



National Council on Aging

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# Getting to Know Your PowerBI Dashboards USER GUIDE

National CDSME Database

(Rev. 8/5/2019)

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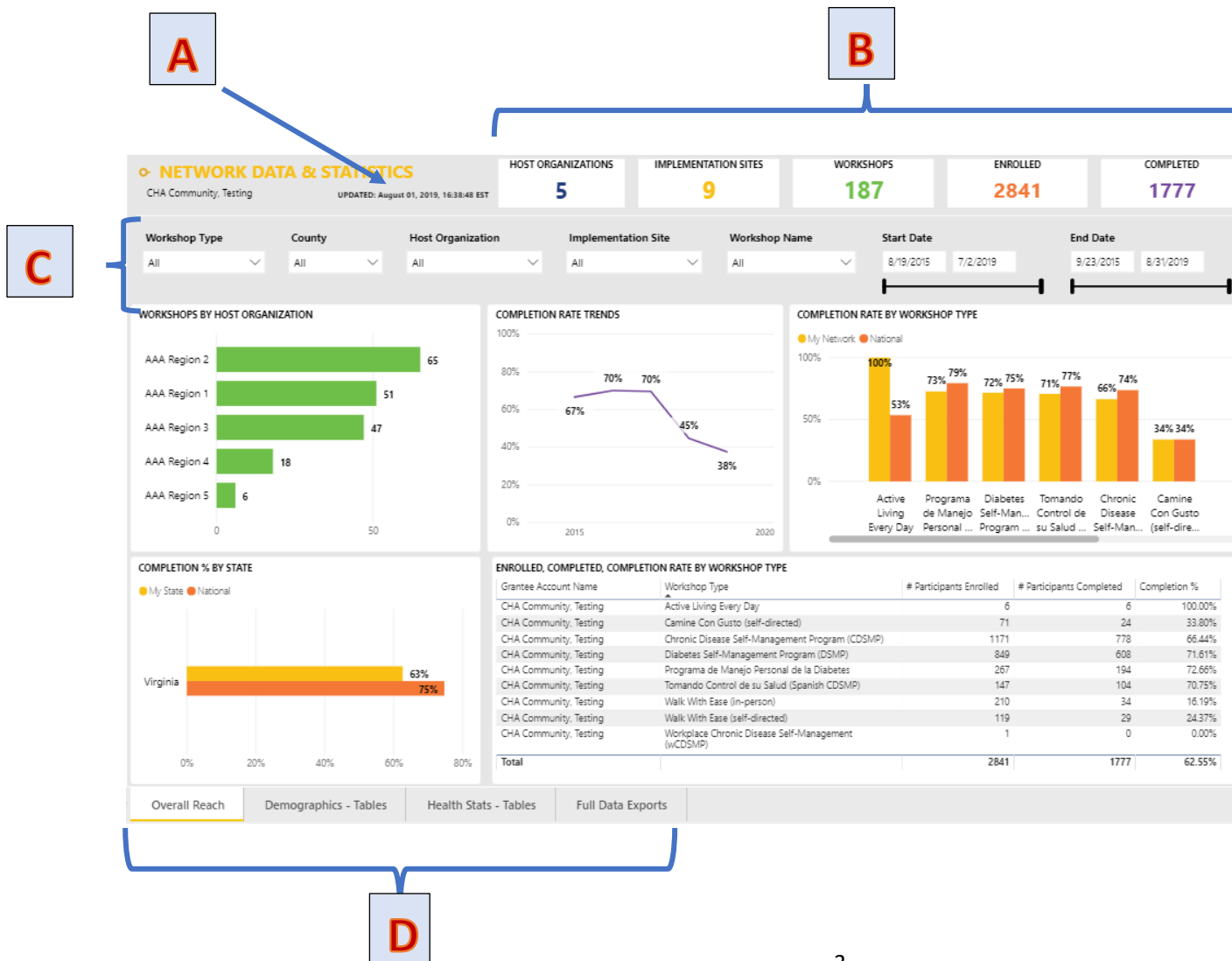
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## I. Logging In

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1. Use your existing username and password to access the CHA Community (National CDSME Database):  
[www.ncoa.org/chacommunity](http://www.ncoa.org/chacommunity)
2. In the header from your homepage, click on the 'REPORTS' tab (or else click on the GREEN 'REPORTS' icon below the banner).
3. Reports page takes less than a minute to load PowerBI dashboards.
4. Only users with access as 'Admin' in the national database will be able to see the PowerBI dashboards or export data.

## II. Anatomy of Your Dashboard



**A** Timestamp shows the time and date when reports were last refreshed. Data is refreshed at 12N EST and 12AM EST.

**B** Dashboard Tiles show a high-level summary of key data points.

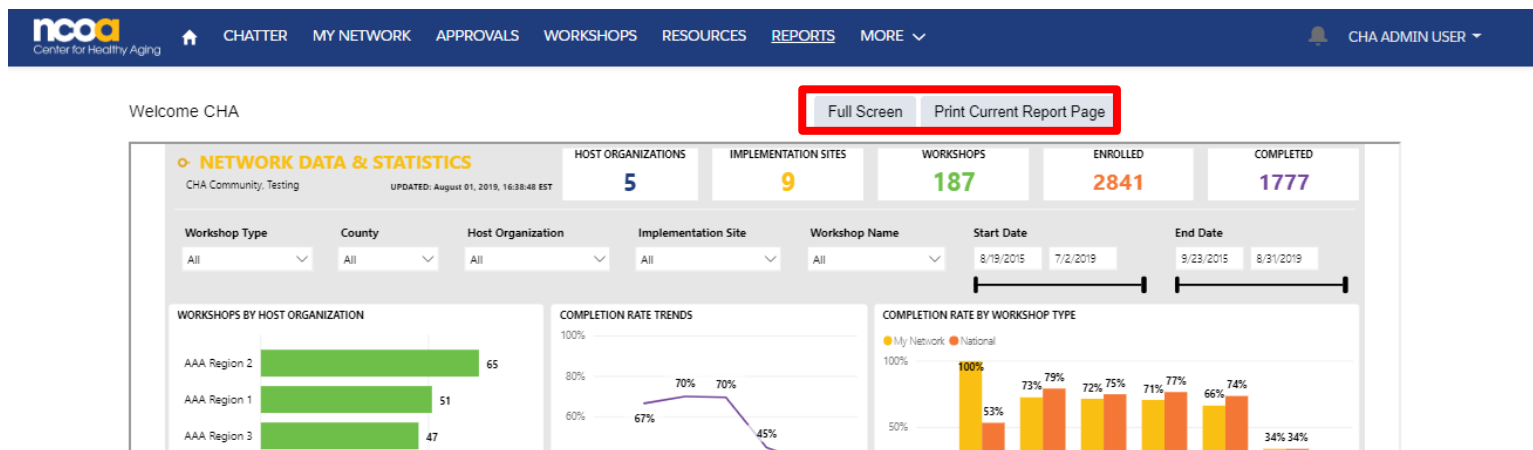
**C** Page-level Filters set filters that apply to all the charts and tables on all four tabs.

