



Interactive Reports

🔍
Rows ▼

Intake #	Person #	Customer	PSA	Start Date	Status	Interviewer	Assessor
30000356	30000516	SMURF, GEORGE	4	04/17/2014	SUBMIT FOR REFERRAL	TRAINING04	(Not Assigned)
30000332	30000630	SMURF, SMARMY D	7	07/18/2013	SUBMIT FOR REFERRAL	TRAINING03	(Not Assigned)
30000338	30013268	SHEEPDOG, STEVE	4	07/30/2013	SUBMIT FOR REFERRAL	TRAINING04	(Not Assigned)
30000341	30013293	DAVIS, KYLE	4	07/31/2013	SUBMIT FOR REFERRAL	TRAINING04	(Not Assigned)
30000342	30013295	MCKINLEY, JAZLIN	4	07/31/2013	SUBMIT FOR REFERRAL	TRAINING03	(Not Assigned)

1 - 5

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Interactive Reports – Introduction

Introduction

Many KDADS Web Applications contain various types of reports that use the Interactive Report feature. Interactive Reports allows the user to create custom views of the report data. Some reports have pre-defined filters that can be selected without having to build custom filters.

If custom views are needed, Interactive Reports provides a variety of reporting tools to create these custom views of a report. This manual will cover the more commonly used reporting tools.

Interactive Report Page Components

The screenshot shows an interactive report interface. At the top, there are radio buttons for 'Review Type' (Response Reviews selected, SED) and 'Quality Review Period' (SFY15-Q2 selected, SFY15-Q1, 2014, 2013, 2013(MFP), 2014(MFP), 2014(SED)). Below this is a 'Create' button and a search bar with a 'Rows' dropdown set to 15 and a 'Go' button. A pagination indicator shows '1 - 15 of 1606'. The main area is a table with columns: Status, Compliance, Review Type, Review Date, Waiver, P/S, Reviewer, and Interview Date. The table contains 15 rows of data, all with 'RESPONSE' as the Review Type and '10/01/2014' as the Review Date.

Pre-Defined Filters (Callout pointing to Review Type and Quality Review Period)

Reporting Tools (Search, Number of Rows to Display, Control List) (Callout pointing to search bar, Rows dropdown, and Go button)

of Currently Displayed Rows (Callout pointing to '1 - 15 of 1606')

Report Data (Callout pointing to the table rows)

Status	Compliance	Review Type	Review Date	Waiver	P/S	Reviewer	Interview Date
-	-	RESPONSE	10/01/2014	FE	P	PAULAELLIS	Wednesday, October 29, 2014
-	-	RESPONSE	10/01/2014	TA	P	NICKKARAM	Monday, December 15, 2014
-	-	RESPONSE	10/01/2014	DD	P	SUSANMERGEN	Thursday, December 11, 2014
-	-	RESPONSE	10/01/2014	FE	S	DIANE BEGGS	Friday, December 5, 2014
-	-	RESPONSE	10/01/2014	FE	P	DIANE BEGGS	Monday, December 1, 2014
-	-	RESPONSE	10/01/2014	PD	S	DIANE BEGGS	-
-	-	RESPONSE	10/01/2014	FE	S	NICKKARAM	-
-	-	RESPONSE	10/01/2014	FE	P	PAULAELLIS	Sunday, November 30, 2014
-	-	RESPONSE	10/01/2014	FE	S	RITALOGAN	-
-	-	RESPONSE	10/01/2014	FE	P	JULIATANDOROST	Tuesday, November 4, 2014
-	-	RESPONSE	10/01/2014	TA	P	JAMIE PEDIGO	-

Interactive Reports – Component Descriptions

Interactive Report Page Component Overview

Region	Purpose
Pre-Defined Filters	Not all Interactive Reports have predefined filters. The ones that do will display at the top of the page, as either radio button or checkbox selections. Radio button selections update the report data automatically. Checkboxes require a 'Go' button that sends a request to the application to update the report data.
Reporting Tools (Search / Number of Rows to Display / Control List)	The Search field provides a way to look for a specific record. The row display defines how many rows of data will appear per page (the '1-15 of 1606' information shows which rows of how many total rows of the report are displaying on the current page. The Control List (yellow gear icon) contains a variety of filtering tools.
Currently Displayed Rows	Which group of rows of the total report are currently displaying.
Report Data	The report data that displays is dependent on the above pre-defined filters and/or other filters/sort options that are selected.

