

WellRyde Dispatch Portal Reporting

Introduction

This job aid explains how to create and run reports within WellRyde.

Reports are a useful tool that will allow Transportation Providers to review information in a targeted way.

Click on the link below to go directly to that section of the job aid:

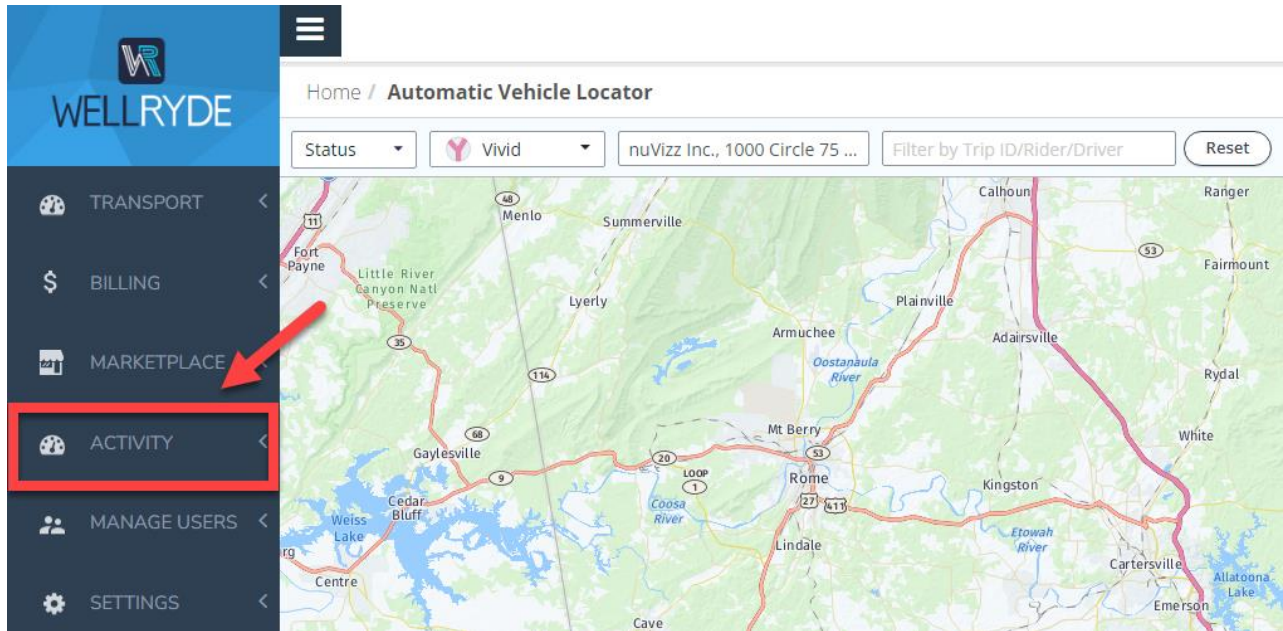
- [Creating a New Report](#)
- [Running a Report](#)

