



## Using the EvaluationWeb® Reflexx Report Writer

Scroll through this Quick Reference guide to see step-by-step instructions on how to use the EvaluationWeb® Reflexx Report Writer, or click a link below to go directly to the information you need.

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### Logging In to Reflexx

1. Go to EvaluationWeb at [evaluationweb.com](http://evaluationweb.com).
2. Click in the **Test Site** box, and then click to select a jurisdiction.
3. Click **Go**.
4. Click in the **Username** box, and then type your username.
5. Click in the **Password** box, and then type your password.

*Note:* Passwords must include:

- A minimum of nine characters
  - Both UPPERCASE and lowercase characters
  - At least one numeric character or at least one of the following special characters:  
! @ \$ % ^ & \* ( ) \_ - + = < > ? /
  - At least one space
6. Click **Submit**.  
*Result:* The Personal Identification Code page appears.
  7. Click to select your 4-digit code from the ten choices.
  8. Click **Submit**.  
*Result:* EvaluationWeb opens in a new browser window.


9. Click **Reports** in the menu on the left.  
*Result:* The EvaluationWeb tab menu opens at the top of the display window.
10. Click the **Reflexx** tab.
11. Click the **Enter Reflexx** button.  
*Result:* The Reflexx report writer opens and displays the Welcome to Reflexx window.

### Creating a New Report

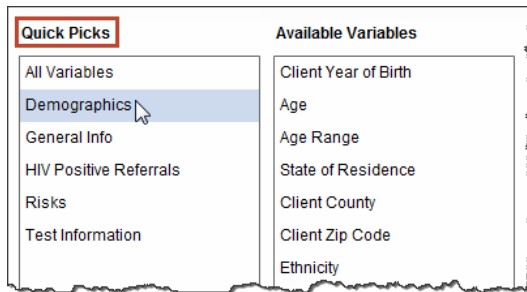
1. Click the **Create New Report** button in the Welcome to Reflexx window.  
*Result:* The New Report window opens.
2. Click to select a report type.
3. Click the **Create Report** button.  
*Result:* The Reflexx Report Setup window opens.

### Selecting Report Variables and Options

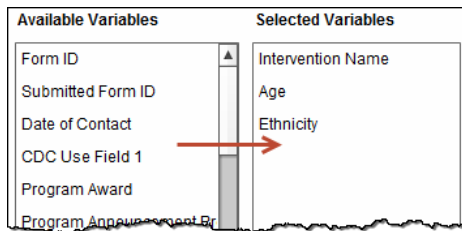
#### **Step 1: Select Variables to Appear in Your Report**

1. Click the up arrow  to expand the Step 1 pane if necessary.
2. Add the variables you want to appear in your report.
  - a. (Optional) Click a category in the **Quick Picks** area to limit the variables appearing in the **Available Variables** area.

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- b. Click, and then drag variables from the **Available Variables** area to the **Selected Variables** area.



*Note:* The order of the variables in the **Selected Variables** area determines the order in which variables will display in your report. You may reorder your selected variables by clicking a variable name in the **Selected Variables** area and moving it up or down with your mouse.

- (Optional) Select data values to limit your report variables. You can limit the data returned in your report by filtering on specific values for one or more variables. For step-by-step instructions, refer to the section [Filtering Results Using the Reflexx Report Setup Window](#) below.
- Click the down arrow to return the Step 1 pane to its original size.

### Step 2: Set Visibility and Computation Options

- Click the up arrow to expand the Step 2 pane if necessary.
- Select (or deselect) any visibility, computation, and grouping options by clicking the appropriate check boxes in the columns.

Variable Name	Visible	Count	Average	Sum
Age	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Referred to Medical Care	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Year of Birth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Note:* You can select or deselect all check boxes in a column by selecting the **Toggle Selection** check box at the top of the column.

- Click the down arrow to return the Step 2 pane to its original size.