Reporting Tools - Search for a Specific Record

Use the **Search** field to look for a specific record. The search looks in all displayed fields for the search text entered.

For example, if the Search text is 'jack,' the following results would be returned:

- Finds a record with the first name of Jack, and
 - finds a record with a last name of Jackson, and
 - finds a record with a Reviewer named JACKSMITH
-

Reporting Tools - Number of Rows to Display

Change the **Rows** drop-down list to reflect the number of rows to display on the page. The currently displayed rows will show which grouping of that number is currently displayed on the report. If displaying 100 rows at a time, the currently displayed rows will show rows 1-100, then 101-200, then 201-300, etc.

If the report is very large, be aware that choosing a large number of rows to display at a time will noticeably increase the length of time it takes to display the rows.

Reporting Tools - Control List

The next chapter will cover the most commonly used Control List functions: **Filter, Sort, Control Break, Highlight, Save Report, Reset, and Download.**

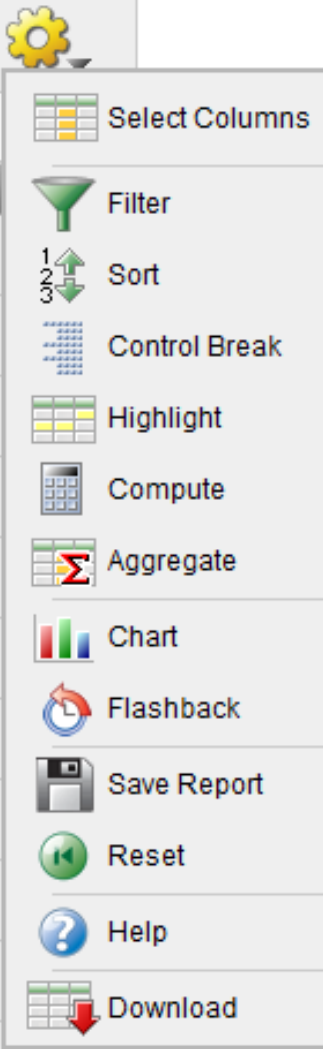
Reporting Tools – Control List

Introduction

The Control List contains a variety of filtering, sorting, and layout tools that provide customization of the default report.

Function Descriptions



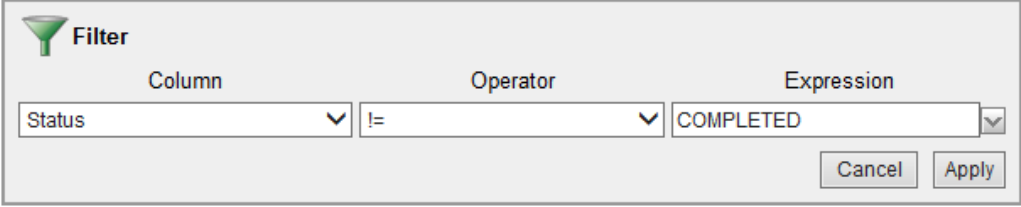
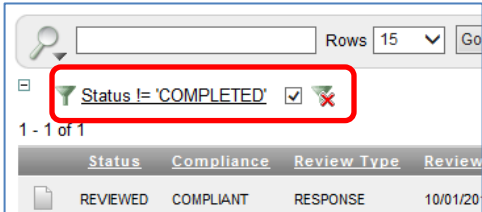

The table below contains the descriptions of the functions available through the Interactive Report Control List:

Control List	Action
	<p>Control List gear icon – Click on the icon to open up the Control List selections.</p>
	<p>Select Columns – Used to modify the columns that display. The columns listed under 'Display in Report' are displayed. The columns listed under 'Do not Display' are hidden. You can reorder the displayed columns using the up and down arrows on the far right. Computed columns are prefixed with **.</p>
	<p>Filter – A more detailed filter with additional operators to further personalize the report data.</p>
	<p>Sort – Used to sort by multiple columns, each column can be sorted in ascending or descending order. You can also specify how to sort nulls (first or last in sorted list).</p>
	<p>Control Break – Used to display the report by groups that you select. The defined sort order is maintained within each group. Example: Control Break by waiver groups the records by waiver, but maintains the original sort order within each group. A group heading separates each waiver.</p>
	<p>Highlight – Highlighting allows you to define a filter with color. The rows that meet the filter settings are highlighted using the characteristics associated with the filter.</p>
	<p>Compute – Computations allow you to add computed columns to your report. These can be mathematical.</p>
	<p>Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.</p>
	<p>Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.</p>
	<p>Flashback – Not available.</p>
	<p>Save Report – Saves a customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.</p>
	<p>Reset – Restores report to the default settings.</p>
	<p>Help – On-line Help on report functions.</p>
<p>Download – Allows the current report to be exported to a comma-delimited file (CSV). The CSV file can be opened in Excel.</p>	

Control List – Filter

How To

Follow the steps in the table below to Filter a report.

