The Data Exchange Reports

Access, explore and export your data

April 2021

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Introduction

This document provides guidance for the Targeted Earlier Intervention (TEI) sector to access, explore and export their Data Exchange data. It will support you to understand:

- what reports are available and what information is in them
- how to access the Data Exchange reports
- how to navigate the Data Exchange reports
- how to filter and explore your data
- how to export your data
- what additional resources available

In the TEI program, all service providers must report data into the Data Exchange. The Data Exchange is web-based platform hosted by the Department of Social Services. It was chosen as the most suitable reporting platform as it has the flexibility to capture information across the entire TEI continuum. It can also be used to ensure we report service delivery information and client outcomes in a consistent way.

The Data Exchange will support us to:

- have a clear understanding of their client base
- be able to track client pathways through the system
- measure the impact we have on client and community outcomes
- work together to deliver quality services and achieve client and community outcomes.

Over time, the Data Exchange will help us build a robust data set and a strong evidence base for the TEI program. The Data Exchange will inform continuous improvement and help us to evaluate the TEI program.

The Data Exchange Reports

The Data Exchange has a self-service reporting function that allows organisations to access their own data in a series of reports. The reports share de-identified data that can inform business planning and provide insights into program delivery and policy development.

The Data Exchange reports share valuable and useful information so you can continually ensure your services are effective and relevant to your clients.

These reports can be accessed by organisations at any time. The content of reports is refreshed every 24 hours, to enable near real-time access to information. This means the more regularly your organisation enters their data, the more relevant your reports will be.

Overview of the Data Exchange Reports

TEI service providers can access eight different Data Exchange reports.

Standard reports

These reports cover the mandatory priority data submitted by your organisation. All organisations who use the Data Exchange have automatic access to these reports.

- Organisation overview report provides information about the organisation's service delivery. It includes information about clients, outlets, service types and patterns of service delivery. You can use this report to see which services are accessed most often, or whether client groups and their needs are changing.
- Organisation data quality report highlights key data quality issues (e.g. missing client information). You can use this report to ensure your organisation report to improve and/or maintain data quality.

Partnership Approach reports

In the TEI program, it is compulsory for service providers to participate in the Partnership Approach.

In the Partnership Approach, you will have access to several additional reports. These reports include extended data, client and community outcomes and population-level datasets.

The following reports are available:

- NSW TEI Activity Report has been designed specifically for the TEI program. This report will support TEI service providers to monitor and evaluate their work and understand the outcomes their activities contribute to.

- Service Footprint report provides a roadmap of clients accessing services. This shows how far clients travel to services and how many clients an organisation has supported within the local and out-of-area regions. Organisations can use this information to better target their services and demonstrate community need.

- Resource Planning report provides an overview of trends in service delivery. It helps predict trends in service delivery to assist with future planning of resources.

- Community profiles reports combine population-level datasets to show a comprehensive picture of NSW communities. There are two editions of this report. The first contains 2011 census data and the second contains 2016 census data. Note: this report does not include information reported by TEI service providers.

- Client outcomes report looks at changes in individual client outcomes over time. This is information reported via SCORE. We can use this data to understand if client's circumstances are improving, if clients are achieving their goals, or if they are satisfied with the service they received.

- Community outcomes report looks at changes in group or community outcomes over time. This is information reported via Community SCORE.

Note: if your organisation uses the Data Exchange for other programs (e.g. DSS-funded programs) you may be able to see and access different reports to what we have described above.

Accessing the Data Exchange Reports

To access the Data Exchange reports, see Introduction and Access for a step-by-step guide for service providers.

To access the Partnership Approach reports your organisation must be signed up to the Partnership Approach. To do this, see Update participation in the Partnership Approach

Note: If you are a DCJ staff member, you will need to follow a different process to access the reports. Email TEI@facs.nsw.gov.au for assistance.

Who can access the Data Exchange reports?

Any staff member in your organisation who has access to the Data Exchange can see the Data Exchange reports.

However, some staff may have restricted access.

In the Data Exchange, there are three different access levels:

- **Organisation administrator**: responsible for managing the Data Exchange. They can set up the organisation's details, add other users, create and manage outlets, create delivery partners.
- **Organisation editor**: can create, edit and view records.
- **Organisation view only**: can only view records.

When an 'editor' or a 'view only' user is created, they are assigned program activities and outlets.

In the Data Exchange reports, 'editors' and 'view only' users, can only see the data for the program activities and outlets they have been assigned.

Organisation administrators can see all the data that has been reported for their organisation.

This means, when you check your data quality and use your data to demonstrate performance an organisation administrator should do this work. If an 'editor' or a 'view only' user does this, they won't be able to see all the data they need to.

To change a staff members access level see: Add and Edit a User

Additional resources

There are numerous resources you can use to better understand how to use the Data Exchange and get the most out of your data:

- TEI Data Collection and Reporting Guide
- Using data in the TEI Program
- Using data to improve our services
- The NSW TEI Activity Report

Navigating the Data Exchange Reports

The Data Exchange reports are online self-service applications that service providers can use to easily visualise and explore their data.

Every chart, table and graph in each report is interactive. You can search, select, drill down or zoom in and out to find the information you need.

The information below walks you through how to:

1. Select a report
2. Report structure
3. Select a sheet
4. Navigate between sheets
    a. Use the left and right arrows to go the next or previous sheet
    b. Select another sheet directly
    c. Go back to the 'overview' page and select a new sheet
5. Change reports
6. Filters
    a. Apply a filter
    b. Filter display area
    c. Apply multiple filters
    d. Change a filter
    e. Filters in graphs, charts and tables
7. Create bookmarks
    a. Access a bookmark
8. Change the x-axis in a graph
9. Change data visualisations
    a. Change a graph or chart to a table
    b. Use the exploration menu to alter the visualisation
        i. Sorting
        ii. Presentation
        iii. Colours and legend

Important note: the data you can see on the following pages is data for the entire TEI program. When a service provider reviews their own reports, they can only see the data reported for their organisation.

1. Select a report

The standard reports and the partnership approach reports are stored in two separate streams.

To see the standard reports, click on the 'DEX – Standard Report' button down the left-hand side of your screen (see Figure 1).

Figure 1. Standard reports

To see the partnership approach reports, click on the 'DEX – Partnership Approach' button down the left-hand side of your screen (see Figure 2).

Figure 2. Partnership Approach reports
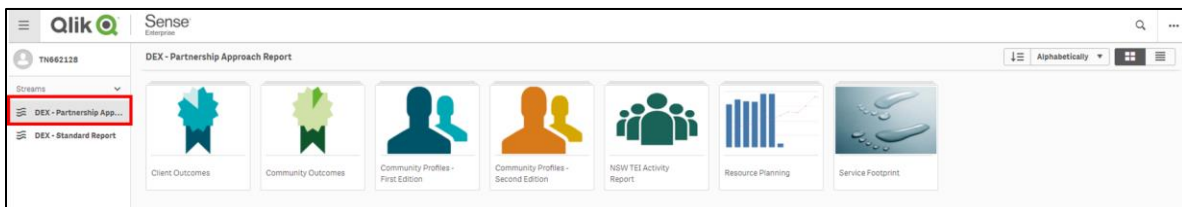
To view a report, simple click on the report you're interested in.

For example, click on the NSW TEI Activity Report, as outlined below (Figure 3).

Figure 3. Select a report
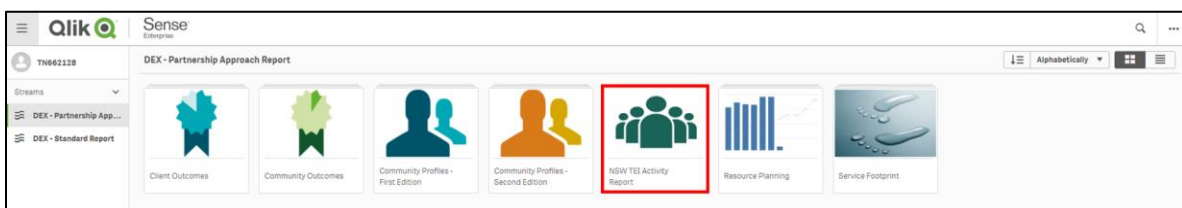
> **Important note:** the screenshots above display what service providers see when they access the Data Exchange reports. DCJ staff can see all the above reports in one stream.

2. Report structure

When you click on a report, you will see an overview of the report. In Figure 4, we can see the NSW TEI Activity Report. From this page you can see:

A	Report details: name of the report, date of last update
B	Report description
C	Sheets navigation button: shows the sheets available in the report
D	Bookmarks button: opens saved bookmarks
E	Stories button: opens saved stories

Each report has a similar structure. Each white square is a 'sheet' that includes different information and data:

F	The user guide provides a short description of the report, information about changes that have been made to the report, the data sources and when it was last updated.
G	The filters page includes several different filters you can use to refine your data.
H	The information page includes a glossary of terms to help you understand the information in the report.

All the other sheets include data that your organisation has reported.

Figure 4. Sheets available in reports

3. Select a sheet

To select a sheet, simply click on the sheet you want to see. In this example, we have selected Overview of Attendee Numbers (see Figure 5).

Figure 5. Select a sheet
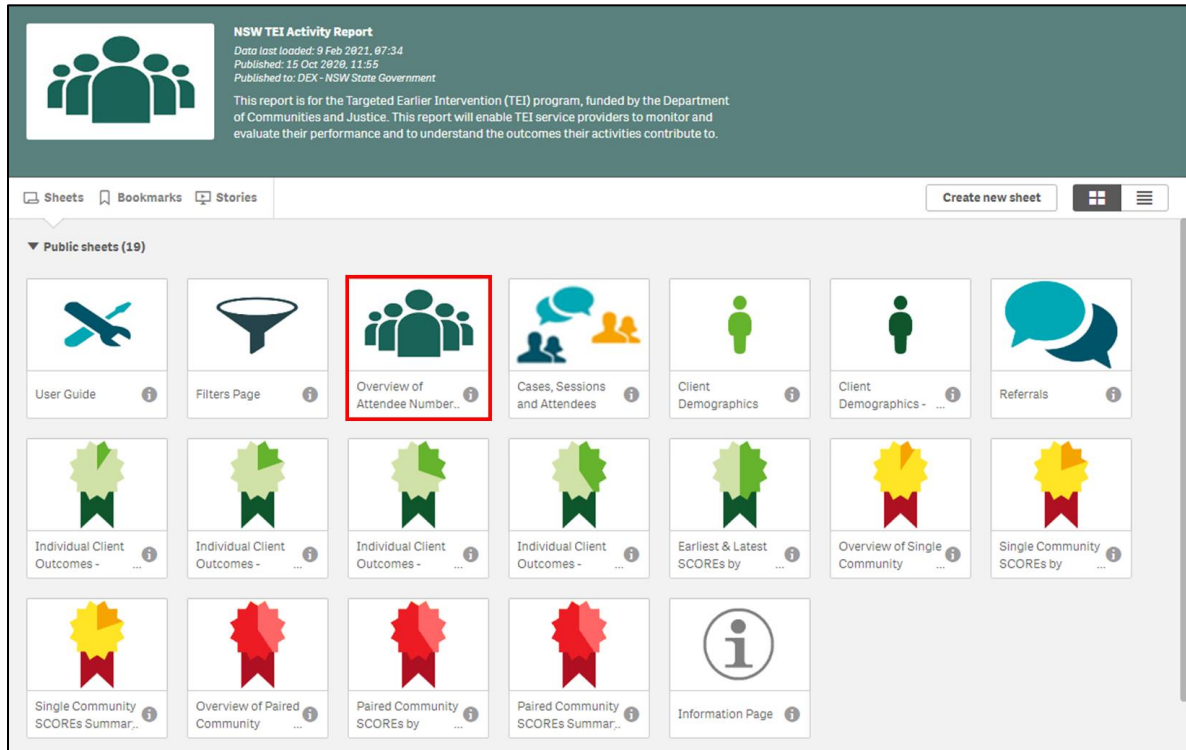
You will then be taken to that sheet and you can see the information and data it includes. The name of the sheet is in the top left corner (see Figure 6).

Figure 6. Overview of attendee numbers
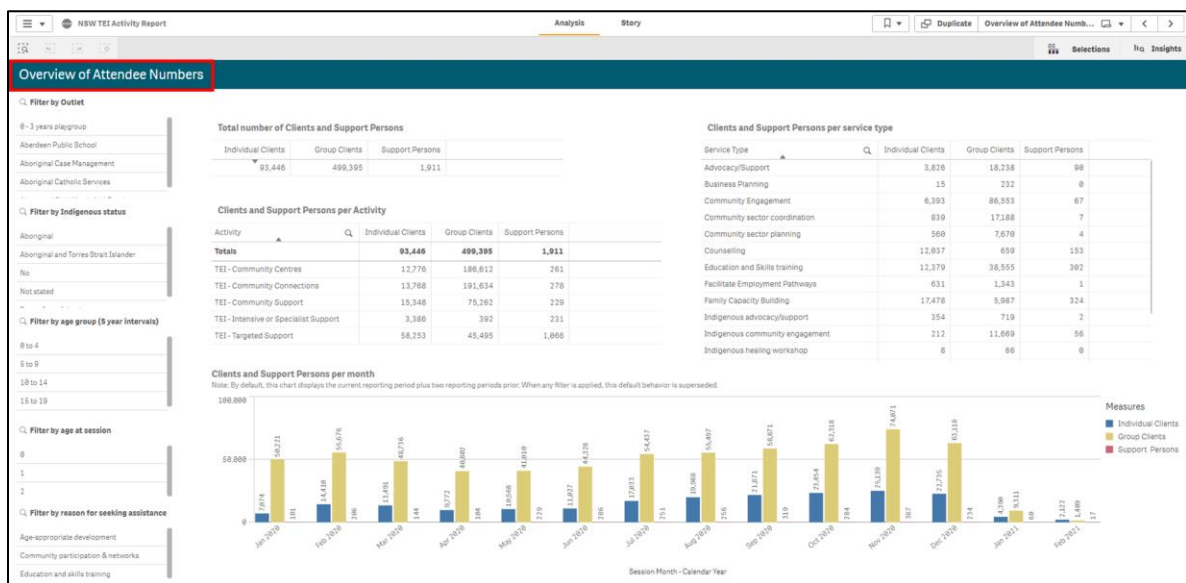
4. Navigate between sheets

There are three different ways you can go to another sheet:

A. Use the left and right arrows to go to the next or previous sheet
B. Select another sheet directly
C. Go back to the 'Overview' page and select a new sheet

A. Use the left and right arrows to go to the next or previous sheet

In the top right corner of the screen are two arrows (see Figure 7). If you click the arrow pointing to the left, you will be taken to the previous sheet. If you click the arrow pointing to the right, you will be taken to the next sheet.

