Dashboard Builder – Quick Guide

The Dashboard builder is a tool to turn SystmOne clinical reports into a more user friendly format. Reports with a Read code output can be cumbersome, with multiple lines for the same patient. The Dashboard builder lets you turn this into something which is more maneageble, such as a simple list view, dated information, or more advanced Grouped Views.

- Installation instructions can be found on the download page at www.lhits.co.uk
- Once installed, a button will appear in your computers version of Microsoft Excel which activates the tool.
- Build your report in SystmOne, run it and set the Breakdown to include Read codes (and Event Date, and Event Done By if you wish).
- Once run, click **Show Patients** and **Save All Pages To CSV**. This will open the report output in Excel. You can now press the button to activate the tool, which will bring up the following window.
- If you require any further training or advice on report building your organisation may have an analyst or trainer who may be able to help. Alternatively, we at LHITS can run a short training session or assist you in report building.
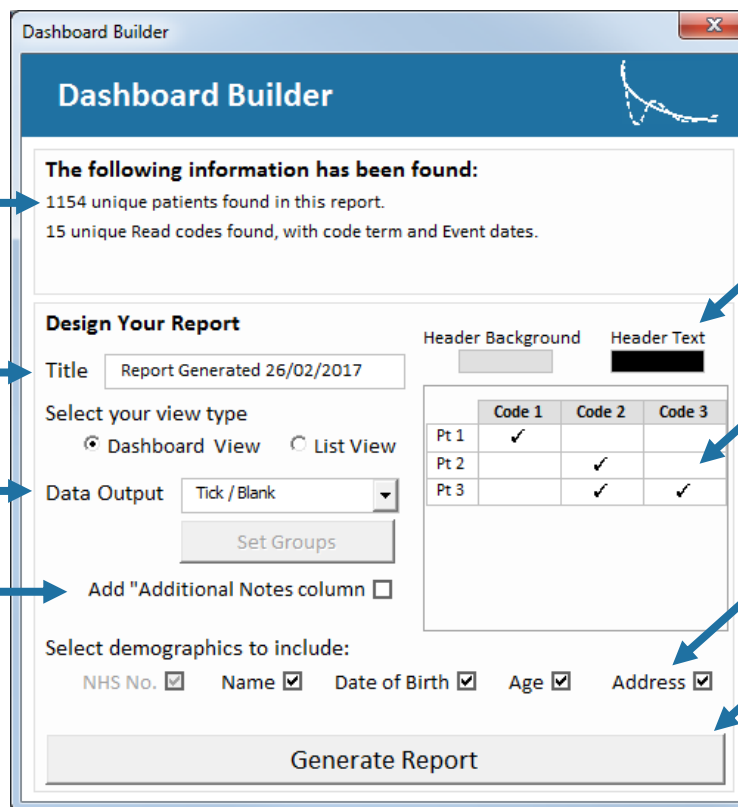
Basic Reports

If the report you have selected is valid, the dashboard builder will detect the number of patients and Read codes found, and potentially other information.

You can change the title of your report.

Select whether you would like a Dashboard or List View, and how you would like your data to be output.

Add in an additional blank column to record your own notes about each patient.

Change the header background and head text colour for your report by clicking these boxes.

The example box changes dynamically to show you how your selections will appear in your final
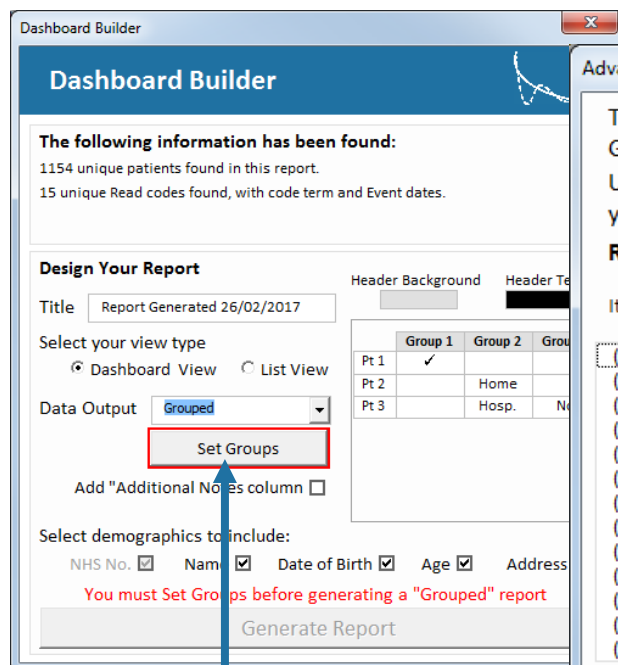
You can include or exclude additional demographic information by ticking or unticking

Once you are happy, press this button to generate your report. This will open in an excel spreadsheet set to landscape, where you can change it further if you wish.

