

ePlan Module Reports

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The purpose of this document is to provide users with an understanding of what the report is used for and to show what it looks like.

The tree below lists all of the available reports within ePlan which is also dependant on the permission level of the user (figure 1). Not all users have access to projects which are not assigned.

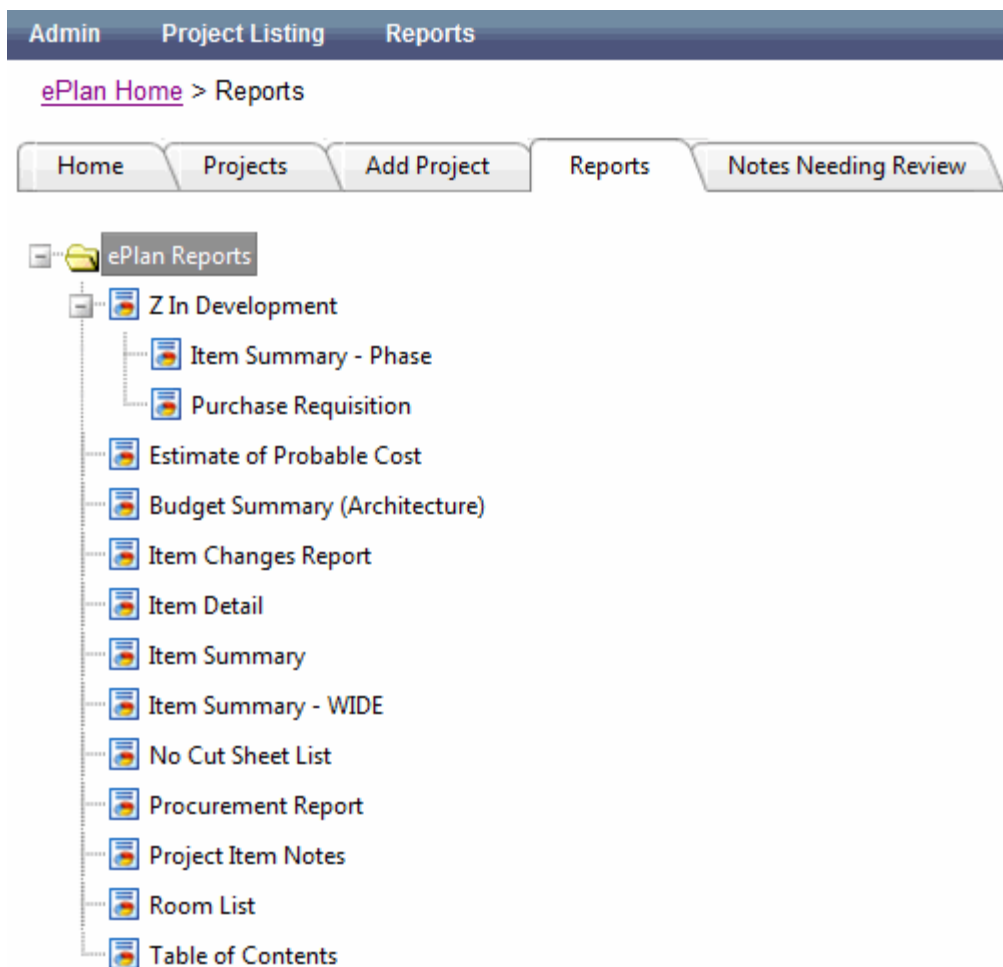


Figure 1

All reports listed in the “Z In Development” folder are still in the testing phase; therefore, it’s not recommended that these reports be used until they are moved out of the “Z In Development” folder.

AdminProject ListingReports

ePlan Home > Reports

HomeProjectsAdd ProjectReportsNotes Needing Review

ePlan Reports

Z In Development

Estimate of Probable Cost

Budget Summary (Architecture)

Item Changes Report

Item Detail

Item Summary

Item Summary - WIDE

No Cut Sheet List

Procurement Report

Project Item Notes

Room List

Table of Contents

Estimate of Probable Cost

Project Id2nd Floor Cardiology/Lab (71)

EXCLUDE: Furnish/Install

C/C

O/C

O/O

O/V

☒ Show Filter Selections on Reports

Run Report

Reset

1/24/2016

Budget Summary (Architecture)

