Getting Started with
Defran Data Insight Reporting

A Guide to Creating Reports with Defran Data Insight

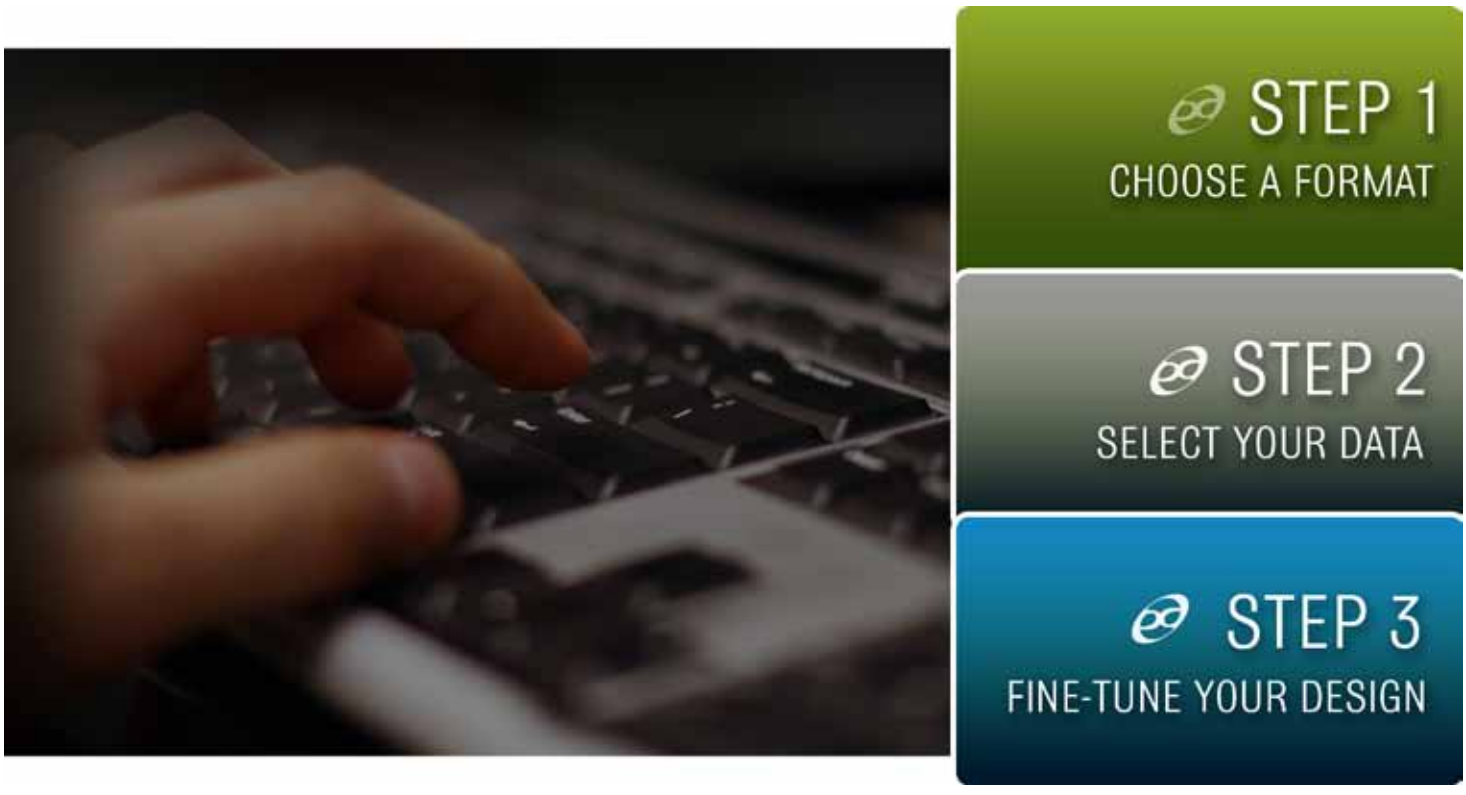
Defran Data Insight is a web-based reporting utility designed to make building, sharing, and analyzing business reports a quick and easy process, even for non-technical users.

Defran Data Insight delivers a user-friendly interface and comprehensive reporting tools. Users can create interactive charts and graphs, as well as publish reports to share with others. An easy-to-use Report Builder walks you through the steps required to create interactive reports without the need to understand SQL or databases.