Advanced Reports - Grouped Report

To build advanced reports, select **Data Output** as **Grouped**, and then click **Set Groups**. This allows you to review Read codes and group them into different headings in your final report, or change how the Read codes appear in the report. For example, you can set the Read code "(XaQTk) Preferred place of care – home" to simply appear as "Home" in your final report.

Use arrows to change the order and priority of a line. Headers in your final report will appear in the order the group first appears in this list.

Multiple items can be put in the same group. Only the most recent Read code will appear under that header in this case.

Select an item from the list and manually amend how it will appear in your final report.

Make the "Item to Display" a tick or cross using these buttons.
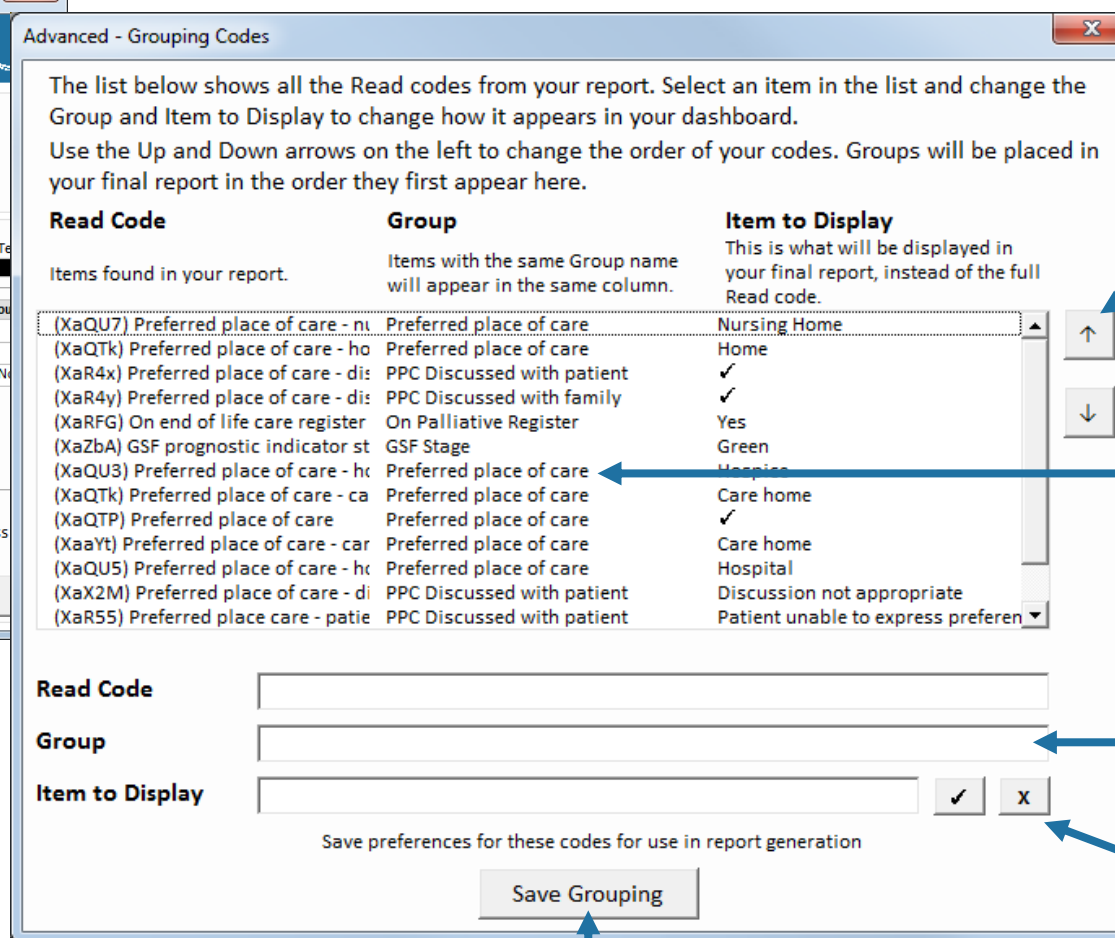
Press Set Grouping to save or amend your groups. You will not be able to generate your report until you have set your groups.

Press to save your preferences and return to the Dashboard Builder. Your preferences will be saved for future reports.

Examples