Figure 7. Use the left and right arrows to go to the next or previous sheet
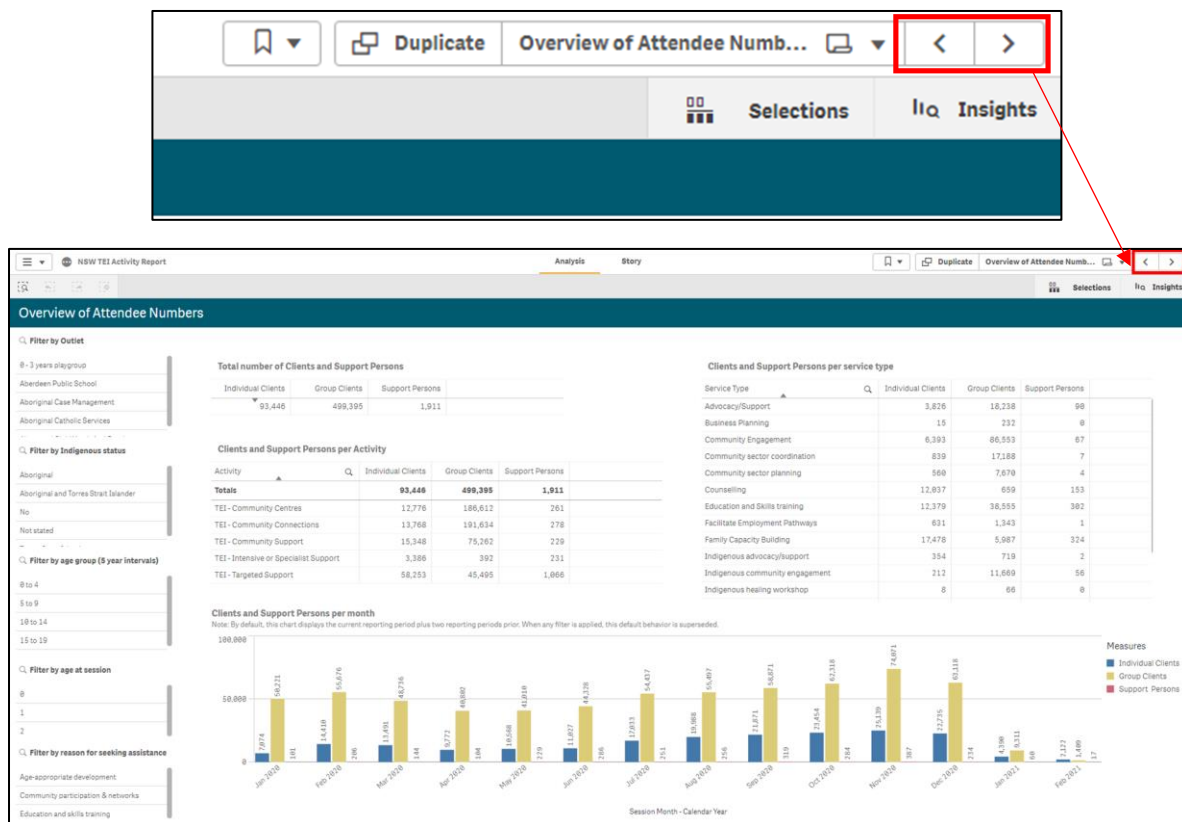
B. Select another sheet directly

In the top right corner of the screen, is a button with the name of the current sheet. In this example, it says 'Overview of Attendee Numbers' because that is the name of the sheet we are on (see Figure 8).

Click this button and a pop-up box will appear with all the sheets available in the report (see Figure 8). You can select any sheet and you will be taken directly to that sheet.

Figure 8. Select another sheet directly
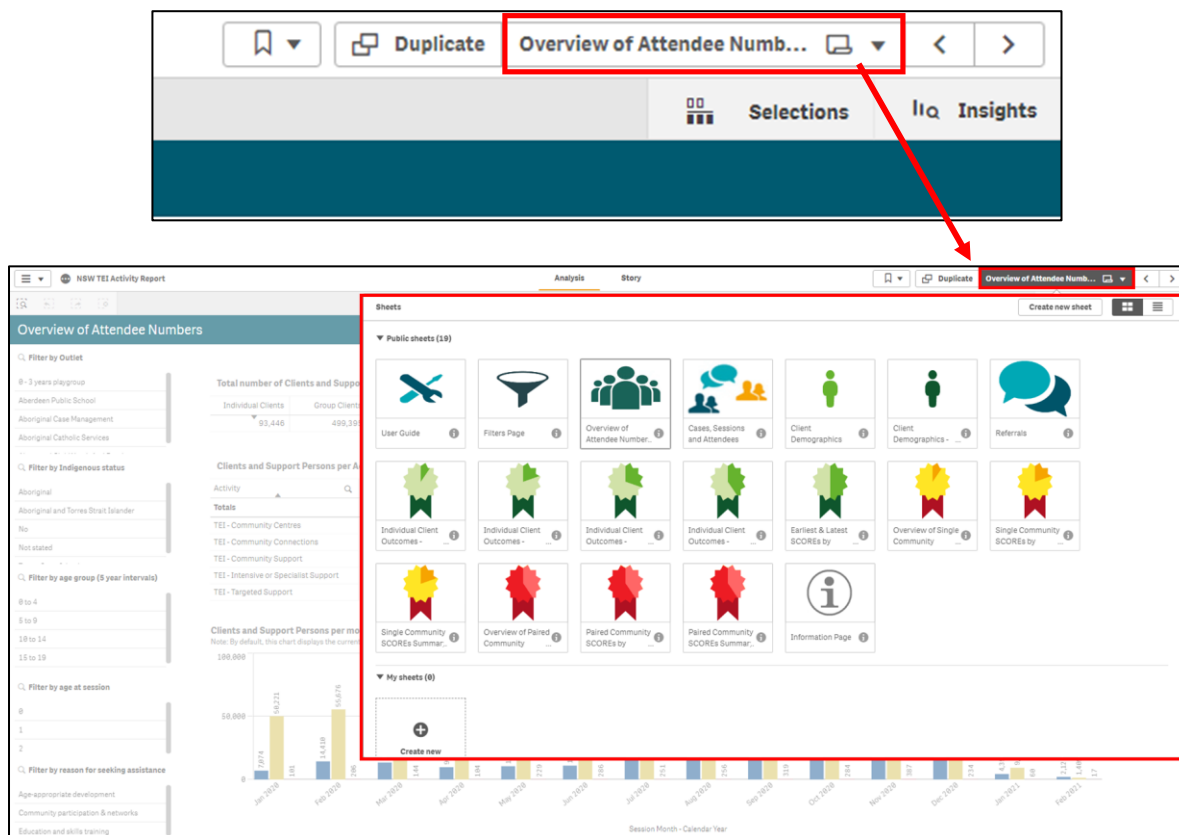
C. Go back to the 'Overview' page and select a new sheet

In the top left corner of the screen is the navigation button.

Click this button and a small menu will appear (see Figure 9). Click on 'App overview'. This will take you back to an overview of the report (see Figure 4). From there, you can select another sheet in the report.

Figure 9. Go back to the 'Overview' page and select a new sheet
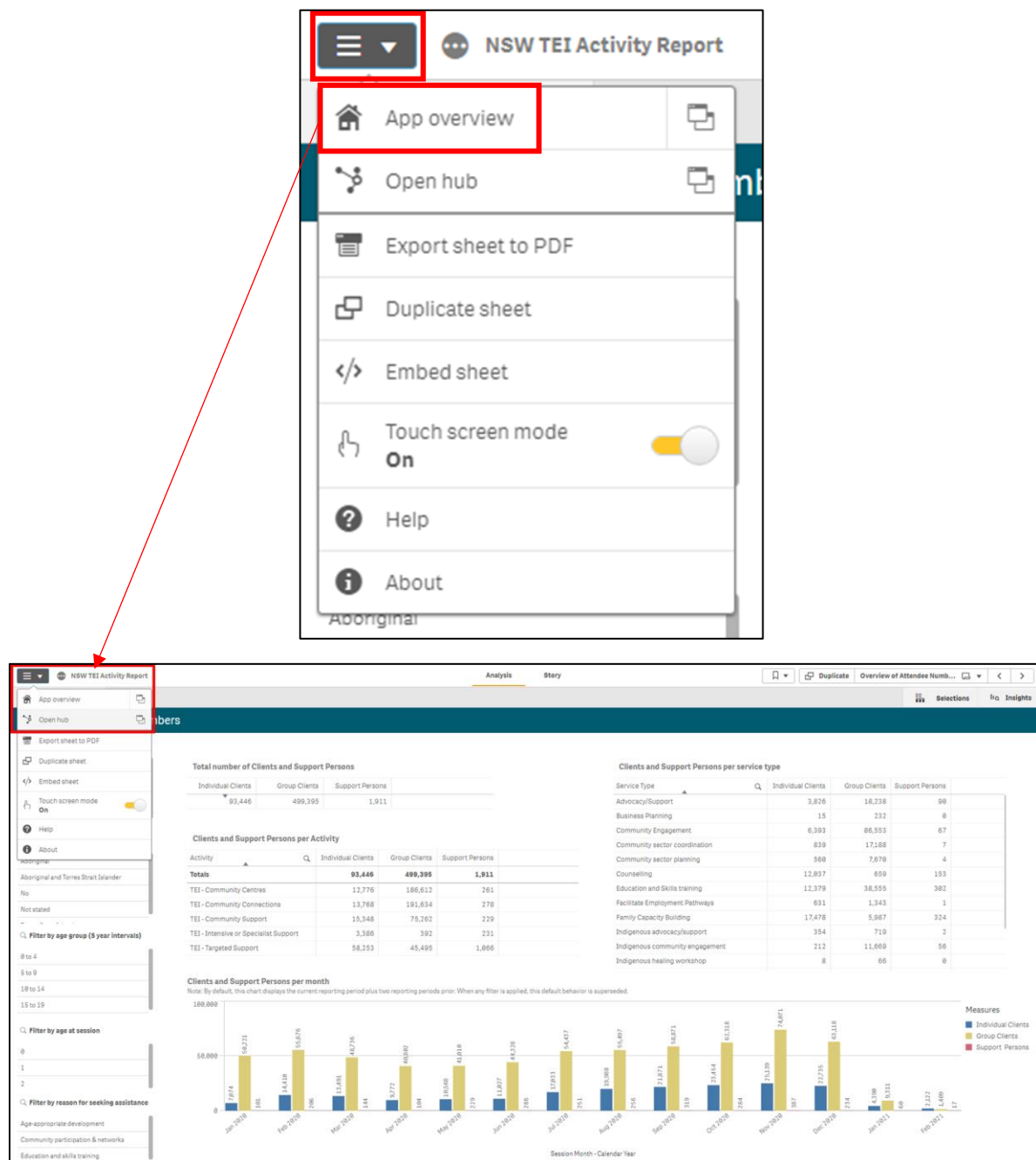
5. Change reports

To go to a different report, select the navigation button in the top left corner of your screen.

A small menu will appear. Click on 'Open Hub' (see Figure 10). This will take you back to the home page where you can see all the different reports (see Figures 1 and 2).

Figure 10. Change reports
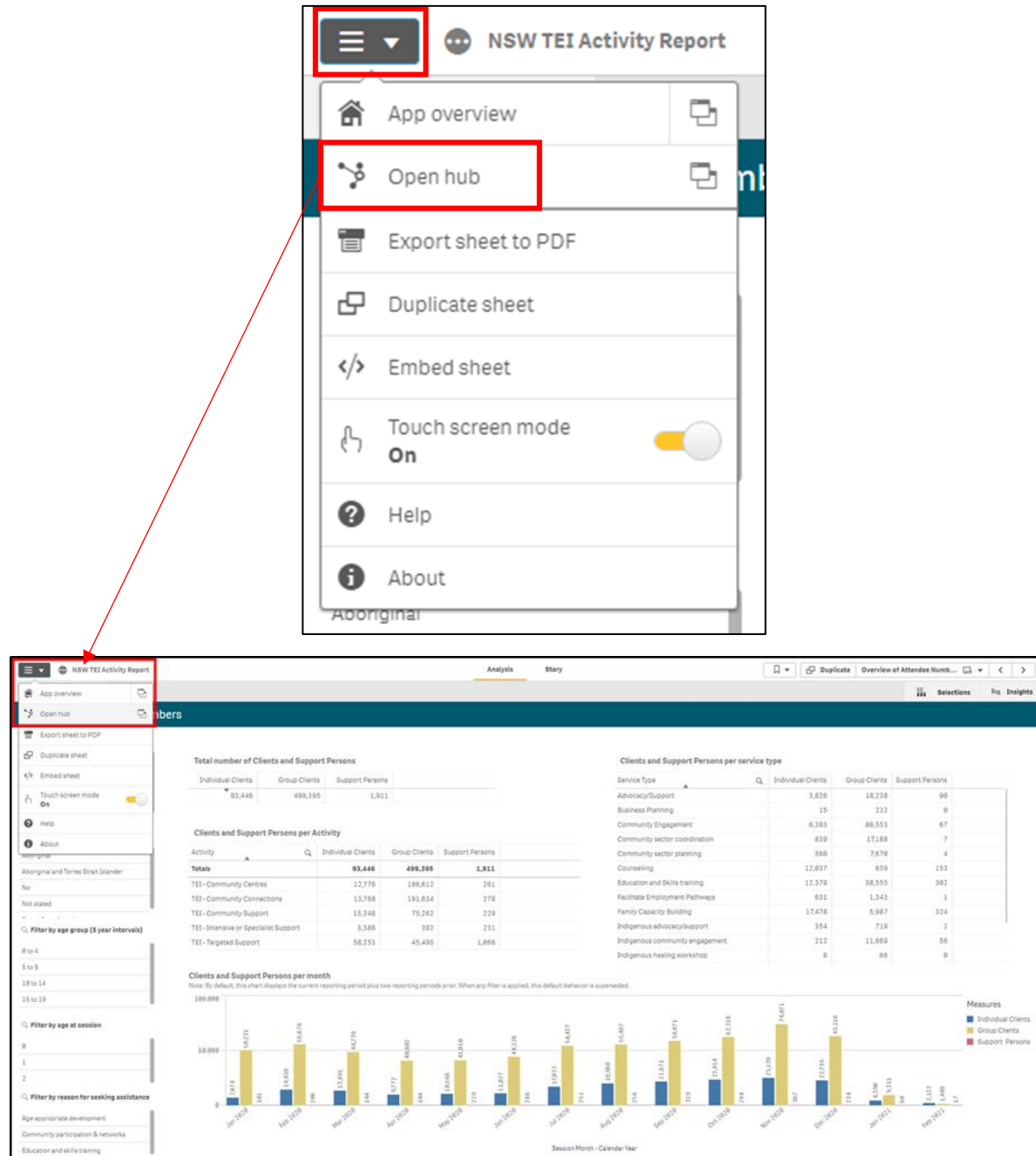
6. Filters

Each report includes filters you can use to refine and explore your data.

