

# HOW TO USE THE INTERACTIVE TOOL



## How do I produce a report?

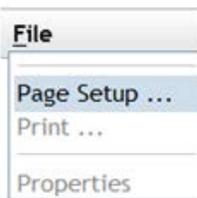
The [Launch Interactive Tool](#) link located on each individual Clearinghouse report page will provide you with access to generate a report. You must click on the link from the report page from which you wish to generate a report.



The tool will open up to a prompt page where you will make data selections for your Ad Hoc Report.

## Prompt page menu bar:

### File



### Page Setup

- This allows you to change the paper and print orientation of your report.
- The default is Landscape.

## General Steps:

- You must select data from each of the prompts.
- Each prompt will provide you with the available data based on your previous selection.
- You may clear all data selections from the “selection” containers at any time by clicking on

[Reset to Default](#) at the top right corner on the prompt page menu bar.

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## Report Prompts: (vary by report)

### Year:

- Select the specific year in which you would like to review data. The drop-down list will default to 2012 if that is the only year available for report generation.

### County:

- Select the County(ies) for the Occupation search you would like to include in your report.

### Occupation:

- Select the Occupation of interest by choosing **one**:
  - Physicians and Surgeons (MDs), or
  - Another specific Healthcare Occupation

### Specialty:

- Select a defined Specialty(ies) area of care:
  - Specialties will be returned for Physicians and Surgeons (MDs) Only
  - Select "No Specialty Available" for all other Healthcare Occupations that do not have a Specialty

### License Type:

- Select a License Type(s):
  - Selections for Physicians and Surgeons (MDs) are A, C, G, AFE, CFE, GFE
  - Select the Occupation Initials for all other Healthcare Occupations

### Academic Year:

- Select from years 1999-2009.
- You may make up to three (3) selections.

### Institution Name:

- Select an Educational Institution.
- You may make up to three (3) selections.

### Discipline Title:

- Select an Educational Program.
- You may make up to three (3) selections.

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## PROMPT Examples: (vary by report)

\*Select a Year:

2012 ▼

- The year drop-down list will default to 2012 in the “Supply” reports, if there are no other years of data available for selection.

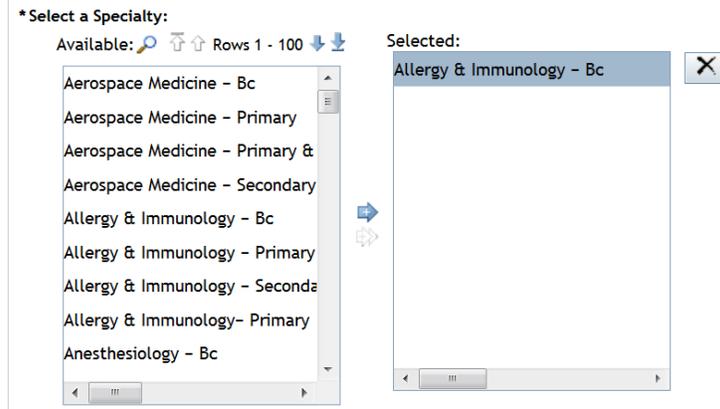
\*Select a County:

Available:	Selected:
Alameda	Butte
Alpine	Amador
Amador	
Butte	
Calaveras	
Colusa	
Contra Costa	
Del Norte	
El Dorado	

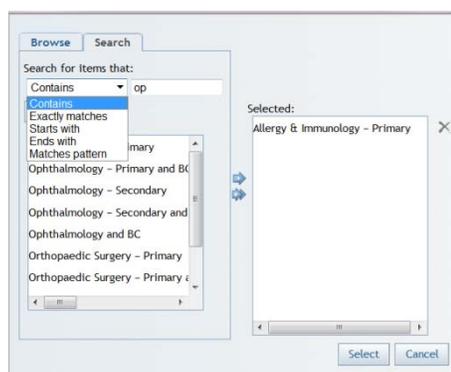
Apply

- Select your data from the “Available” container:
  - Click on your selection to highlight it.
  - Click on the center arrow to move your data selection to the “Selected” container or double click on your selection.
  - Click on the double arrow to move “all” rows of data over to the “Selected” container.
    - When the arrows are grey the system has intentionally prevented the “all” rows of data selection due to the volume of data available. Or when a limit has been placed on the number of selections that can be made.
- To remove a selection from the “Selected” container:
  - Click on the item and click on the “Delete” button or double click on the item.
- To accept your selection and move on to the next prompt:
  - Click on the “Apply” button, if presented, if not move onto the next prompt.

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- Some prompts may return a significant amount of data from which to select. Icons are displayed at the top of the prompt container to assist in searching for your selection:
  - To view complete titles, scroll to the right using the scroll bar located at the bottom of the container.
  - To move up and down the list use the scroll bar located on the right side of the container.
  - Click on the “top of the list arrow” to return to the first row on the list or the “up arrow” to return to the previous 100 rows of the viewable list.
  - Click on the “down arrow” to turn to the next 100 rows on the viewable list or the “end of the list arrow” that takes you to the last row on the list.
  - Click on the “Magnifying glass” to open up the Browse/Search functionality.



