

# 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:

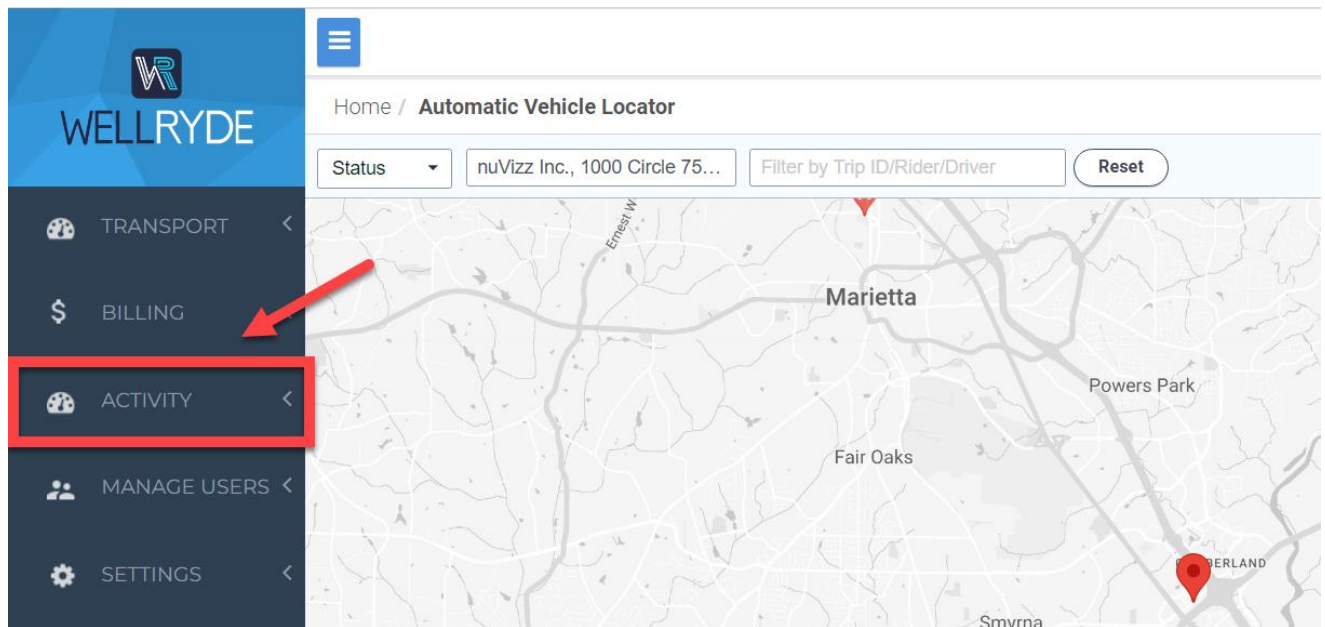
- [Creating a New Report](#)
- [Running a Report](#)

