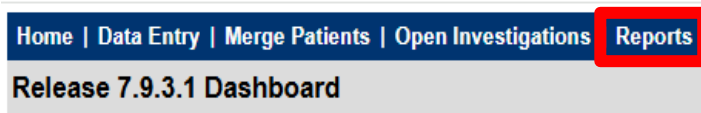


How To: Run, Customize, and Save MIDIS Reports

Where to Find Reports

1. Log into MIDIS
2. Select "Reports"
3. To Use a Report, Click "Run" next to the name



There are four different report sections:

- **Private Reports:** Reports that you have created and saved to your MIDIS account. **No one else can see these reports or access them** so keep in mind that your coworkers cannot see reports you save here. If you need help making these public, reach out to DPHHS.
- **Public Reports:** These are reports that can be accessed and used by any MIDIS user
 - *Default Report Section:* Created by CDC programmers or where a custom report saves if you don't specify to save it elsewhere
 - *Montana CDEpi Reports:* Built by DPHHS for anyone to use, customize, or save as your own
 - *Montana LHJ Reports:* Built by LHJs for more specific purposes, be aware of Jurisdiction specific filters
 - *STD Report Section:* Built by STD team for grant data and analysis
- **Template Reports:** This is a great place to start if you want to build and customize your own report
 - *Default Report Section, Montana CDEpi Reports and Montana LHJ Reports:* Same as above
- **Reporting Facility Reports:** Used by DPHHS to monitor Facilities – Don't worry about these

Running a Report: "Run" vs. "Export"

- **Run:** Opens the report in a new web browser tab in HTML and shows filter criteria
 - Only good for small reports, this option prevents large reports to keep MIDIS from slowing down
 - Make sure you turn off your pop-up blocker to allow the new browser tab to open
- **Export:** Generates a CSV file for download that can be opened in Excel and saved to your computer
 - Able to handle larger files, if "Run" says your selectin is too large, try "Export"
 - Bonus of all the sorting and table-making functionality native to Excel
- **Key Takeaway:** The MIDIS Reports only write data once per day, overnight. Any reports pulled from MIDIS will always be a day behind what is available in the system (e.g. If pulling a report on a Wednesday, only data through Tuesday will be available)



Customizing a Report

Check the public reports section, there may already be a report that pulls the information you're looking for. **Key Takeaway:** MIDIS only pulls data for jurisdictions **you have access to**, if another jurisdiction built a report, you can use it and it will populate with your data. On the flip side, make sure there aren't any jurisdiction filters that may block your data from coming into the report (e.g. "Jurisdiction Equals Yellowstone"). See "Saving A Report" to learn how to save these reports as your own without overwriting the original.

1. Find a report you want to run. Select "Run" next to the report you want to run.

Run	COVID-19 CELR REPORT
Run	COVID-19 Investigation Report
Run	COVID-19 LTCF Report

2. The first tab that comes up is "Basic Filter" which is usually a date or disease filter. The **Ctrl** key can be used to select multiple diseases

Basic Filter | Advanced Filter | Column Selection

COVID-19 Investigation Report

Time

Date Filtered By: Investigation Start Date ☐ Include NULLs
From: 12/23/2020
mm/dd/yyyy
To: 12/26/2020
mm/dd/yyyy

Basic Filter | Advanced Filter | Column Selection

Basic Case Line List Report

Condition

☐ Select All
2019 Novel Coronavirus (COVID-19)
AIDS
Acute flaccid myelitis
African Tick Bite Fever
Amebiasis
Amplified...

3. The second tab is "Advanced Filter". This tab lets you apply a ton of great filters on the report.

1. The "Basic Filters Selected Plus:" logic field shows what is currently selected. If something is selected and you want to remove it, you can select the "<" arrow to remove one line or use "<<" to remove everything in the list.

Basic Filters selected plus:

Patient Last Name Not Null

Connectors

Click on a button to start or end parenthetical statements and/or click a connector button to include or except statements.



3. AND/OR Logic: AND expressions require all filters to be met to be included in the report, whereas OR expressions require only one of the filters to be met. The parentheses can be used to group and separate AND/OR statements for more complex requests. To use these connectors click the blue buttons for (,), AND, and OR.