WellRyde Dispatch Portal

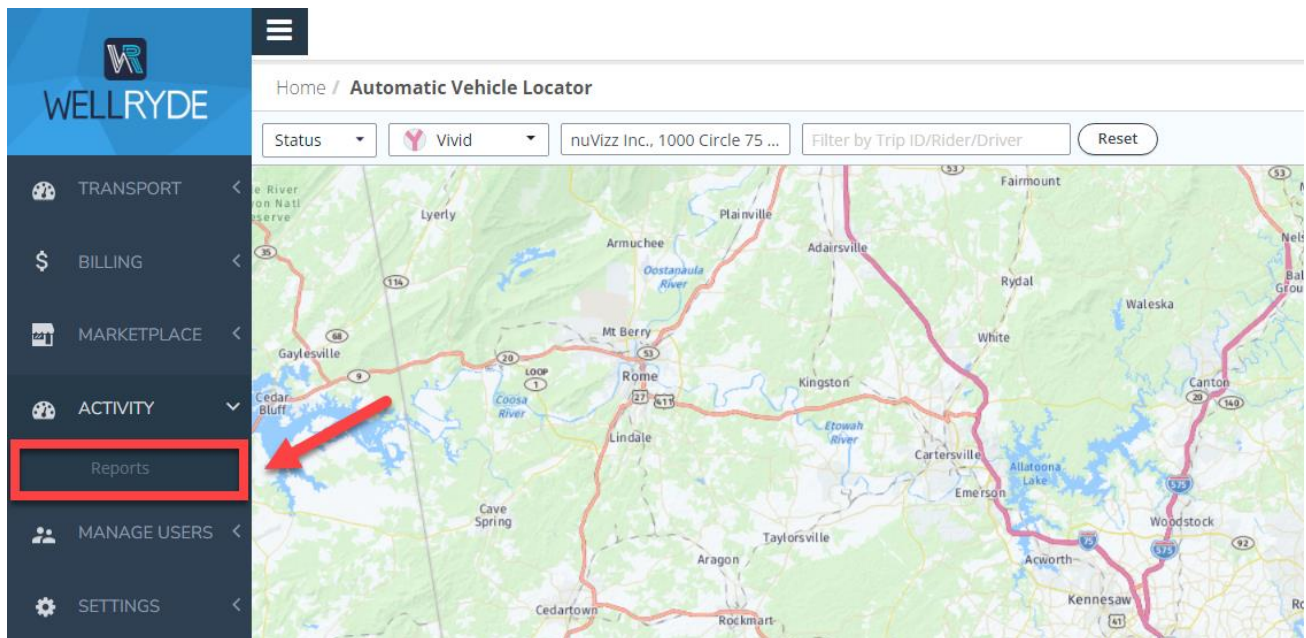
Reporting

Creating a New Report

1. Click Activity, found on the left tab



2. Click Reports, found beneath Activity



WellRyde Dispatch Portal Reporting

Creating a New Report

3. To create a new report, click Create Report

Home / Reports

modivcare | WR Training Account | Seve Stember

Search

Report Type: --All-- | Report Name: Type | Created Date: (None) | Report Source: --All--

10 Reports

Create Report | Rule Formatter | Column Search | Export | Refresh List

Report Name	Updated Date	Report Type	Report Source	Report Description	Schedule	Created by
Billed Trips by Driver 2	05/11/2023 3:49:02 PM GMT-04:00	VTripBilling	Custom	Billed Trips by Driver 2		Anne ONeill
Billed Trips by Driver	05/11/2023 3:43:15 PM GMT-04:00	VTripBilled	Custom	Billed Trips by Driver		Anne ONeill

4. Fill in the following fields:
- a. Report Name
 - b. Report Title
 - c. Sub-Title
 - d. Report Description (Optional)

Home / Reports / Create Report

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Run Report | Save | Cancel

Report Details

Report Name | Report Title | Sub-Title

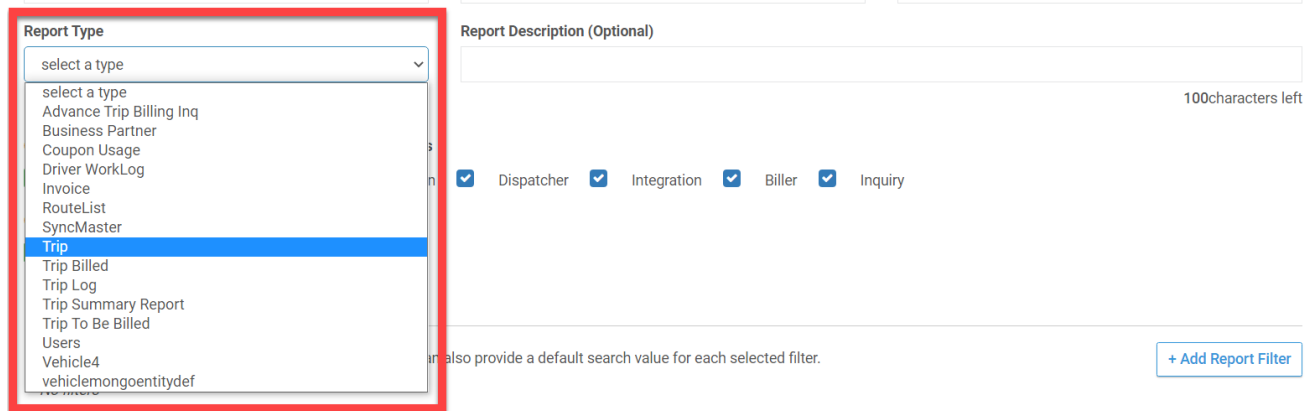
Report Type: select a type

Report Description (Optional)

