Data Sets

Last Modified on 20/05/2025 3:24 pm ACST

> This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Data sets are the structure of the data within your CareRight system, which enables you to easily and closely define your own reports. To create or modify a report, go to **Administration > Workflow > Data Sets** A list of your current reports will appear with previous versions as well.

From this screen you can either start a new data set report, modify an existing data set report or copy from another report. The structure and concepts of coding your own report are based on the Blockly methodology. It would be useful to familiarize yourself by going through a free, one hour tutorial which is available on https://studio.code.org/

A report can be archived or delete if no longer in use.

Reporting

Dataset Reporting are customised reports built in CareRight via Administration → Workflow → Datasets. If you require a customised report please contact your System Administrator.
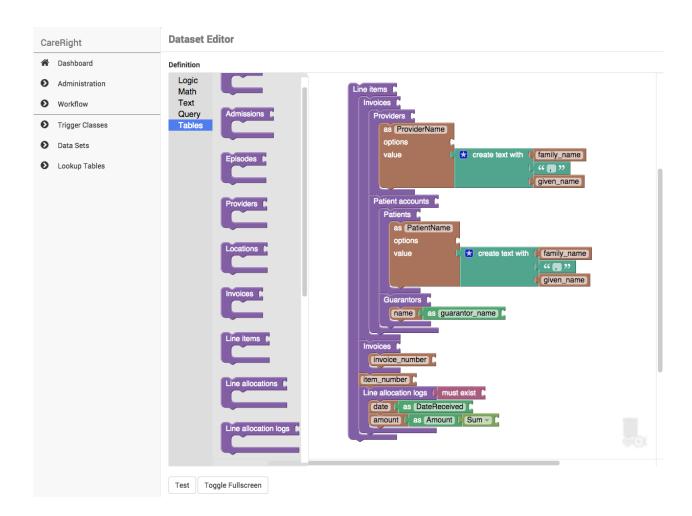
There are a number of standard dataset reports which may be available in your CareRight instance: Ledger Report

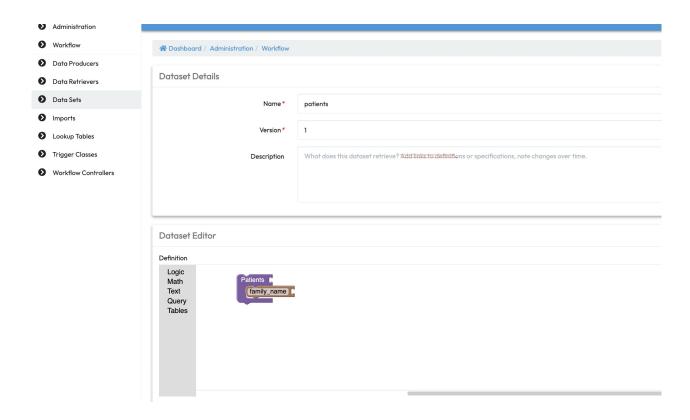For any Invoicing reports the following statuses are used:

- B = Billed
- R = Raised
- S = Sent
- P = Paid
- X = Reversed

Visual Query Builder

CareRight includes a visual query builder for defining datasets to form a basis for reports or workflow operations.
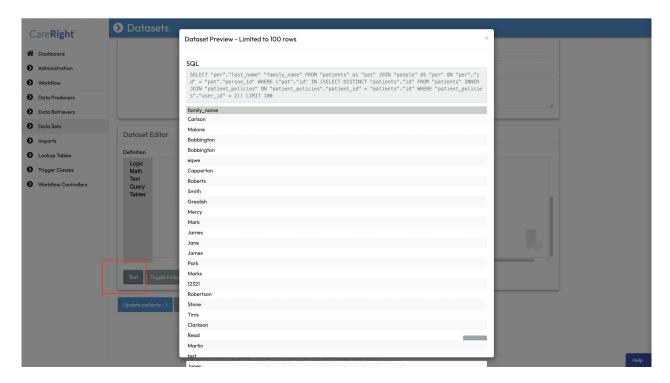
1. From Administration, click Workflows > **Data Sets**.

2. In the Datasets panel, click **New** for creating a dataset.

3. Add **Name**, **Version,** and **Description** columns of the Dataset Editor.

When done, click **Update Dataset.**

Datasets can be Tested using the Test button at the bottom.

The visual builder provides a drag-and-drop interface to assemble a query from the data sources within CareRight. The visual builder allows the user to focus on extracting the data they require for the report without worrying about the implementation details of the data structures in the Database. When run the Dataset automatically constructs all the joins based on a detailed inbuilt knowledge of how the tables and keys all work within the CareRight database.

Rounding Decimals in the Visual Query Builder

The Visual Query Builder supports the selection of up to 4 decimal places when displaying values. To access this feature:

1. From Administration, click Workflows > **Data Sets**.

2. In the Datasets panel, click **Edit** for a dataset.

3. In the **Definition** column of the Dataset Editor, click **Math**.

4. In the **Round to** field, click the drop-down arrow and select the number of desired decimal places for the value.

5. When done, click **Update Dataset**.