Each report includes a filters page. See Figure 11 for an example in the NSW TEI Activity Report.

Figure 11. Filters page

As seen in Figure 11, the filters page includes several different filters that can be used to refine your data. You can select a financial year, reporting period, outlet, program activity etc.

There are also different filters available on other sheets in the report.

In Figure 12, you can see a series of filters down the left-hand side of the page.

Figure 12. Filters on data sheets
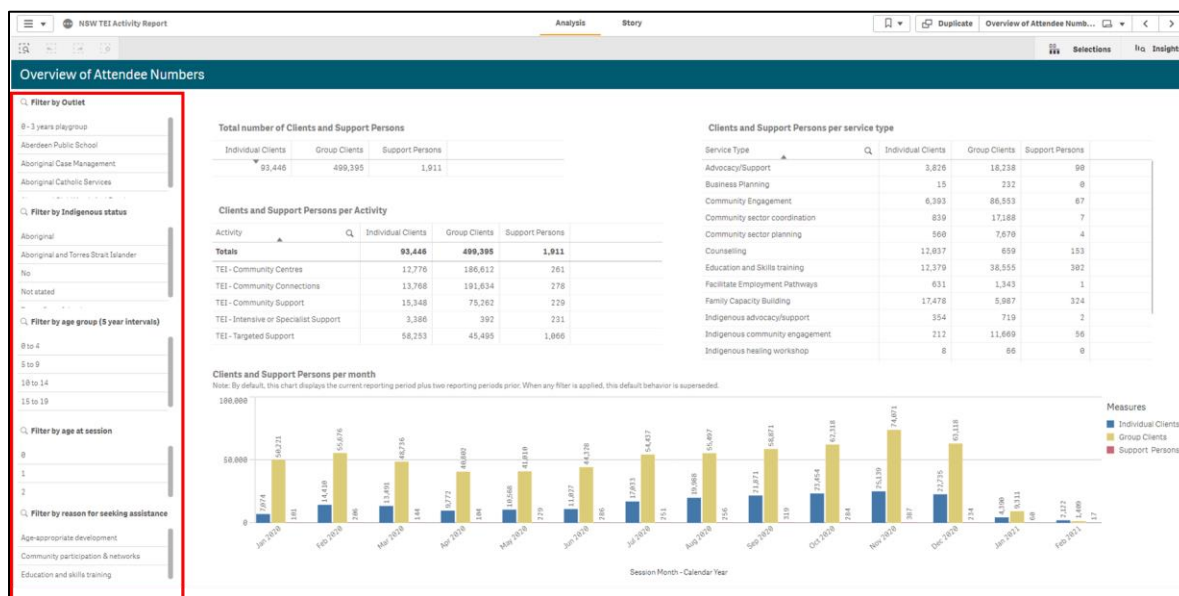
6a. Apply a filter

To apply a filter, simply click on the filter you want.

Select [✔] to confirm your selection.
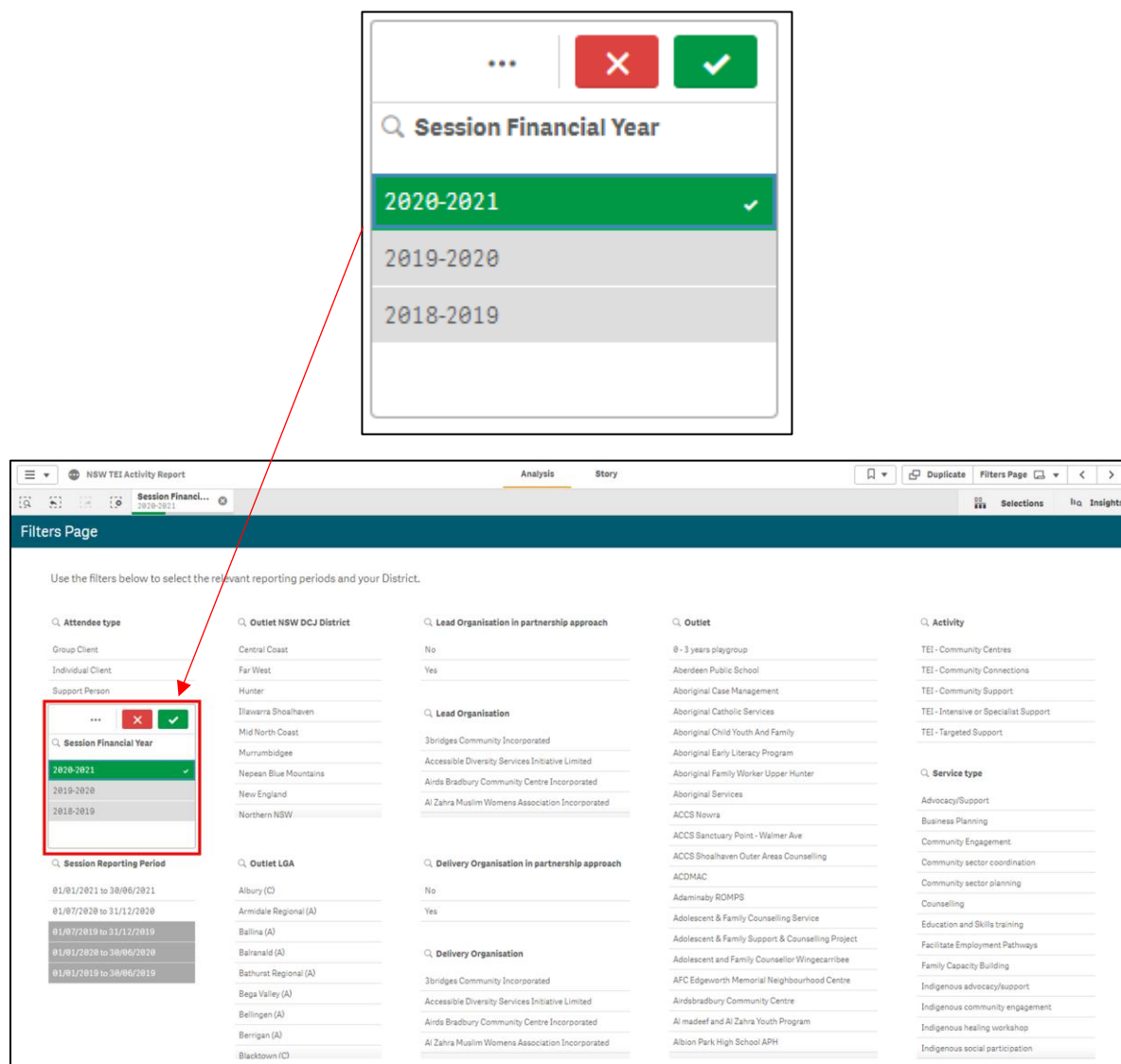
Select [✘] to undo your selection.

When you select a filter, the report will automatically update and display the filtered items. The filter will be applied to the all the sheets in your report.

You can apply as many filters as you like.

In Figure 13, we have selected the 2020-2021 financial year. Now, all the data in the report will only be from that financial year.

Figure 13. Applying a filter

6b. Filter display area

When a filter is applied, it will appear in the filter display area at the top of your page. This tells you what filters have been selected and applied to your report.

In Figure 14, we can see the filter **Session Financial Year** has been applied. We can also see that the option **2020-2021** was selected.

The filter display area can also be used to:
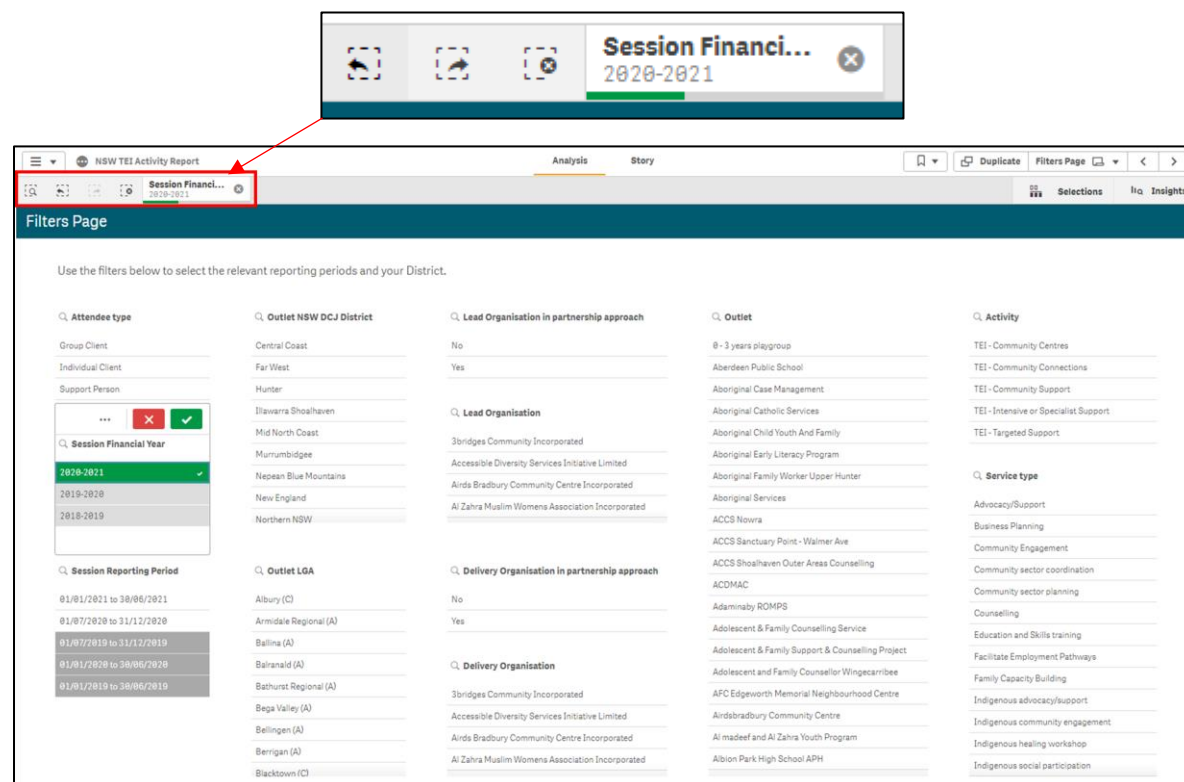
|	
⊗	Remove an individual filter
⌞⊗⌝	Clear all your filters at once (clear selections)
⌞↱⌝	Undo your last selection (step back)
⌞↰⌝	Redo a selection (step forward)

Figure 14. Filter display area

6c. Apply multiple filters

You can apply as many filters as you like to your report.

In Figure 15, we've applied 3 different filters: attendee type, activity and service type.

You can see all the filters you have applied in the filter display area.

**Figure 15. Apply multiple filters**
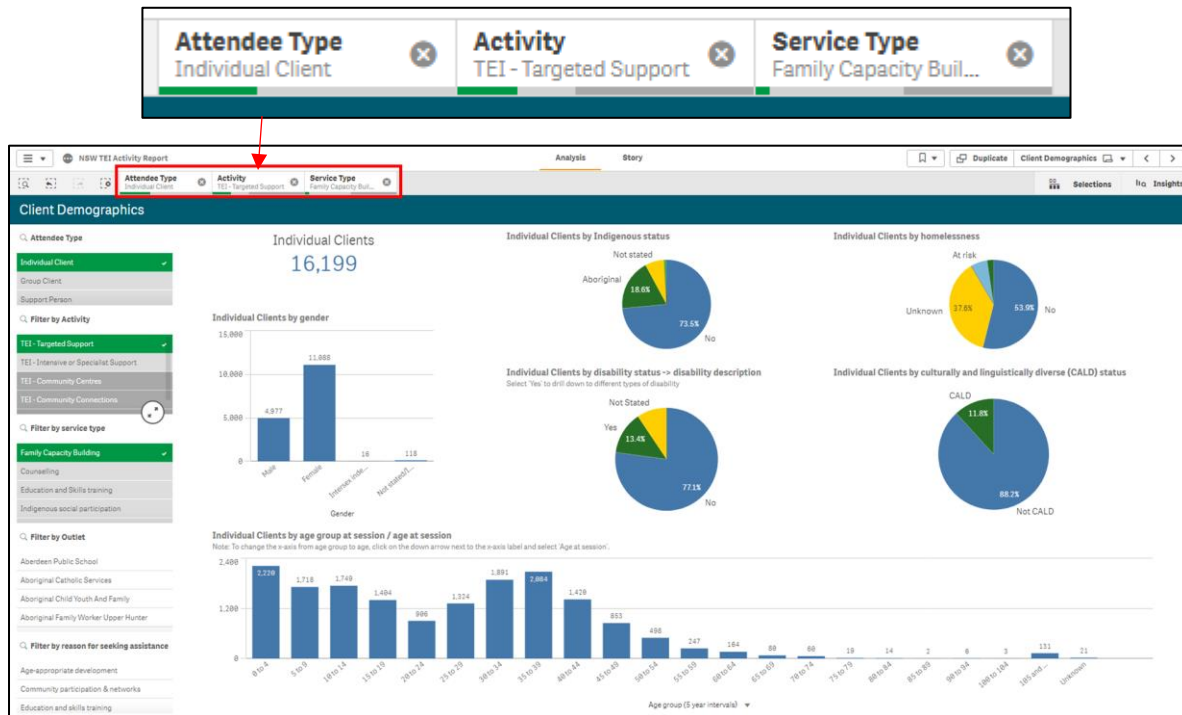
You can also select multiple options within each filter.