## **Browse Tab:**

- Click on the Browse tab, if there are less than 100 rows of data displayed use the scroll bar on the right side of the container to scroll up or down the list.
- The “up” and “down” arrows will display if more than 100 rows of data are returned.

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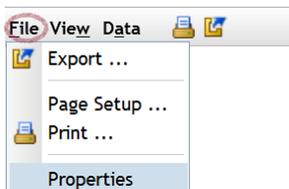
## Search Tab:

- Click on the Search tab and then on the drop-down arrow in the search box that defaults to “contain”.
  - Click on the type of search you want to perform.
  - Type in your search criteria in the next field.
  - If you choose “Matches Pattern” it requires the use of a “WildCard” to complete your search. A WildCard is a character (\*) that may be substituted for any of a defined subset of characters.
  - Click on the Search button and all data based on your search criteria will display for selection in the prompt box.
- After completing all Prompts:
- Click on the  “View Report” button located on both the top and bottom of the screen and the report will display based on the data selected.

## **Menu Bar Functions:** (upper left corner of results page)

### File

- Provides the following drop-down menu:



### Export

- Exports data in a Zip File to either “Excel” or “HTML”.

### Page Setup

- This option allows you to change the paper orientation.
- The default is Landscape.

### Print

- Click on “Print”.
- Click “Print to PDF”. A PDF report will be created in a separate window.
- A new “page” will present for you to re-select “Landscape” as your paper orientation for your PDF and then click on OK.

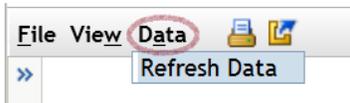
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## *How do I “go back” to create a new report?*

### Data

- Provides the following drop-down menu:



### Refresh Data

- This option allows you to “go back” to the prompts to select and apply different data for another report.
- To remove a previous selection from the “Selected” container:
  - Click on the item and click on the  “Delete” button.
  - OR Click on  “Reset to Default” in the prompt page header. This will clear the previously selected data from all of the prompts.

### Browser Back

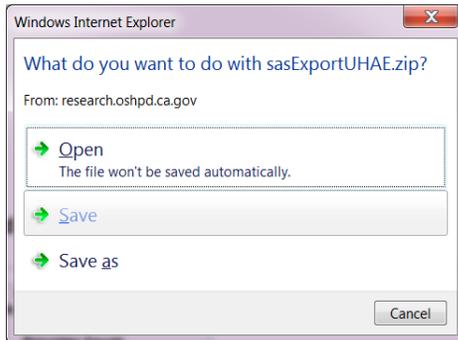
- Clicking on the  “back arrow” on the top left corner of the browser will take you back to the report prompt screen.
- Click on  “Reset to Default” in the prompt page header. This will clear the previously selected data if you want to produce a different report.
- If you try to “delete” the individual selections inside the selection container you will receive an error.

## *How do I export a report?*

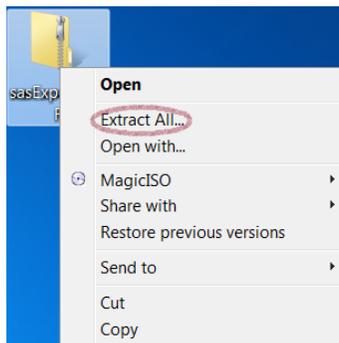
### Export Button

- Allows you to Export your report in a Zip File
- Click on the  “Export Icon”

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- Click on **“Open”**
- The Export folder and both Excel and HTML files will appear, however, the files are empty until you complete the next steps.
- Click on  “Extract all files” in the top menu bar
- Select the destination to which you want to save the Zip file
- Go to the destination to which you saved the Zip File
- An Excel file will be available to open “if” you have Excel on your computer
- OR click on the “SAS folder” in the same location which will provide you with an Excel file or an HTML file to open
- Click on **“Save”** or **“Save as”**
- Select the destination to which you want to save the Zip file
- Go to the destination to which you saved the Zip File



- Right Click on the Zip File
- Select **“Extract All”** **NOT** Open
  - If you select **“Open”** the files will be empty, so you must first extract all of the data files prior to opening
- Select your Destination and click on the Extract button
- There will be a **“Folder”**, an Excel, and an HTML file available to open
- Double click on either the Excel or the HTML file to open

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## Right Mouse Click Export:

- You may right click on the body of your report and select “Export Table”
- Select Excel, Word or a Comma Separated Values (.csv) format
  - This will be a data only file, and will not include graphics or logos but will include column headers
- Select “Open” to view the file
- Select “Save” which will download the file directly to your system
- Select “Save As” which will provide you with the option to select the destination for your downloaded file

## *How do I use the “Download All Data” feature on the Report Web Page?*



The Clearinghouse provides you with the ability to download all data that is available in each report. You must click on the “Excel or CSV” link located underneath “Download all Data” on the report website page from which you choose to collect the reporting data.

- If you have a computer that has Excel software on it both the Excel and CSV options will open in Excel.
- Click either the Excel or CSV link.
- You will be provided the ability to either open or save the Excel or CSV data file to your computer.
- Only data and the column headers will download.
- If you do not have Excel software on your computer the file will be provided in a CSV file format.

## *How do I return to the Clearinghouse website?*

### Close the Browser

- It is **important** to close the report prior to selecting another report type.