Getting Started

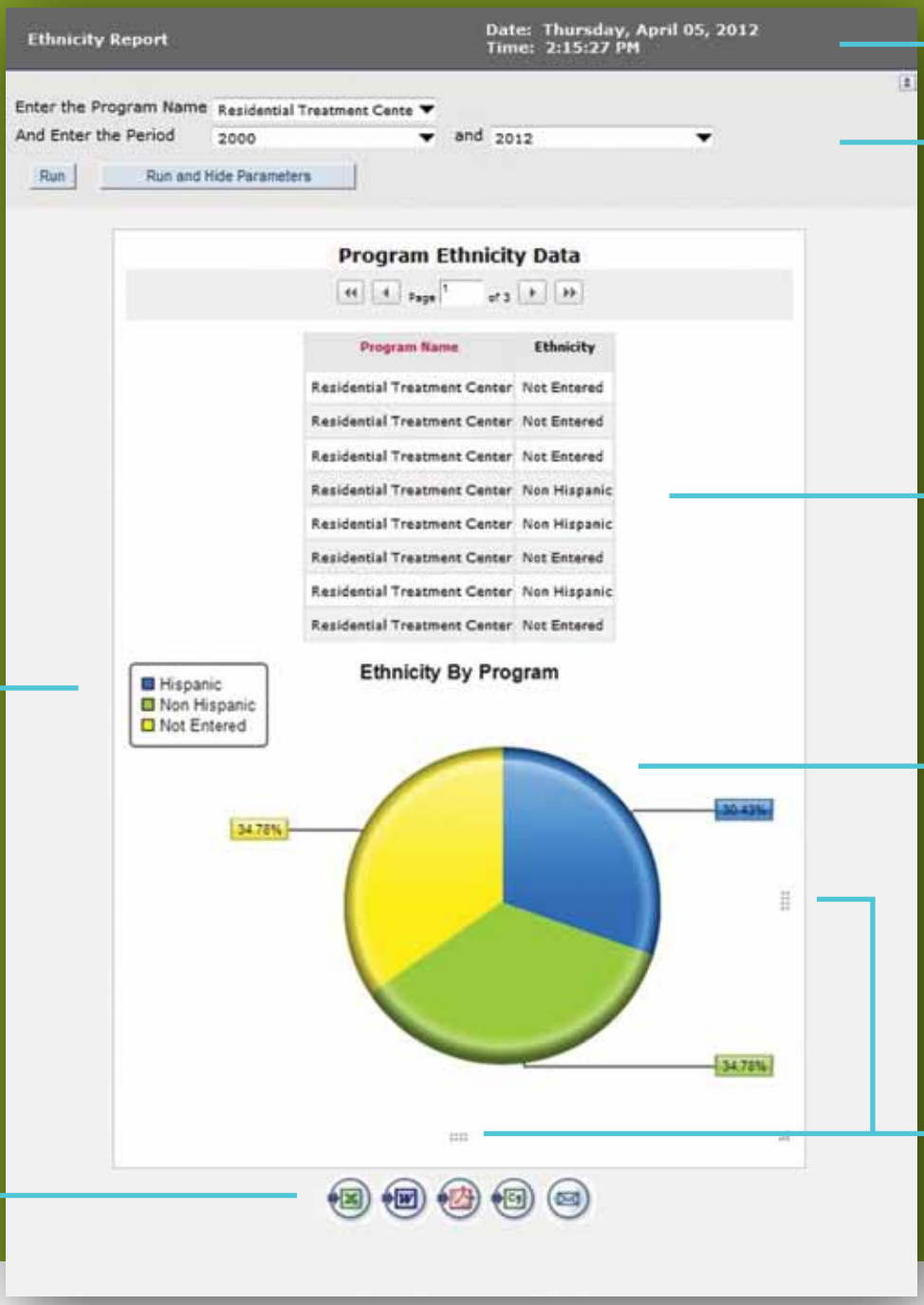
This guide is meant to provide a general overview of the report creation process using Defran Data Insight. It demonstrates the steps needed to create a basic report that would be familiar to an Evolv-CS user. Although your organization's data will differ from that of the specific example provided, by reading through this guide, you will become familiar with many of the techniques that can later be used to build custom reports to meet your individual needs.

For more detailed instructions about using the advanced features not covered in this guide, please refer to the complete **Defran Data Insight Report Design Guide.**



A Sample Report
Ethnicity by Program

In this guide we will create a report titled **Ethnicity by Program**. The image below shows how the report will appear when it is run. This report is designed to track the ethnic makeup (by percent) of any of an agency's programs using parameters the viewer can choose and change at any time. Users can enter the parameter data using three drop down lists: 1. Program Name 2. Time Period Start Year and 3. Time Period End Year.



1

Login to Evolv-CS and navigate to **Defran Data Insight > Evolv-CS > Reports > Data Insight Report Writer > Custom Reporting**.

In the Report Management component, click **Add**, and then click **Report**.

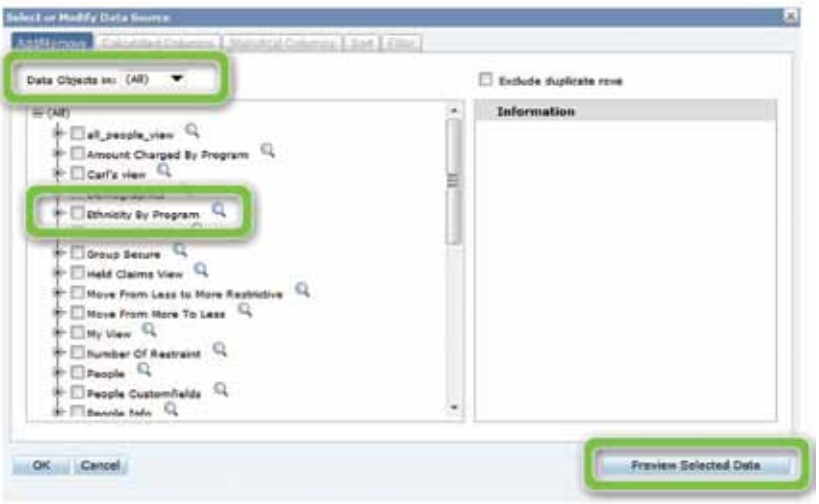
2

A template selection dialog will be presented. Six templates are included in addition to the Blank template. For our example, select **Tabular Report with Chart** and then click on the **OK** button.

3

After selecting the report template the **Select or Modify Data Source** dialog will appear.

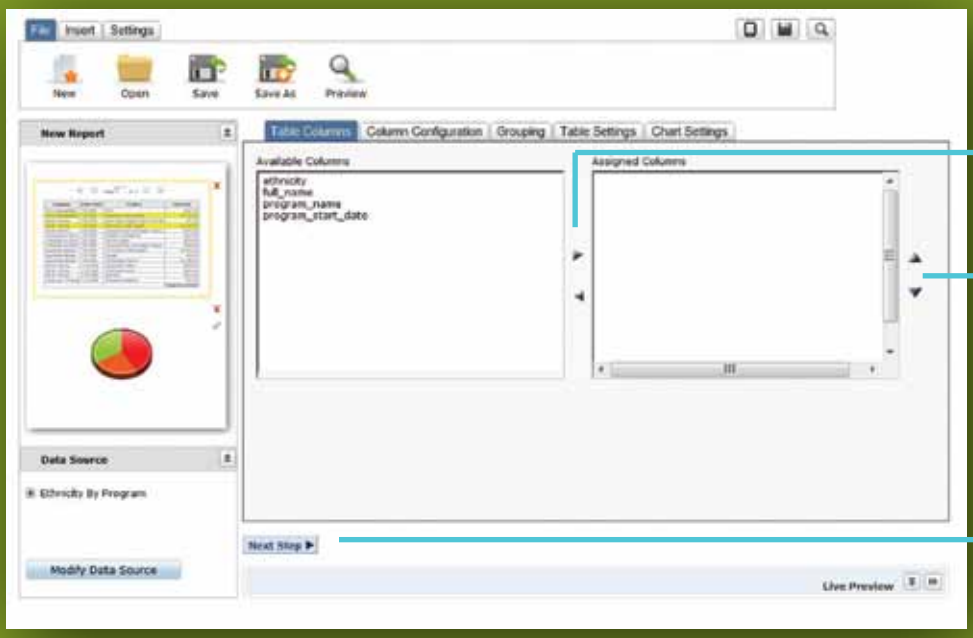
Set the Data Objects in the drop down to **(All)** to see the complete list of available data sources. Next, select the **Ethnicity by Program** data object. After selecting the object, you can click **Preview Selected Data** to see a small subset of the data columns that resides within that data set.