In Figure 16 (point B), we've selected two program activities: Intensive or Specialist Support and Targeted Support.

The filter display area will tell you how many options have been selected. See point A below – 2 of 5 options have been selected.

If you have only selected one option, it will include the name of that option. See point C below – Family Capacity Building has been selected.
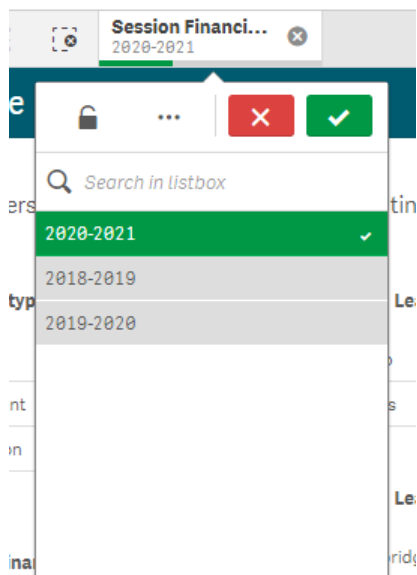
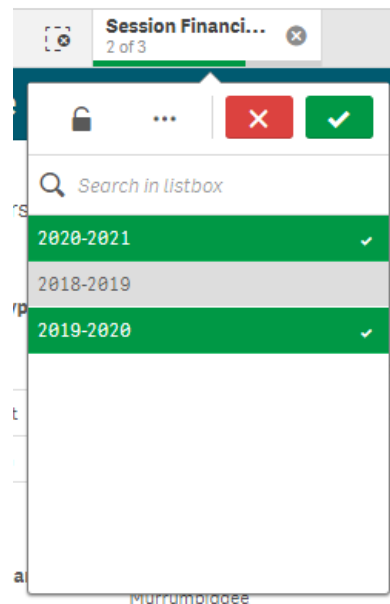**Figure 16. Select multiple options within each filter**
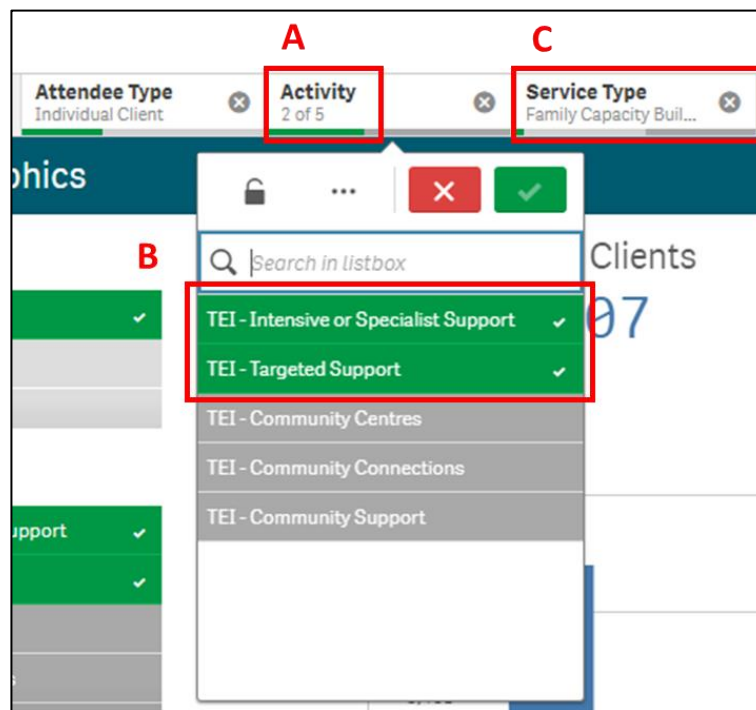
6d. Change a filter

To change a filter:

1. Click on the filter in the filter display area. The filter will appear in a pop-up box. 	2. Select the new filter you want (e.g. 2019-2020).
3. De-select any filters you want to remove (e.g. 2020-2021). 	4. Click the green tick to apply your new filter.
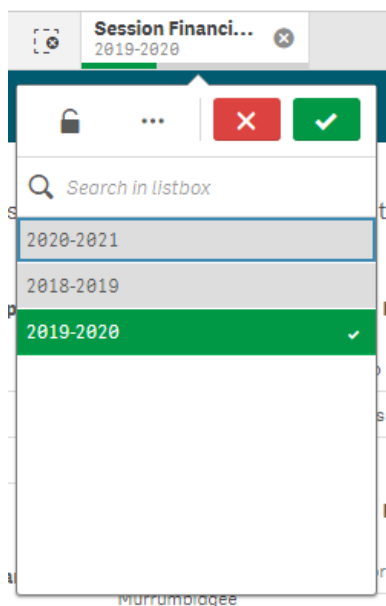
Note: If you select the red cross, , the change you made will not be applied. The filter will revert to your original selection. To remove a filter entirely, you must select the small grey cross .

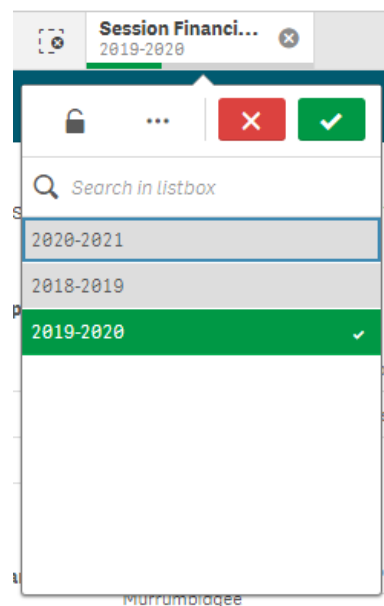## 6e. Filters in graphs, charts and tables

Filters can also be applied by clicking on different parts of the tables, graphs and pie charts in the reports.

Tables: You can select a row in a table to apply a filter.

In Figure 17, we have selected 'Community Centres' in the Activity table. When this filter is applied, the report with only show data for the program activity 'Community Centres'.

Figure 17. Applying filters from tables
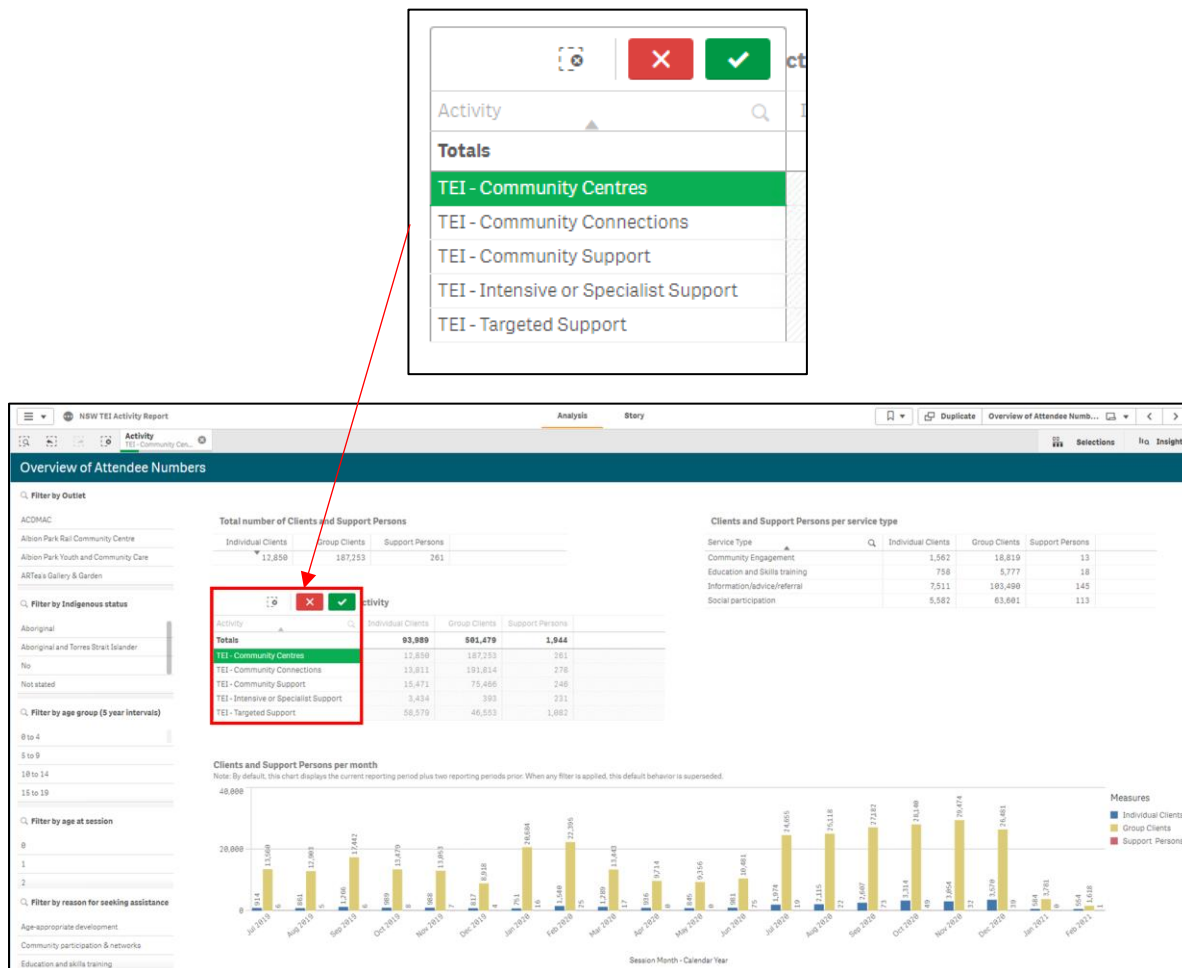
Graphs: You can select a column in a column graph to apply a filter.

In Figure 18, we have selected 'male' in the gender graph. When this filter is applied, the report will only show data reported for male clients.
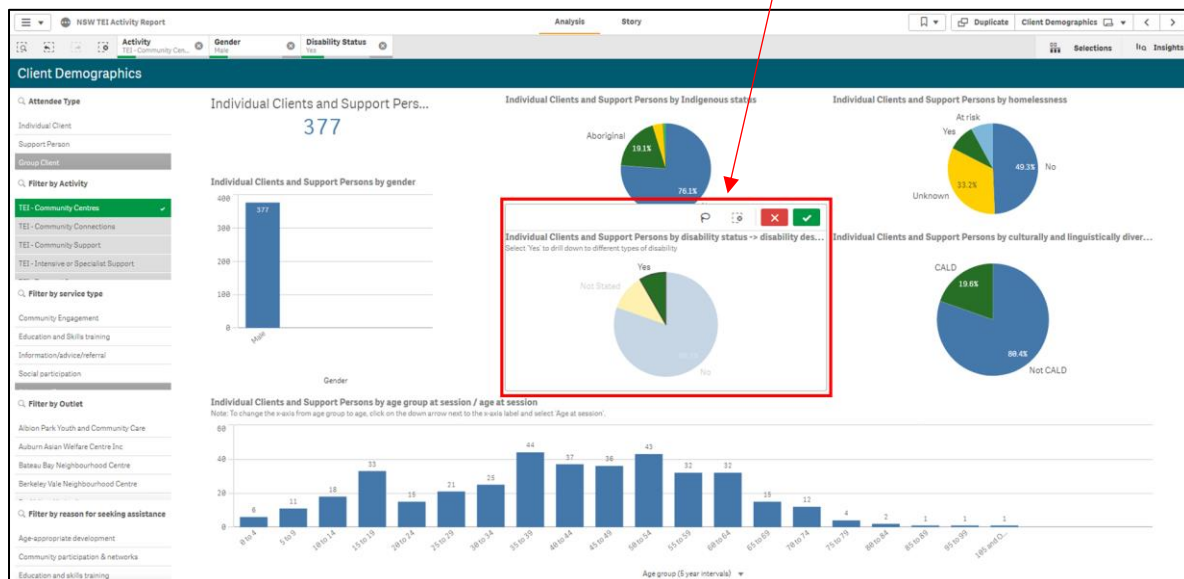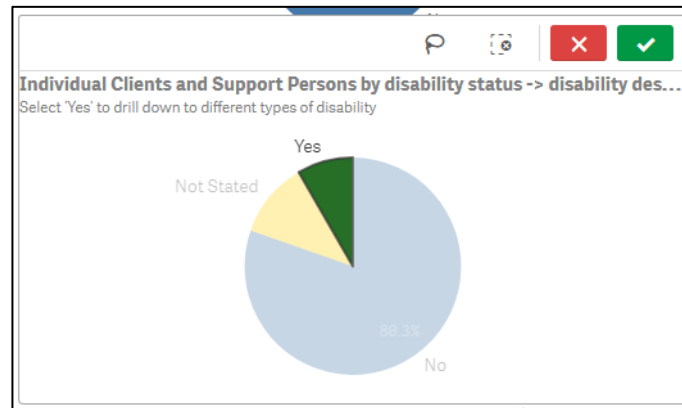
Figure 18. Applying filters from graphs
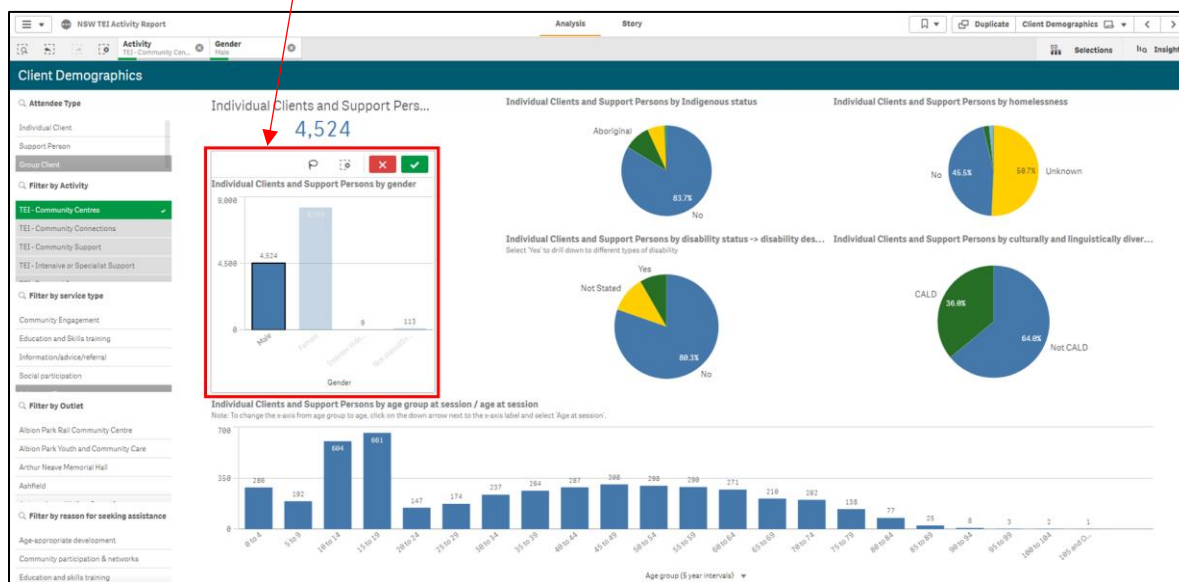
Pie charts: You can select a section of a pie chart to apply a filter.