### Step 3 (optional): Date and Break Out Selection

- Click the **Variable** arrow, and then click to make a selection in the menu.  
*Note:* If you do not make a selection in the dropdown menu, the selection will default to **Date of Contact**.
- Click in the **Start Date** box, and then type a starting date (format: mm/dd/yyyy).  
*Note:* You can also click the calendar icon to select a date.
- Click in the **End Date** box, and then type an end date (format: mm/dd/yyyy).  
*Note:* You can also click the calendar icon.
- Click the **Breakout by** arrow, and then click to select a value.  
*Note:* if you do not select a breakout value, the box will default to **No Breakout**.
- Click the details icon to see the report details you have selected.  
*Result:* The Report Details window opens.
- Click the “X” in the upper right corner of the Report Details window to close the window.

After you set up your report, you can either run and view your report or export your dataset to a CSV (comma-separated values) file, as described in the next two sections.

### Exporting a Dataset to a CSV File

- Click the **Export** button.  
*Result:* The **Save File As...** dialog box displays.
- Change the filename and the location where the file is to be saved, if desired, then click the **Save** button.  
*Result:* The CSV file is saved.

*Note:* For large datasets, the file may be exported as a .zip file.

### Running and Viewing a Report

*Note:* When viewing a report, you can click **Return to Setup** at the top of the report window to return to the Report Setup window and change variable options, if needed.

- Click the **Report** button to run your report.  
*Result:* Your data report opens in a new window with the **Counts** tab active.


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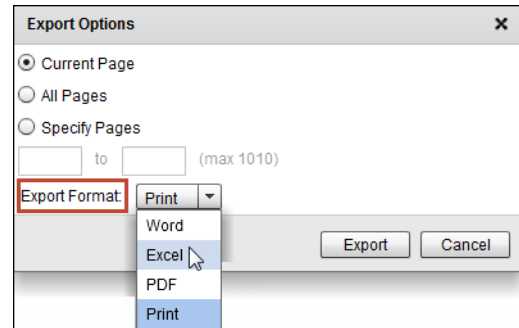
2. Scroll through the **Counts** window to view the number of tests and percentage totals for each variable.  
*Note:* The data are displayed in a tabular format consisting of one table for each selected variable.
3. Click the **Computations** tab to view any computations you selected in Step 2 of the report setup, such as sum, minimum, maximum, mean, and standard deviation.  
*Note:* Computation data are available only for variables with numeric values.
4. Click the **List** tab to view all the report data in a table, with each variable displayed as a table column.  
*Note:* You can customize how List view displays data. For instructions, see [Customizing a Report](#) below.
5. Click the **Cross Tab** tab to quickly create a cross tab report displaying counts of variables you select.
6. Click the **Graphs** tab to select a variable and create a bar or pie graph for it.
7. Click the **Print All** tab to choose which combination of counts, computations, and graph you want to print or export.

### Saving a Report

1. On the File menu, click **Save Report**.  
*Result:* The Save Report window opens.
2. Click in the **Name** box, and then type a name for the report.
3. (Optional) Click in the **Description** box, and then type a report description.
4. Click the **Save** button.  
*Result:* the Save Report window closes and Reflexx saves your report.

### Printing and Exporting a Report in List View

1. Click the **List** tab.
2. Click the **Print** icon  in the upper right part of the window.  
*Result:* The Export Options window opens.
3. Click **Current Page**, **All Pages**, or **Specify Pages** to select pages to print.
4. Click the **Export Format** arrow, and then select **Excel**.



*Note:* Other formats you can select in the Export Format menu are **PDF** and **Word**. Alternatively, you can select **Print** to open a print selection window from which you can initiate the printing process.

5. Click **Export**.  
*Result:* The file download dialog box opens.
6. Click **Open**.  
*Result:* Your Reflexx report opens in a Microsoft Excel window. This data can now be worked with independently of EvaluationWeb using any of Microsoft Excel's functions and commands.

### Printing and Exporting a Report in Print View

1. Click the **Print All** tab.
2. Click to select the **Counts** check box.
3. Click to select the **Computations** check box.
4. Click to select the **Graph** check box.
5. Type information in the **Header**, **Title**, and **Footer** boxes.
6. Click **Print**.  
*Result:* Your report opens in a new browser window, and a print dialog box opens.
7. Select your printer in the print dialog box, and then click **Print**.  
*Result:* The report prints, and the print dialog box closes.
8. Click **File** on the browser window's menu bar, and then select **Exit** in the dropdown window.
9. Click the **Export to Excel** button.
10. Click **Open** in the download dialog box.  
*Result:* Microsoft Excel opens, with your exported report data in a worksheet.

