

How to Run Reports

To Run Reports, use the Built-In Reports on the right side of the Nurse Leader Dashboard.

image.png

Use the filters to retrieve the data you want in the report.

Search by RPI Progress, Competency Progress, or Module Progress. A best practice is to clear your filter before you begin your search.

RPI Progress

Item Type defaults to All Resources but can be filtered by Nurse Development Resources or Organizational Resources.

Item Status defaults to All Statuses. **We recommend using this filter to be specific in your query.** For example, select "Overdue" from the dropdown box to see everyone who is overdue in their RPI progress.

Roles default to All Selected and will search every role. You can choose specific or multiple roles.

Hospital/Unit is permission-based and defaults to all assigned hospitals and units IF users have permission. If you have multiple hospitals/units, they can be filtered using the dropdown box.

Item Assigned Date Please note that the Item assigned date defaults to the past 30 days. However, The Item Assigned Date is not automatically selected. You must click the box in front of the Item Assigned Date and select the date range you want to be included in your report. If you do not select a date range for reports, Engage will pull every user who has had the items assigned regardless of the date.

The date shown in the filter will always reflect the past 30 days, but the data is NOT filtered by this date. Once again, it defaults to the set date on your dashboard set by your organization.

Cohort is not filtered by default. If you want to filter by cohort, use the dropdown box to select the cohort.

Click Filter.

image.png

Competency Progress and Module Progress

Item Type defaults to All Resources but can be filtered by Nurse Development Resources or Organizational Resources.

Competency Type defaults to Any. **We recommend using this filter to be specific in your query.** For example, select "Competency Groups" or "Individual Competencies" from the dropdown box.

Item Status defaults to All Statuses. We recommend using this filter to be specific in your query. For example, select "Overdue" from the dropdown box to see everyone who is overdue in their competency progress.

Cohort is not filtered by default. If you want to filter by cohort, use the dropdown box to select the cohort.

Roles default to All Selected and will search every role. You can choose specific or multiple roles.

Hospital/Unit is permission-based and defaults to all assigned hospitals and units IF users have permission. If you have multiple hospitals/units, they can be filtered using the dropdown box.

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Archived is not included unless you select the box in front of "Include Archived".

Click Filter.

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