OneView© Reports Module - FAQ

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Q: Why should I use the new OneView Reports Module?

Right now, OneView reporting is available as a static download option through the built-in reports on the Team page, which limits how users can download and modify data. Each time you download the CSV, you may need to do a series of cleanups to make the report fit the need for your workflow.

Moving the CSV standard reports to a dedicated reporting module will improve how you interact with or export data for your needs. Early users report that the module is easy to use and offers great features to personalize the dataset and prepare it for future downloads.

This tool will unlock new abilities in terms of ease of use, curation, and self-serviceability. You can modify a standard report so that it offers you exactly the information you want to see (hiding and renaming columns, etc.) which you can then save for future use. You can customize all the data available in the current standard reports, and additional ad-hoc reporting will be added in the future.

Q: What kind of ad-hoc reporting will I be able to pull in this new Reports Module?

You will immediately have the ability to perform ad-hoc reporting using our standard reports as a source. The new platform offers options to summarize data fields, apply filters, visualize datasets as charts or graphs, and format column settings before export. Advanced modifications include merging reports and creating custom columns. To enable even more robust ad-hoc reporting, we will also add a new source report containing most OneView data fields, allowing you to create reports from scratch without complex data joins. Timing details will be announced soon.

Q: What makes the Reports Module better than the current reporting?

The new Reports Module will include a catalog of standard reports that can be manipulated to create the formatting you need (move/rename/hide columns), which you can then save to your personal collection. Instead of making changes manually each time you download, simply customize the report that you want to access every time! The reports will maintain data parity with the reporting you've already accessed through built-in reports on OneView Team and Tracking pages but may have slight improvements in how the data is displayed. You will be able to access their data in close to real-time and better manage how you curate and export reporting for ongoing needs.

Q: What loading speed can I expect when viewing reports online?

Report loading times can vary significantly depending on the size and complexity of the report. To give you some feedback, the tool will show a progress count in your browser tab after 30 seconds, and a final count in the report footer once it's complete. This initial loading time covers displaying the available questions, like when you open a Standard Report. However, applying filters, summaries, or sorting will require additional processing time.

For large datasets, it may be faster to download the report as an Excel file and perform those actions there, as each filter or sort within the web application requires the data to be reprocessed.

Q: How long does it usually take to download a report file?

The download speed depends on the number of rows and your computing system. The front-end data tool will only load 2,000 rows, though the full report can be aggregated with summarization or filters. Files with more rows can be downloaded as a CSV or XLXS with up to 1 million rows. If you experience issues downloading reports of this size, please submit a support request for alternative methods of report sharing.

Q: How often is the data updated in the Reports module?

After entering data into OneView, it typically takes approximately 3.5 minutes for that data to appear in the Reports module during standard business hours. However, if data is entered outside of business hours, the update to the Reports module may take significantly longer.

Q: Why does it take longer to filter or sort certain columns?

When you use an online reporting tool, every time you filter or sort data, the system needs to reload and process the information from the internet. This can take more time compared to using Excel, where the data is already saved on your computer and doesn't need to be reloaded every time you make a change. If you always need the data filtered the same way, then it makes sense to apply them in the online tool one time and save the report to your Personal Collection. Otherwise, it may be easier to download the file and add filters in Excel.

Report Setup

Q: Which time zone is used?

All report timestamps are set in Eastern Time Zone. You can always click on a column header for the time stamp (most often used on Updated Date) and see the time zone included.

Q: Why is the Licensure report different between built-in reports and the new Reports Module?

While these new reports will include the same data, a few reports have been adapted to use our new data model more effectively. The Licensure report will include State, DEA, and Controlled Substance licenses on individual rows, instead of capturing license numbers and dates across additional columns.

Consider how this may require change to your team's internal processes for imports or other automation, though the reports will still be available on the Team page for a period of time to allow you time to adjust. Q: Why does it take longer to filter or sort certain columns?

Q: Is there a way to move columns from one report to another? How can I add data points that aren't currently in a report?

The reports available in this new module will match the standard reports that you currently have access to. This module does not allow you to add new columns or data points – any requests like that would need to be accommodated through a new request via a support ticket.

Q: Can encrypted fields like SSN be added to my report?

Requests for new columns will also need to be sent in via a support ticket, though we have finalized the work to securely share encrypted fields in reports.

Q: Will the web reports be added to the new Reports module?

TBD – We don't currently have a plan or timeline for these, so users can continue to access them through the Team page.

Q: Does OneView have other reporting capabilities?

Users in the OneView V2 section should also be familiar with the grid reporting capability that allows you to download the information visible to the grids to CSV or Excel files. These reports are available at the grid level and will match the filters and column settings applied to each grid.

Report Permissions

Q: How can I share the reports I create with everyone on my team?

To enable team-wide collaboration on customized reports and dashboards, we offer 'Curator' access. This permission level allows designated users to modify and save reports to a shared 'Curated' folder. To maintain data integrity and ensure consistent reporting, we recommend assigning Curator access to 1-2 users with strong data analysis skills. Please submit a request to enable this access.

Filtering Data

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Q: How do I filter for multiple specific text entries within a single search?

To search for multiple specific text entries in one go, the 'Contains' filter, which finds items including text like 'Aetna,' works for single entries only. For multiple exact entries, use the 'Is' filter, which offers a dropdown selection. Or, use the advanced filter editor to combine multiple 'Contains' conditions.

Third-Party Information

Q: What is Snowflake?

Snowflake is the preferred data warehouse that is used by Modio which will allow us near-real time reporting for our clients. It facilitates the data model that is used for the standard reports and can be ramped up or down to accomplish any data task. Snowflake is an industry-leading vendor which will give us additional capabilities moving forward for any clients who also use Snowflake for their data efforts.

This includes Data Share, an option allowing for the secure, real-time, and scalable sharing of data between organizations. More is available in this marketing guide about the Snowflake data share process.

Q: What is Metabase?

Modio has partnered with Metabase, a leading business intelligence platform, to power our new OneView Reports module. This strategic partnership, similar to our integration with DocuSign for the Forms module, allows us to leverage Metabase's robust analytics capabilities and optimized data queries. This provides our customers with powerful self-service reporting tools to support crucial credentialing workflows, enabling the creation of custom charts and dashboards from diverse data sources.

Our Modio Business Intelligence team has extensive experience with Metabase, and we have selected the Enterprise version to ensure a superior user experience. We have customized the module to specifically address our clients' reporting needs, resulting in a streamlined interface that may differ from general Metabase documentation.

As a third-party integration, the Reports module's availability is subject to Metabase's upgrade schedule and potential downtime. We are committed to proactively communicating any service impacts to our customers, ensuring they can effectively utilize the Reports module for their reporting requirements.

Q: What does “Model” mean?

In Metabase, a model is a curated version of a table designed to help answer common questions more easily. Behind the scenes, our Business Intelligence team does a lot with data models. In fact, all the standard reports you rely on are built from data models in Snowflake, our primary data warehouse. While you may see a “model” referenced within Metabase, you will not be able to create them yourself as a user.

See other terms you’re unfamiliar with? Check out the link below.

Most of the language is set by Metabase and how they organize the tool. If you are looking for more specifics, use this link to the Metabase glossary.

Need help or have more questions? Contact our live chat support or email support@modiohealth.com