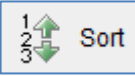
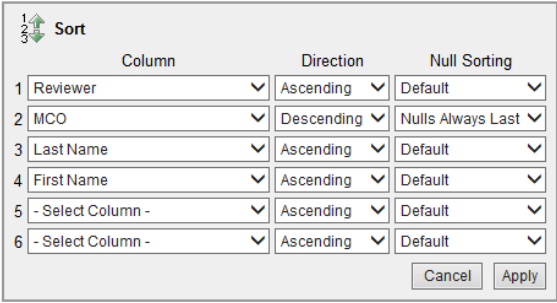
Step	Action	
1.	Click on the Interactive Report Control List icon 	The Control List drop-down displays.
2.	Select Filter from the Control List. 	The Filter control tool displays.
3.	Select the Column to be filtered	
4.	Select the desired Operator	The != operator is 'not equal to'
5.	Select or type the desired Expression .	Depending on the column being filtered, and what data are displayed in the column, the Expression field may populate with the available choices for that column.
<p>Example:</p>  <p>This filter will display all records that do <i>not</i> have a status of Completed.</p>		
6.	Click on the Apply button.	The filtered report displays.
7.	The filter criteria displays at the top of the report.	 <p><input checked="" type="checkbox"/> = Turn filter on/off</p> <p> = Permanently remove filter</p>


Multiple filters can be created for a report, and each filter can be individually turned on/off.

Control List – Sort

How To

Follow the steps in the table below to Sort a report.

Step	Action	
1.	Select Sort from the Control List. 	The Sort control tool displays.
2.	Select the desired Column sort order. Select the Direction (Ascending or Descending) for each column. Select where the Blank Fields (nulls) should display.	
3.	Click on Apply .	The sorted report displays.

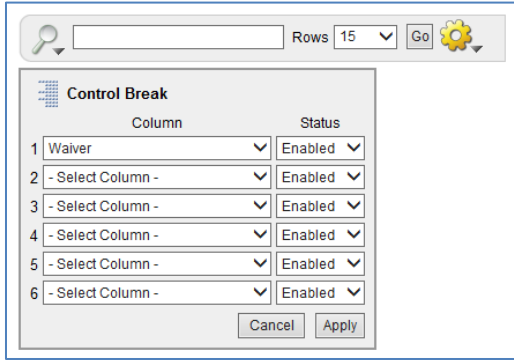
Status	Compliance	Review Type	Review Date	Waiver	P/S	Reviewer 	Interview Date	KAMIS ID	Medicaid Nbr	F
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	6	00	EL
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	-	00	M
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	2	00	TR
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	4	00	JU
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	6	00	A
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	1	00	E
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	1	00	S
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	1	00	M
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	2	00	L
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	2	00	J
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	2	00	B
-	-	RESPONSE	10/01/2014	FE	P	APRILUNRUH	-	3	00	IN