Admin Project Listing Reports

ePlan Home > Reports

Home Projects Add Project Reports Notes Needing Review

ePlan Reports

- Z In Development
 - Estimate of Probable Cost
 - Budget Summary (Architecture)**
 - Item Changes Report
 - Item Detail
 - Item Summary
 - Item Summary - WIDE
 - No Cut Sheet List
 - Procurement Report
 - Project Item Notes
 - Room List
 - Table of Contents

Budget Summary (Architecture)

Project Id: 2nd Floor Cardiology/Lab (71)

EXCLUDE: Architecture: 0
 Permanently Attached To Building
 Electrical Not Attached
 Non-Electrical Not Attached
 Surgical Instruments

EXCLUDE: Furnish/Install: C/C
 O/C
 O/O
 O/V

☒ Show Filter Selections on Reports

Run Report Reset

Using the above search criteria displays the projects budget by department without any breakout as is found in the Item Summary and totals the project at the bottom.

Budget Summary (Architecture) close window

1 of 1 100% Find | Next

Budget Summary By Department and Architecture

Report Created by: Team Support Desk @ 8/2/2012 12:03:51 PM

Department	Forecasted New (MFP)	Equipment Purchased (MFP)	Projected MFP Total (New+Purchased)	Established Budget	Variance	Contributed Funds (MBO)	Hold or Future
Dialysis Clinic							0
							0

Projected MFP Total:

Inflation:

Contingency:

Approved Equipment Budget:

Variance:

If Inflation percentage or Contingency percentage was selected, the amounts would be displayed in conjunction with Approved Equipment Budget, Variance and Contributed Funds from the MBO. This is EXCLUDING Architecture and Furnish/Install items for this report.

Item Changes Report

Admin Project Listing Reports

[ePlan Home](#) > Reports

Home Projects Add Project Reports Notes Needing Review

ePlan Reports

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Item Changes Report

Project: --- All Projects ---

Department: --- All Departments ---

Room: --- All Rooms ---

* From Date:

* To Date:

Change Type: All Types

Change Field: All Fields

Intermediate Changes: All Intermediate Changes included

Group By: Room by Room

☒ Show Filter Selections on Reports

Click on “Run Report” when a search criterion is completed.

This displays a list of changes or additions using the date range that is selected.

