

# TIPS & TRICKS IN CONNECT:

## *Managing Migrated Ad Hoc Reports in Reportal*

### **Introduction**

Connect's Reportal has been updated and migrated to a new version. This job aid serves as a helpful guide in resaving your migrated reports in the new version of Reportal.

During the transition, all user-designed and built Ad Hoc reports from the previous version of Reportal were converted to both an Ad Hoc View and Ad Hoc Report in the new version.

**Ad Hoc View Functionality:** Ad Hoc Views is available and can be fully utilized.

**Ad Hoc Report Functionality:** In order to successfully utilize migrated Ad Hoc Reports in the updated version of Reportal, you will need to open the Ad Hoc View and resave your reports before running them. (The steps in this document detail this process.)



### **Key Points**

- ❖ The **View / Reports** section of Reportal is the same as the prior version of Reportal. This is still where you will open/update/run Ad Hoc Views and Reports in the new version of Reportal.
- ❖ Once the migrated reports have been accessed via the Ad Hoc View and saved to Reports, you will manage them exactly as you did before in Reportal.

# TIPS & TRICKS IN CONNECT:

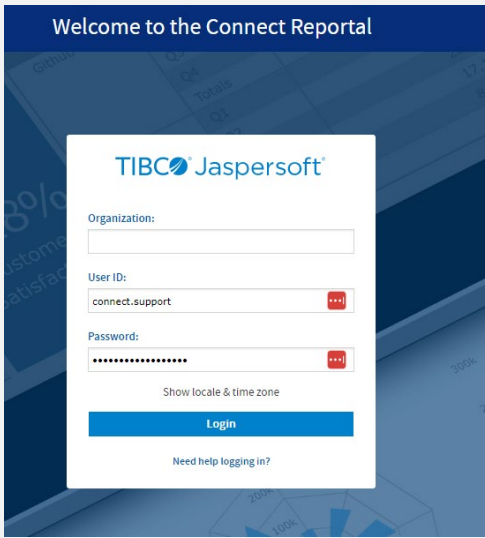
## Managing Migrated Ad Hoc Reports in Reportal

### Resaving Migrated Ad Hoc Reports

#### Logging In

To access Reportal and your Ad Hoc reports.

### Step-by-Step Guide

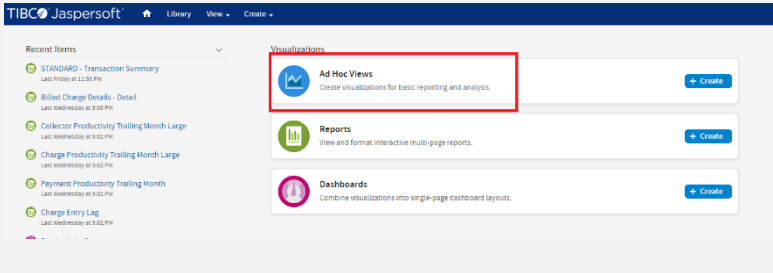
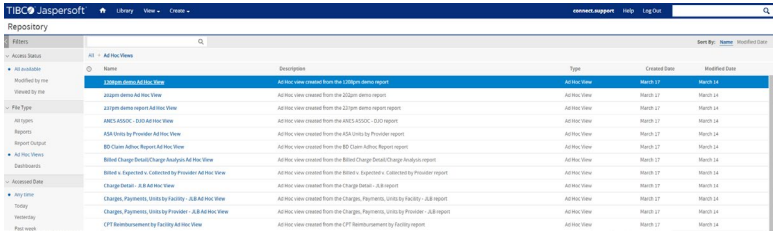
STEP	INSTRUCTIONS	SCREENSHOTS
1	<p>Navigate to the New Reportal URL: <a href="https://demo.basconnect.net/jasperserver-pro/login.html">https://demo.basconnect.net/jasperserver-pro/login.html</a></p> <p><b>NOTE:</b> Replace "demo" in the URL above with your instance name, just like you do when accessing Connect for the first time.</p>	
2	<p>Enter your <b>User ID</b> and <b>Password</b> that you use to log into Connect Back Office.</p> <p><b>NOTE:</b> Leave the <b>Organization</b> field blank.</p>	
3	<p>Click <b>Login</b>.</p>	

# TIPS & TRICKS IN CONNECT: Managing Migrated Ad Hoc Reports in Reportal

## Saving Views as Reports

Ad Hoc Views must be accessed and resaved as Reports in order to be successfully run in the new version of Reportal.