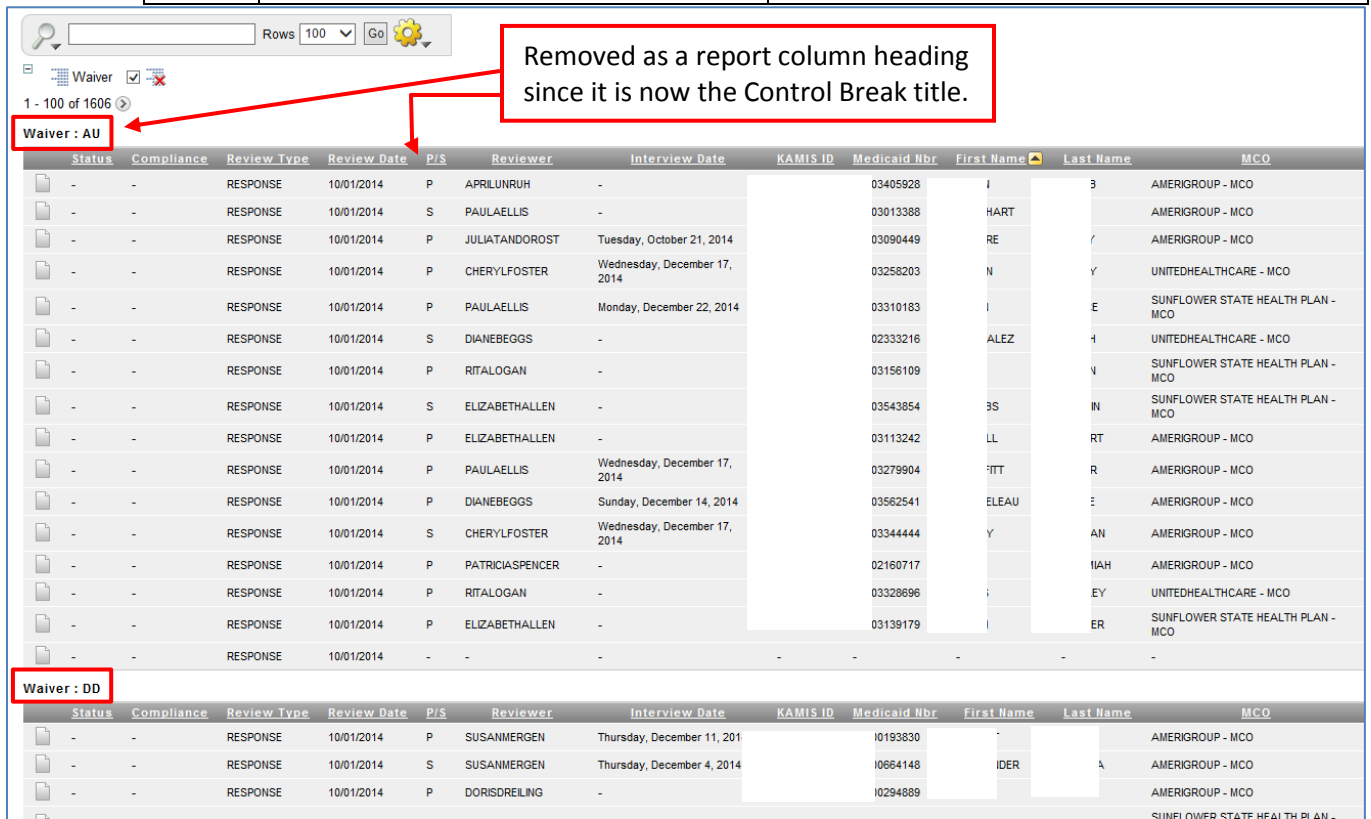
Note: The initial sort column displays an icon after the column-heading label, indicating an ascending or descending sort.

Control List – Control Break

How To

Follow the steps in the table below to group data by Control Breaks based on the criteria selected.

Step	Action	
1.	Select Control Break from the Control List.	The Control Break control tool displays.
2.	Select the Column(s) at which the data will break. Note: The Status can be changed in the Control Break criteria listed at the top of the report, so the Status here can be left at Enabled.	
3.	Click on the Apply button.	The new layout displays, with the report grouped by the control break selected in step 2. The Control Break column is removed from the resulting report, since the Control Break title is that column.



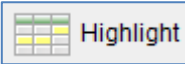
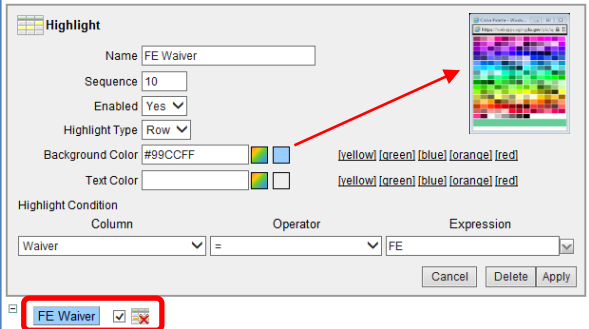
Removed as a report column heading since it is now the Control Break title.