Item Changes Report close window

1 of 2 ? 100% Find | Next

Item Change Report - by Room

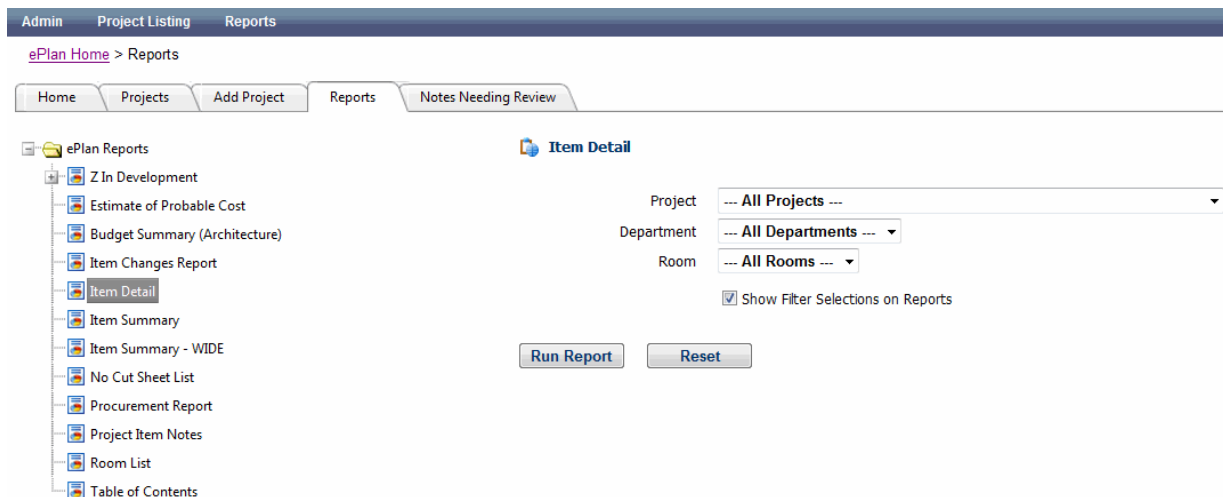
From: 06/03/2012 To: 08/01/2012

Report Created by: Team Support Desk @ 8/2/2012 12:06:46 PM

5D
5D
5D1

Chg date	Chg type	AltID	Item/Mfgr/Model	qty	Field N	Old Value	New Value
6/6/2012	ADD		Adapter for Pole Mount/Edwards Lifesciences/MHAPLMNT	1			
6/6/2012	ADD		Allowance, Signage/To Be Determined/TBD	1			
6/6/2012	DEL		Allowance, Signage/To Be Determined/TBD	1			
6/6/2012	ADD		Compass Modular Wall System/Herman Miller/TBD	1			
6/6/2012	CHG		Compass Modular Wall System/Herman Miller/TBD	1	Cost	\$	
6/6/2012	ADD		Gel Dispenser Touch Free/Ecolab INC/92021121	1			
6/6/2012	ADD		Monitor Vigileo/Edwards Lifesciences/MHM1	1			
6/6/2012	ADD		Monitor Samsung 17" LCD/Sound Computers/17" LCD	1			
6/6/2012	ADD		Modular Optical/Edwards Lifesciences/OM2MH	1			
6/6/2012	ADD		TV Security Screw kit/Philips Consumer Electronics (see TeleHealth Serv.)/THLCDSHW	1			
6/6/2012	ADD		26" TV Wall mount/Lucasey Mfg Corp - through	1			

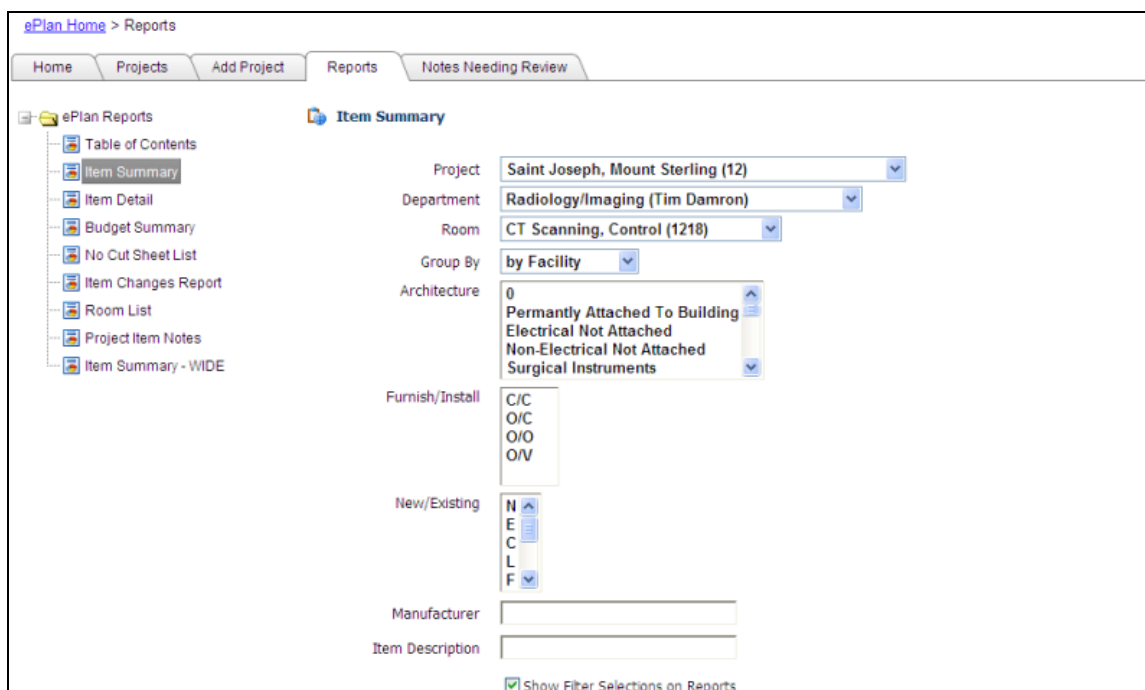
ITEM DETAIL



The screenshot shows the ePlan Reports menu on the left with 'Item Detail' selected. The main area is titled 'Item Detail' and contains filter dropdowns for Project (--- All Projects ---), Department (--- All Departments ---), and Room (--- All Rooms ---). There is a checkbox for 'Show Filter Selections on Reports' and two buttons: 'Run Report' and 'Reset'.

