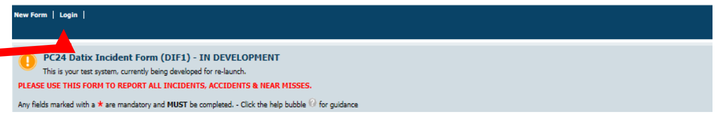
Datix Guidance Document

Designing reports

To access Datix

➔ Click on the DATIX icon found on your PC24 desktop computer

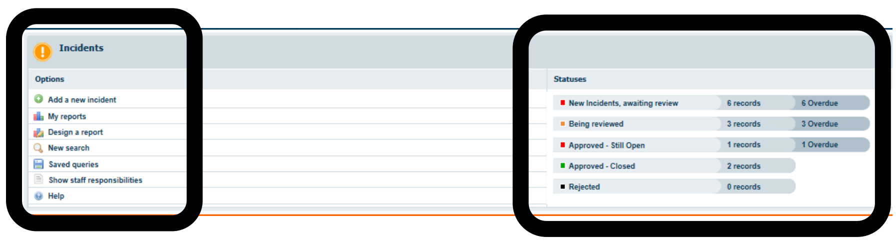
- The screen will display the blank DIF1.
- Click Login (top left of the screen) to sign in if you have got access to Datix.



- The screen will display the To-Do List as your "landing page". This displays all records that require your action.

- 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)

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 datix@pc24.nhs.uk 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:-

More than 1 style of chart

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.

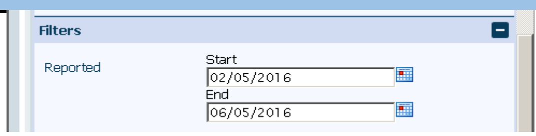
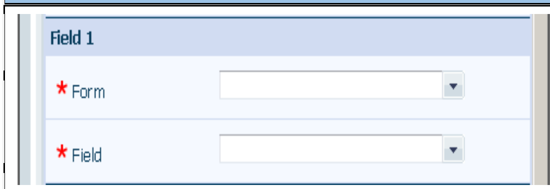
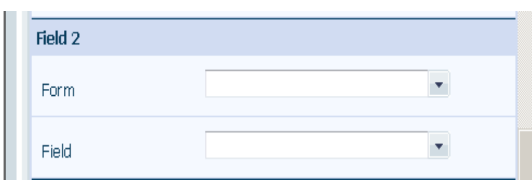
Detailed Listing Report:
A listing report displays information from named fields based on a predefined query. They are useful for listing information to help identify significant concerns or areas of improvement. You create listing reports using base reports (chosen from the pre-created Packaged Reports).

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.

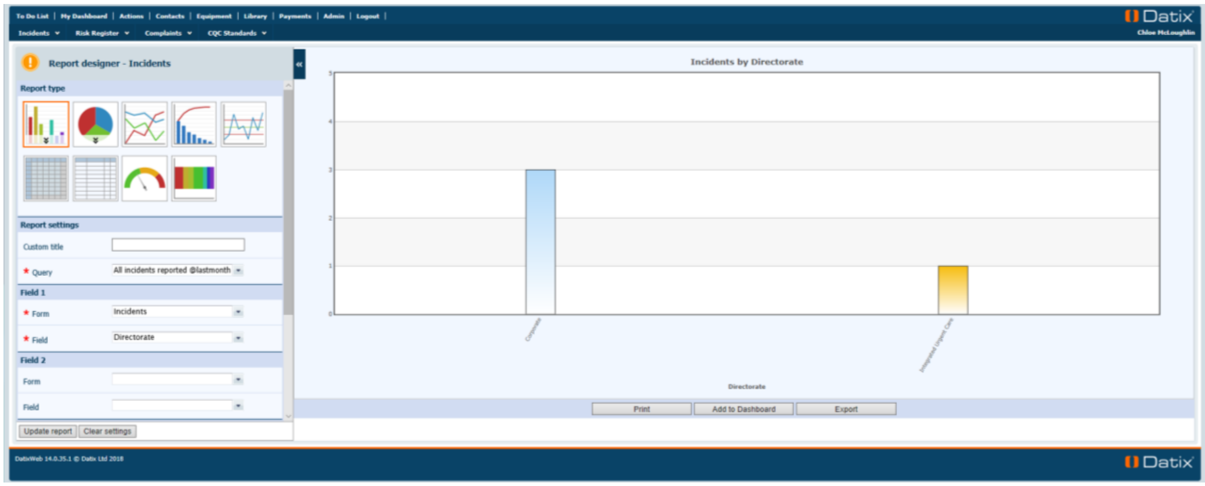
Traffic Light Chart:
A traffic light chart is a single horizontal stacked bar chart that displays the sum total of each field as coloured bars, adding to a cumulative total across the bottom of the report. It can be useful as an indicator of proportionality.

- 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		
	**Custom Title**	Enter a title for the report. If you don't enter a title, one will be system generated.
	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		
	**Type**	**Optional**. Double click an option in the Type drop-down list to filter the results returned by the query.
Field 1 (Mandatory)		
	**Form**	Select the module for the data you want to display
	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)		
	**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	**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		
	**Show Top**	Enter number required
	Count Style	Chose Count Style to be displayed
	Show %	Select % display required

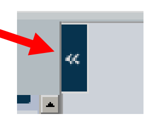
- Once you have completed your Report Parameters click “Run Report”



- 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



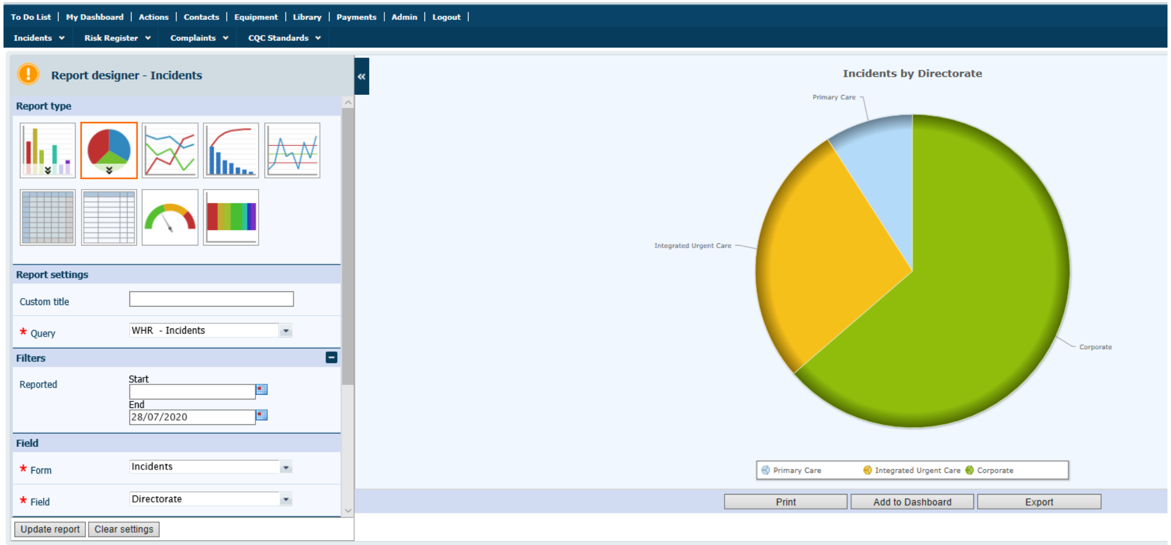
- There is an Export button at the bottom of the screen.

- 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



Note:

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