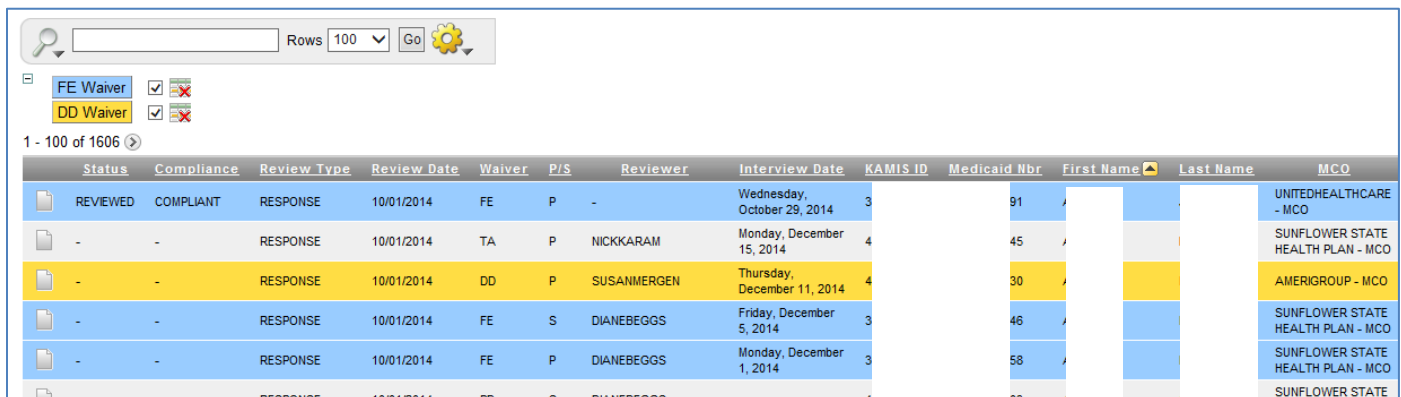
Status	Compliance	Review Type	Review Date	P/S	Reviewer	Interview Date	KAMIS ID	Medicaid Nbr	First Name	Last Name	MCO
-	-	RESPONSE	10/01/2014	P	APRILUNRUH	-	-	03405928	I	B	AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	S	PAULAELLIS	-	-	03013388	HART		AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	P	JULIATANDOROST	Tuesday, October 21, 2014	-	03090449	RE		AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	P	CHERYLFOSTER	Wednesday, December 17, 2014	-	03258203	N	Y	UNITEDHEALTHCARE - MCO
-	-	RESPONSE	10/01/2014	P	PAULAELLIS	Monday, December 22, 2014	-	03310183	I	E	SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	S	DIANE BEGGS	-	-	02333216	ALEZ	H	UNITEDHEALTHCARE - MCO
-	-	RESPONSE	10/01/2014	P	RITALOGAN	-	-	03156109		V	SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	S	ELIZABETHALLEN	-	-	03543854	BS	IN	SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	P	ELIZABETHALLEN	-	-	03113242	LL	RT	AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	P	PAULAELLIS	Wednesday, December 17, 2014	-	03279904	HITT	R	AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	P	DIANE BEGGS	Sunday, December 14, 2014	-	03562541	ELEAU	E	AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	S	CHERYLFOSTER	Wednesday, December 17, 2014	-	03344444	Y	AN	AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	P	PATRICIASPENCER	-	-	02160717		IAH	AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	P	RITALOGAN	-	-	03328696		EY	UNITEDHEALTHCARE - MCO
-	-	RESPONSE	10/01/2014	P	ELIZABETHALLEN	-	-	03139179		ER	SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	-	-	-	-	-	-	-	-

Control List – Highlight

How To

Follow the steps in the table below to highlight filtered information in a Report.

Step	Action	
1.	Select Highlight from the Report Control list. 	The Highlight control tool displays.
2.	Select the criteria for the highlight display. <ul style="list-style-type: none"> Name – description of how the highlight is being used Enabled – active now or not* Highlight type – the whole row or just the cell in the selected column Background Color Text Color (leave blank for black) Column, Operator and Expression – build the filter for the highlight 	 <p>*The highlight can also be toggled on or off using the check boxes in the Highlight criteria listed at the top of the report.</p>
3.	Click on Apply .	The highlighted report displays.

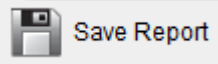


Status	Compliance	Review Type	Review Date	Waiver	P/S	Reviewer	Interview Date	KAMIS ID	Medicaid Nbr	First Name	Last Name	MCO
REVIEWED	COMPLIANT	RESPONSE	10/01/2014	FE	P	-	Wednesday, October 29, 2014	3	91			UNITEDHEALTHCARE - MCO
-	-	RESPONSE	10/01/2014	TA	P	NICKKARAM	Monday, December 15, 2014	4	45			SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	DD	P	SUSANMERGEN	Thursday, December 11, 2014	4	30			AMERIGROUP - MCO
-	-	RESPONSE	10/01/2014	FE	S	DIANE BEGGS	Friday, December 5, 2014	3	46			SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	FE	P	DIANE BEGGS	Monday, December 1, 2014	3	58			SUNFLOWER STATE HEALTH PLAN - MCO
-	-	RESPONSE	10/01/2014	DD	S	DIANE BEGGS	-	4	30			SUNFLOWER STATE