Item Detail will provide Description, Manufacturer, Model and each items architectural requirement including locations in this format shown at 50% (below).

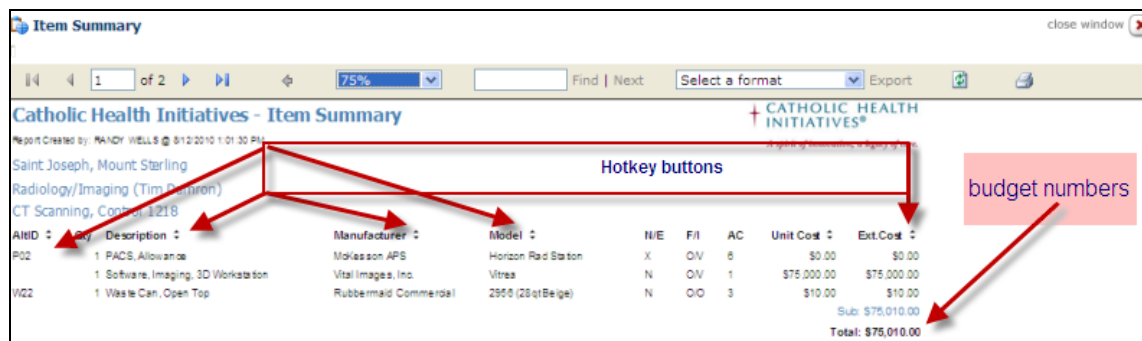
ITEM SUMMARY:



The screenshot shows the ePlan Reports menu on the left with 'Item Summary' selected. The main area is titled 'Item Summary' and contains filter dropdowns for Project (Saint Joseph, Mount Sterling (12)), Department (Radiology/Imaging (Tim Damron)), Room (CT Scanning, Control (1218)), and Group By (by Facility). There are also dropdowns for Architecture (0, Permanently Attached To Building, Electrical Not Attached, Non-Electrical Not Attached, Surgical Instruments), Furnish/Install (C/C, O/C, O/O, O/V), New/Existing (N, E, C, L, F), Manufacturer, and Item Description. There is a checkbox for 'Show Filter Selections on Reports'.

Because of how ePlan provides data the item summary is the most frequently used report.

Under Item Summary you can look for department or room items. If you do not select from the pull-down choices (previous screen), it will display in a group order the entire project(s) selected for review. You have access to the hotkey buttons in this report also.



Item Summary

Report Created by: RANDY WELLS @ 5/12/2010 1:01:30 PM

Saint Joseph, Mount Sterling
Radiology/Imaging (Tim Damron)
CT Scanning, Contact 1218

Hotkey buttons

budget numbers

A/RID	Qty	Description	Manufacturer	Model	N/E	F/I	AC	Unit Cost	Ext. Cost
P32	1	PACS, Allowance	Mohrson APS	Horizon Rad Station	X	O/V	6	\$0.00	\$0.00
	1	Software, Imaging, 3D Workstation	Vital Images, Inc.	Vitrea	N	O/V	1	\$75,000.00	\$75,000.00
W22	1	Waste Can, Open Top	Rubbermaid Commercial	2950 (29qt Beige)	N	O/O	3	\$10.00	\$10.00
								Sub:	\$75,010.00
								Total:	\$75,010.00

You can also use this (typically equipment planners) for finding budget numbers rather than the Budget Summary. (Budget Summary may produce a figure which is different than the total under Item Summary.) The item summary displays the actual items to verify what makes up total costs. For example: This week all of a sudden the equipment budget for project 32 is \$1M higher than it should be. Looking through the item summary you can quickly see the variance and why. The budget summary will just provide figures without explanation.

Item Summary: cont'd

The item summary is very useful for all kinds of data mining but not for all user reviews. A listing by room will generate an excel sheet with tabs for each room. This is not the standard method for this type of request. All rooms should be on the same page broken out by room. To get around this, the wide item summary was developed (see below). However this report does not break out by room but rather alpha numerical order. The WIDE summary has no hotkey button feature.