**D** Tabs let you navigate among collections of related charts: Overall Reach, Demographics, Health Stats, and Full-Exports.

### III. Navigating the Dashboards

You have the option to see full page views by using the Full Screen button on top of the visuals.

You can print the visuals as you seem them on screen by using the Print Current Report Page button. This is similar to Print Screen, and only captures what is visible on the screen. Take note that longer charts with many rows may only display the top rows with this print option. You may need to pull out the chart/table on its own page in order to view the chart/table in its entirety, with all rows shown.



You'll see a series of tabs at the bottom of the page. Each of these tabs links you to your different reports. Click on any tab to navigate to that report.



## IV. What do the top-level summary numbers mean?

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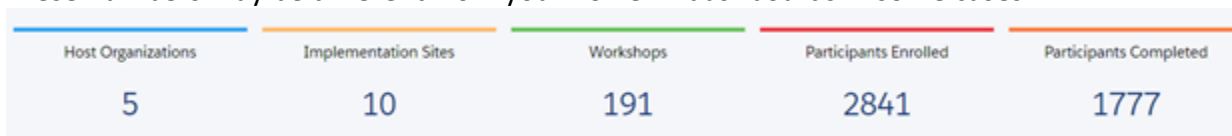
At the top of your PowerBI dashboards, high level summary numbers are shown in 'Tiles' for Host Organizations, Implementation Sites, and Workshops. These are limited to individuals who had at least one participant associated with a workshop. For example, a Host Organization or Implementation Site would be excluded from this count if it did not have at least one workshop, with at least one participant.

On the Tabs 1 to 3, these summary numbers never change. As these tabs feed demographic and health statistics, participant data is needed. Essentially, the tiles on these tabs display that total number of participants reporting any demographic or health data, regardless of whether attendance data is reported.

The tiles on the fourth tab, Full Data Export, do update when page-level filters are applied. The numbers on the last tab encompass counts for all profiles of Host Organizations, Implementation Sites, and Workshops, even if they are not associated with any profiles down the tier. As the last tab serves as your full data export page, its important that counts include all of your data, even those entities that may be empty, to assist you with quality control and monitoring of your network.



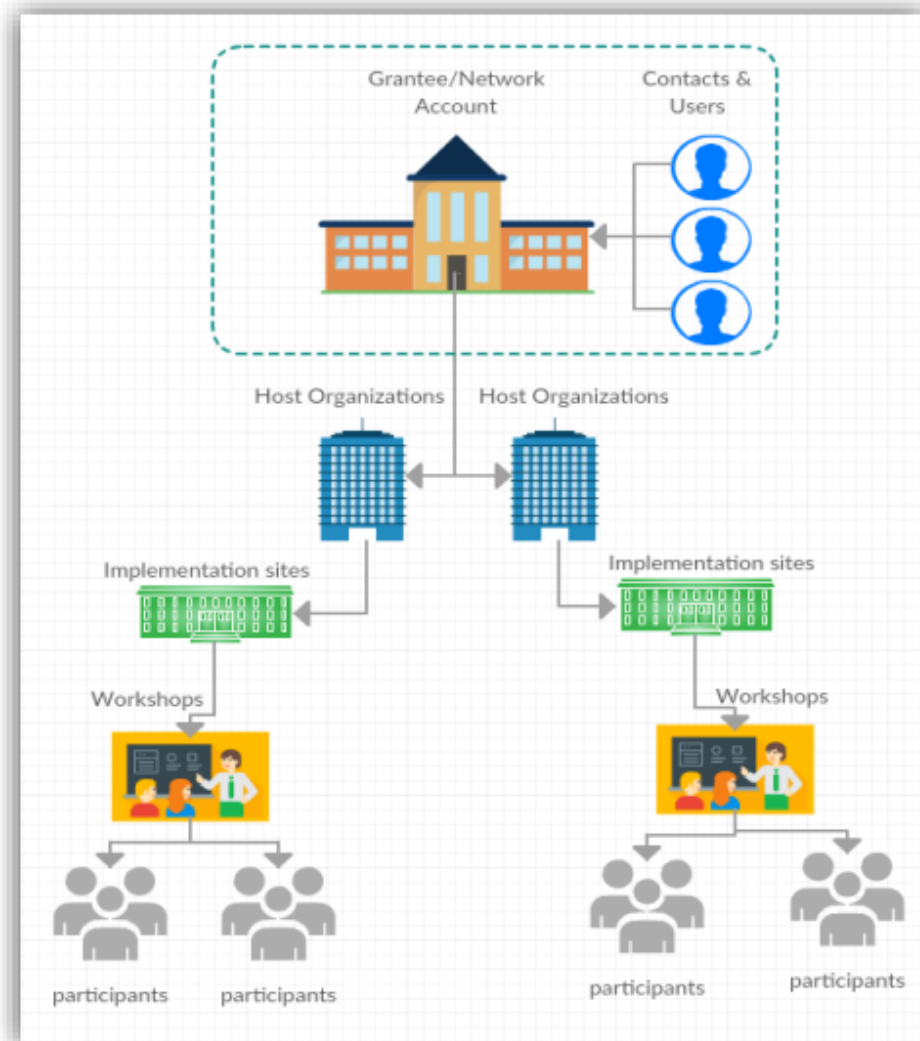
You may be wondering how this is related to the summary statistics you are accustomed to seeing in the My Network page of your CHA Community. These numbers may be different from your PowerBI dashboards in some cases.