100characters left

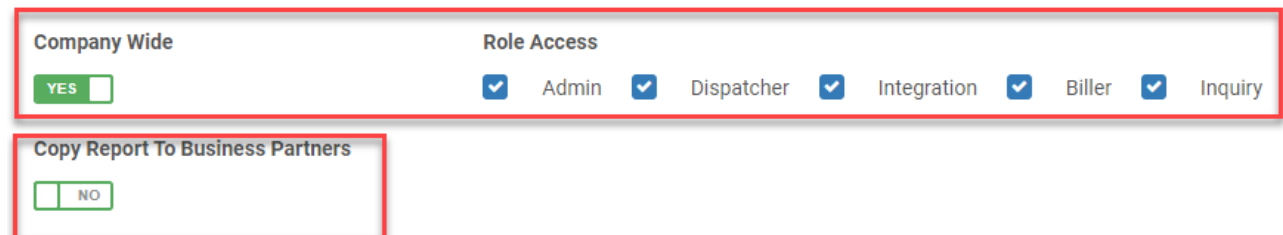
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5. Select the Report Type from the dropdown menu. The most common report types are Trip, Trip Billed, and Trip Log.



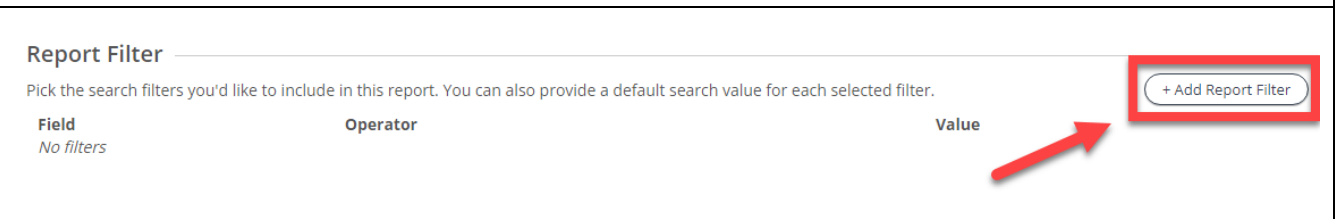
The screenshot shows a 'Report Type' dropdown menu with the following options: select a type, Advance Trip Billing Inq, Business Partner, Coupon Usage, Driver WorkLog, Invoice, RouteList, SyncMaster, Trip (highlighted), Trip Billed, Trip Log, Trip Summary Report, Trip To Be Billed, Users, Vehicle4, and vehiclemongoentitydef. To the right, there is a 'Report Description (Optional)' field with a 100-character limit and a row of checkboxes for 'Dispatcher', 'Integration', 'Billier', and 'Inquiry', all of which are checked. A '+ Add Report Filter' button is located at the bottom right.

6. Adjust the audience who has access to the report. Normally, these buttons and click boxes are left as is.



The screenshot shows two sections: 'Company Wide' with a 'YES' radio button selected, and 'Role Access' with checkboxes for 'Admin', 'Dispatcher', 'Integration', 'Billier', and 'Inquiry', all of which are checked. Below this is a 'Copy Report To Business Partners' section with a 'NO' radio button selected.

7. Add report filters, as desired, by clicking the +Add Report Filter button.



The screenshot shows the 'Report Filter' section with the instruction: 'Pick the search filters you'd like to include in this report. You can also provide a default search value for each selected filter.' Below this is a table with columns for 'Field', 'Operator', and 'Value'. The table currently contains the text 'No filters'. A red arrow points to a '+ Add Report Filter' button in the top right corner.

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8. Select the information to filter and it should be filtered from each dropdown menu.

Report Filter

Pick the search filters you'd like to include in this report. You can also provide a default search value for each selected filter. [+ Add Report Filter](#)

Trip Date	Select Date	Last 30 days
AccountNumber	<	0

Column Selection

Pick and choose columns you'd like to include in your report. Or [Add/Remove Columns](#) when they are displayed. [Help](#)

The image shows a screenshot of the 'Report Filter' section in the WellRyde Dispatch Portal. It features a 'Report Filter' header and a sub-header: 'Pick the search filters you'd like to include in this report. You can also provide a default search value for each selected filter.' Below this, there are three filter fields: 'Trip Date', 'Select Date', and 'Last 30 days'. A fourth filter field, 'AccountNumber', is highlighted with a red box. Its dropdown menu is open, showing options: '<', '(none)', '=', '>', '>', 'Not Equal', and 'like'. The '>' option is highlighted in blue. To the right of the 'AccountNumber' field is a text input field containing '0', also highlighted with a red box. Below the filter fields is the 'Column Selection' section, which includes the text 'Pick and choose columns you'd like to include in your report. Or [Add/Remove Columns](#) when they are displayed.' and a blue 'Help' button.