*Note:* You may also choose to export to PDF or Word in Print All view.

## Closing a Report

1. On the **File** menu, click **Close Report**.  
*Result:* The Confirm Close window opens.
2. **Do you want to save changes to the report?**

If	Then
Yes	a) Click <b>Yes</b> . <i>Result:</i> The Save Report window opens. b) Click the <b>Save</b> button in the top section of the Save Report window to save over a previous report, or click in the <b>Name</b> box, and then type a name to save the report as a new report.
No	Click <b>No</b> . <i>Result:</i> The Save Report window closes and a blank Reflexx window appears.

## Customizing a Report

### List View Customizations

After running a report, you can modify how the report displays data in the List view. You can:

- Sort the data in ascending or descending order
- Rearrange the order in which the columns appear
- Filter variables to remove rows from the columns

List view customizations immediately change how the report looks. If you do not like the results, you can undo the changes right away.

*Important Note:* Customizations you make in List view are temporary: they are not saved when you move from List view to another view, or when you save the report

### Report Setup Window Customizations

The customizations you make in the report Setup window appear in all report views:

- Counts view
- List view
- Graphs view

In customizing a report in the report Setup window, you can:

- Limit the data displayed in your report:
  - By choosing specific values of one or more variables
  - By one or more ID values:
    - Form ID
    - Client ID
  - By adding upper and lower limits in date fields to query on a specific date range.
- Add calculations:
  - Mean
  - Sum
  - Minimum
  - Maximum
  - Standard Deviation


Customizations made in the report Setup window determine which data are brought back from the database. Therefore, they cannot be undone without creating a new report or modifying a saved report.

*Important Note:* Report Setup window customizations are permanent in that they apply to all views of the report and are saved as part of saving the report. Because of this, these customizations require more thought up front when you set up a report.

## Customizing a Report in List View

*Reminder:* Customizations you make in List view are temporary: they are not saved when you move to another view or when you save the report.


### Selecting Columns to Display in List View

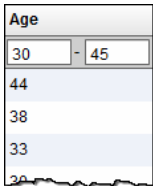
1. On the **Welcome to Reflexx** window, click **Find Saved Report**.
2. Click to expand **My Reports**.
3. Click to select the report you want to open.
4. Click the **Open Report** button.  
*Result:* The saved Reflexx report opens in the Report Setup window.
5. Click **Report**.
6. Click the **List** view tab.
7. Click the **Preference** icon  on the task menu.  
*Result:* The Preferences window opens.
8. Click the check boxes for variables in the **Columns To Show** area to select or deselect columns.

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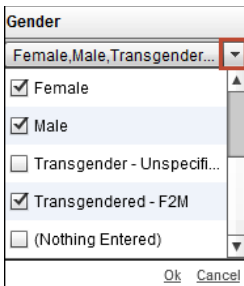
- Click the **Show Filter** check box to display or hide column filters.
- Click the **Ok** button.  
*Result:* List view displays columns only for the variables you selected.

### Filtering Variables in List View


- Click the **Show/Hide Filter** icon  on the task menu as needed to display column filters directly below the column headers.
- For numeric variables, type information in the filter boxes.  
*Result:* List view immediately filters the report data.



- For non-numeric variables, click the down arrow in the filter box at the top of a column, and then click check boxes to select or deselect values to display.



- Click **Ok**.  
*Result:* List view filters the report data.

*Note:* To remove all filtering, click the **Clear Filter** button  in the task menu.

### Sorting in List View

- Click the column header for the column you want to sort.  
*Result:* The column information is sorted in ascending order.
- Click the column header again to sort in descending order.

### Adjusting Column Width and Order in List View

- Click, and then drag the line between columns to the left or right to change the width of a column.


Age	ethnicity
77	Hispanic or Latino
25	Not Hispanic or Latino

- Click, and then drag a column header left or right to change the order of columns.

### Customizing a Report in the Report Setup Window

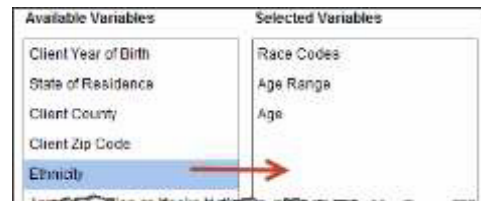
*Reminder:* Customizations you make in the report Setup window apply to all views of your report and are permanently saved when you save the report.