The counts shown in your CHA Community include counts of all profiles (e.g. Host Organizations, Implementation Sites, etc), regardless of whether there are lower tier profiles associated with them. That is, hosts and sites with empty workshops or no workshops at all would still be captured in this roll-up.

It's important to regularly monitor your workshop data. Occasionally, we have participant demographic and health data, but not reported attendance data, or the reverse. This can create inconsistencies with total values.

It may be helpful to recall the existing organizational structure of the database.



## V. Basic Tools for Exploring Your Charts and Tables

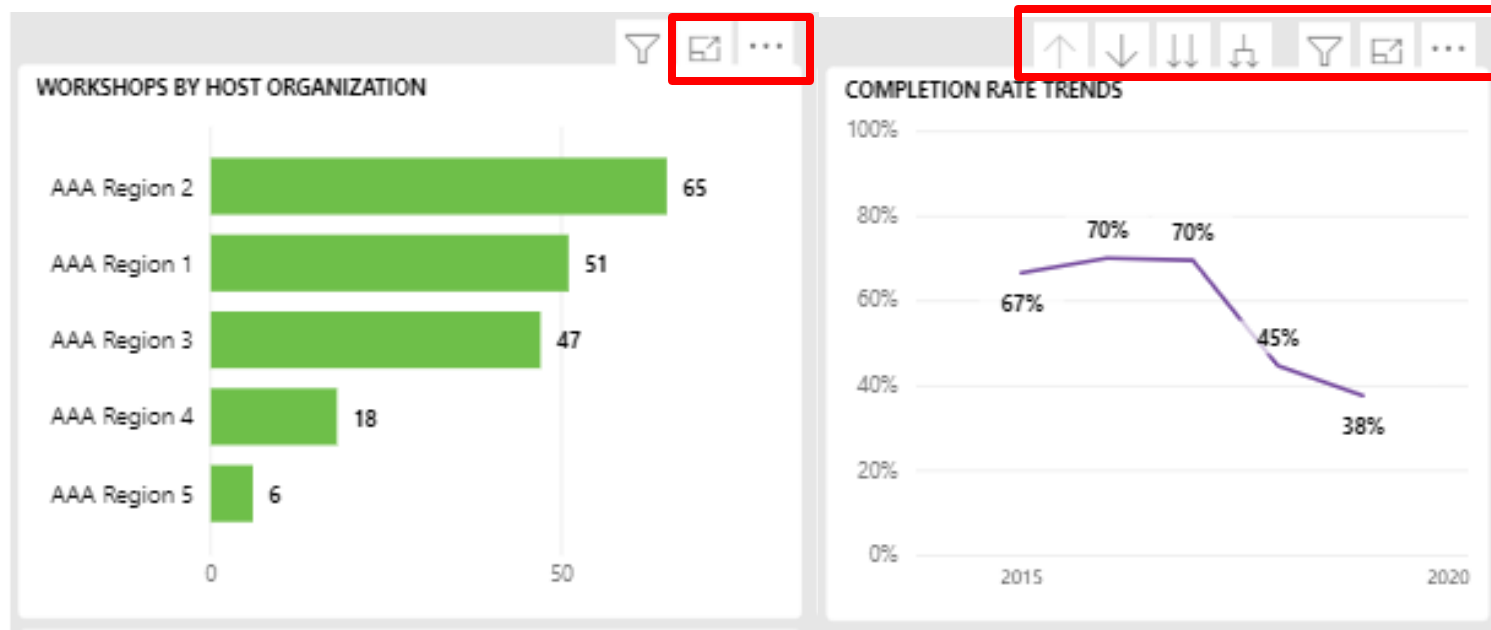
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There are standard buttons available on each chart. These appear when you hover your mouse pointer over the chart.

For each of your visual charts and tables, you can see more detail by clicking the 'expand' button on the top right side. This pulls out the chart. The buttons are visible when you hover the mouse on the dashboard.

Some charts have additional buttons.

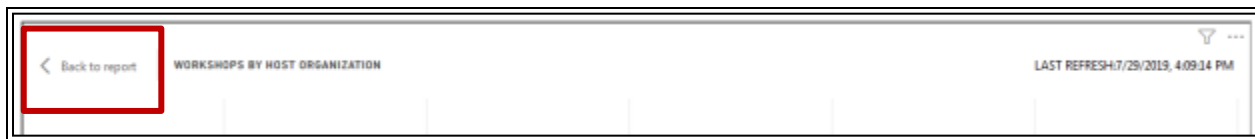
Trend charts, such as the one shown on the right below allow you to drill down further, by month and/or quarter.



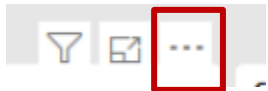
The second button is the **Focus** button. Click this button to expand the chart itself into full-page mode.



From focus mode, click the “< Back to report” link to return to the report page.



The third button is for **More Options**.



From the drop-down menu for this button, you can choose:

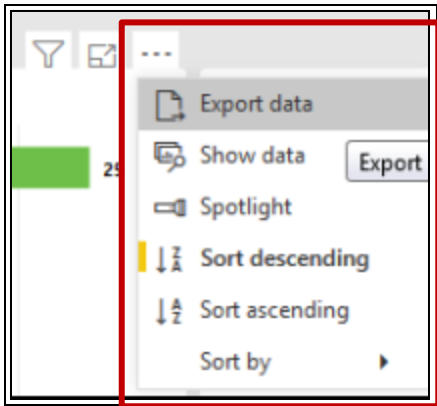
Export data, which exports to Excel or CSV the table of data that underlies the chart display;

Show data, which opens the full-page view of the chart and shows the underlying table data as well;

Spotlight, which pops the chart image up by itself

Sort by the data element of your choice and choose whether to sort that value *ascending* or *descending*.