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9. Choose columns you'd like to include in your report. Once you've added columns, you can change the order in which they are displayed

Column Selection

Pick and choose columns you'd like to include in your report. Once you've added columns, you can change the order in which they are displayed.

AccountNumber	Billed Amount	Appointment Type	Actual Distance
---------------	---------------	------------------	-----------------

Report Schedules (Optional)

You can schedule reports to be sent out automatically to the emails you provide below.

Enabled <input type="checkbox"/> NO	Comments <input type="text"/>	Repeat --Select--	Repeat Every <input type="text"/>
Scheduled Time (HH:mm:ss) <input type="text"/> 02/24/2023 11:36:06 am	Report Format --Select--	EndPointConfig --Select--	Don't send empty reports <input type="checkbox"/> NO
Available <input type="text"/> Filter	Selected <input type="text"/> Filter		

[Add/Remove Columns](#)

Filter x

- AccountNumber
- Actual Distance
- Actual Return Depot Time
- Appointment Type
- Attendants
- Billed Amount
- Broker Billed
- Business Partner
- Business Partner
- Cancellation Comments
- Cancellation Reason Code

10. You can schedule reports to be sent out automatically to the emails you provide below. To do so, complete the information below.

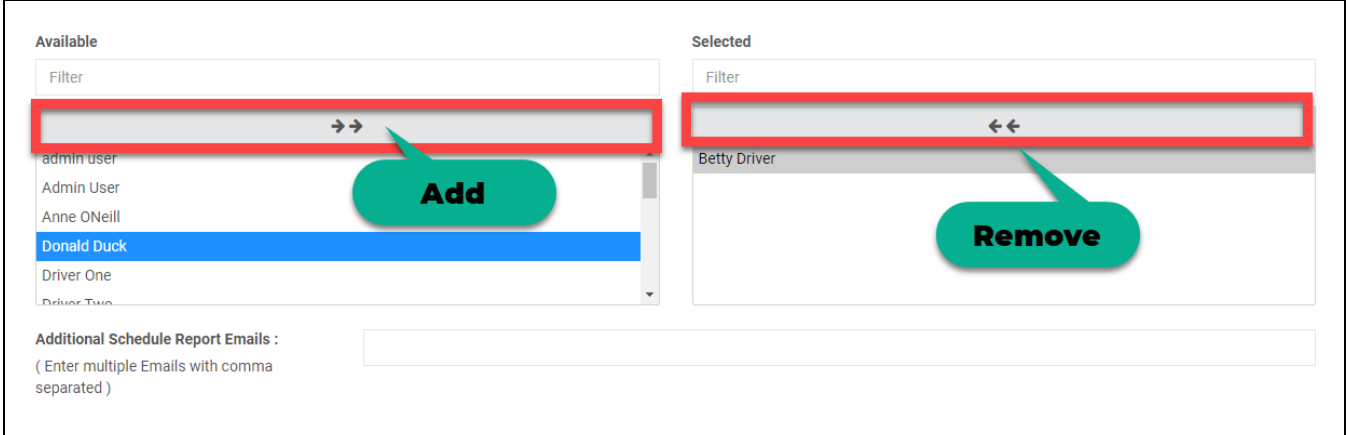
Report Schedules (Optional)

You can schedule reports to be sent out automatically to the emails you provide below.

Enabled <input type="checkbox"/> NO	Comments <input type="text"/>	Repeat Weekly	Repeat Every Sunday
Scheduled Time (HH:mm:ss) <input type="text"/> 02/24/2023 11:36:06 am	Report Format PDF	EndPointConfig --Select--	Don't send empty reports <input type="checkbox"/> NO

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11. To add people within your company to the automated report emails, click their name, then click the double right arrow icon to add them. If you'd like to remove someone from the automated email list, click their name and click the double left arrow icon to remove them.