Common data sources are tables and objects called **views.** A view is set of queries that create a virtual table which contains columns and data combined from different tables.

Fine-Tuning
your report design

Once the data objects for the report have been selected, the full **Report Builder** interface becomes available. The Report Builder is a comprehensive and flexible interface designed to allow you to "step" through the report building process one step at a time with the **Next Step** button in the lower left corner of each tab window.



4

In the **Table Columns** dialog we will select the data columns that will be in the report.

Select the **program_name** and the **ethnicity** columns under **Available Columns** and click the right pointing selection arrow to assign them to the report.

The two columns will now be listed under **Assigned Columns**. The **program_name** column should be the first (at the top) column listed. If it is not, click on it, and then click on the up arrow to move it to the top.

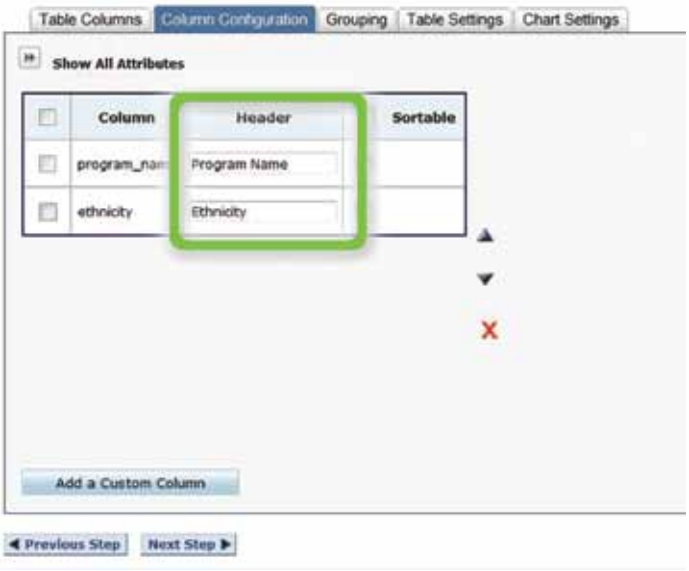
To continue click **Next Step** in the lower left area of the screen.

5

In the **Column Configuration** dialog you can give the columns user friendly names which will appear cleaner in the final report. In the **Header** fields enter the user friendly names for each column.

The columns can also be made sortable by clicking on the **Sortable** check box.

To continue click **Next Step** in the lower left area of the screen.



6

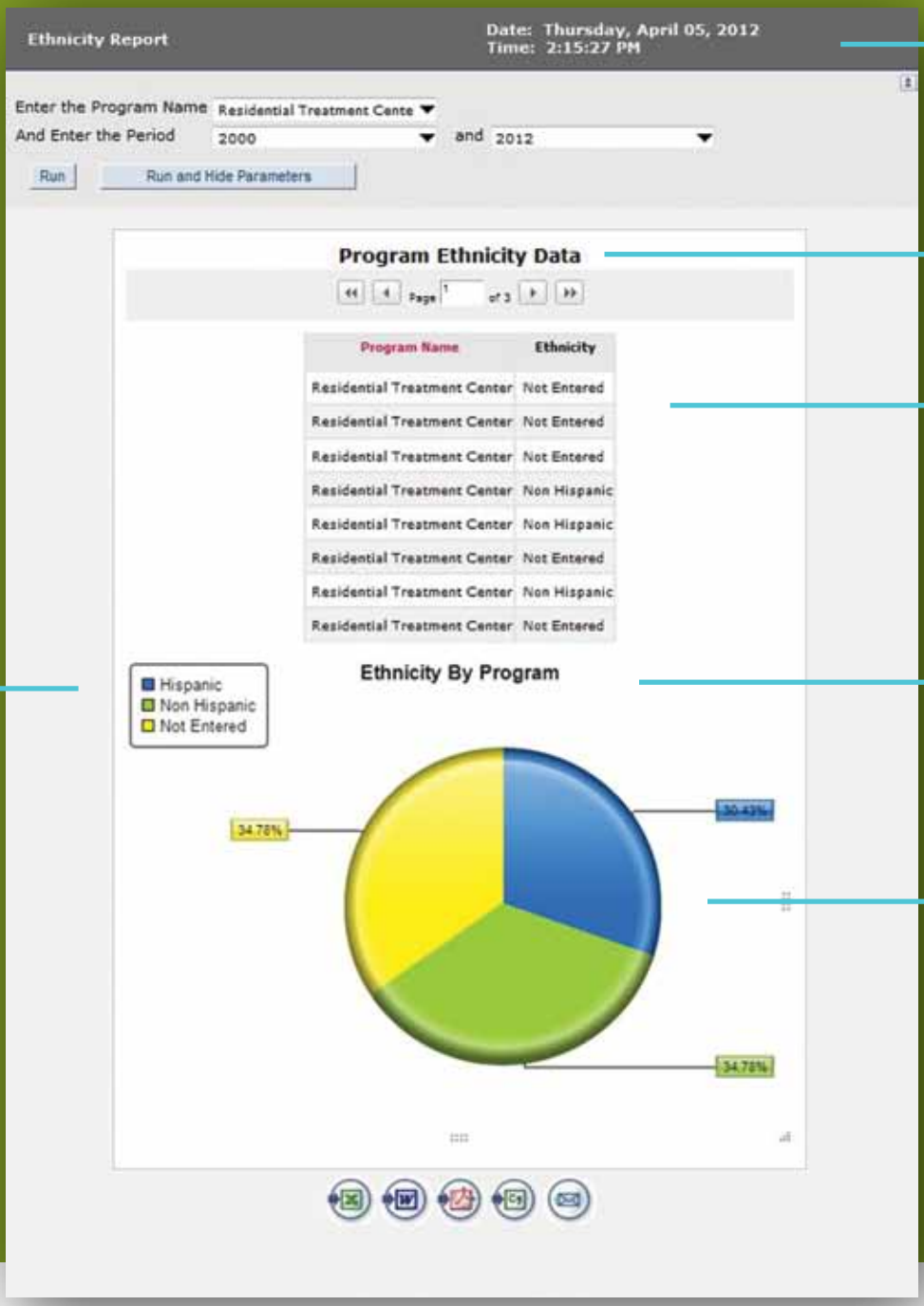
The **Grouping Tab** allows you to group column data for flat-table and drill-down style reports. The feasibility of grouping data highly depends on the data source chosen for the report.