The **Completion Rate Trends** chart has additional buttons that allow you to drill up and down into your completion rate data over different time periods (from year to quarter to month to day) and across different scopes (within a single year or for all time *within* the page-level date filter that you have set).

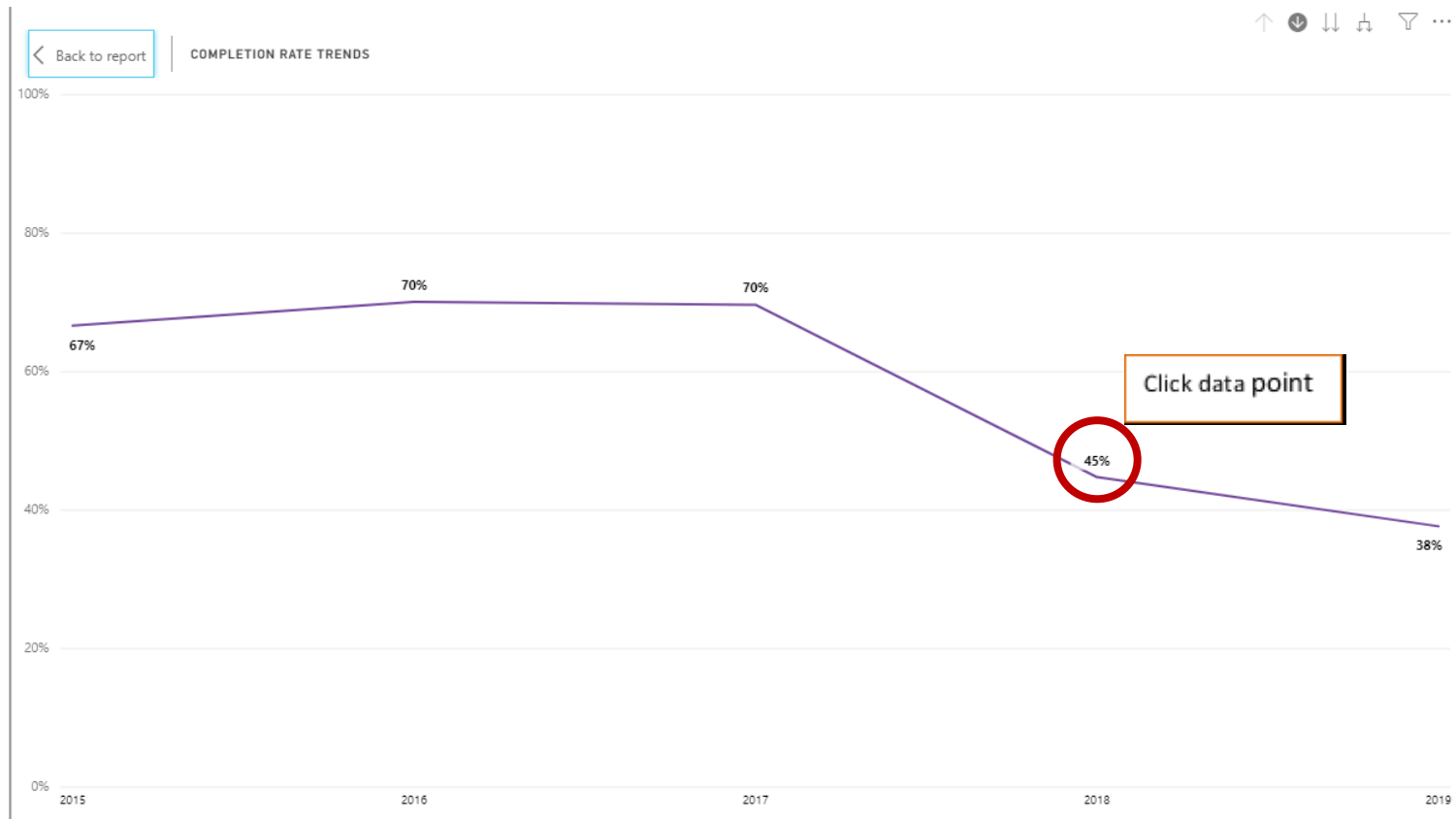
- The *single up-arrow* at the left of the row of buttons returns you to higher levels after you have drilled down in the data using the other buttons. (It is grayed out until you have started drilling down from the top level.)



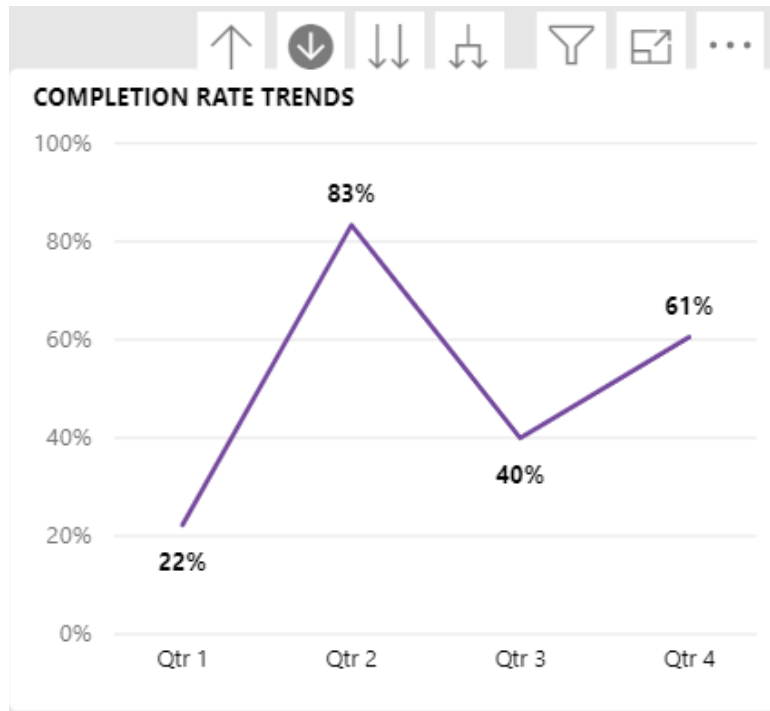
- The *single down-arrow button*, second from the left on the row of buttons, turns on the drill-down feature. When it is on, click a data point in the chart (representing a year) to drill down into that year's completion rates by smaller time periods. For example, clicking the 2018 data point in drill-down mode expands the data for that year to show completion rate by *quarter*, as shown below. You can keep drilling down to the data for the year by *month* or by *date*. (Click the single up-arrow at the left of the row of buttons to return to higher levels.)