In Figure 19, we have selected 'yes' in the disability pie chart. When this filter is applied, the report will only show data reported for clients with a disability.

Figure 19. Applying filters from pie charts

7. Create bookmarks

You can save filters by creating bookmarks.

Bookmarks can be created for reports you access regularly.

Bookmarks are saved in individual reports. For example, if you save a bookmark in the NSW TEI Activity Report, it can only be accessed in that report.

To create a bookmark, open a report and select the desired sheet.

Apply the filters you want (see point A in Figure 20).

Select the bookmark icon [bookmark icon] in the top right corner of your screen (see point B in Figure 18).

Figure 20. Select the bookmark icon
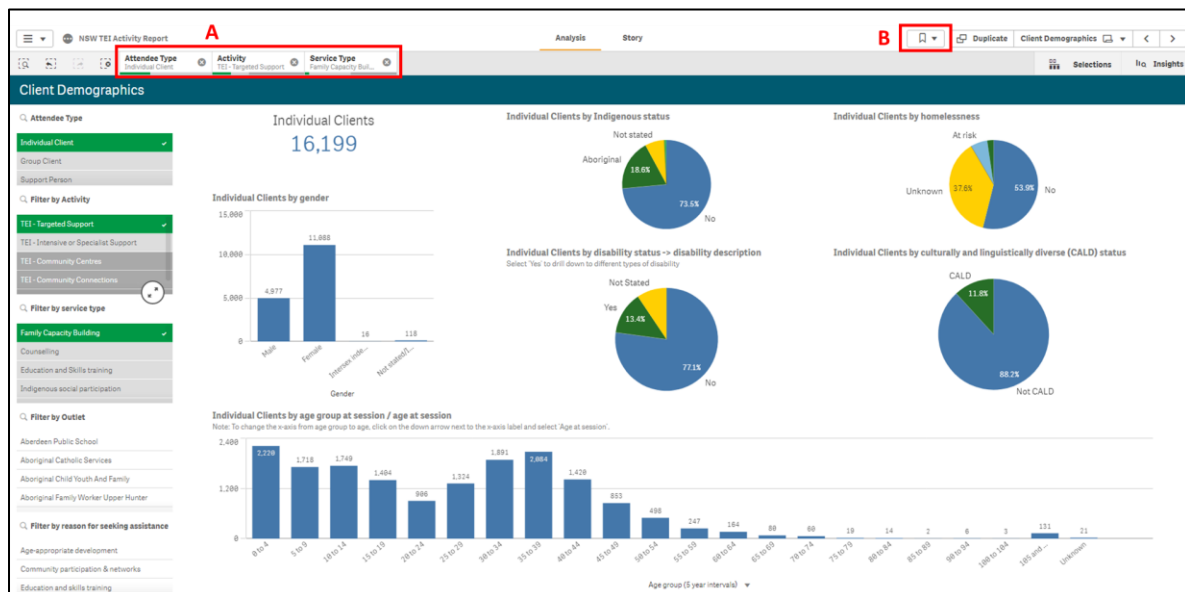
A pop-up box will appear with previous bookmarks you have saved.

Select ┌─────────────────────┐ (see Figure 21).
       │ Create new bookmark │
       └─────────────────────┘

Figure 21. Select 'create a bookmark'
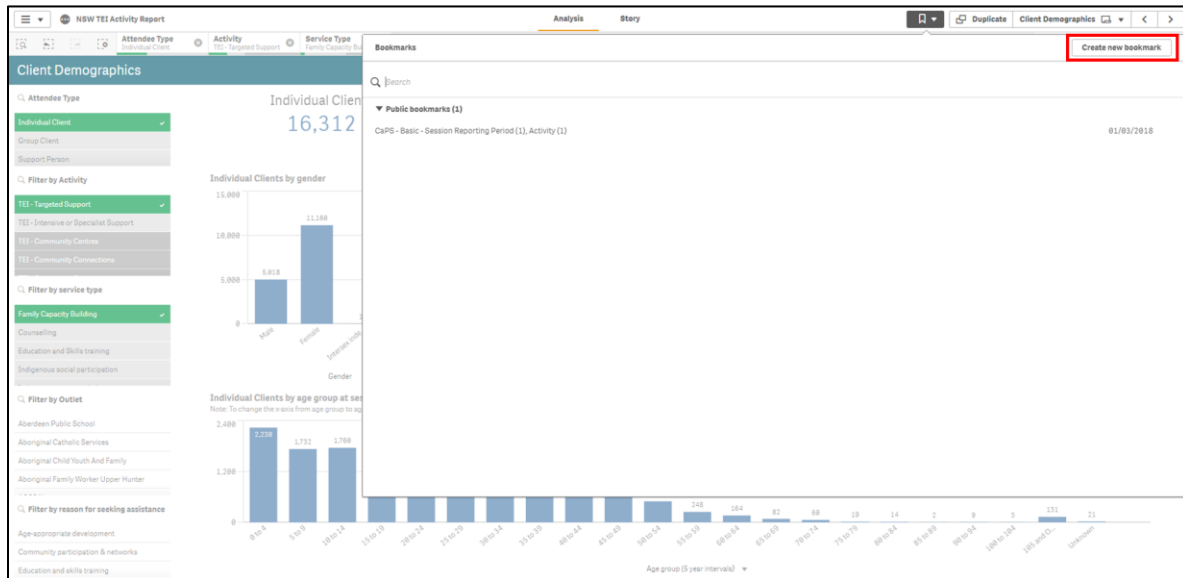
Enter a title and description for your bookmark.

Click the green tick icon ⊘ to save you bookmark (see Figure 22).

Figure 22. Name and describe your bookmark

7a. Access a bookmark

Your saved bookmarks can be accessed two different ways: from the report overview page, or from a sheet in the report.

A. Access bookmarks from the report overview page
B. Access bookmarks from a sheet in the report

A. Access bookmarks from the report overview page

To access bookmarks from the report overview page, click on the report with your saved bookmarks. Click on the bookmarks icon (see Figure 23).

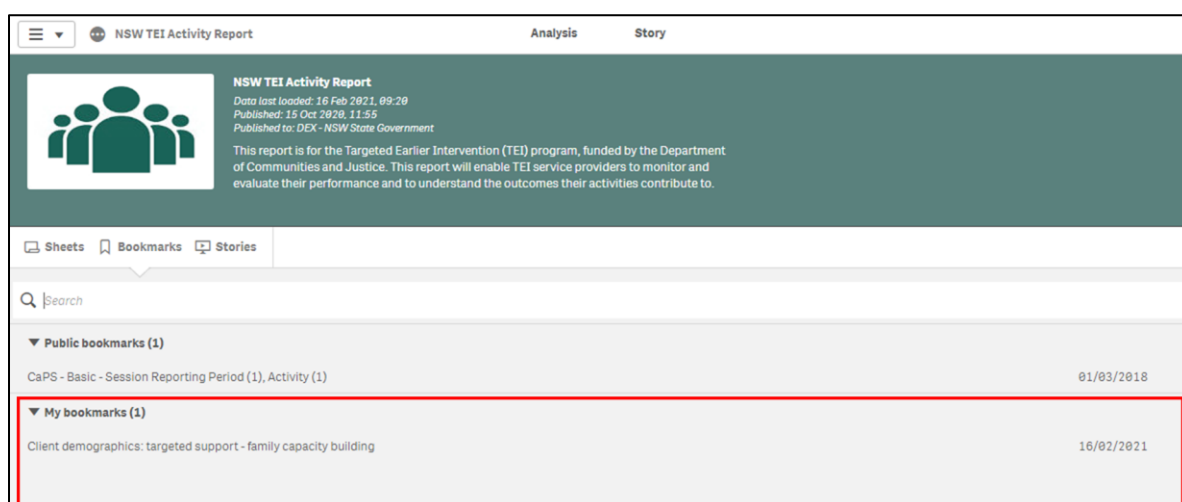**Figure 23. Access bookmarks from report overview page**
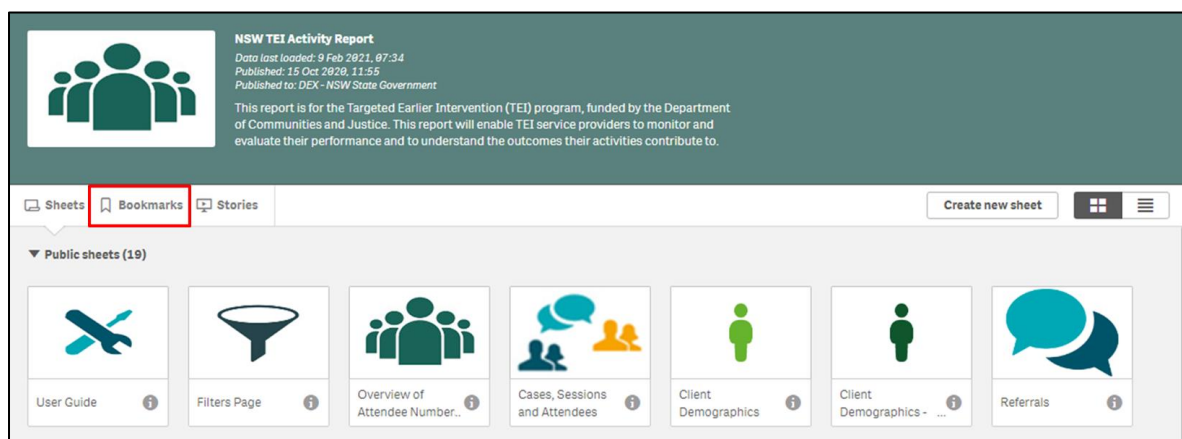
Your bookmarks will appear in the My Bookmarks section (see Figure 24).

Click on the bookmark you want.

The filters in your bookmark will be applied to the report. You will also be taken to the sheet the bookmark was created on.

Figure 24. Select bookmark from the 'My Bookmarks' section

B. Access bookmarks from a sheet in the report

From any sheet in your report, click the bookmark icon [bookmark icon] in the top right corner (see Figure 25).

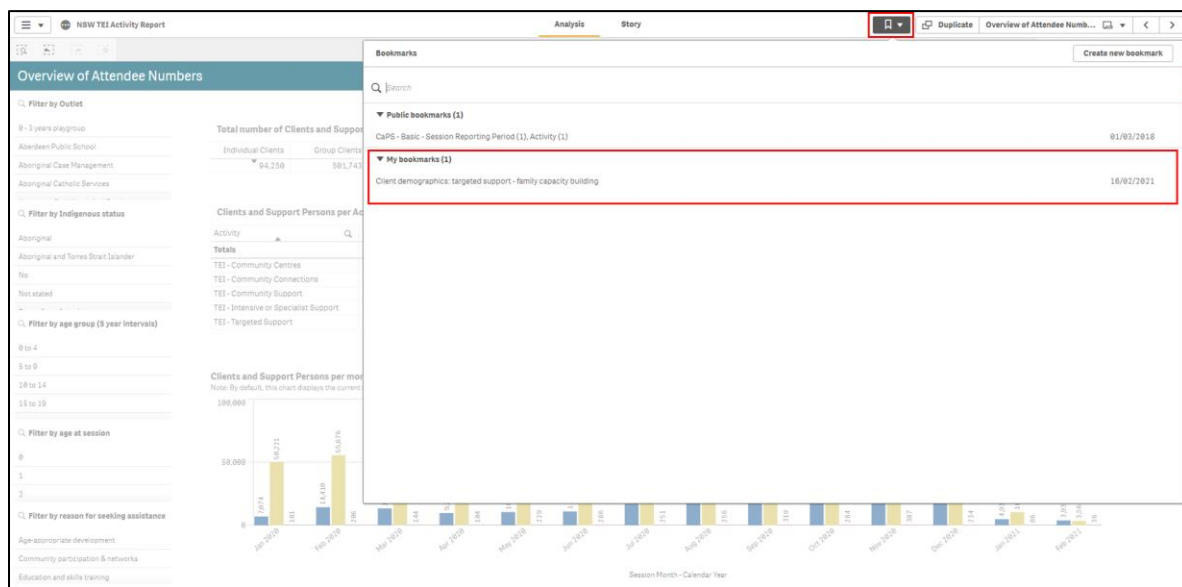Your bookmarks will appear in the My Bookmarks section.

Click on the bookmark you want.

The filters in your bookmark will be applied to the report. You will also be taken to the sheet the bookmark was created on.
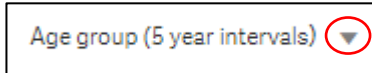
Figure 25. Access bookmarks from a sheet in the report

8. Change the x-axis in a graph

Some graphs have an alternate x-axis. This means you can change the information that appears in the graph.