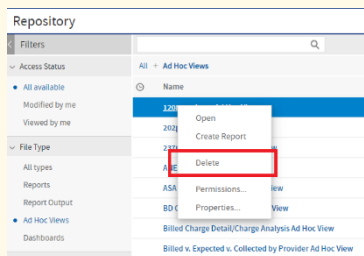
## Step-by-Step Guide

STEP	INSTRUCTIONS	SCREENSHOTS
1	Click <b>Ad Hoc Views</b> from the Home page.	
2	The <b>Repository</b> opens with a filtered view of your Ad Hoc Views migrated from the previous version of Reportal.  <b>NOTE:</b> Ad Hoc Views that were created in the migration will contain the Description "Ad Hoc view created from the XXX report".	



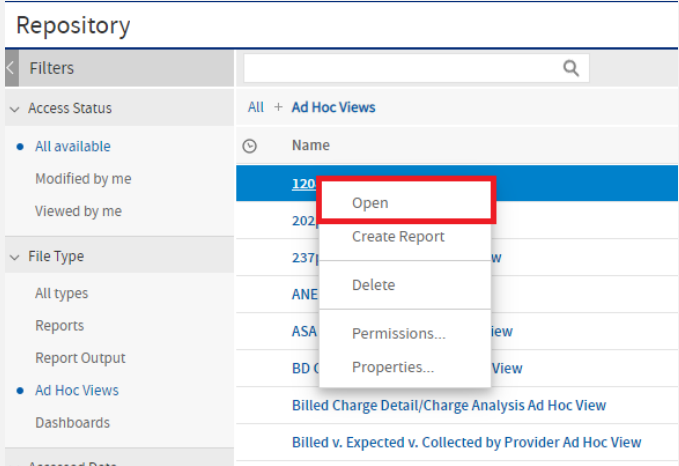
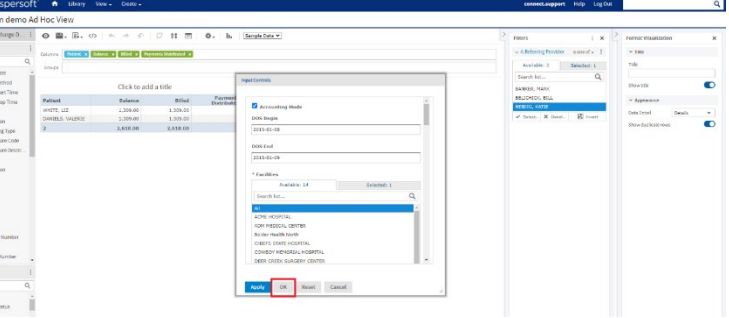
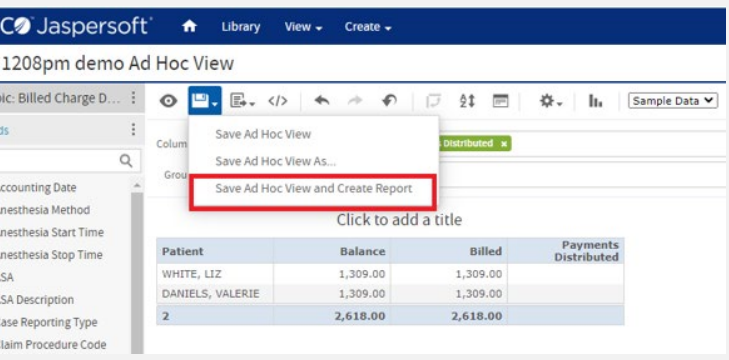
## Key Points

- ❖ It is strongly recommended to take the time to clean up and organize your Ad Hoc Views. Delete any outdated, or no longer needed, Ad Hoc Views from this page. Simply right-click on the Ad Hoc View Name and select **Delete** from the menu.



