

Datix Guidance Document

Designing reports

PrimaryCare:24

To access Datix

- → Click on the DATIX icon found on your PC24 desktop computer
- > The screen will display the blank DIF1.
- Click Login (top left of the screen) to sign in if you have got access to Datix.



3 records found	Displaying 1-3				
5 records round.	Displaying 1-5.				
All	ID	Module	Name	Action required	Due date
Overdue	4425	Incidents		Overdue Overall	12/08/2020
	4425	Incidents		Being reviewed	31/07/2020
Due today	184	Actions	Ranid Review Action	Investigation (Incidents)	10/07/2020

PC24 Datix Incident Form (DIF1) - IN DEVELOP

Any fields marked with a * are mandatory and MUST be completed. - Click the help bubble 🖗 for

ncidents

- Click the Module link required (top left side of the screen) in this example click on the Incidents link – the screen is now split into 2 parts.
- The options on the left side of the screen are used for searching for records, saving queries, designing and viewing reports.
- The options on the right side of the screen are explained in the Datix Guidance document for manaing incidents (DIF2)

Incidents					
Options			Statuses		
Add a new incident			New Incidents, awaiting review	6 records	6 Overdue
🏙 My reports		Print and a second	1 Overdue		
🍰 Design a report			- Deling retrieved	01000103	5 Officiale
Q New search			Approved - Still Open	1 records	1 Overdue
🔚 Saved queries			Approved - Closed	2 records	
Show staff responsibilities	taff responsibilities	0			
😣 Help			- Nejecieu	o records	
1					
	,				



How to Design Reports in Datix

You are able to design your own reports within any Datix module and display them in a variety of formats. Once designed, reports can be drilled down and accessed directly or reports can be exported into excel or PDF format for further dissemination and analysis. The benefits are that you can run these reports prior to a meeting, save them and have them ready to display in Excel during the meeting. This is useful especially if you are unable to access the Datix system in your meeting venue.

If you require a listing report (a report that provides more detailed description) then you should contact the Quality & Governance team <u>datix@pc24.nhs.uk</u> to discuss this or use the Base listing reports already available.

- Log into Datix
- > Click on the Module you wish to design reports for (in this instance **Incidents**)
- > From the left side panel click on **Design a report** to display the Report Designer
- You can enter any information that you need to filter your report by. You will only have access to reports that you have been given permissions for (see your Datix lead for any profile amendments)
- > The different types of reports can be identified by hovering the mouse over each image:-





Report Types

Bar Chart:

A bar chart is a report that consists of rectangular bars with lengths that are proportional to the values that they represent. You can create vertical, stacked vertical, horizontal and stacked horizontal bar charts.

Pie Chart:

A pie chart is a circular chart divided into two or more slices, each representing a portion of the total. You can create standard or exploded pie charts.

Line Graph:

A line graph displays a series of data points, representing individual measurements, connected by straight line segments. You can create single lined and multiple lined line graphs.

Pareto Graph:

A Pareto graph contains both bars and a line graph, where bars represent the individual values in descending order, and the line represents the cumulative total.

SPC Chart:

A statistical process control (SPC) chart is a method of quality control used to monitor and control a process. It helps to ensure that a process operates at its full potential. Data is shown chronologically and helps users identify whether variations in a process are within control limits. You can create a c-charts, i-charts (x-charts), moving range reports or run reports.

Crosstab Report:

A crosstab report is a table, in a matrix format that displays the (multivariate) frequency distribution of variables. It gives a basic picture of the interrelation between two variables and can help find interactions between them.

Detailed Listing Report:

A listing report displays information from named fields based on a predefined query. They are useful for listing information to help identify significant concerns or areas of improvement. You create listing reports using base reports (chosen from the pre-created Packaged Reports).

Gauge Chart:

A gauge chart is a representative visual report that shows where the total count of a selected event falls within three user-defined ranges.

Traffic Light Chart:

A traffic light chart is a single horizontal stacked bar chart that displays the sum total of each field as coloured bars, adding to a cumulative total across the bottom of the report. It can be useful as an indicator of proportionality.

- > Once you have selected your Report Type, you need to decide on the required criteria.
- > You can use your most recently defined search criteria or select a saved query.
- You can clear the latest results search by selecting "Clear Settings" tab as required



Report Designer Parameters – Bar Chart Example

Section	Parameter	Definition			
Report Settings					
Report settings	Custom Title	Enter a title for the report. If you don't enter a title, one will be system generated.			
A Query Incidents last week	Query	Either select the current criteria (your most recently defined search criteria) or select a saved query to extract the data for the report.			
Filters					
Filters Image: Constraint of the second	Туре	Optional . Double click an option in the Type drop-down list to filter the results returned by the query.			
Field 1 (Mandatory)					
Field 1	Form	Select the module for the data you want to display			
* Form	Field	Select a coded or date field to display from the module selected. (extra fields can be used)			
	Date Option	If a date field has been chosen above, select the relevant date option to display.			
Field 2 (Optional)					
Field 2 Form	Form	Optional . Select the section containing the data you want to report on for Field 2. You can select the current module or a linked data from another module linked to this record.			
Field	Field	Optional . Select a coded field or date field to use based on the module/link data section selected in the Form list. Note that you can also select extra fields.			
	Date Option	If a date field has been chosen above, select the relevant date option to display.			
Additional Options					
Additional options	Show Top	Enter number required			
Show top items Count style Number of records	Count Style	Chose Count Style to be displayed			
Show % 1 Value only	Show %	Select % display required			



> Once you have completed your Report Parameters click "Run Report"

To Do Lint Hy Dashboard Actions Cantacts Equipment Library Paym Incidents × Risk Register × Complaints × CQC Standards ×	ands Admin taquat	Datix Chice HeLoughlin
Report designer - Incidents	n Incidents by Directorate	
Report type		
Report settings Custom title		
* Query All incidents reported @lastmonth * Field 1		
Form Incidents		
* Field Directorate *		
Form	Directorele	
Red	Print Add to Deshboard Export	
Update report Clear settings		
DutxWeb 14.0.35.1 @ Dutix Ltd 2018		🚺 Datix

- The results of your search are now shown. Click on any area to access those particular incidents.
- For example if you wanted to look at incidents within Integrated Urgent Care, you would click on the relevant bar (column) and you would be taken to the list of those particular incidents. You can then click on each one to look at the incident in more detail as required.
- If you wish to maximise the report on screen you can do so by clicking the arrow icon
- > There is an Export button at the bottom of the screen.
- You will be asked to select how you want the report displaying.
- If you select the Excel option the data will open in an Excel format and both the graph and the data are shown.
- The Report Type can be amended as required to get the desired result, the above example can be amended to display as a Pie Chart for example
 - Select the new report type
 - Ensure the required fields are completed
 - Click Update Report



Example of All Incidents reported by Directorate

To Do List Ny Daobhound Actions Contacts Equipment Library Payments Admin Logont				
Incidents 👻 Risk Reg	jister 👻 Complaints 👻 CQC Sta	ndards ¥		
Report desig	jner - Incidents		Incidents by Directorate	
Report type		^	Primary Care	
		\mathbf{V}		
			Megantal Urgent Care	
Report settings				
Custom title				
* Query	WHR - Incidents	•	Common	
Filters				
Reported	Start End 28/07/2020			
Field				
* Form	Incidents	•	🛞 Primary Care 🛛 🔞 Integrated Urgent Care 🛞 Corporate	
* Field	Directorate	•	Print Add to Dashboard Export	
Update report Clear	settings			

Note:

- Drill down to further details by clicking on chart segments
- Clear settings before running new reports.