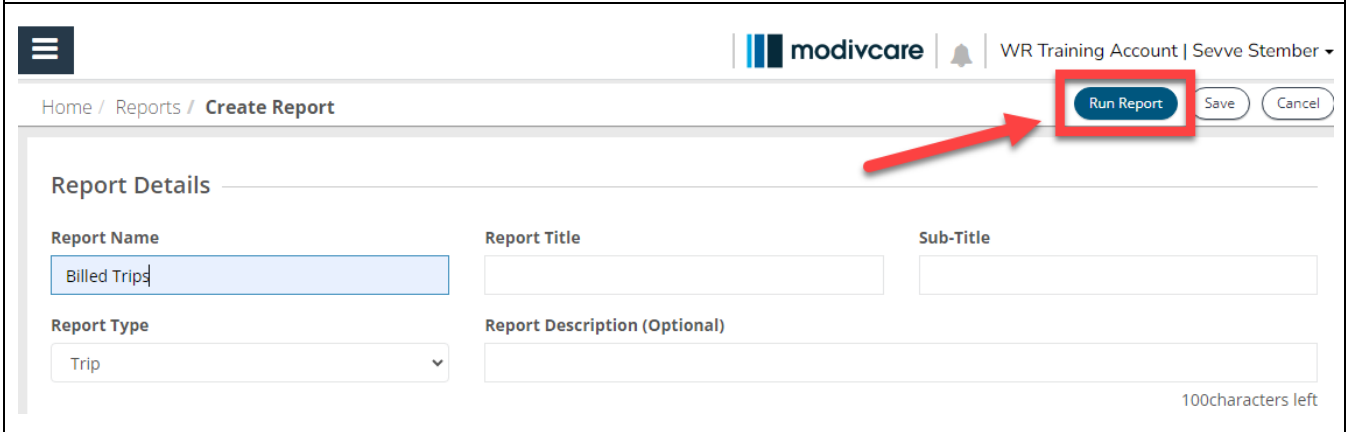


12. If there's someone you'd like to receive the automated reports, but they aren't on the list in step 11, simply add their email address in the text field. Be sure to separate multiple email addresses with a comma.



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13. Lastly, to save the report you just created, click Run Report (if you'd like to see the report you just created). This button both saves the report and runs the report. Or, click save. Now each time you click the Reports button under the Activity tab, you'll see the report you created.



Home / Reports / **Create Report**

modivcare | WR Training Account | Seveve Stember

Run Report Save Cancel

Report Details

Report Name
Billed Trips

Report Title

Sub-Title

Report Type
Trip

Report Description (Optional)

100characters left

WellRyde Dispatch Portal

Reporting

Running a Report

1. Click Activity, found on the left tab. Click Reports from the dropdown menu. [See steps 1 and 2 in the Creating a New Report](#) if you need a visual reminder of this process.
2. When the Reports page loads, select the report you'd like to run from the list.

10 Reports Create Report Rule Formatter Column Search Export Refresh List

Showing 10 of 10 Results per page: 50

			Report Name	Updated Date	Report Type	Report Source	Report Description	Schedule	Created by
			Billed Trips by D...	05/11/2023 3:49:02 P...	VTripBilling	Custom	Billed Trips by Driver 2		Anne O'Neill
			Billed Trips by D...	05/11/2023 3:43:15 P...	VTripBilled	Custom	Billed Trips by Driver		Anne O'Neill
			Billed Trips	03/01/2023 2:30:16 P...	VTripBilled	Custom	Billed Trips	Weekly on Sunday in p...	Seve Stember
			Practice 123	02/28/2023 3:26:45 P...	TripLog	Custom	Practice 123		Seve Stember
			Cancelled Trips	10/31/2022 12:04:44 P...	VizonTrip	Custom	Cancelled Trips	Weekly on Monday in ...	Anne O'Neill

3. Select the Trip Date Select Date from the dropdown menu.

Filter

Trip Date Select Date

Today

- (None)
- +/-7 Days
- Last 30 days
- Last 7 days
- Last Month
- Last Week
- Last Year
- Next 30 days
- Next 7 days
- Next Month
- Next Week
- This Month
- This Week
- This Year
- Today**
- Tomorrow
- Yesterday
- Range
- Specific Date

Rider's Name like

Trip Id like

Refresh List Export to PDF Export to Excel Print

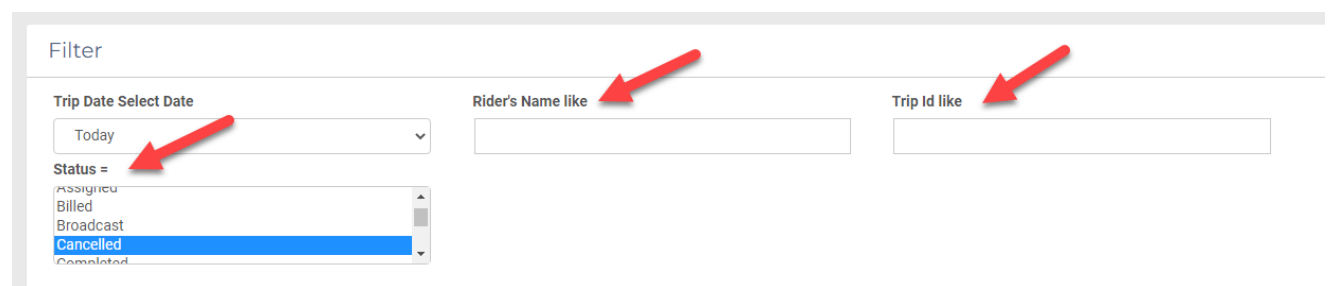
ember.