A grouped report is not necessarily appropriate when the data is simply a list of programs, such as in our report so we will not use this feature and leave it in its default setting of **Not Grouped**. Click **Next Step** in the lower left area of the screen to continue.

Table and Chart Settings in your Report

The **Table Settings** tab allows you to control the characteristics of the table in the final report that is displayed.

The **Chart Settings** tab allows you to control the general characteristics of the chart in the final report that is displayed.



Header

Table Title

Table
Change the Rows per Page settings in the Table Settings tab to take up less space in the final report.

Legend
Add a legend and change its positioning in the Chart Settings tab.

Chart Title
Add a title for the chart in the Chart Settings tab.

Chart
Choose what data is used in the Chart Settings tab.

7

Give the table the title **Program Ethnicity Data** and change the **Rows Per Page** to 8 which will reduce the amount of screen space used by the table in the final report. Click **Next Step** in the lower left area of the screen to continue.

8

Give the chart the title **Ethnicity By Program**.

Next, select the **Label** and **Data Columns**. The Label Column area allows the user to select the column to be used for a pie chart label. Data values will be aggregated based on this column.

The Data Column area allows the user to select the data to be shown in the chart, select the format from the suite of numeric formats, and select the aggregation function to be applied to the data.

Next, check the boxes to **Include Legend** and **Allow Resizing**. The **Allow Resizing** attribute will present resizing bars around the displayed chart so that the user can adjust the display when the report is viewed.

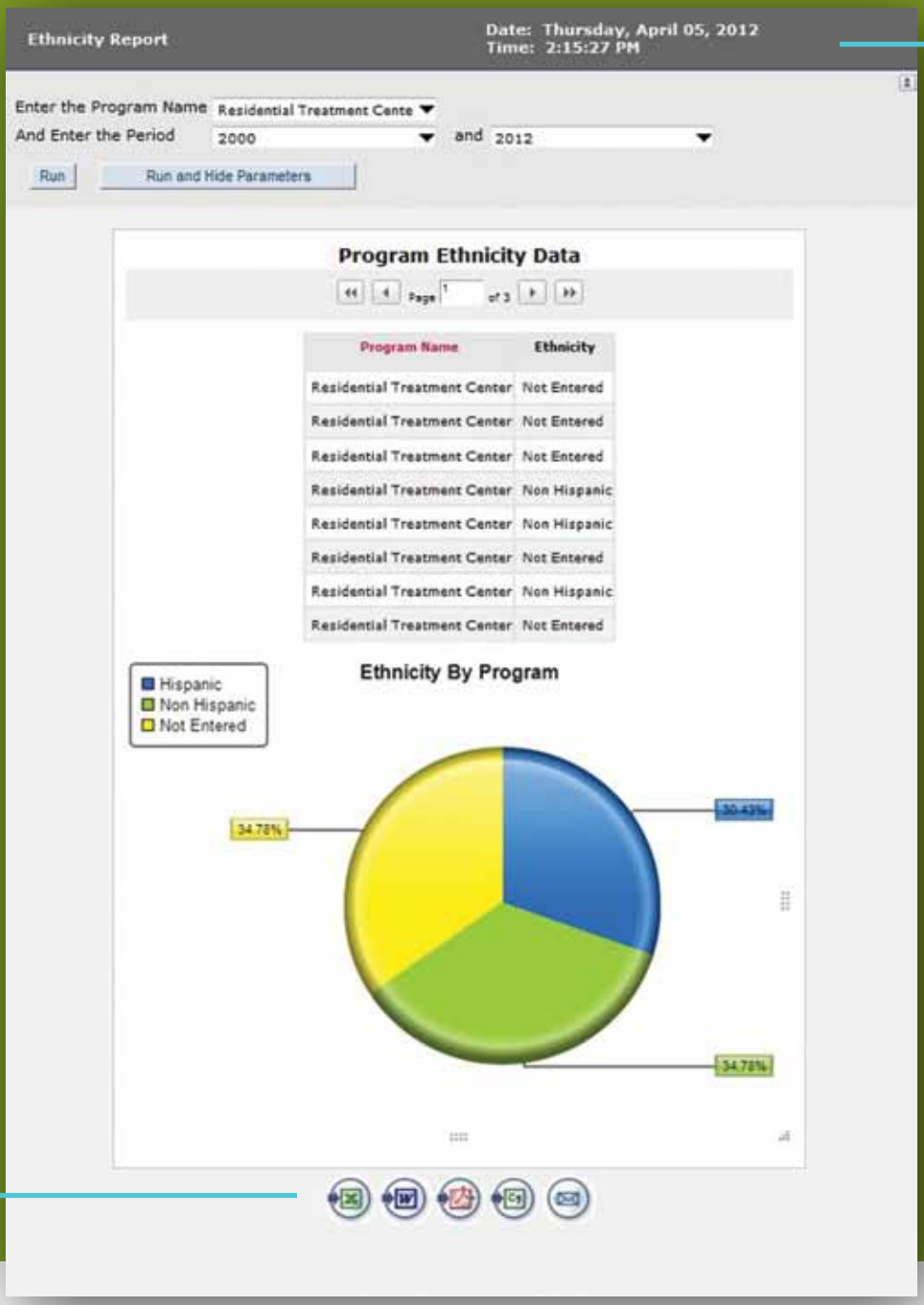
9

Save the report and name it **Ethnicity Report.** You can save it to either the **Personal Reports** folder or the **Shared Reports** folder if you want others to be able to use this report.

Add Header and Export Options to your Report

A **Header** displays basic information about the date and time the report is run.

The **Export Options** component allows links to be added to the bottom of the report that give users the ability to export reports to popular formats such as Excel, Word and PDF as well as make the report searchable and able to be sent by email.