### Changing Column Order

- On the **Welcome to Reflexx** window, click **Find Saved Report**.
- Click to expand **My Reports**.
- Click to select the report you want to open.
- Click the **Open Report** button.  
*Result:* The saved Reflexx report opens in the Report Setup window.
- Click the up arrow  to expand the Step 1 pane if necessary.
- Click a variable name in the **Selected Variables** area, and then move the variable up or down.  
*Result:* Reflexx will display variables in your report using the same order you set in the **Selected Variables** area.

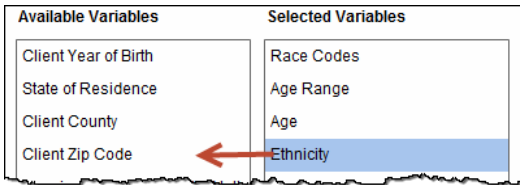
### Adding and Removing Report Variables

- Open the Report Design window for the desired report.
- Click, and then drag variables from the **Available Variables** area to the **Selected Variables** area to add them to your report.



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- Click, and then drag columns from the **Selected Variables** area back to the **Available Variables** area to remove them from your report.

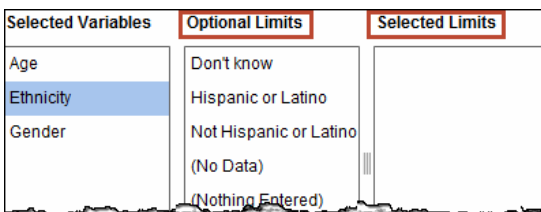


- Click the down arrow to return the Step 1 pane to its original size.
- Click the **Report** button.  
*Result:* Only the variables you dragged to the **Selected Variables** area appear in your report.

### Filtering Results Using the Reflexx Report Setup Window

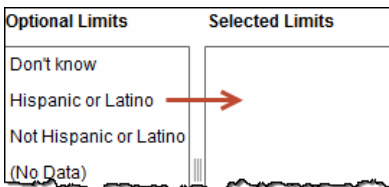
You can choose to limit the data returned in your report by filtering on specific values for one or more selected variables in Step 1.

- Click the up arrow to expand the Step 1 pane if necessary.
- Click a variable in the **Selected Variables** area to select it.  
*Result:* The **Optional Limits** and **Selected Limits** areas appear, and all available values for the selected variable appear in the **Optional Limits** area.

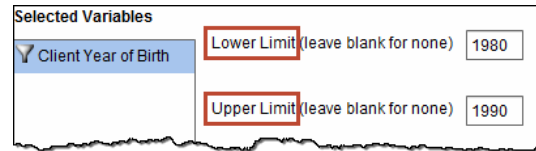


*Note:* For numeric variables, **Upper Limit** and **Lower Limit** boxes appear instead of the **Optional Limits** and **Selected Limits** areas.

- Click, then drag values from the **Optional Limits** area to the **Selected Limits** area



- For numeric variables, click, and then type numbers into the **Upper Limit** and **Lower Limit** boxes.



*Note:* When you filter a variable in the Step 1 pane, a filter icon appears next to the variable name.

- Click the down arrow to return the Step 1 pane to its original size.
- Click **Report**.  
*Result:* The report opens and displays values according to the filtering selections you made

### Grouping Results Using the Reflexx Report Setup Window

- Click **Return to Setup**.
- Click the up arrow to expand the Step 2 window if necessary.
- Choose grouping options by making selections in the **Group By** column.

Variable Name	Visible	Count	Mean	Sum	Min	Max	Std. Dev.	Count Distinct	Group By
Age	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Ethnicity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2
Client Year of Birth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	


- Click the down arrow to return the Step 2 pane to its original size.
- Click **Report**.  
*Result:* The report data are grouped according to the grouping selections you made.

### Saving Report Setup Window Changes




- On the **File** menu, click **Save Report**.
- Save over the previous report or type a name in the **Name** box to save a new report.
- Click **Save**.  
*Result:* The Save Report window closes, and Reflexx saves the Setup window changes in the report.