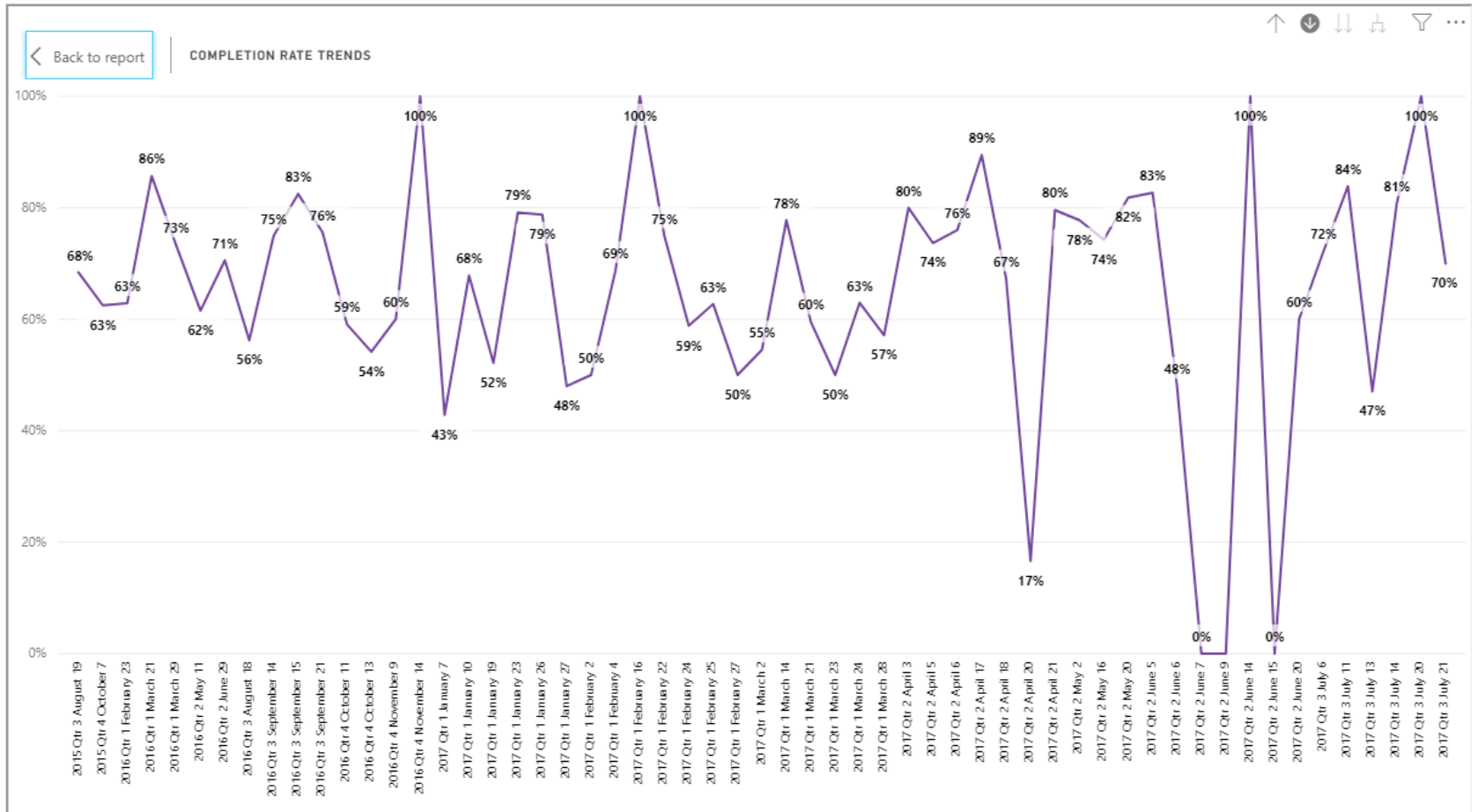
Showing chart by year (default), drilling down on 2018:



Clicking on a specific data point expands data further, showing data by quarter:



- Click the button with *two down-arrows* to move to the next level down in the time-period hierarchy (from grouping by year, to grouping by quarter, then month, the date). Note that this button groups by the time period (quarter, month or date) across *all years combined* – that is, you will be looking at your completion rate for all “Quarter 1’s” combining all years, or for all Januaries combining all years. (Remember, if you want to drill down by *within* a single year, turn on the Drill Down feature first, select the year you want to examine, and then drill down within that particular year.)  
For example, the chart below shows that this grantee’s lowest completion rates, on average, were in Q2 of 2017.
- The *split down-arrow* button moves down the hierarchy of time periods for *all years* at once. It is like using the *single down-arrow* button to drill down for a single year, but showing all the years individually on one chart. Note that this may result in a crowded chart if your filters include several years of data.