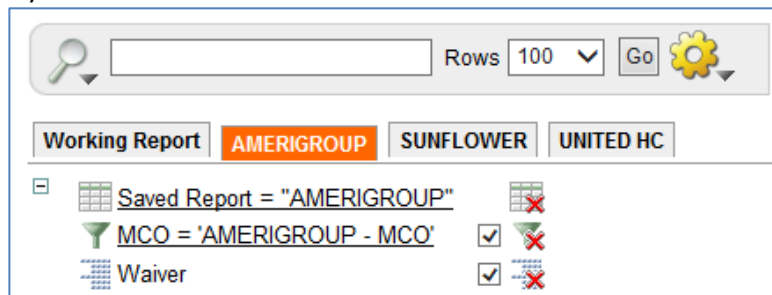
Control List – Save Report

How To


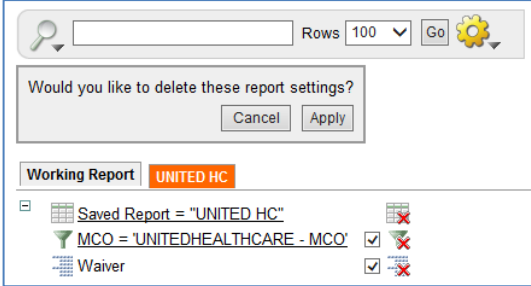
Follow the steps in the table below to save a customized Report.

Step	Action	
1.	Create the filters, highlights, control breaks, and/or sorts as desired to create a customized report. Select Save Report from the Report Control list. 	The Save Report control tool displays.
2.	Enter the Name of the Report to be saved.	The saved report name will display as a new tab on the Interactive Report.
3.	Click on Apply .	The Report is saved and displays on a separate tab.

In this example, three separate customized reports were saved, filtering the list by each MCO, and grouping the list by waiver:



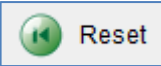

Note: The 'Working Report' tab appears automatically after a customized report is saved. It contains the customization of the most recently saved report, but can be reset back to the default without affecting the saved report(s).

4.	If/when the report is no longer needed, it can be deleted. <ul style="list-style-type: none"> Click on the tab of the saved report you want to delete (the selected tab is orange.) Click on the delete icon next to the 'Saved Report = (report name)' criteria label (the red X):  A dialog box will display confirming deletion of the report. Click on Apply. 	 <p>The report is deleted and the saved report tab disappears.</p>
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Control List – Reset

How To


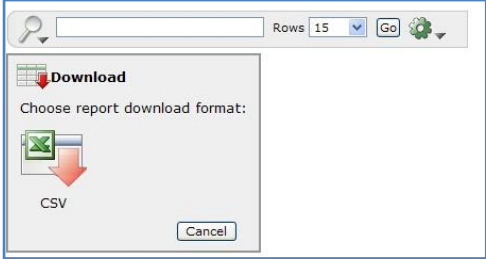
Follow the steps in the table below to reset a report back to the default settings. If you have saved customized reports, make sure you have the 'Working Report' tab selected to reset the original report. Resetting the report removes all filters, sorts, highlights, etc. and cannot be undone.

Step	Action	
1.	Select Reset from the Control list. 	The Reset control tool displays.
2.	Click on Apply to reset the report. Any customizations that you created will be deleted and the original report format will display.	

Control List – Download

How To

Follow the steps in the table below to download a report's data.

Step	Action	
1.	Select Download from the Report Control list. 	The Download control tool displays.
2.	Click on the CSV Icon. The only option in the download format is CSV (Comma/character-Separated Values.)	
3.	A prompt/dialog box will display asking if you want to Open or Save the file. Select Save as .	The browser you are using may display or word the question/dialog box in different ways. You may have both a Save and Save as option – choose Save as. Note: If the file saves without prompting for a name, it most likely was saved to your Downloads folder. This is controlled by your browser settings and can be changed if desired.
4.	The Save As dialog box displays. Navigate to the location you want to save the file to and enter the desired File name .	When naming the file, do not change the Save as type and do not add a different file extension.
5.	Click on the Save button.	The file is saved to the drive/folder location you selected.
6.	Browse to the File Location and Open the file in Excel	Do a Save as in Excel and save the file as an Excel workbook (.xlsx) file so you can take advantage of any formatting options available in Excel.