Graphs with an alternate x-axis have a little arrow next to the x-axis label:

If there is no arrow, it means this feature is not available for that graph.

To change the x-axis, click the x-axis label and select the alternate option.

In Figure 26, we can change the x-axis for a graph that displays client age. We can change the graph from showing age groups (5-year intervals), to age at session (individual ages).

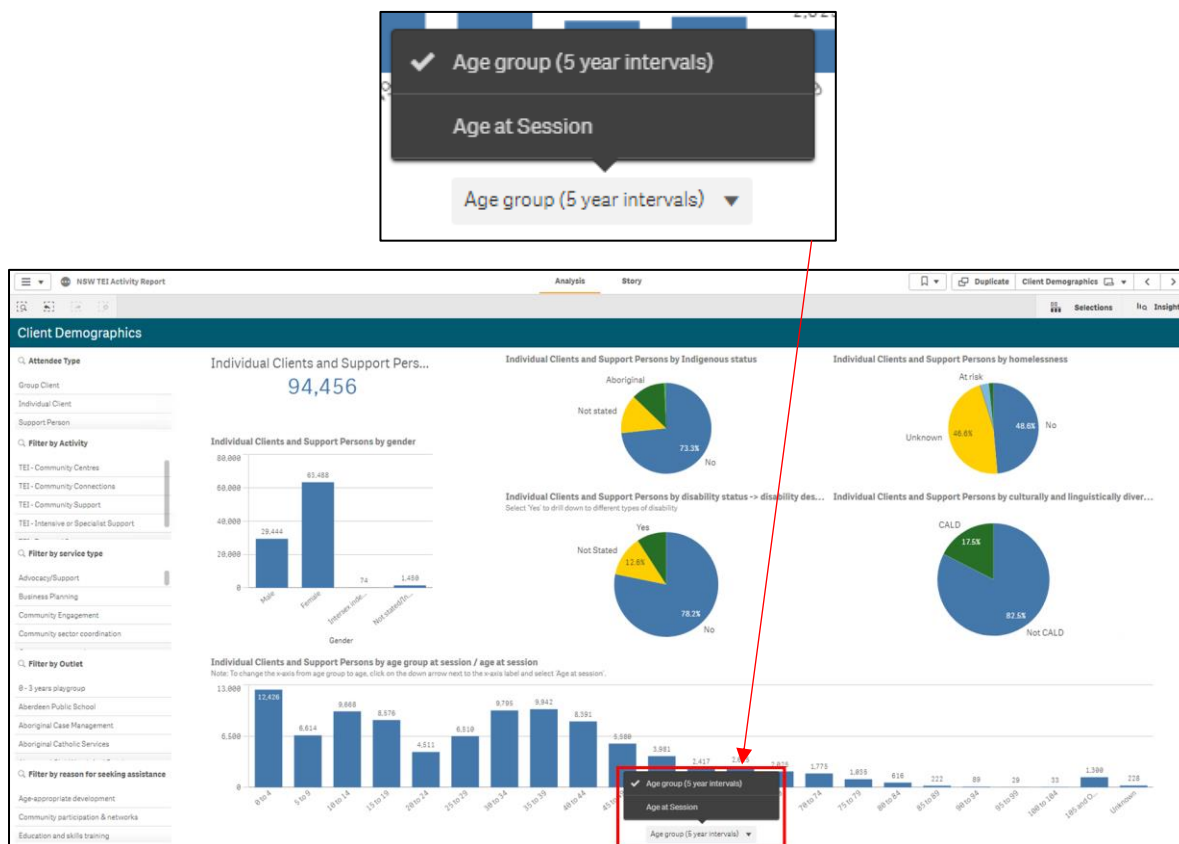**Figure 26. Change the x-axis in a graph**
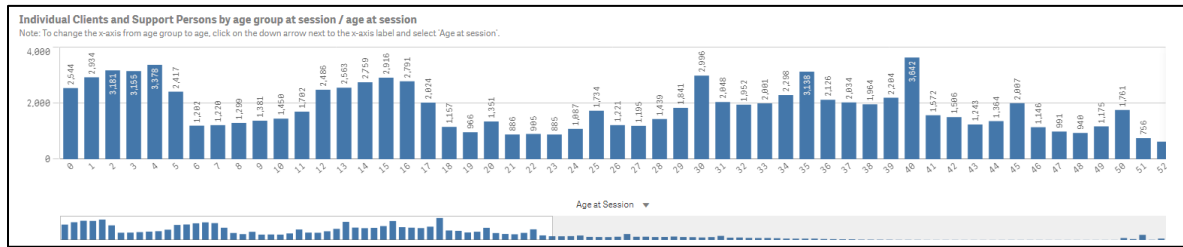
Figure 27 shows what the age graph looks like after we've changed the x-axis. To change it back, follow the same process outlined above.

Figure 27. Age at session graph

Individual Clients and Support Persons by age group at session / age at session
Note: To change the x-axis from age group to age, click on the down arrow next to the x-axis label and select 'Age at session'.

9. Change data visualisations

In the reports, you can change what the graphs and charts look like. This can be useful for building stories or to make your data easier to read and analyse.

You can change data visualisations by:

A. Changing a graph or chart to a table
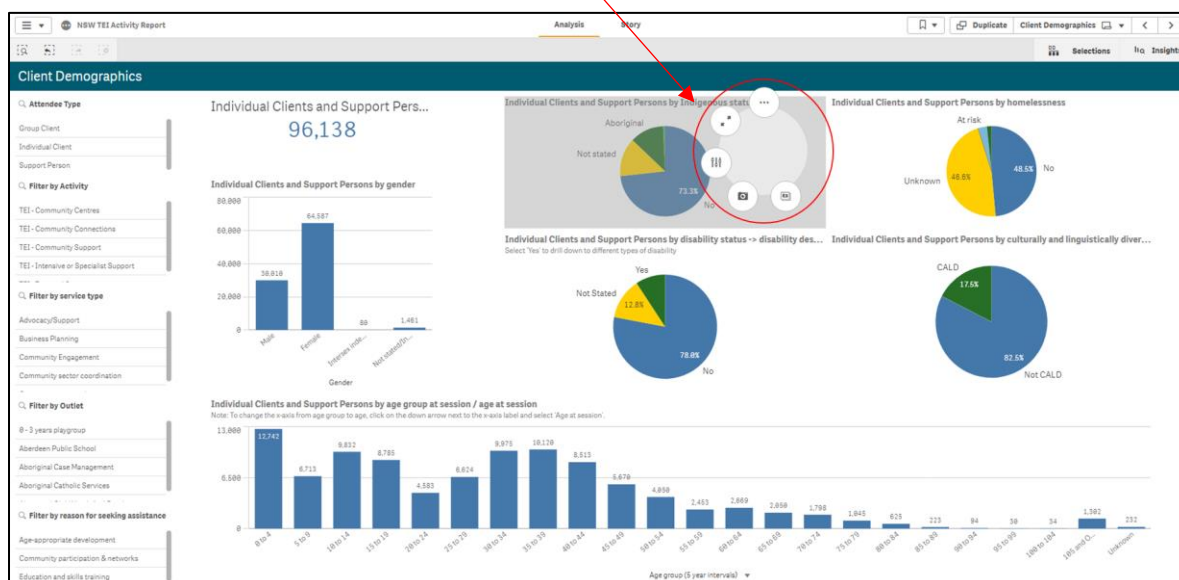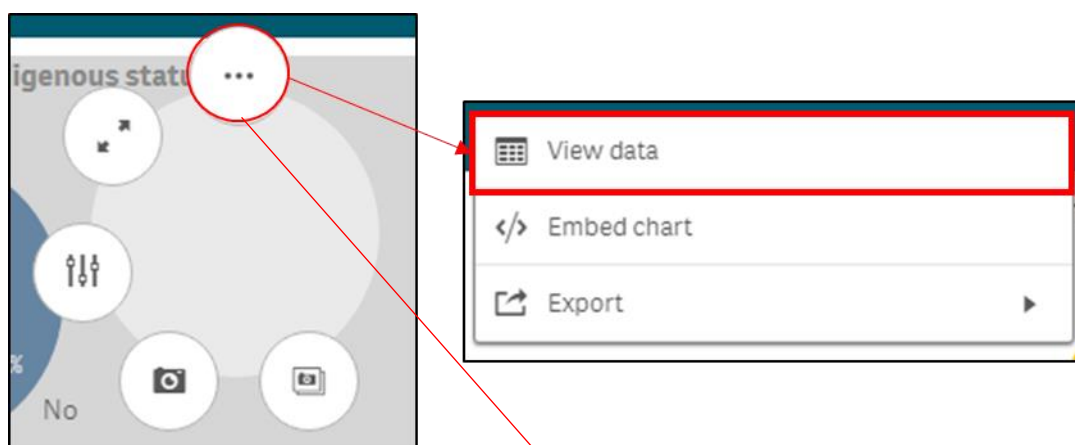B. Using the 'exploration menu' to alter data visualisations

A. Change a graph or chart to a table

You can change a graph or chart to table.

Right click on the graph or chart. A series of icons will appear. Click on the ellipsis (see Figure 28).
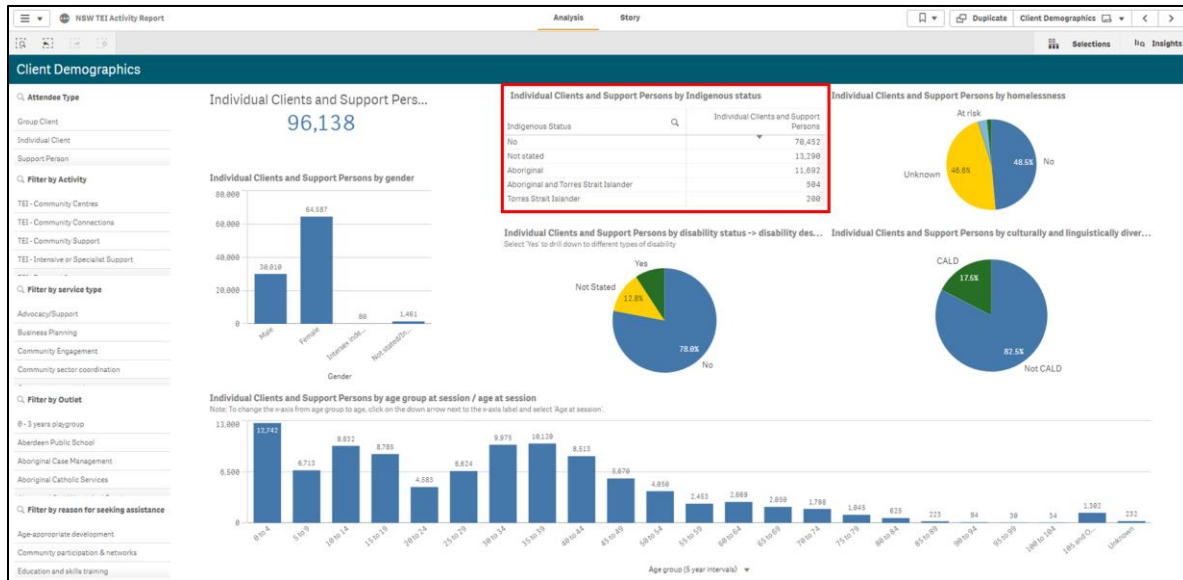
A small menu will pop us. Select 'view data'.

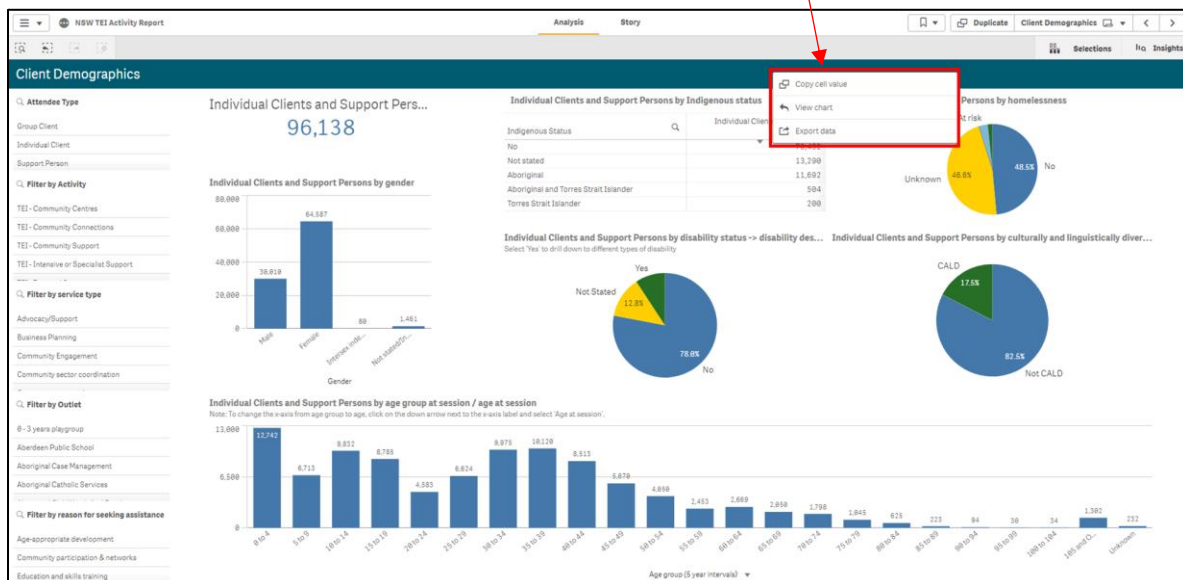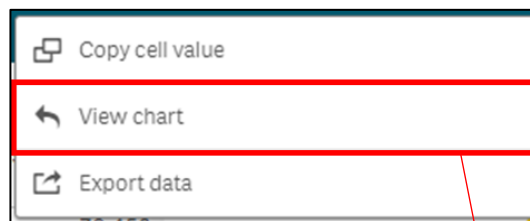**Figure 28. Changing pie charts to tables**

The graph or chart will change to a table (see Figure 29).