Role Accessed: MemberAdmin, DL_Dispatcher, DL_Integration, DL_Biller, DL_Inquiry) Scheduled Weekly on Monday in XSLX Format with 1 recipient(s)

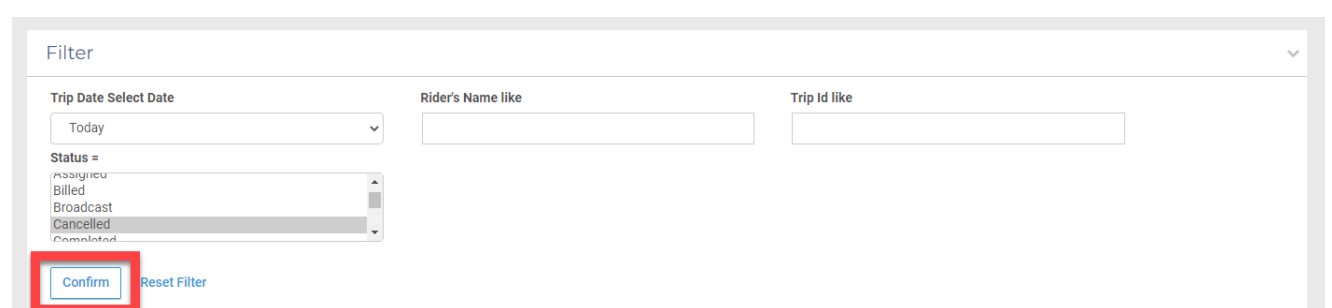
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Running a Report

4. Fill in the rest of the filter fields, as is relevant:
 - a. Status =
 - b. Rider's Name like
 - c. Trip Id like



5. Click Confirm to run the report.



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6. Once the report loads, select one of the four options from the list:
- a. Refresh List
 - b. Export to PDF
 - c. Export to Excel
 - d. Print

Important note: reports can be interactively run as a PDF or Excel document, but do have record limitations.

- PDF files: limitation is 150 records
- Excel files: limitation is 1,000 records

If report exceeds the limitations above, the report will need to be scheduled to run. Refer to page 6 for instructions on this process.

Filter

Trip Date Select Date

Last Month

Rider's Name like

Trip Id like

Status =

--All--
 Accepted
 Assigned
 Billed

Cancelled Trips

Statistics of Trip for **WR Training Account** by **Sevve Stember**.
 Report type Trip Company **WR Training Account** (Role Accessed: MemberAdmin, DL_Dispatcher, DL_Integration, DL_Biller, DL_Inquiry) Scheduled Weekly on Monday in XSLX Format with 1 recipient(s)
 Created by **Anne O'Neill**

54 Results

Driver	Trip Date	Trip Id	Member Name	PU - Full Street	PU - City	PU - Schedule Ti...	PU - Actual Time	Pick Up Signatur...
▼ Driver : Anne O'Neill (38)								
Anne O'Neill	01/02/2023 07:30:00 AM	TRN-503	LINN, JIMMY	833 BRIAR CREEK COURT	CONYERS	01/02/2023 07:00:00 AM		
Anne O'Neill	01/02/2023 08:30:00 AM	TRN-504	MORRIS, CHRISTY	2130 FAIRWAY COURT	CONYERS	01/02/2023 08:00:00 AM		
Anne O'Neill	01/02/2023 09:30:00 AM	TRN-505	JOHNSON, RAMOTA	10109 JEFFERSONE VILL...	COVINGTON	01/02/2023 09:00:00 AM		
Anne O'Neill	01/03/2023 12:00:00 PM	TRN-543	DANIEL, RICHARD	7115 GREEN ACRES DRIVE	COVINGTON			
Anne O'Neill	01/03/2023 12:00:00 PM	TRN-545	BROWN, GRACIE	1190 RIDGE AVE	COVINGTON			
Anne O'Neill	01/06/2023 07:30:00 AM	TRN-594	LINN, JIMMY	833 BRIAR CREEK COURT	CONYERS	01/06/2023 07:00:00 AM		