# TIPS & TRICKS IN CONNECT: Managing Migrated Ad Hoc Reports in Reportal

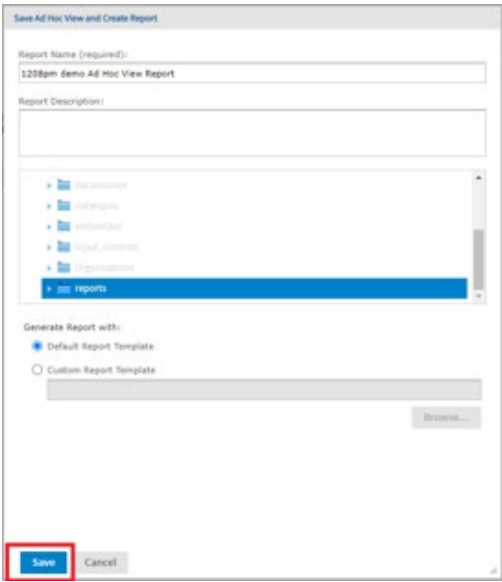
## UPDATING/SAVING AS AD HOC REPORTS

STEP	INSTRUCTIONS	SCREENSHOTS
1	<p>Right-click the desired Ad Hoc View from the list and select <b>Open</b> from the menu.</p>	 <p>The screenshot shows a 'Repository' window with a search bar and a list of Ad Hoc Views. A right-click context menu is displayed over the first item, with the 'Open' option highlighted in red. Other options in the menu include 'Create Report', 'Delete', 'Permissions...', and 'Properties...'. Below the menu, there are links for 'Billed Charge Detail/Charge Analysis Ad Hoc View' and 'Billed v. Expected v. Collected by Provider Ad Hoc View'.</p>
2	<p>From the <b>Ad Hoc View Designer</b>, update the report's <b>Input Controls</b> and click <b>OK</b>.</p> <p><b>NOTE:</b> <i>If no updates are needed, just click <b>OK</b>.</i></p>	 <p>The screenshot shows the 'Ad Hoc View Designer' interface. The 'Input Controls' dialog box is open, showing a list of input controls. The 'OK' button is highlighted in red. The background shows a data table with columns for Patient, Balance, Billed, and Payments Distributed.</p>
3	<p>From the Ad Hoc View Designer toolbar, open the <b>Save ( )</b> dropdown menu and select <b>Save Ad Hoc View and Create Report</b>.</p>	 <p>The screenshot shows the 'Ad Hoc View Designer' toolbar. The 'Save' dropdown menu is open, showing options: 'Save Ad Hoc View', 'Save Ad Hoc View As...', and 'Save Ad Hoc View and Create Report'. The 'Save Ad Hoc View and Create Report' option is highlighted in red. The background shows a data table with columns for Patient, Balance, Billed, and Payments Distributed.</p>