## VI. Filter Types

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There are two types of filters you'll encounter:

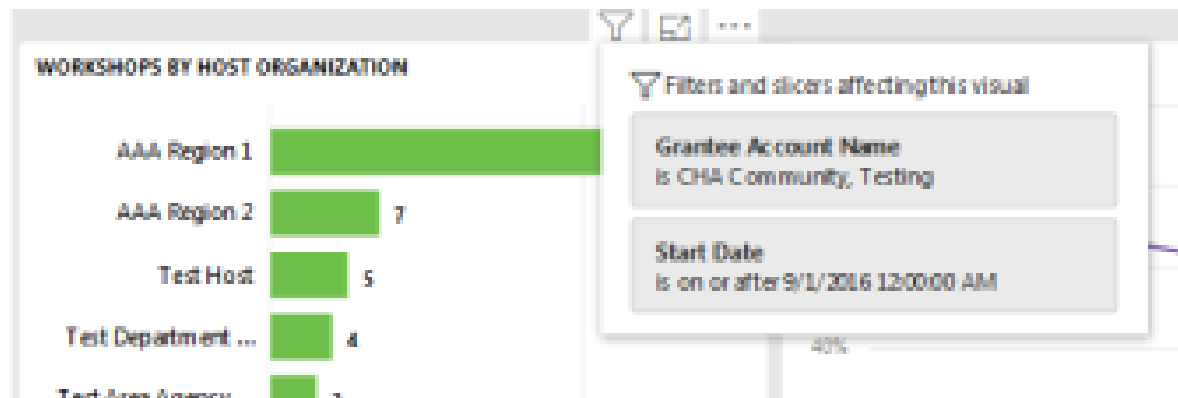
### Page-Level Filters

- Each tab contains a set of filters on the top of the visuals which you can use to filter your visuals by specific data points, such as Workshop type, County, Start Date and End Date and more. These are the same across all tabs.
- Simply select a few filters and watch as your data updates live.

### Report / Visual Level Filters

- Each table or chart allows users to double click on each response option (row) by which to filter other charts on the same tab. You can also select multiple rows/answer options across multiple charts, and watch your data update live. This is explained further in Section VIII. Demographics and Health Stats tabs.

The first button is the **Filter** button. Click this button to see what filters are currently applied to the data shown in this chart.

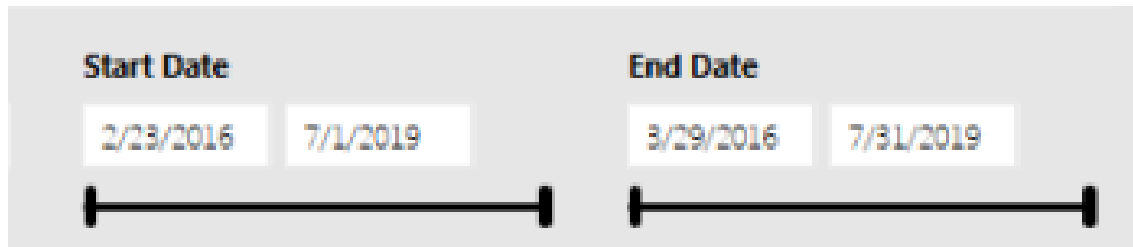


## VII. Start and End Date Filters

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Date range fields are page-level filters.

- **Start Date** and **End Date** range filters refer to the *workshops'* start dates and end dates.
- The default date range shown reflects the earliest and latest workshop **start dates** in your dataset, and the earliest and latest workshop **end dates** in your dataset, respectively. In the example below, this grantee's earliest workshop started on 2/23/2016. Their most recent workshop started on 7/1/2019. Their earliest workshop ended on 3/29/2016, and their most recent workshop ended on 7/31/2019.



- Because most ACL reporting uses the workshop's *end date* to determine if a given workshop is eligible to be counted in a given reporting period, in practice, you can usually leave the Start Date range *unfiltered* (i.e., keep the default date ranges as-is / leave the slider set wide open), and only adjust the End Date filter to limit your reports. For example, if you just wanted to see data for the reporting period 7/1/2018 to 12/31/2018, you could set the filters as shown below, where the Start Date remains all-inclusive, but the limit is applied using the End Date range:

**Start Date**                      **End Date**

2/23/2016    7/1/2019                      7/1/2018    12/31/2018

However, some programs (e.g. Walk With Ease) do not require that an end date be entered in the database. This is one reason you may need to filter based on workshop’s start date range instead. In this case you can leave the End Date filter wide open, and instead adjust the Start Date range as required.

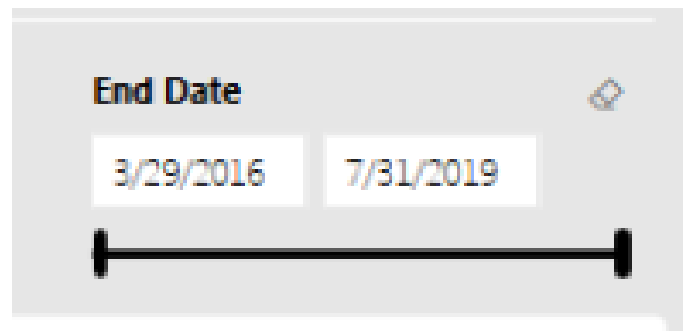
If you apply a date range limit using *both* the Start Date and End Date ranges, be aware that this may exclude certain workshops that you were expecting to see. For example, with the Start Date and End Date set for the same range (as shown below), you would exclude a workshop with the dates 6/2/2018 – 7/15/2018. Even though it would be included based on the range set by the End Date filter, the workshop’s start date *excludes* it from the filtered range, because it starts outside of the range set for the Start Date filter. This filter setting will include only workshops that *both started and ended* within this period.

**Start Date**                      **End Date**

7/1/2018    12/31/2018                      7/1/2018    12/31/2018

### Clearing a filter:

To clear a filter and reset it to include all workshops, hover your mouse pointer over the filter area and click the small “eraser” icon as shown here:



## VIII. Demographics and Health Stats Tabs

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The charts on these tabs show the response frequencies for the participants in your grantee network compared to those for all participants nationally. In addition to the buttons described above, you can apply additional filters (in addition to the page-level filters described above): Click on a row in any of the charts, and the other charts on the same page will be filtered by that group. These filters can be layered. For example, clicking on the “75-79” age group, update the rest of the chart, including the distribution of other demographic characteristics for that subset of participants aged 75-79.