10

Near the upper left corner of the Report Builder screen, click the **Insert** tab. A ribbon of display elements that can be added to the report will appear.

Click **Header** from the Insert ribbon to add the Header to a report. A Header Information tab will automatically be created. Click the **Date** and **Time** boxes to include these elements in the header.

11

Click on **Exports** icon from the Insert ribbon to add the Export Options tab to the report definition.

12

The Export Options tab and dialog appear. Click the **Export to: Excel, Word, PDF, CSV** and **Send Report by eMail PDF** check boxes.

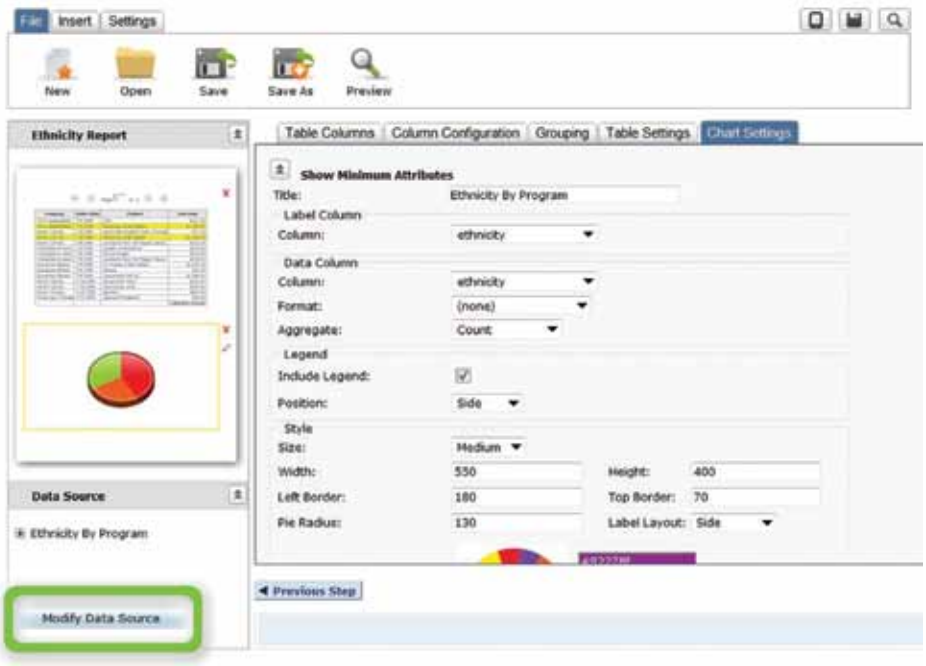
When the report is rendered the result will be a menu of **Export Options** displayed at the bottom of report which will export the report to that application when clicked.

Configuring the **Advanced Display Elements**

In some cases, you may need to create new data columns to provide additional source data for a report. Calculated Columns is an advanced technique that allows a user to create a custom column by manipulating raw data from other existing columns or objects in the report. The newly created Calculated Column can then be used as an additional data source.

Users can create formulas from the six provided operators (mathematical functions to create new values out of old values) or use the predefined functions and advanced users can utilize SQL for further customization.

13 While in the Report Builder window click the **Modify Data Source** button in the lower left corner of the screen, then click the **Calculated Columns** tab.



14 For our report we want to be able to choose a time period in years. However, the time related data in our object (program_start_date column) is in the dd/mm/yyyy format. We need to simplify it to show the year only. This can be achieved by creating a **Calculated Column**. Beneath **Functions**: click on the **Date/Time** button and select year which will display the column data by year only.

15

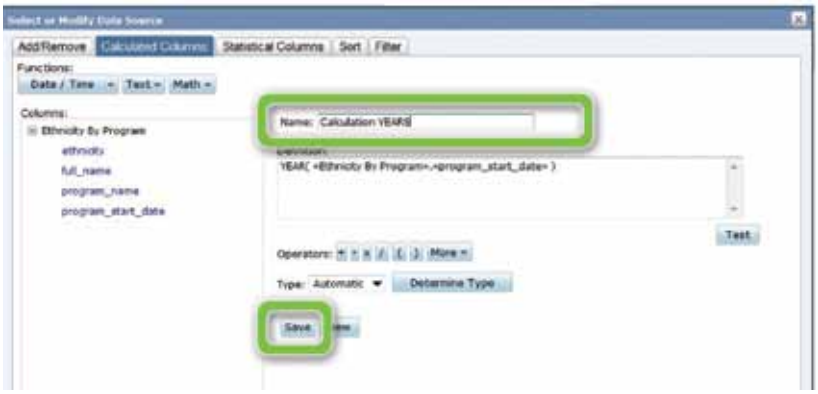
Data Insight will find the relevant date column. In the image below, the column is named **program_start_date**.

16

Click on the column name and it will appear in the **Definition:** area of the **Calculated Columns** window as seen in the image below. To see the result of the new column, click the **Test** button.

17

In this window there are many calculations that can be performed to the data but for our example we will not need to use them. Later, we will filter this newly created column further to allow us to choose a range of years to be included in our report. Name the new column **YEARS** in the name field and click **Save**.

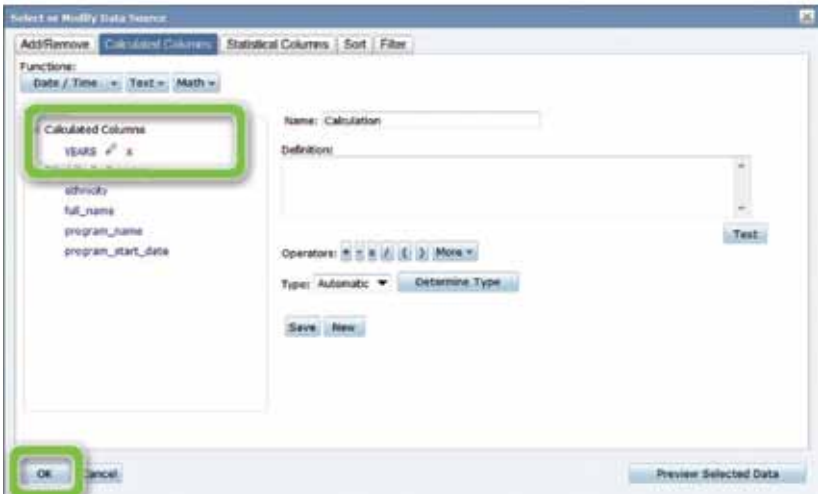


18

After clicking **Save** the newly created Calculated Column will appear in the **Columns** section.