Item Summary

Report Created by: RANDY WELLS @ 5/12/2010 12:39:10 PM

Saint Joseph, Mount Sterling
Radiology/Imaging (Tim Damron)

Select type of export

Excel Export

A/RID	Qty	Description	Manufacturer	Model	N/E	F/I	AC	Unit Cost	Ext. Cost
-------	-----	-------------	--------------	-------	-----	-----	----	-----------	-----------

NOTE: It can be exported to excel, filtered and then cut and pasted, but in review mode it should be in a useable format by default.

Item Summary – WIDE:

The wide item summary was developed as a feature to see the entire spreadsheets information where the item summary was only displaying a few sortable columns (see item summary above). However this report does not break out by room but rather in alpha numerical order. The WIDE summary has no hotkey button feature (below is at a 25% view).

As the name implies this is a WIDE report with many columns of information.
Column Headers from left to right:
AltID: QTY: Description: Manufacturer: Model: N/E (new/existing)
F/I (furnished/installed): AC (Architectural code): Unit Cost: Ext. Cost
Project Name: Department Name: Room Name: Room Number

1/24/2016

Home
Projects
Add Project
Reports
Notes Needing Review

ePlan Reports

- Table of Contents
- Item Summary
- Item Detail
- Budget Summary
- No Cut Sheet List**
- Item Changes Report
- Room List
- Project Item Notes
- Item Summary - WIDE

No Cut Sheet List

Project: Saint Joseph, Mount Sterling (12)
Department: Radiology/Imaging (Tim Damron)
Room: --- All Rooms ---
Group By: by Facility
Manufacturer:
Description:
☒ Show Filter Selections on Reports

Run Report
Reset

No Cut Sheet List - Displays items without cut sheet information within the selected parameters.

No Cut Sheet List
close window

1 of 2
100%
Find | Next
Select a format
Export

Catholic Health Initiatives - No Cut Sheet
CATHOLIC HEALTH INITIATIVES®
A spirit of innovation, a legacy of care.

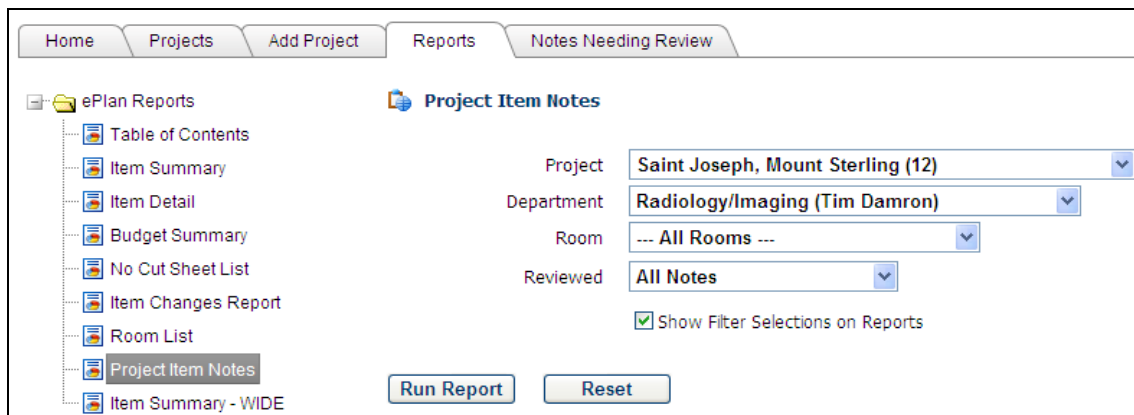
Report Created by: RANDY WELLS @ 8/12/2010 1:26:04 PM

Saint Joseph, Mount Sterling
Radiology/Imaging (Tim Damron)

AltID	Description	Manufacturer	Model
	Software, Imaging, 3D Workstation	Vital Images, Inc.	Vitrea

Project Item Notes:

Select appropriate project, department, and room reviewed and click on “Run Report” to see status of changes made in notes.



