confirmed
2021-04-04, 5:00 p.m.	CFB Comox - Glacier Gardens Arena	Cancelled

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List Views vs. Reports

There are some differences between a List in AVBS and custom built AVBS Reports:

LIST VIEW

1. Allows users to **view and edit data**

2. Does **not allow grouping, summarizing** and **calculating data**

3. Does **not allow exporting data** to Excel

4. Allows users to **print the table**

5. Can only display data stored on the tab in which the list view is created (E.g., Appointments)

REPORTS
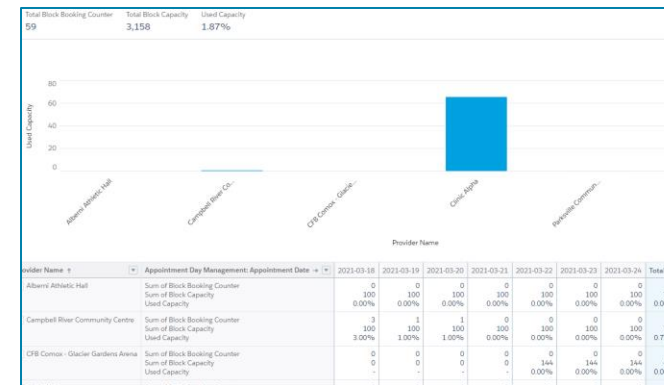
1. Does **not allow users to edit data**

2. Allow for **grouping, summarizing and calculating data** (sums, averages, etc.)

3. Allow **for easy exporting data** to Excel

4. Can display data stored on other (related) objects, depending on the Record Type selected (E.g., Registrations with Appointments)