# WellRyde Dispatch Portal

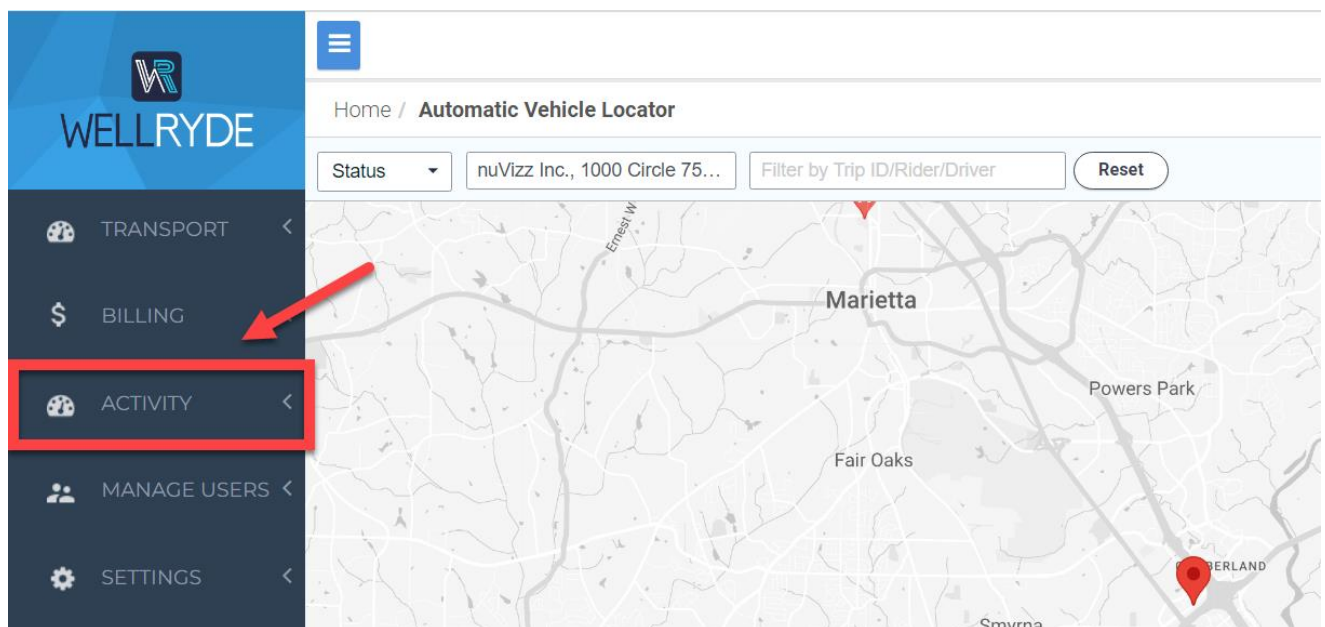
## Reporting

### 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

Search Current View ⓘ Default Filter ▼ ✎ Edit ✕ Delete ✔ Make Default + Add New View ▼

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

Search Reset

6 Reports Create Report Rule Formatter Column Search Export to PDF Export to Excel Refresh List

Showing 6 of 6 Results per page: 50 ▼

			Report Name	Updated Date	Report Type	Report Source	Report Description	Schedule	Created by
			Cancelled Trips	10/31/2022 12:04:44 PM G...	VizzonTrip	Custom	Cancelled Trips	Weekly on Monday in xslx f...	Anne O'Neill
			Adv Trip	09/14/2022 05:47:18 PM G...	VizAdvTBInq	Custom		Weekly on Sunday in pdf for...	Admin User

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

Home / Reports / Create Report Run Report Save Cancel

**Report Details**

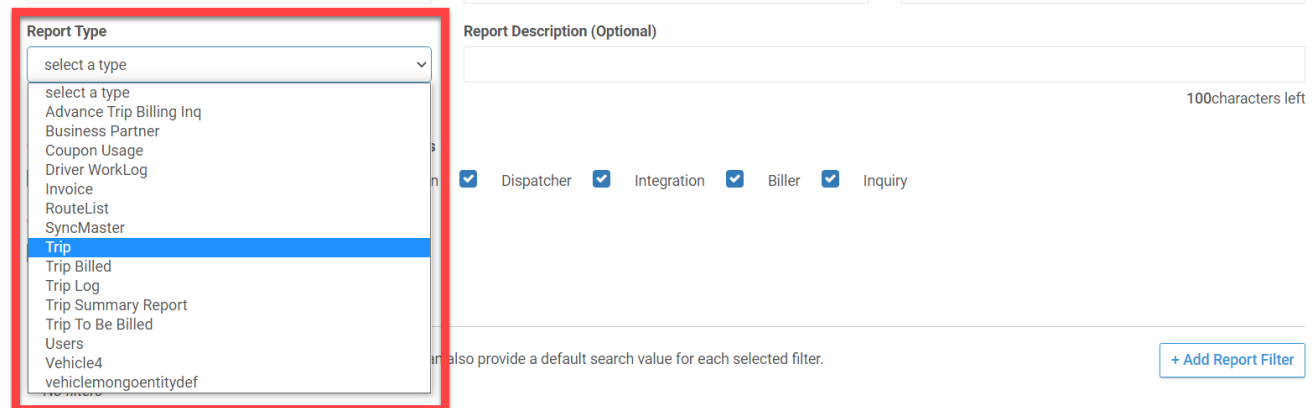
Report Name:  Report Title:  Sub-Title:

Report Type: select a type ▼ Report Description (Optional):  100characters left

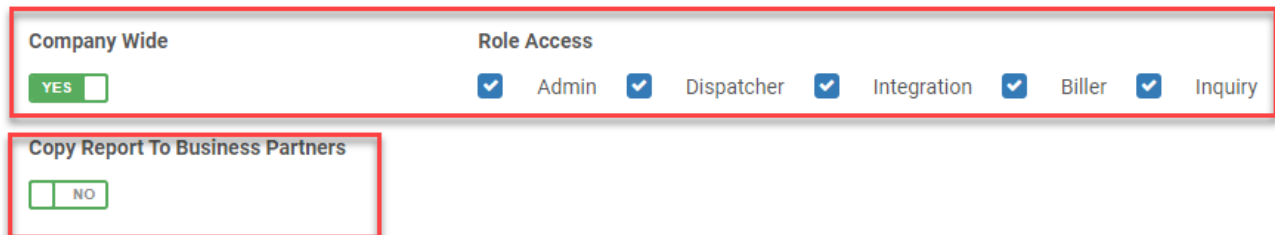
## WellRyde Dispatch Portal Reporting

### Creating a New Report

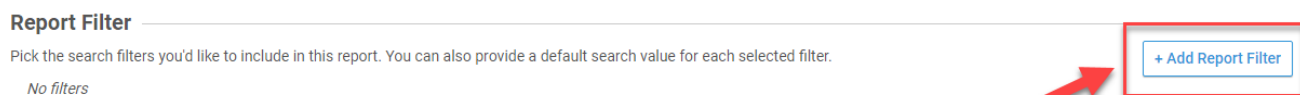
- Select the Report Type from the dropdown menu. The most common report types are Trip, Trip Billed, and Trip Log.



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



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



# WellRyde Dispatch Portal Reporting

## Creating a New Report

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

(none)  
 =  
<  
 >  
 Not Equal  
 like

### 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.

Add/Remove Columns

? Help

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

Add/Remove Columns

Filter ✕

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

## WellRyde Dispatch Portal Reporting

### Creating a New Report

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.

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

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.

<p><b>Available</b></p> <p>Filter</p> <div style="border: 2px solid red; padding: 2px; text-align: center;">→→</div> <ul style="list-style-type: none"> <li>admin user</li> <li>Admin User</li> <li>Anne O'Neill</li> <li style="background-color: #007bff; color: white;">Donald Duck</li> <li>Driver One</li> <li>Driver Two</li> </ul> <p><b>Additional Schedule Report Emails :</b> ( Enter multiple Emails with comma separated )</p> <input type="text"/>	<p><b>Selected</b></p> <p>Filter</p> <div style="border: 2px solid red; padding: 2px; text-align: center;">←←</div> <ul style="list-style-type: none"> <li>Betty Driver</li> </ul> <p><b>Additional Schedule Report Emails :</b> ( Enter multiple Emails with comma separated )</p> <input type="text"/>
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12. If there's someone you'd like to receive the automated reports, but they aren't on the list in step 11, simple add their email address in the text field. Be sure to separate multiple email addresses with a coma.

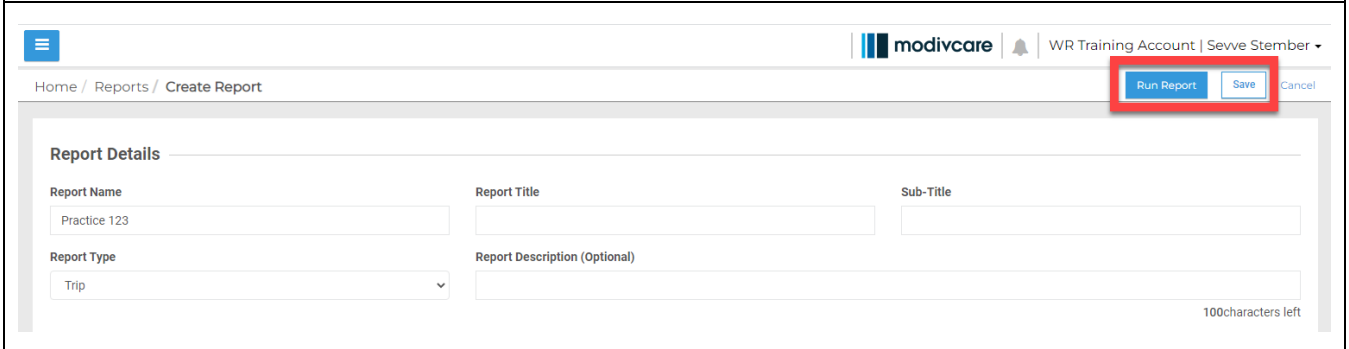
**Additional Schedule Report Emails :**  
( Enter multiple Emails with comma separated )

**Save report and enable summary**  
 NO

## WellRyde Dispatch Portal Reporting

### Creating a New Report

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 | Seve Stember

Run Report Save Cancel

#### Report Details

<b>Report Name</b> Practice 123	<b>Report Title</b> 	<b>Sub-Title</b> 
<b>Report Type</b> Trip	<b>Report Description (Optional)</b>  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.