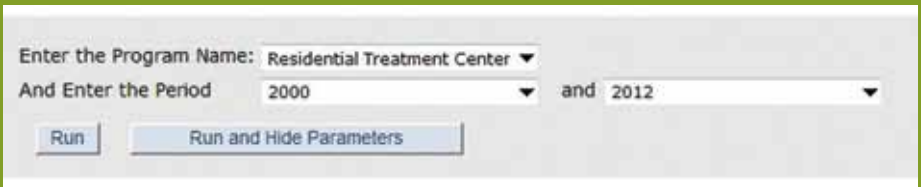
Click **OK** to move on to the next step.

This report will not use the Statistical Columns or the Sort features.



Filtering Lists

The Filter tab is where we create the report's parameters. We will create two parameters: 1) the Program Name, and 2) the start and end years for the report's time period. The image below shows how the parameters drop down lists of the Ethnicity by Program will look when the completed report is viewed.



19

Click the **Filter** tab to create the report's parameters. Click on **Add a Parameter**. To create the Program Name parameter, select the **program_name** column from the **Column** drop down.

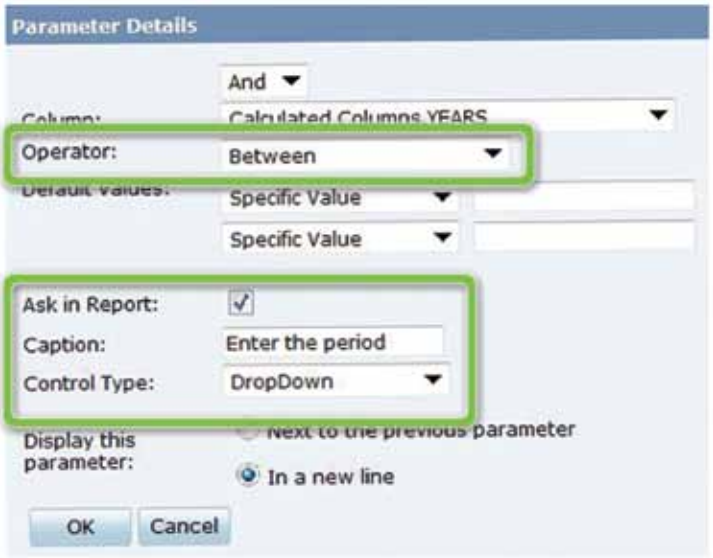
Check the **Ask in Report** option to offer the report viewer the option of setting the parameter values each time the report is rendered. Enter "Enter the Program Name" in the **Caption** field. For **Control Type**: use a drop down list and click **OK**. The result will be a drop down list of all of the programs in the column.

20

Add a second parameter to enter the time period. We will use the Calculated Column named YEARS we created earlier.

Because we want the report to show a time period of a number during a range of years we will use **Between**.

Again, check the **Ask in Report** option to create parameters that can be modified. Next, enter the **Caption** "Enter the Period" and for **Control Type** select DropDown. In the finished report, this will allow the viewer to select the period start and end years each from a drop down list. Click **OK** and you will now see both of the filters in the dialog box below.



Review the Output

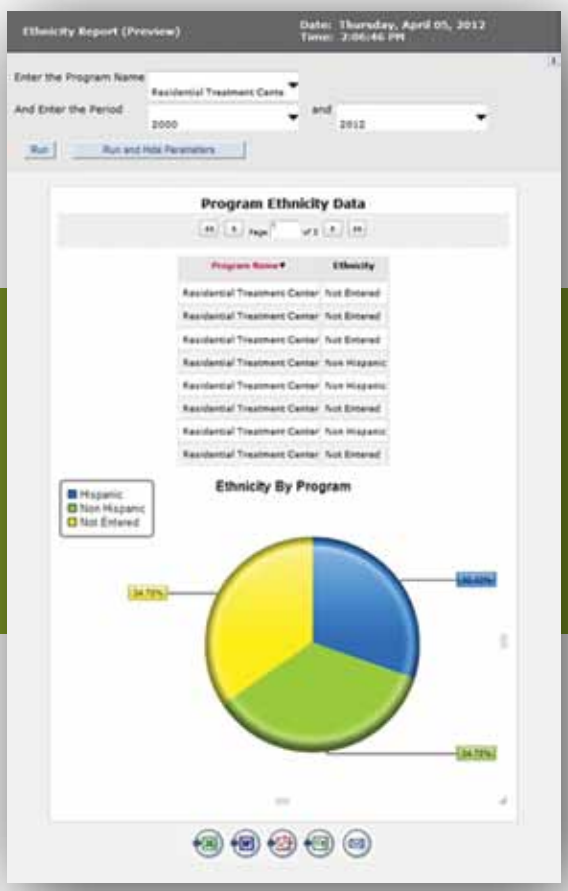
21

Preview the output to see what the report will look like by clicking the **Preview** icon which will render the report in a web browser.

22

You can now see the parameters we created using the filters. Clicking on the **Enter the Program Name** drop down list shows us all of the agency's programs that this report can be run on. Enter the **Residential Treatment Center** program. For the time period start and end years enter **2000** and **2012** and click **Run**.

Now you will see the final output of the Ethnicity by Program report for the Residential Treatment Center program from the years 2000 through 2012.



Running Reports

The **Report Management** button displays the main page of the application.