To combine filters, hold down the Control key (“Ctrl”) on your keyboard and then click the rows you want to filter by. In the example below, the charts are filtered by both age range (75-79) and race (African American). This shows that African-Americans age 75 to 79 were primarily female (i.e. 45 of 57 reporting sex data were female).



# NETWORK DATA & STATISTICS

CHA Community, Testing

UPDATED: August 05, 2019, 16:41:15 EST

HOST ORGANIZATIONS

5

IMPLEMENTATION SITES

9

WORKSHOPS

187

ENROLLED

2841

COMPLETED

1777

Workshop Type

All

County

All

Host Organization

All

Implementation Site

All

Workshop Name

All

Start Date

8/19/2015 7/2/2019

End Date

9/23/2015 8/31/2019

AVG AGE

77

MIN AGE

75

MAX AGE

79

## AGE GROUP

Age Group	# Participants My Network	%	# Participants National	%
Under 60	142	26.84%	20263	27.12%
60-64	73	13.80%	9651	12.90%
65-69	92	17.39%	11633	15.55%
70-74	86	16.26%	10028	13.41%
75-79	57	10.78%	7959	10.64%
80-84	27	5.10%	5220	7.12%
85-89	14	2.65%	2784	3.72%
90 and older	10	1.89%	1382	1.85%
Unknown	28	5.29%	5743	7.68%
Total	529	100.00%	74792	100.00%

## RACE

Race	# Participants My Network	%	# Participants National	%
African-American	57	19.52%	7959	19.27%
Asian	25	11.00%	2077	5.03%
Pacific Islander	2	0.68%	224	0.54%
White	143	48.97%	27022	65.41%
Unknown	55	18.84%	3678	8.90%
Total	292	100.00%	41313	100.00%

## EDUCATION

Education	# Participants My Network	%	# Participants National	%
Some elementary, middle, or high school	4	7.02%	840	10.55%
High school graduate or GED	18	31.58%	1277	16.04%
Some college or technical school	22	38.60%	1087	13.66%
Bachelor's degree or higher	11	19.30%	605	7.60%
Unknown	2	3.51%	4150	52.14%
Total	57	100.00%	7959	100.00%

## ETHNICITY

Ethnicity	# Participants My Network	%	# Participants National	%
Hispanic or Latino	3	5.26%	194	2.44%
Not Hispanic or Latino	48	84.21%	6722	84.46%
Unknown	6	10.53%	1043	13.10%
Total	57	100.00%	7959	100.00%

## GENDER

Gender	# Participants My Network	%	# Participants National	%
Female	45	78.95%	6604	82.98%
Male	12	21.05%	1196	15.05%
Total	57	100.00%	7959	100.00%

## LIVING ARRANGEMENT

Living Arrangement	# Participants My Network	%	# Participants National	%
Lives Alone	28	49.12%	4774	59.98%
Lives With Others	28	49.12%	2950	37.06%
Unknown	1	1.75%	235	2.95%
Total	57	100.00%	7959	100.00%

## MONTHLY INCOME

Monthly Income	# Participants My Network	%	# Participants National	%
Unknown	658	100.00%	62829	99.94%
\$4,000 or more	0	0.00%	6	0.01%
\$3,500 - \$3,999	0	0.00%	2	0.00%
\$3,000 - \$3,499	0	0.00%	0	0.00%
\$2,500 - \$2,999	0	0.00%	1	0.00%
\$2,000 - \$2,499	0	0.00%	2	0.00%
\$1,500 - \$1,999	0	0.00%	1	0.00%
\$1,001 - \$1,499	0	0.00%	16	0.03%
Less than \$1,000	0	0.00%	7	0.01%
Total	658	100.00%	62864	100.00%

Overall Reach

Demographics - Tables

Health Stats - Tables

Full Data Exports

The chart-level filters can also be applied in the same manner for the charts on the Health Stats tab. **However, the filters do not apply across pages.** If you wanted to filter by a data element from the demographics tab combined with a data element found on the Health Stats tab, you would need to work with the full data export spreadsheet.

## IX. Exporting Charts and Data

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To export the data associated with tables or charts, select the ellipses (three dots) in the top-right side of any visualization and choose the Export data icon. Your data is exported as a .csv or .xlsx file. You can save and open the file in Excel.

If you wish to export detailed, raw data, you have two options available:

- Workshop-Level Data For Export – one row per workshop; contains all variables pertaining to the workshop’s Host Organization, Implementation Site, Facilitators, Funding Source and Workshop, including calculated fields showing total number of participants enrolled and total number completed, and the completion rate for the workshop.
- Participant-Level Data For Export – one row per participant; contains all of the variables described above (except for the workshop’s completion rate), plus every variable collected at the participant level (including demographics, survey responses, and attendance data, as well as optional fields made available by NCOA).