	Report Name	Updated Date	Report Type	Report Source	Report Description	Schedule	Created by
	Cancelled Trips	10/31/2022 12:04:44 PM GMT--	VizonTrip	Custom	Cancelled Trips	Weekly on Monday in xlsx form...	Anne O'Neill
	Adv Trip	09/14/2022 05:47:18 PM GMT--	VizAdvTBInq	Custom		Weekly on Sunday in pdf forma...	Admin User
	Driver pay	04/22/2022 04:16:10 PM GMT--	VTripSummaryRpt	Custom			Admin User
	Billed Trip Log	07/15/2022 08:44:50 AM GMT--	VTripBilled	Custom			Admin User
	Drivers	03/03/2022 04:04:28 PM GMT--	Driver WorkLog	Custom			Admin User
	Trips Billed	09/08/2022 12:23:52 PM GMT--	VTripBilled	Custom			Ryan Gauvin

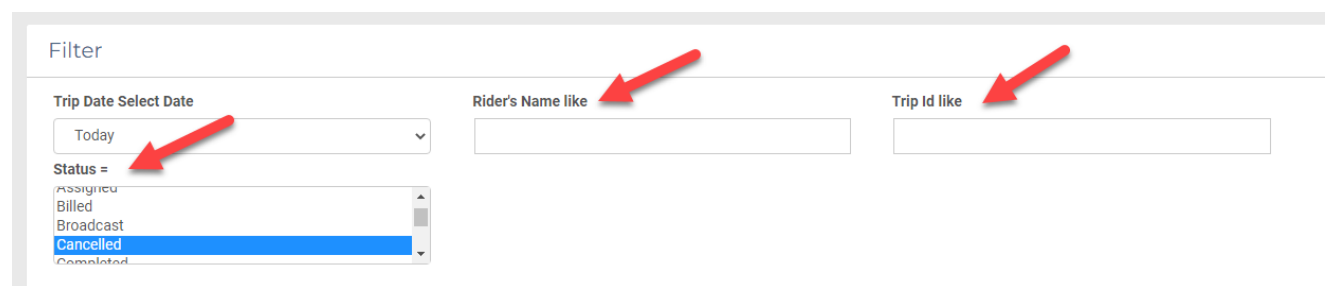
3. Select the Trip Date Select Date from the dropdown menu.



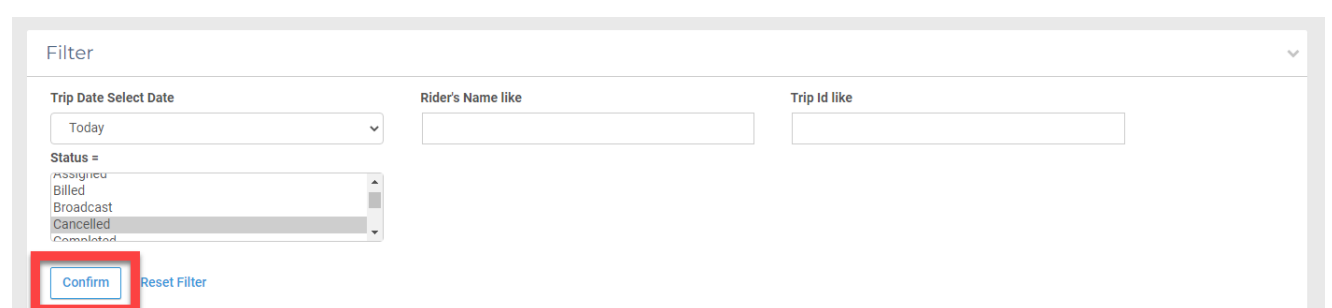
## WellRyde Dispatch Portal Reporting

### 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.



# WellRyde Dispatch Portal Reporting

## Running a Report

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

Filter ^

**Trip Date Select Date**

Last Month v

**Rider's Name like**

**Trip Id like**

**Status =**

--All--

Accepted

Assigned

Billed

Confirm
Reset Filter

### Cancelled Trips

Refresh List
Export to PDF
Export to Excel
Print

Statistics of Trip for **WR Training Account** by **Sevve Stember**.

Report type Trip
Company WR Training Account (Role Accessed: MemberAdmin, DLDispatcher, DLIntegration, DLBillor, DLInquiry)
Scheduled Weekly on Monday in XSLX Format with 1 recipient(s)

Created by **Anne O'Neill**

**54 Results**

Showing 54 of 54
Results per page: 200

Driver	Trip Date	Trip Id	Member Name	PU - Full Street	PU - City	PU - Schedule TI...	PU - Actual Time	Pick Up Signatur...
<b>▼ Driver : Anne O'Neill (38)</b>								
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		