# TIPS & TRICKS IN CONNECT:

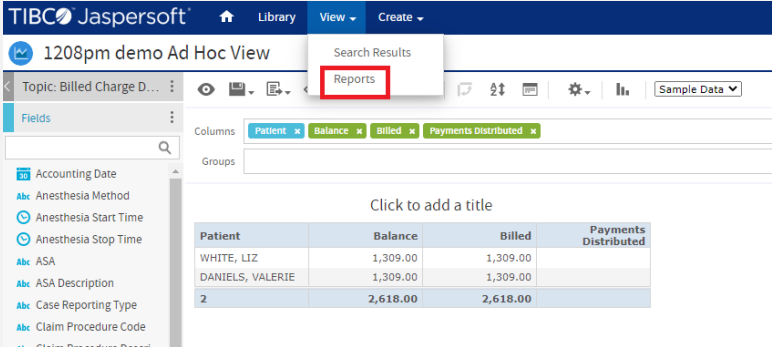
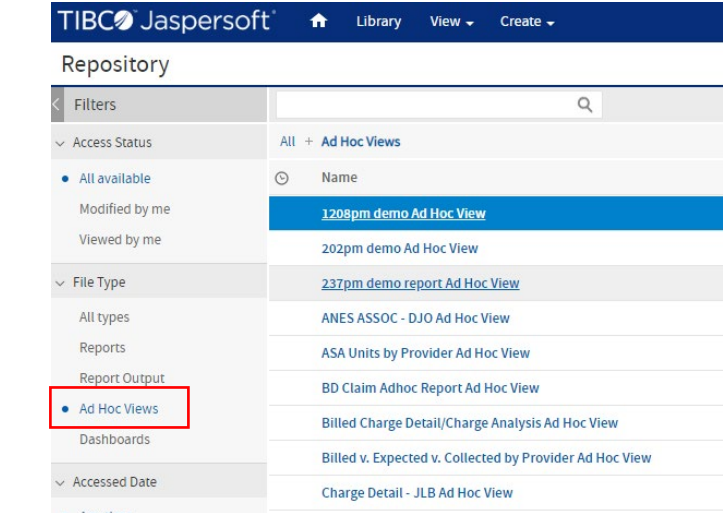
## Managing Migrated Ad Hoc Reports in Reportal

### UPDATING/SAVING AS AD HOC REPORTS

STEP	INSTRUCTIONS	SCREENSHOTS
4	<p>From the <b>Save Ad Hoc View and Create Report</b> window, update the <b>Report Name</b>.</p>	
5	<p>[Optional] Add a <b>Report Description</b>.</p>	
6	<p>Click <b>Save</b>.</p> <p><b>NOTE:</b> <i>The Report folder and Default Report Template options are automatically selected by the system and should not be changed.</i></p>	
7	<p>Navigate to the <b>View</b> menu and select <b>Reports</b> to see your saved reports.</p>	

# TIPS & TRICKS IN CONNECT: Managing Migrated Ad Hoc Reports in Reportal

## RETURNING TO AD HOC VIEWS / CONTINUING

STEP	INSTRUCTIONS	SCREENSHOTS																
1	Open the <b>View</b> menu and select <b>Reports</b> .	 <p>The screenshot shows the TIBC Jaspersoft interface. The 'View' menu is open, and 'Reports' is highlighted. The main content area displays a table with columns: Patient, Balance, Billed, and Payments Distributed. The data includes rows for 'WHITE, LIZ', 'DANIELS, VALERIE', and a summary row '2'.</p> <table border="1"> <thead> <tr> <th>Patient</th> <th>Balance</th> <th>Billed</th> <th>Payments Distributed</th> </tr> </thead> <tbody> <tr> <td>WHITE, LIZ</td> <td>1,309.00</td> <td>1,309.00</td> <td></td> </tr> <tr> <td>DANIELS, VALERIE</td> <td>1,309.00</td> <td>1,309.00</td> <td></td> </tr> <tr> <td>2</td> <td>2,618.00</td> <td>2,618.00</td> <td></td> </tr> </tbody> </table>	Patient	Balance	Billed	Payments Distributed	WHITE, LIZ	1,309.00	1,309.00		DANIELS, VALERIE	1,309.00	1,309.00		2	2,618.00	2,618.00	
Patient	Balance	Billed	Payments Distributed															
WHITE, LIZ	1,309.00	1,309.00																
DANIELS, VALERIE	1,309.00	1,309.00																
2	2,618.00	2,618.00																
2	From the <b>Filters</b> pane, select <i>Ad Hoc Views</i> under <b>File Types</b> .	 <p>The screenshot shows the 'Repository' view in TIBC Jaspersoft. The 'Filters' pane is open, and 'Ad Hoc Views' is selected under the 'File Type' category. The main content area displays a list of Ad Hoc Views, including '1208pm demo Ad Hoc View'.</p>																
3	Repeat the process for each of the Ad Hoc Views, as needed.																	