Export either table by following these steps:

1. Set the page-level filters that you want to apply, if any.
2. Hover over the table you wish to export to cause the buttons to appear in the upper right corner of the table, and click the “More Options” button (three dots, far right)

**NETWORK DATA & STATISTICS**  
 CHA Community, Testing      UPDATED: August 01, 2019, 16:38:48 EST

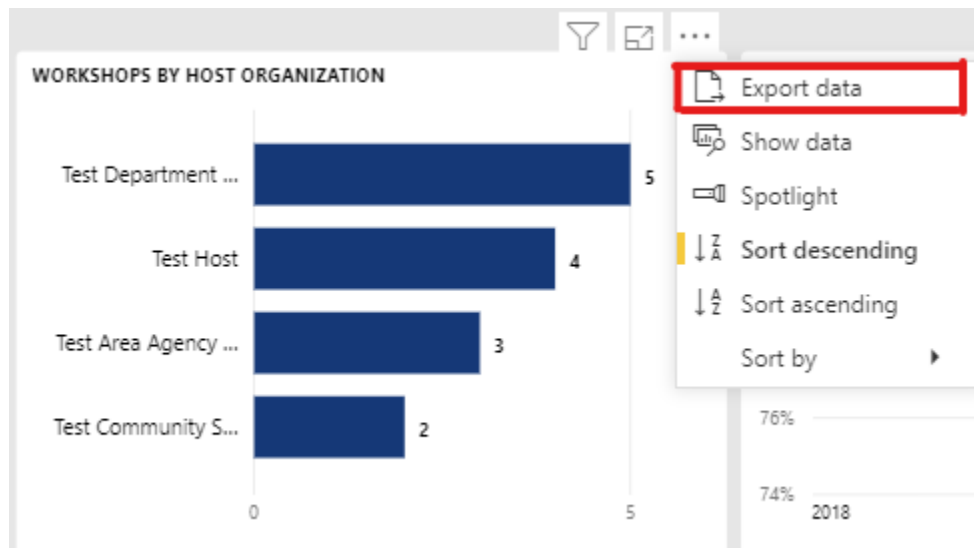
HOST ORGANIZATIONS	IMPLEMENTATION SITES	WORKSHOPS	ENROLLED	COMPLETED
5	9	187	2841	1777

Workshop Type: All | County: All | Host Organization: All | Implementation Site: All | Workshop Name: All  
 Start Date: 8/19/2015 - 7/2/2019 | End Date: 9/23/2015 - 8/31/2019

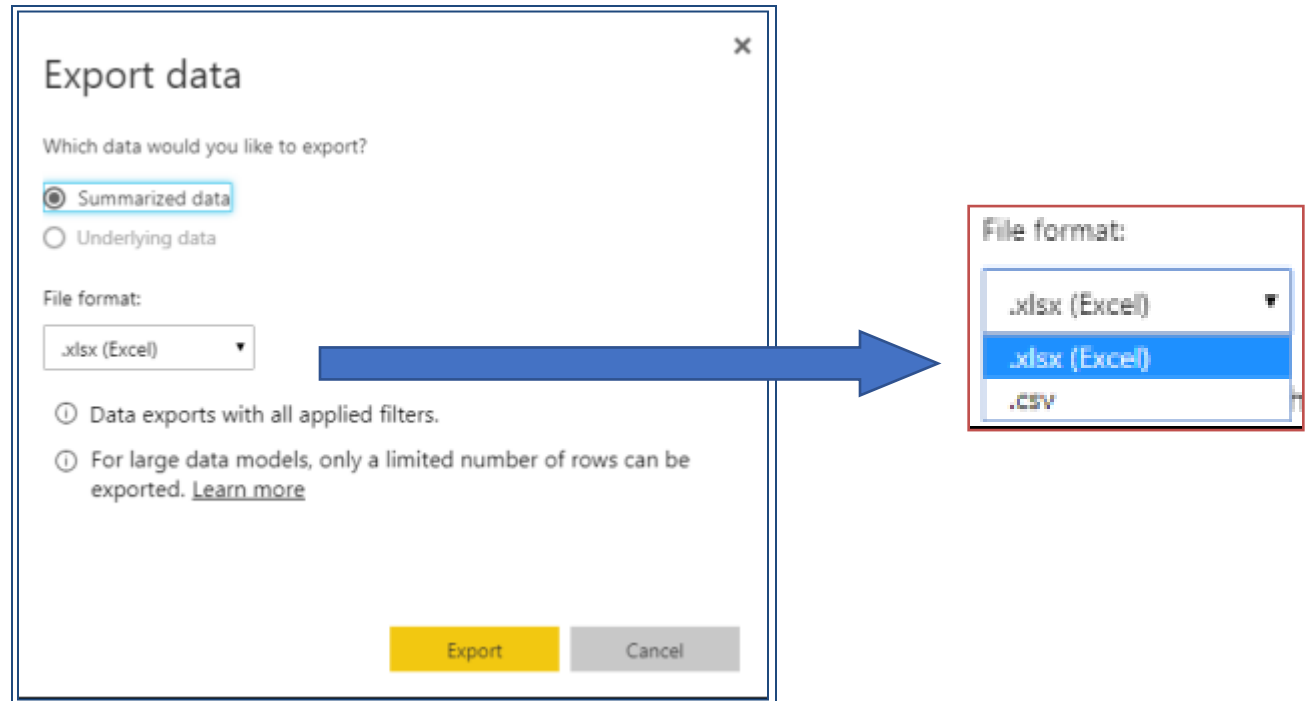
**WORKSHOP - LEVEL DATA FOR EXPORT**

Grantee Account Name	Workshop Type	Workshop ID	Workshop Name	# Participants Enrolled	# Participants Completed	Completion %	Facilitator 1 First
CHA Community, Testing	Diabetes Self-Management Program (DSMP)	a19f2000002KJ67AAG	VANORT_091917	45	43	95.56%	Jane
CHA Community, Testing	Chronic Disease Self-Management Program (CDSMP)	a19f2000002KJAOAA4	VANORT_041717	38	34	89.47%	Jane
CHA Community, Testing	Chronic Disease Self-Management Program (CDSMP)	a19f2000002KJ7UAAW	VACENT_060517	35	33	94.29%	Jane
CHA Community, Testing	Program de Gestion Personnalisee de la Diabetes	a19f2000002KJDAAA4	VACENT_032417	54	50	92.59%	Jane

3. On the drop-down menu, select **Export data**.



4. On the Export data dialog box, choose your file format from the dropdown menu. Excel is will export with formatting (e.g., alternate line shading). CSV will export without formatting.



5. There are some limits to export sizes to keep in mind:
- a. The maximum number of rows that **Power BI** can export to a .csv file is 30,000.
  - b. The maximum number of rows that the applications can export to an .xlsx file is 150,000