The screenshot shows the 'Project Item Notes' form within the 'ePlan Reports' application. The form has a sidebar with a tree view of report categories: Table of Contents, Item Summary, Item Detail, Budget Summary, No Cut Sheet List, Item Changes Report, Room List, Project Item Notes (selected), and Item Summary - WIDE. The main area contains filters for Project (Saint Joseph, Mount Sterling (12)), Department (Radiology/Imaging (Tim Damron)), Room (--- All Rooms ---), and Reviewed (All Notes). There is a checkbox for 'Show Filter Selections on Reports' which is checked. At the bottom are 'Run Report' and 'Reset' buttons.

Running this report generates the compiled list of changes made in “Notes” for the selected department or other filter selection.

This is also exportable to several formats.



The screenshot shows the 'Project Item Notes' report output window. It displays a table with columns: Room Name, Room No., Alt ID, Item Description, Rev?, and Item Note. The report is filtered for Project 12, Department 134, and Reviewed 0. The table lists various items and their associated notes, including quotes from DJ national accounts and updates from the PAC Administrator.

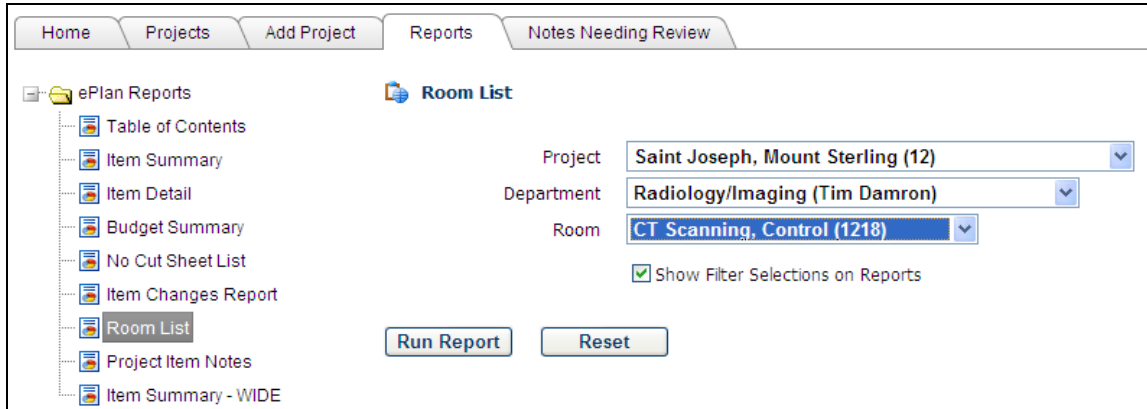
Room Name	Room No.	Alt ID	Item Description	Rev?	Item Note
Saint Joseph, Mount Sterling-Radiology/Imaging (Tim Damron)					
Aloove, X-Ray (OR/Rad)	1219	X07	X-Ray Unit, Mobile, Digital	Rev	Quote price from DJ national accounts.
CT Scanning	1217	D12	Dispenser, Glove, Triple Box	Rev	hello
CT Scanning	1217	C76	CT Scanner, Multi-Slice, 64-320 Slice	Rev	Quote price from DJ national accounts.
CT Scanning, Control	1218	P02	PACS, Allowance	Not	oooo
CT Scanning, Control	1218	None	Software, Imaging, 3D Workstation	Not	aaaa ok.
Injection	1254	C66	Chair, Clinical, Blood Draw, Bariatric	Rev	Coming from Outpatient Rehab
Nuclear Medicine	1252	C13	Camera, Gamma, Dual Head	Rev	Quote price from DJ national accounts.
Reading Room (Radiologist)	1237	P02	PACS, Allowance	Rev	This the allowance for the Physician workstations. The ammount was Tracy Eades the PAC Administrator from Lexington. The count was pr Tim Damron on 12/2/09 during an update meeting in his office. GB
X-Ray, General	1229	X03	X-Ray Unit, General Radiography, Digital	Rev	Quote price from DJ national accounts.
X-Ray, General (Tomo)	1226	X03	X-Ray Unit, General Radiography, Digital	Rev	Quote price from DJ national accounts.
X-Ray, R&F (Fluoro)	1220	C72	Computed Radiography, Plate Reader, Multi	Rev	Needs to be in Fluoro, 1220, per staff mtg.
X-Ray, R&F (Fluoro)	1220	X08	X-Ray Unit, RadiFluoro, Digital	Rev	Quote price from DJ national accounts.