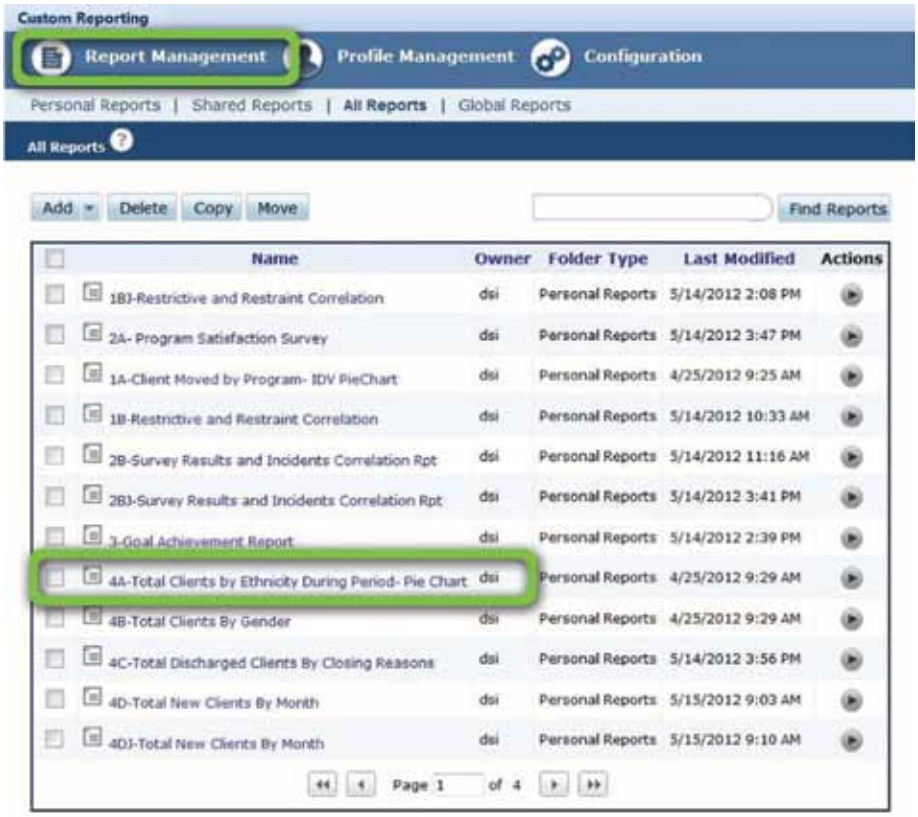
As reports are created, you can save them under the **Personal Reports** or the **Shared Reports** tabs. Clicking on either of these tabs shows a list of the reports available (If no reports have been created, this list is empty).

Click the name of the report to launch it in a new browser window.

There are two options for running the report:

Run
Run the report and leave parameter input box visible.

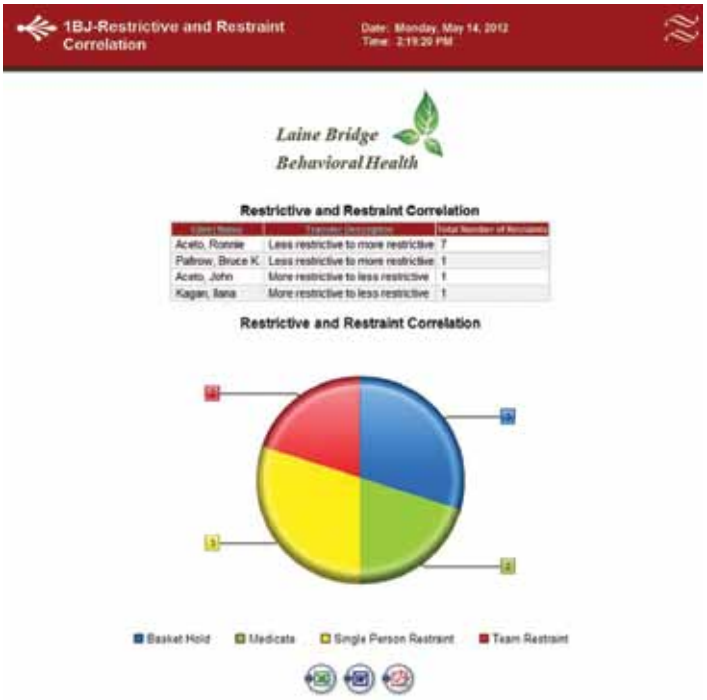
Run and Hide Parameters
Run the report and hide parameter input box.