Figure 29. Changing charts to tables

To change the table back to a graph or pie chart, right click on the table, select the ellipsis icon and select 'view chart' (see Figure 30).

Figure 30. Changing tables back to charts

B. Use the 'exploration menu' to alter data visualisations

You can use the 'exploration menu' to alter data visualisations. The exploration menu is only available to use for graphs and charts – not tables.

To access the exploration menu, right click on a graph or chart. A series of icons will appear

(see Figure 31). Select the exploration menu icon:

Figure 31. Open exploration menu

The visualisation will expand, and a menu will appear on the right side of the screen (see Figure 32).
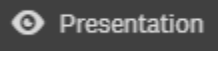
The menu includes four items:

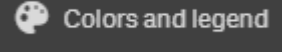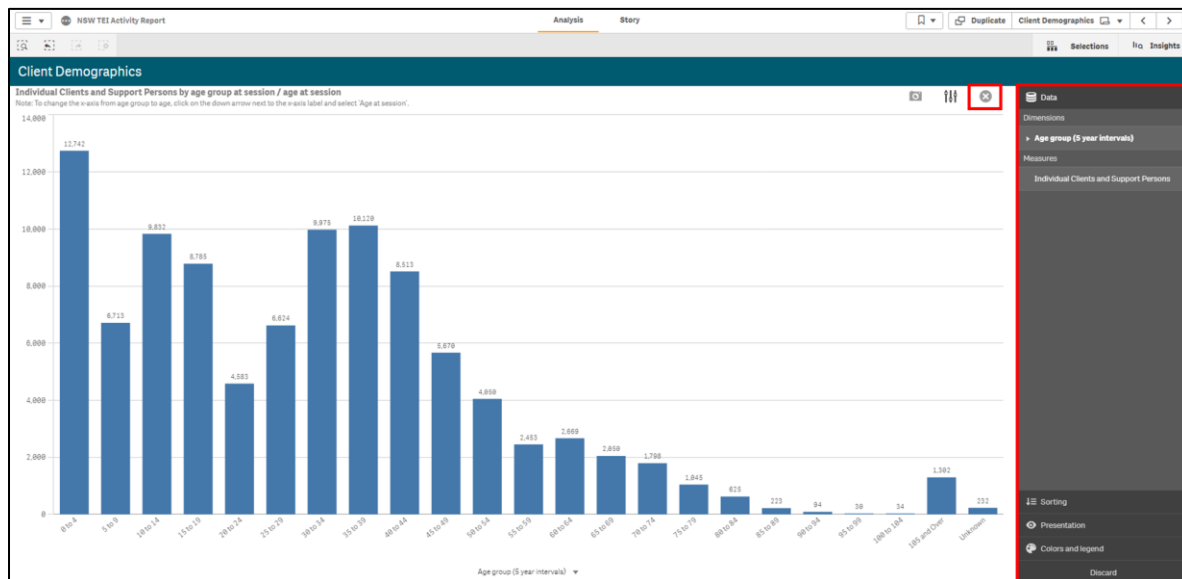|	
🗄 Data	This lists the data fields that are in the graph or chart.
↓≡ Sorting	Can be used to sort the data in different ways.
⊙ Presentation	Can be used to change how the data is presented.
🎨 Colors and legend	Can be used to changes the colours in your graph or chart.

Figure 32. Exploration Menu

To return to the main report sheet, select ⊗ in the top right corner (see Figure 26).

Sorting

To sort a graph or chart, in the exploration menu click on the sorting button: **↓☰ Sorting**

This will display the data fields in the graph or chart.

For example, in Figure 33 we have opened the exploration menu for a graph that shows the age groups of individual clients and support people. When we open the sorting menu, we can see two data items:

1. Age groups (5 years intervals)
2. Individual clients and support persons

In Figure 27, the graph is sorted by age group (note how Age Group is number 1 in the sorting list). This means the columns in the graph appear in age order. 0-4-year olds are first, followed by 5-9-year olds and so on.

We can change the order of the columns by re-sorting the data fields.

Re-sort the data fields by selecting one and dragging it up or down.

Figure 33. Sorting your data
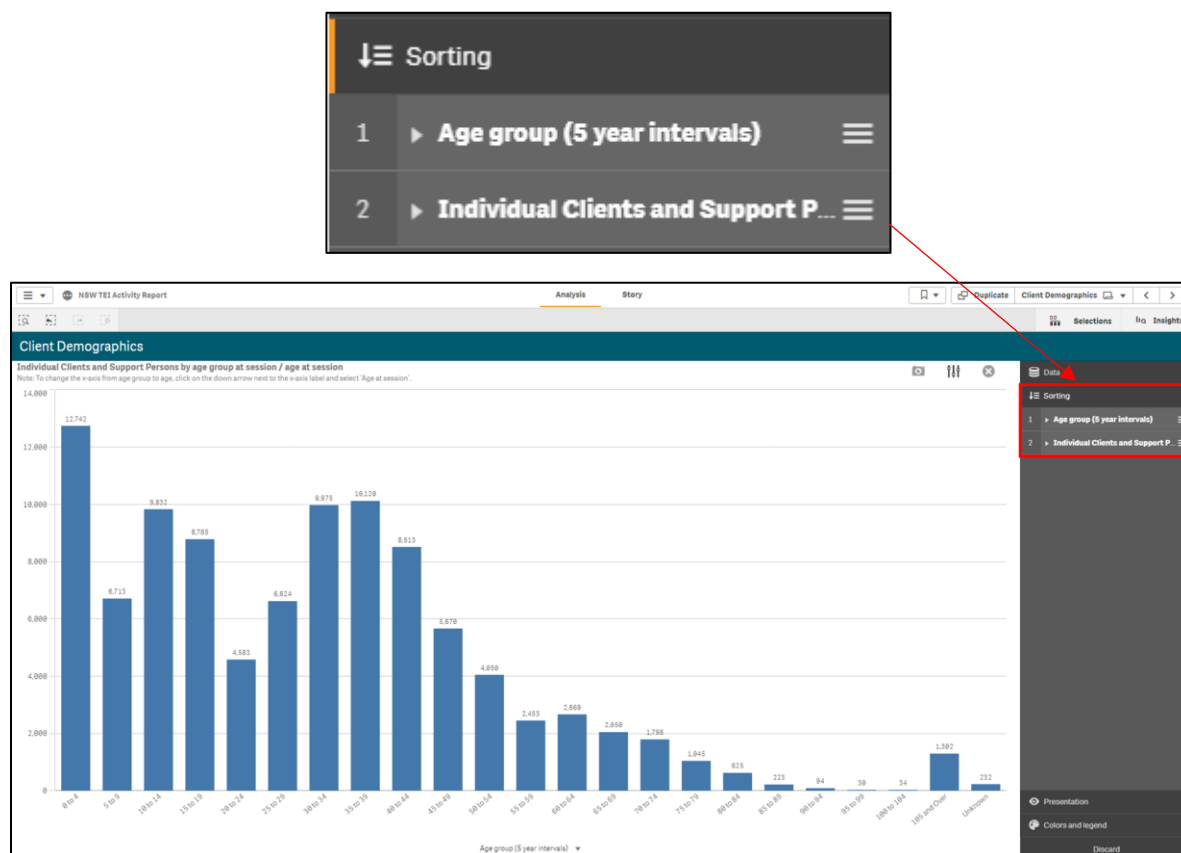
In Figure 34, we have re-sorted the graph by the number of individual clients and support persons (note how individual clients and support persons is number 1 in the sorting list).

Now, the columns in the graph appear in order of the age groups with the most clients. 0-4-year olds are first with the highest number of clients, but then it's followed by 35-39-year olds because they have the second highest number of clients.

Figure 34. Sorting your data
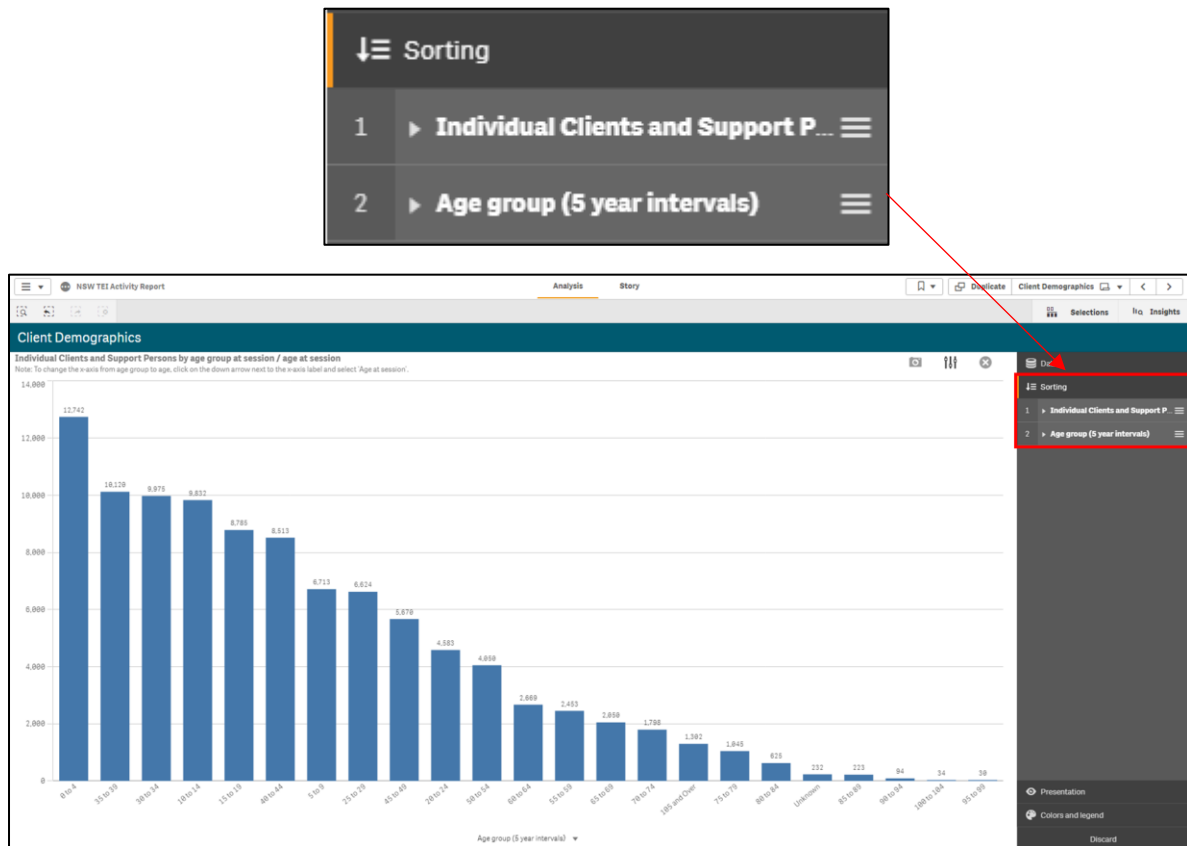
Presentation

To change how a graph or chart is presented, you can click the presentation button:

 Presentation
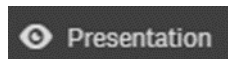
You will be given different options for how you can change the graph or chart. For example, in Figure 35, we can change the columns from vertical to horizontal.

Different visualisations will have different options. For other column graphs, you might also have the option to group or stack data fields. For pie charts, you can change them from pies to donuts. The options available to you, will depend on the type of graph or chart.

Figure 35. Changing the presentation of a graph or chart
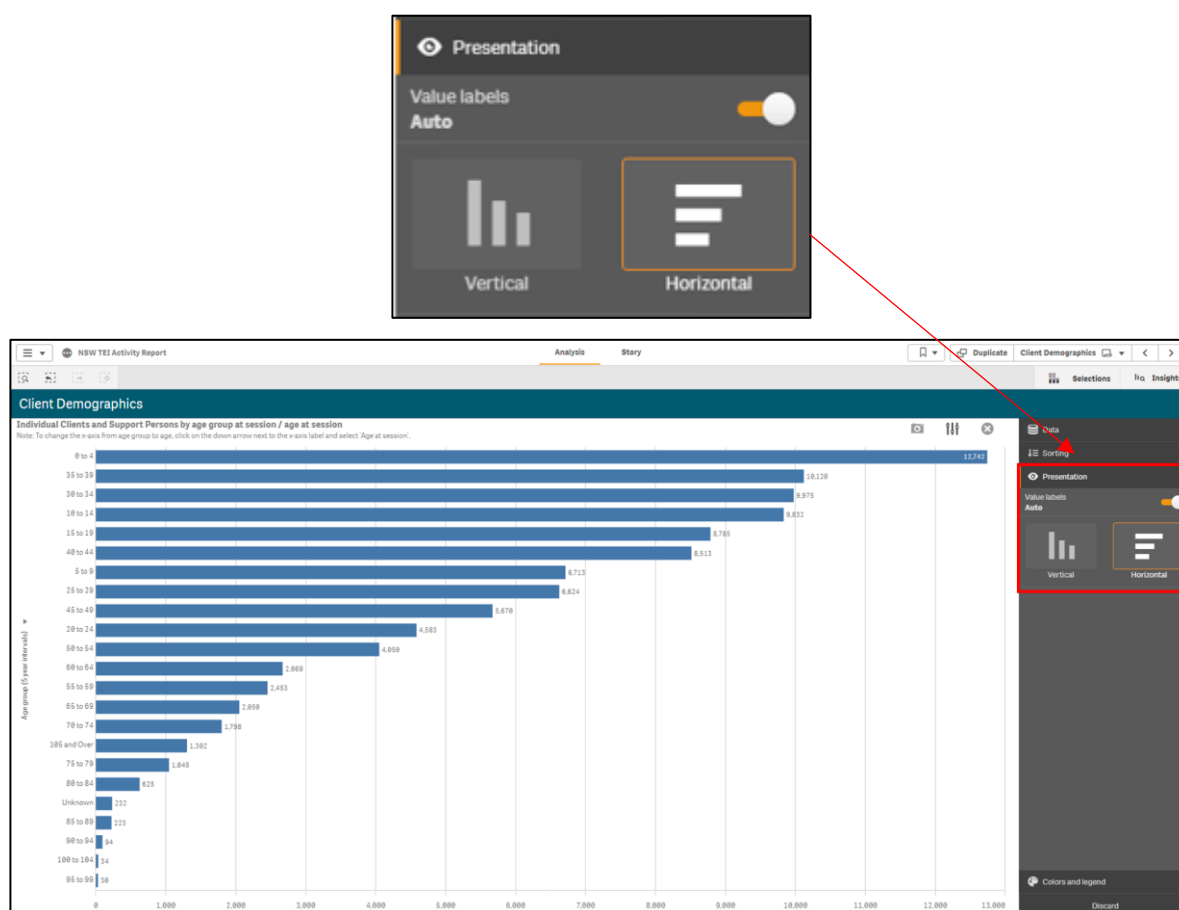
Colours and legend