- This AND will give me only those COVID cases reported as both breakthrough infections **AND** deaths
- This OR will give me two different sets of cases:

Basic Filters selected plus:

COVID Breakthrough Case Equals "Yes"
AND
DIE_FROM_ILLNESS_IND Contains "Y"

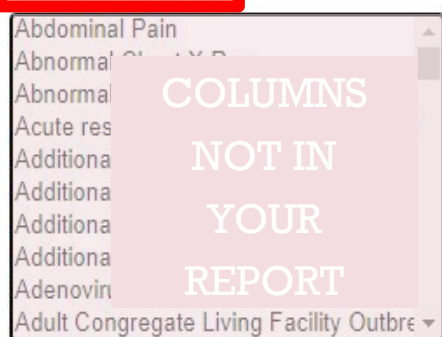
Basic Filters selected plus:

COVID Breakthrough Case Equals "Yes"
OR
DIE_FROM_ILLNESS_IND Contains "Y"

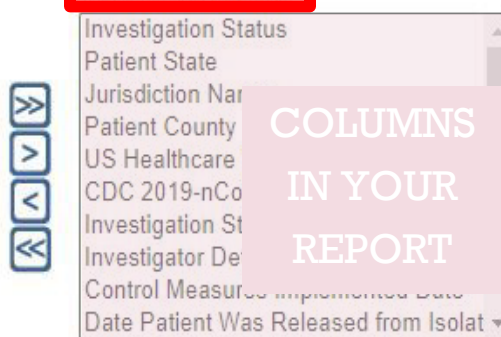
- All Breakthrough Cases
- **OR** All Cases marked as COVID Deaths
- Will not relate the two columns to each other

4. The last tab is "Column Selection". The "Available Columns" section shows all columns that can be added to the report. "Selected Columns" shows the columns already selected from the "Available Columns" tab and the order that they will be shown in the table.

Available Columns:



Selected Columns:



You can use the arrows between "Available Columns" and "Selected Columns" to move columns.

1. >>: Moves all "Available" to "Selected", can be good for understanding all the information available, but not advised to save this way as the report is very large
2. >: If you highlight a column in "Available" and select ">", it will move the column over to "Selected"

3. <: If there is a column in the “Selected” that you don’t want in your report, select the column name and then hit “<” to move it back over to “Available”
4. <<: If you want to start fresh, hit this button and it will move everything in your “Selected Columns” over to your “Available Columns” and give you a clean slate
5. You can use the up and down arrows to the right of “Selected” to organize the columns in the report by selecting a column and using the arrows to rearrange how you see fit.
6. The final step is to either run, export, or cancel the report. See the bottom of Page 1 for an explanation of which one to select!

Saving A Report

Key Takeaway: The only option that allows a report to be saved is the “Run” option

The selected report has been run and is displayed in a new window.



When you hit “Run” there are four options that can be presented to you:

1. **Refine Criteria:** This button takes you back to the report you’ve been working on in case you need to modify anything prior to saving, without making you start over
2. **Save:** This option only shows up if you are the owner of the report, whether it is a public or private report. **Using this option will overwrite any previous settings**, so be sure that you are comfortable overwriting the previous settings. Because this only shows up for the owner, others can’t overwrite your reports, only you can.
3. **Save As New:** This option shows up on every report. Use this option to save any changes you made to the report so that you can come back to it in the future without having to make changes again. This can be saved as Private if you only want it for your use, or Public – MT LHJ Reports if you want co-workers or other jurisdictions to be able to see it. It is helpful to be specific in your naming convention and Description when saving a new report as well for when you come back to it.
4. **Run New Report:** This option will take you back to the Reports module, it will not give you the option to refine your criteria or to save your selection and will make you start over, so do not select this option unless you are okay losing your selections!

*** Indicates a Required Field**

Save this report design as: ☐ Private ☒ Public ☐ Reporting Facility

*** Report Name:**

Description:

*** Report Section:**

▼

Archived
 Default Report Section
 Montana CDEpi Reports
 Montana LHJ Reports
 STD Report Section

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