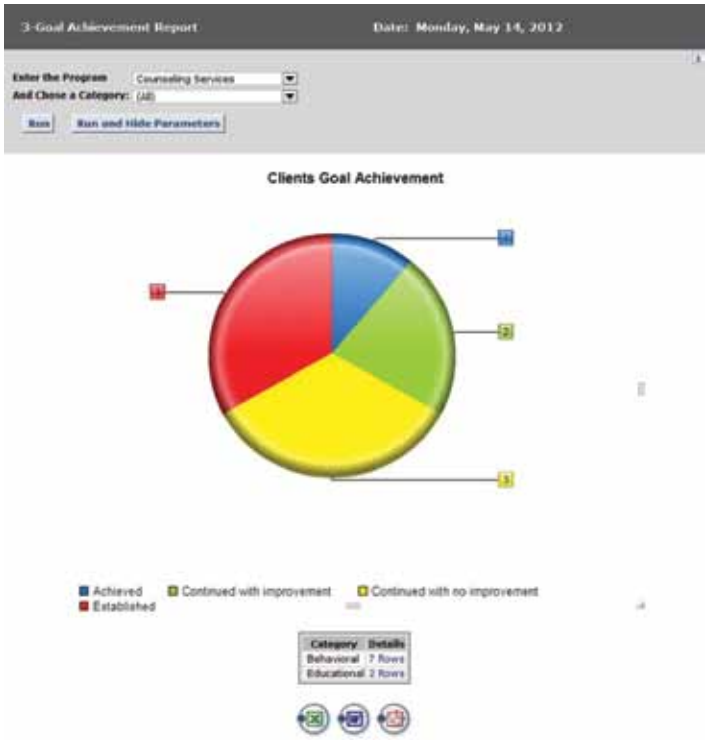


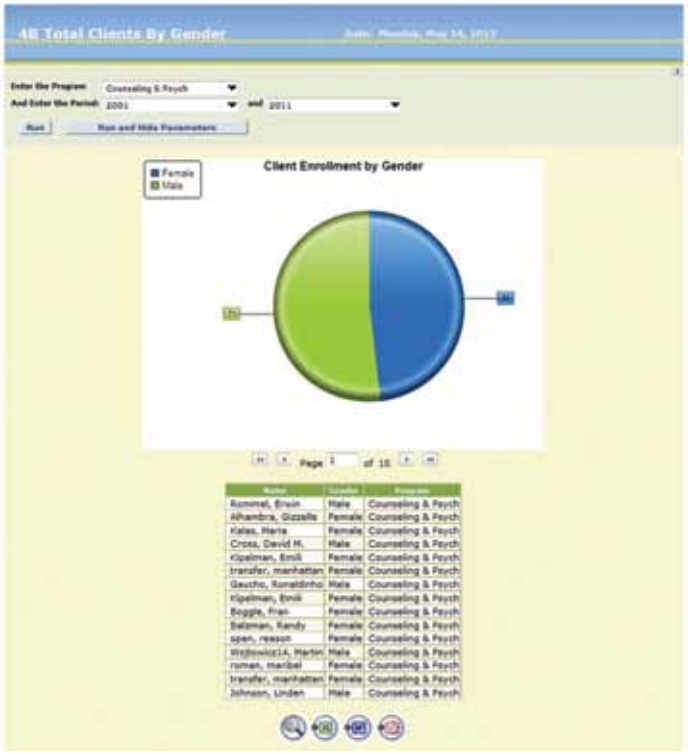
If the report contains numerous parameters, click **Run and Hide Parameters** to provide more screen space for the report. Run the report again to input additional parameters.

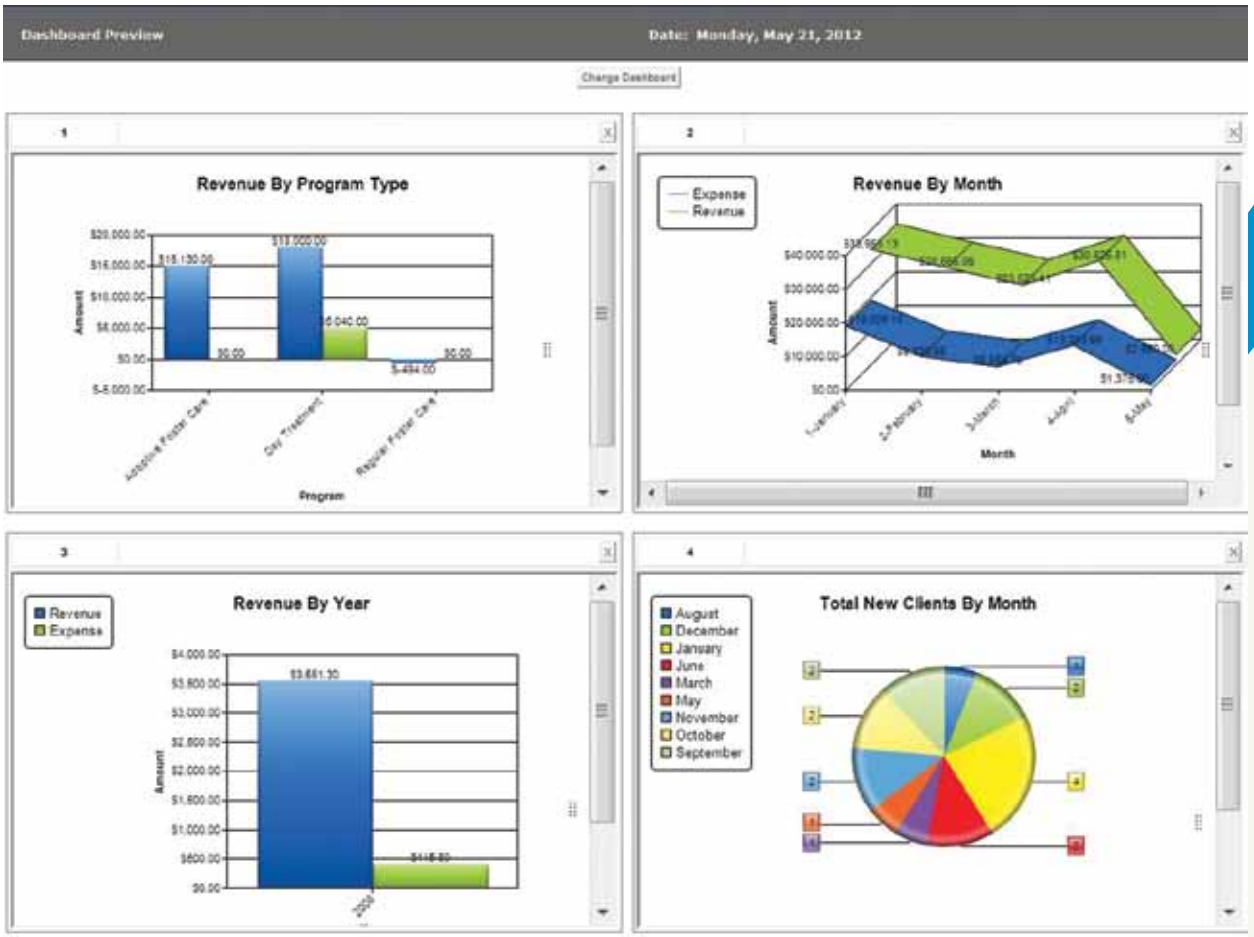
Example Reports

Program Name	Closing Reason
Aftercare	Discharged from Foster Care
Alcohol and Drug Treatment	Disruptive Behavior
Adult Day Treatment	Goals Achieved
Family Day Care	Goals Achieved
Adult Day Treatment	Medical reason
Alcohol and Drug Treatment	Moved out of area
Elementary	Other
Kinship Care	Other
Residential Treatment Center	Other




3-Goal Achievement Report
Date: Monday, May 14, 2012
Enter the Program
Counseling Services
And Chose a Category:
(All)
Run
Run and Hide Parameters
Clients Goal Achievement
Achieved
Continued with improvement
Continued with no improvement
Established
Category
Details
Behavioral
7 Rows
Educational
2 Rows


48 Total Clients By Gender
Enter the Program
Counseling & Psych
And Enter the Period:
2001
and
2011
Run
Run and Hide Parameters
Client Enrollment by Gender
Female
Male
Page
of 10


Dashboard Preview
Date: Monday, May 21, 2012
Change Dashboard
1
Revenue By Program Type
Amount
Program
2
Revenue By Month
Expense
Revenue
Amount
Month
3
Revenue By Year
Revenue
Expense
Amount
4
Total New Clients By Month
August
December
January
June
March
May
November
October
September

Additional Resources

i. *The Defran Data Insight Report Design Guide (PDF)*

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