Report Criteria: Project: 12 Department: 134 Reviewed: 0

Format for Notes and report can be closed using the upper right hand X.

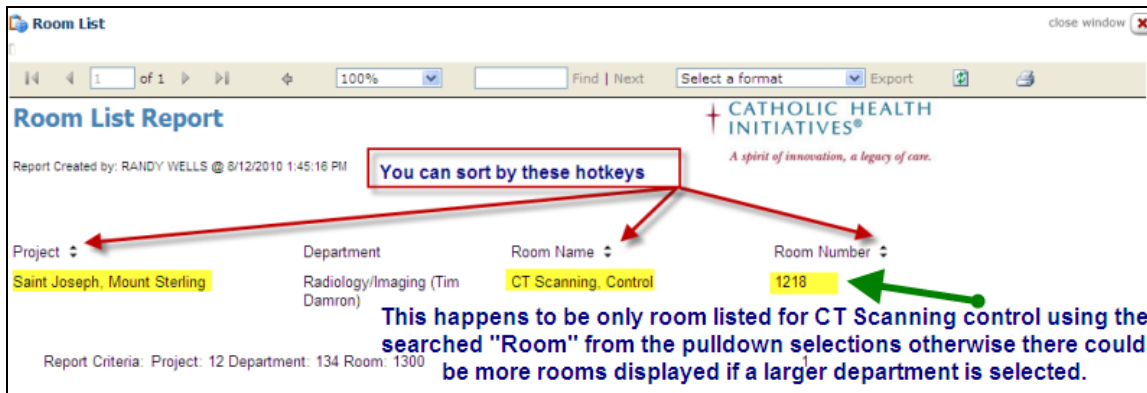
Room List:

Select project, department and the room you prefer to review. Click on “Run Report” to see room list.



The screenshot shows the 'ePlan Reports' sidebar with a tree view containing: Table of Contents, Item Summary, Item Detail, Budget Summary, No Cut Sheet List, Item Changes Report, Room List (highlighted), Project Item Notes, and Item Summary - WIDE. The main area is titled 'Room List' and contains three dropdown menus: 'Project' set to 'Saint Joseph, Mount Sterling (12)', 'Department' set to 'Radiology/Imaging (Tim Damron)', and 'Room' set to 'CT Scanning, Control (1218)'. There is a checked checkbox for 'Show Filter Selections on Reports' and two buttons: 'Run Report' and 'Reset'.

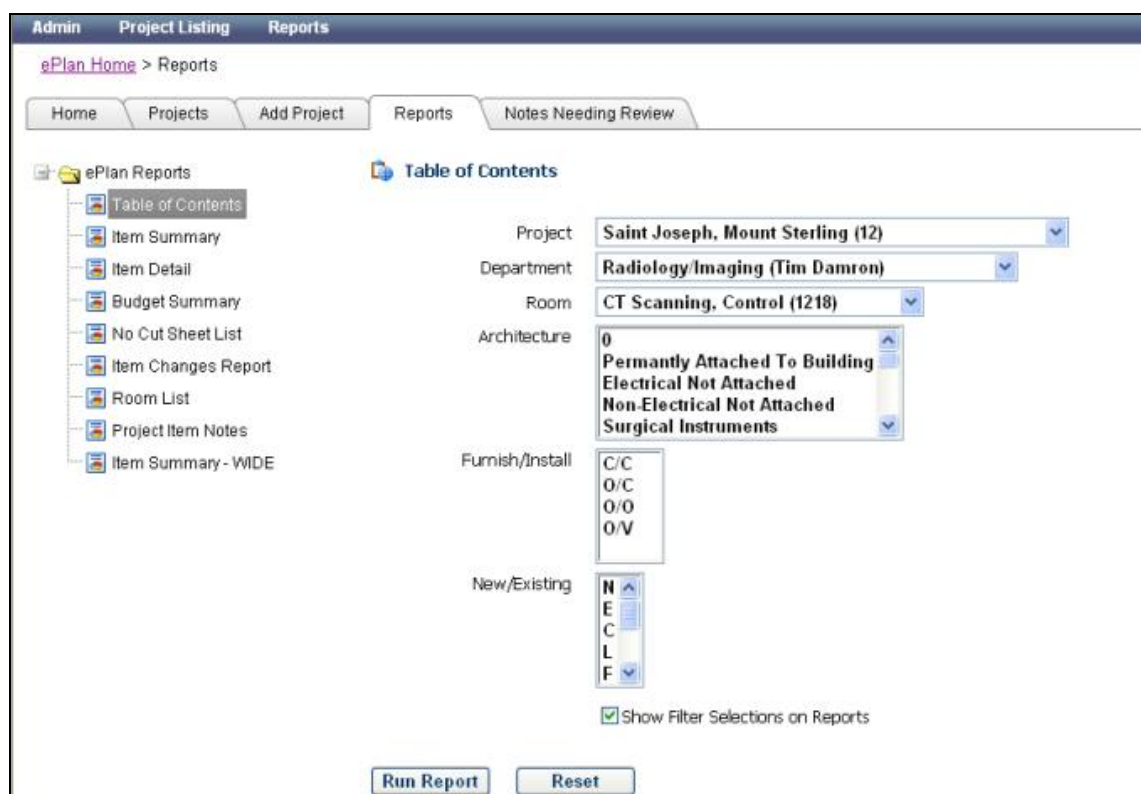
Within the Room List report (below) allows a further sort within the selected report by using the arrow hotkeys.



