



# **KDHE DAISEY Technical Assistance Brief**

## **Accessing Reports**

### **August 2016**



### **What are Reports?**

Tableau is a data visualization software system integrated into DAISEY that is used to develop, design, and house reports. Reports pull client level data that has been entered into DAISEY. Reports do not pull information from Aggregate Entry Forms.

DAISEY reports are updated once daily. Edits made to client data in DAISEY will be reflected in the report after the daily update.

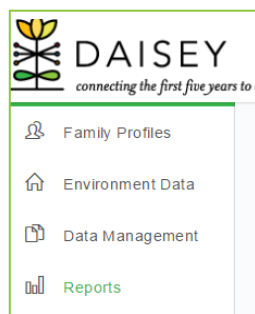
### **Accessing Reports in DAISEY**

To access DAISEY reports, click the “Reports” link in the left navigation menu (Figure 1).

A “Reports Table of Contents” will be displayed (Figure 2). Available reports are displayed in the “Table of Contents” and are also listed in report tabs along the top of the screen (Figure 2).

Click the program report name from either the table of contents or the tabs to view the report.

**Figure 1**



**Figure 2**



The program-specific table of contents (a list of reports associated with that program) will open (Figure 3).

Click the name of the report to view. The report will open in a new browser tab. Users can keep reports open while navigating in DAISEY to update client information or correct errors.

**Note:** The “KDHE Referral Report” is only accessible from the table of contents.

**Figure 3**

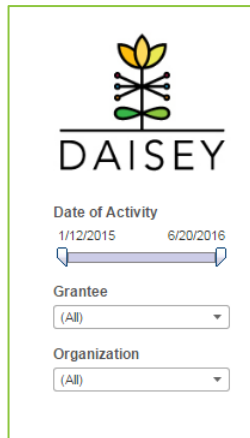


## Using Filters

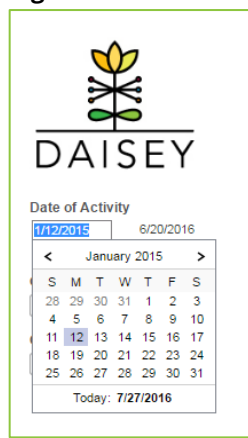
A filter navigation menu is displayed on the right side of each report.

Reports can be filtered by dates in two ways: 1) drag the sliders to adjust the start and end dates (Figure 4); or 2) click on the start or end date which will cause a calendar to appear allowing the user to select specific dates or type in specific dates (Figure 5).

**Figure 4**



**Figure 5**

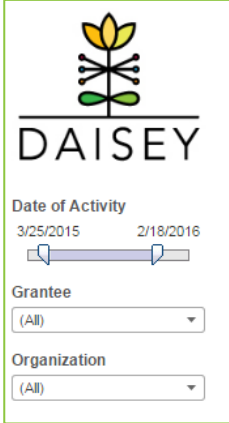


Reports can also be filtered by “Grantee” and “Organization” (Figure 6). Click the drop-down menu to select the desired grantee(s) and organization(s). Only the grantees and organizations assigned to this DAISEY user will be visible.

**Note: Most users only have access to one organization under one grantee.**

When a filter is applied the report will automatically refresh to reflect the filter.

**Figure 6**

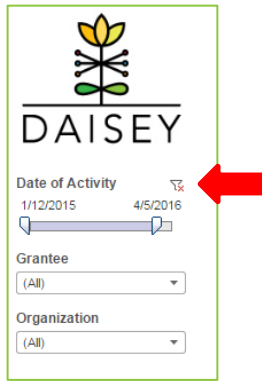


The screenshot shows the DAISEY logo at the top. Below it, there is a "Date of Activity" section with a date range from 3/25/2015 to 2/18/2016 and a horizontal slider. Underneath are two dropdown menus: "Grantee" with "(All)" selected and "Organization" with "(All)" selected.

### Clearing Filtered Fields

To clear the filter fields hover over the filter menu. A funnel icon with a red X will appear (Figure 7). Click on the funnel icon to clear the filter.

**Figure 7**



This screenshot is similar to Figure 6 but shows a red arrow pointing to a funnel icon with a red X next to the "Date of Activity" date range (1/12/2015 to 4/5/2016). The "Grantee" and "Organization" dropdown menus are also visible, both set to "(All)".

### Displayed Categories

Some reports only show response options in which data has been entered. If a response option has not yet been selected in DAISEY, that category will not appear on the report.

*Note: Instructions for accessing underlying client level data and downloading PDF versions of reports are available in the DAISEY TA Brief “Using Reports for Quality Assurance”.*