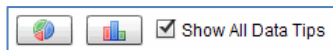
## Using Graphs View

To create a graph, the **Count** box must be checked in the Step 2 pane of the Report Setup window for every variable you want to represent in the graph.

1. Open the Report Setup window for a report.
2. Click the up arrow  to expand the Step 2 window if necessary.
3. Select check boxes for **Count** variables to be displayed in the graph.

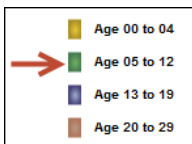
Variable Name	Visible	Count	Ave
Age	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client County	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ethnicity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Click the down arrow  to return the Step 2 pane to its original size.
  5. Click **Report**.
  6. Click the **Graphs** tab.
  7. Click the **Choose Variable to Graph** arrow, and then select a variable.
  8. Click the pie graph icon  or the bar graph icon .
- Result:* Graphs view displays a graph based on the data for your selected variable.
9. Click to select the **Show All Data Tips** check box.



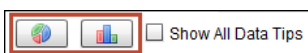
*Result:* Data tips describe each value, quantify the total, and assign values a percentage of the total amount.

10. Click a variable color box (for pie graph only).



*Result:* The chart piece for the value selected stands out from the rest of the pieces.

11. Click a chart type button to select a different type of graph.



## Managing Reports

### Didn't Get the Results You Expected?

Sometimes you may create a query that does not give the expected results. The following table describes some common things to check.

Report Result	How to Change It
"No Data Found" message is received after clicking the <b>Report</b> button.	<ul style="list-style-type: none"> <li>• Try running the report with fewer limiting criteria.</li> <li>• Ensure that you have entered the correct dates in Step 3.</li> </ul>
"No Count variables were selected" message is received after clicking the <b>Report</b> button.	<ul style="list-style-type: none"> <li>• Check that the <b>Count</b> check box is selected for at least one variable in the Step 2 pane of the Report Setup window.</li> <li>• <i>Note:</i> If you view a report, and then return to the Setup window to add other variables, you must remember to check the <b>Count</b> box for the new variables.</li> </ul>
Counts for variables do not appear in the Counts view.	<ul style="list-style-type: none"> <li>• The variable does not have the Count option available. You can still create a report; however, no information will be visible in the Count view. Information will be visible elsewhere, such as List view.</li> </ul>
Variables are selected in the Report Setup window, but they do not appear in some of the report views.	<ul style="list-style-type: none"> <li>• Make sure that the <b>Visible</b> option is checked for the variable in Step 2.</li> </ul>

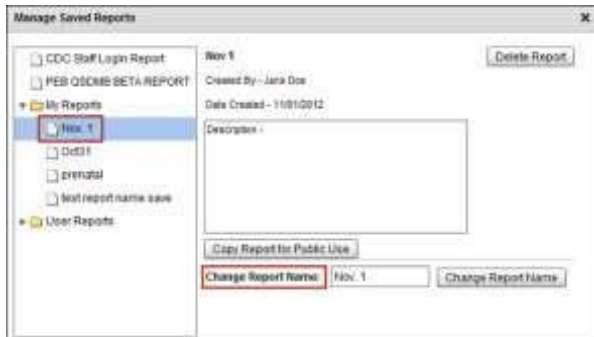
### Managing Your Reports

After you have created and saved a report, you may change the report name or delete the report if it is no longer needed.

1. Click **Manage Reports** on the **File** menu.  
*Result:* The Manage Saved Reports page appears.
2. Click to expand **My Reports**.
3. Click to select the report you want to manage.
4. Click **Delete Report** to delete the report.
5. Click in the **Change Report Name** box to type a new name for the report.

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- Click the **Change Report Name** button.  
*Result:* Reflexx changes the report name in the **My Report** folder list.



### Managing Reports for Others

If you have Administrator access, you have the ability to manage reports for other users.

- Click **Manage Reports** on the **File** menu.  
*Result:* The Manage Saved Reports page appears.
- Locate, and then click the report you want to manage.
- Click the **Delete Report** button to delete the report.
- Click in the **Change Report Name** box to type a new name for the report.
- Click **Copy Report for Public Use**.  
*Result:* The report appears in the report listing in the Manage Saved Reports window, allowing all users access to the report.
- Click **Add New Folder** to add a new folder to the Manage Saved Reports window.