The screenshot shows the 'Room List Report' window. At the top, it says 'Report Created by: RANDY WELLS @ 8/12/2010 1:45:16 PM'. Below this is a table with four columns: 'Project', 'Department', 'Room Name', and 'Room Number'. The data row shows: 'Saint Joseph, Mount Sterling', 'Radiology/Imaging (Tim Damron)', 'CT Scanning, Control', and '1218'. A red box with the text 'You can sort by these hotkeys' has arrows pointing to the dropdown arrows on the 'Project', 'Room Name', and 'Room Number' columns. A green arrow points to the 'Room Number' value '1218'. Below the table, a blue text box states: 'This happens to be only room listed for CT Scanning control using the searched "Room" from the pulldown selections otherwise there could be more rooms displayed if a larger department is selected.' The report criteria at the bottom are: 'Project: 12 Department: 134 Room: 1300'.

TABLE OF CONTENTS:

This is supposed to be used to fit with the cut sheets. It doesn't always follow the order the cut sheets are arranged and therefore requires manipulation and review before issuing. One way to use this report is to identify for the GC (general contractor) those items which they have responsibility.



The screenshot shows the 'ePlan Reports' interface. On the left is a sidebar with a tree view containing: Table of Contents, Item Summary, Item Detail, Budget Summary, No Cut Sheet List, Item Changes Report, Room List, Project Item Notes, and Item Summary - WIDE. The 'Table of Contents' report is selected. The main area is titled 'Table of Contents' and contains several filter fields: Project (Saint Joseph, Mount Sterling (12)), Department (Radiology/Imaging (Tim Damron)), Room (CT Scanning, Control (1218)), Architecture (0), Furnish/Install (C/C, O/C, O/O, O/V), and New/Existing (N, E, C, L, F). A checkbox 'Show Filter Selections on Reports' is checked. At the bottom are 'Run Report' and 'Reset' buttons.

Display for Table of Contents:

Hotkey buttons make it simple and easy to find information. Used in conjunction with the other pull down menus it is simple to drill down to items of interest.



The screenshot shows the 'Table of Contents' report display. At the top is a header bar with navigation controls (back, forward, search, etc.) and a 'close window' button. Below the header is the title 'Catholic Health Initiatives - Table of Contents' and a subtitle 'Report Created by: RANDY WELLS @ 8/12/2010 2:48:11 PM'. The main content area displays a table of items. A red callout box with arrows pointing to the 'Alt. Id', 'Description', and 'Model' headers contains the text: 'Using the hotkey buttons, you can quickly sort through the list to find information on these headers.'

Alt. Id	Description	Model
A27	Software, Imaging, 3D Workstation	Vitrea
A28	Apron, Lead	65023 Easywrap Large
B01	Apron, Lead, Half	9-083 Mini Apron (Set of 3)
B20	Bar, Grab, Toilet	LCS-KLA
C13	Bracket, Television, Wall, Flat Panel	24" Glass Door [DJ06]
C13	Cabinet, Warming, Dual, Freestanding	Infinia 3/8