To change the colours or legend in a graph or chart, click the Colours and
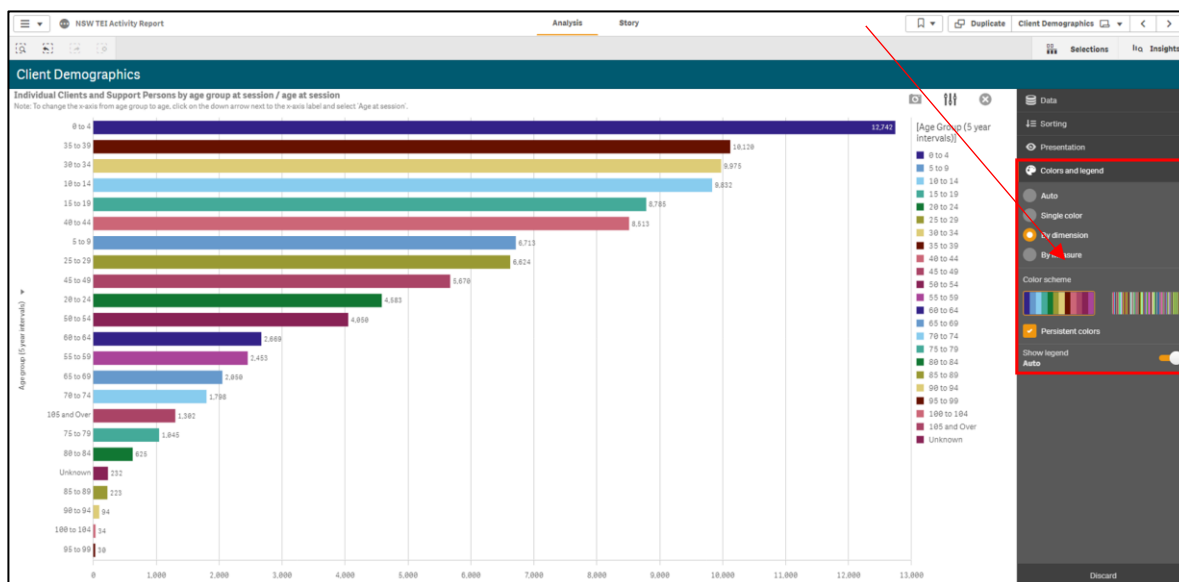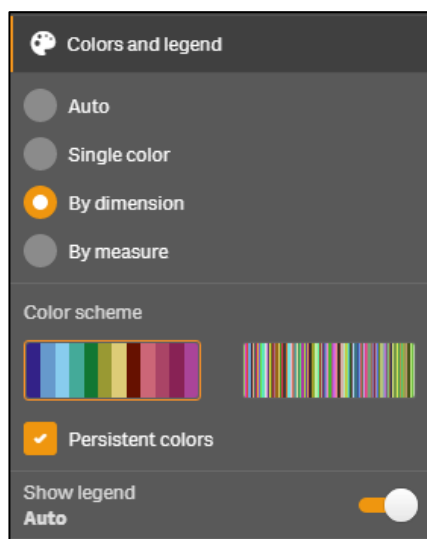
legend button: Colors and legend
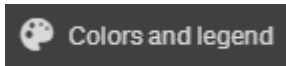
You can leave the colours on auto, change the graph or chart to a single colour, or change the colours by dimensions or measures.

You can also show or hide the legend.

In Figure 36, we've selected the 'by dimension' option to change the colour of each column.

Figure 36. Changing the colours and legend in a graph or chart

To return to the main report sheet, select ✖ in the top right corner (see Figure 37 – point A).

To return the graph or chart to its original layout, select the discard button in the bottom right corner (see Figure 37 – point B).

Figure 37. Getting out of the exploration menu and undoing changes
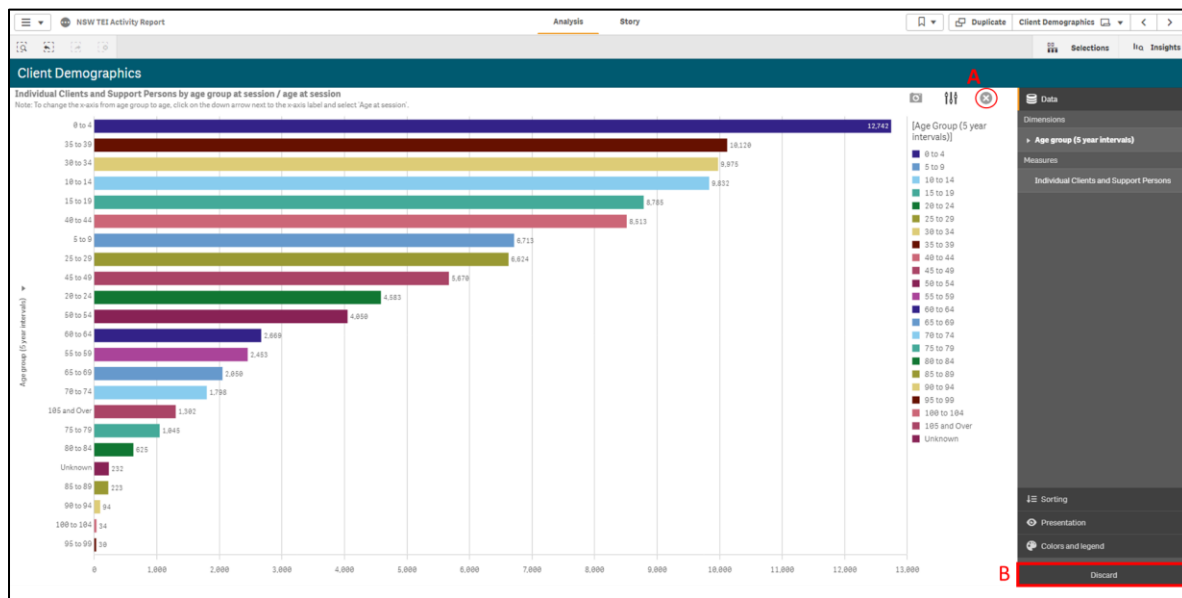
> **Important note:** any changes made to a graph or cart in the exploration menu will only apply to your current session. Once you leave the report, the graph or chart will return to its default settings.
>
> You can, however, take a snapshot 📷 of your new visualisation and add it to a story. See Create a story and export your data for more information.

Create a story

In the Data Exchange, you can create a story to examine and explain your data. You can build a narrative for your data and highlight important findings by taking snapshots of your graphs and tables and putting them in slides.

To make your slides stand out, you can add visual effects, text and shapes. You can also embed sheets to make your story interactive.

A story is connected to its report, so you can return to the live data anytime, to discover new and hidden stories.

You can also export your story to share with others.

The information below walks you through how to:

1. Take a snapshot
2. Create a story
   a. Add a snapshot to your story
   b. Add text to your story
   c. Edit your snapshot
   d. Use the effects library
   e. Add shapes to your story
   f. Add media objects to your story
   g. Add a live data sheet to your story
   h. Preview your story

Important note: the data you can see on the following pages is data for the entire TEI program. When a service provider creates their own stories, they can only use the data reported for their organisation.

1. Take a snapshot

Before you can create a story, you need to take 'snapshots' of your data. A snapshot is a static 'point in time' copy of your data. Snapshots are used to build a story and highlight key findings in your data.
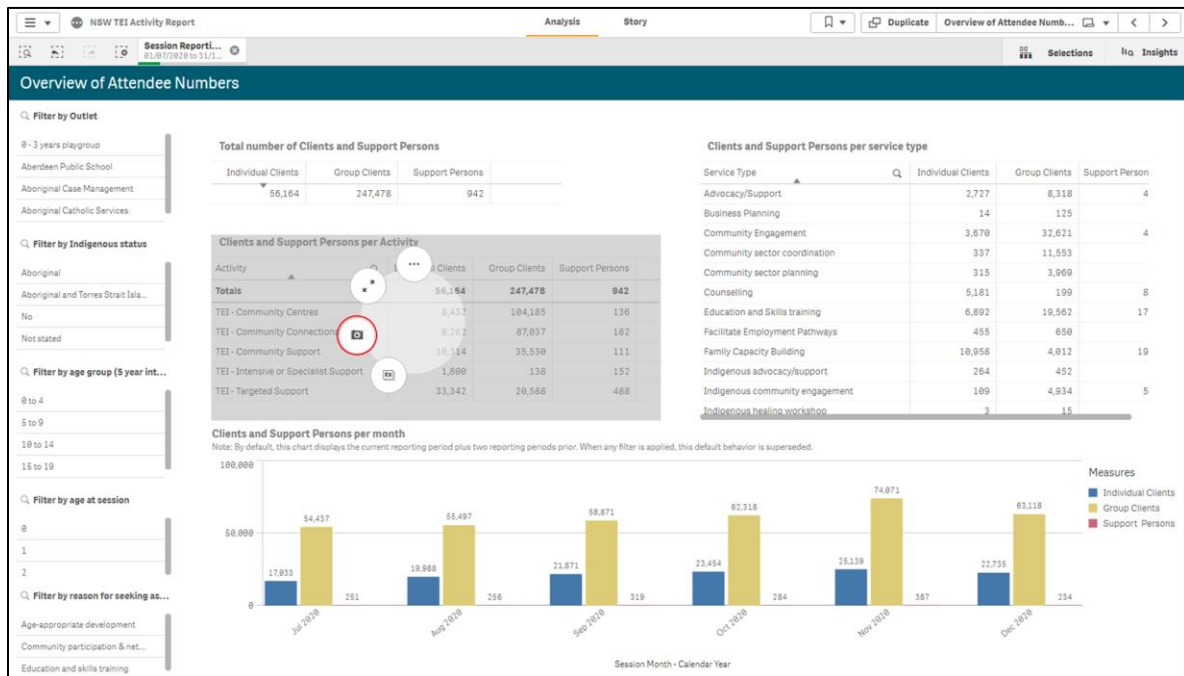
To take a snapshot, find the graph, table or chart you're interested in. Apply any necessary filters.

Right click on the graph or table (see Figure 38).

Select the 'snapshot' icon:

Figure 38. Take a snapshot

A snapshot annotation box with appear (see Figure 39). Add a description of the snapshot and click save.

In your description, you might want to include information about the reporting period you have selected or any other filters you have applied.

You can take as many snapshots as you like. You can also apply different filters and take multiple snapshots of the same table or graph.

Your snapshots will be saved in your snapshot library.

> **Hot tip:** before you take a snapshot, you can make changes to your data visualisation. Change graphs and chart to tables or use the exploration menu to change the appearance of visualisations and re-sort data.

Figure 39. Snapshot annotation
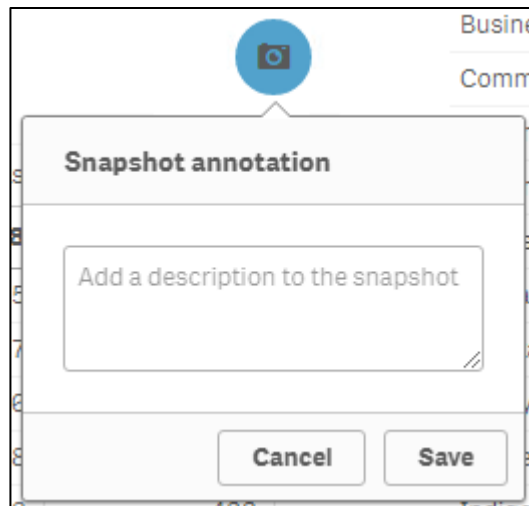
To view the snapshots you have saved, right click on a graph or table. A menu will pop up. Select 'Open snapshot library' (see Figure 40).
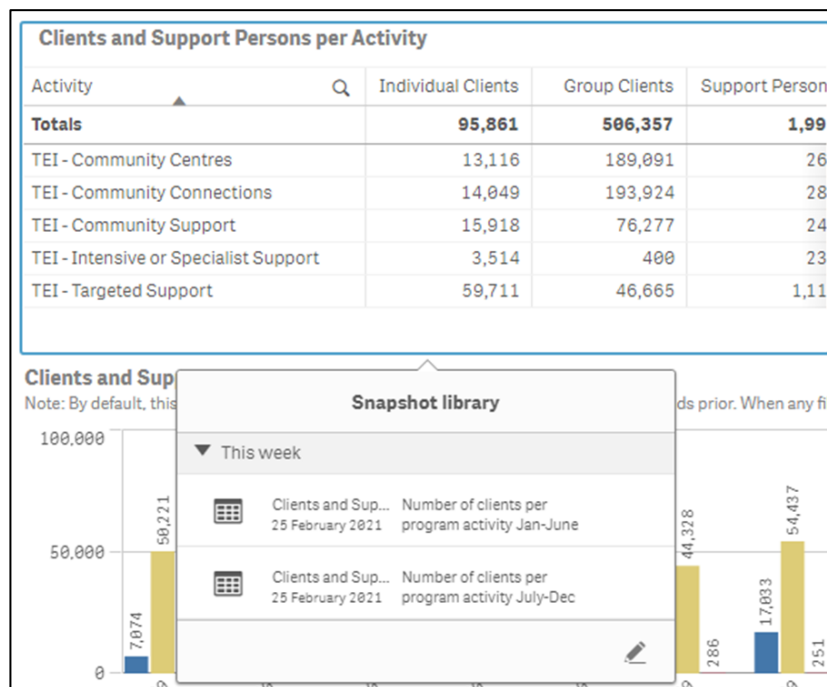
Figure 40. Open snapshot library
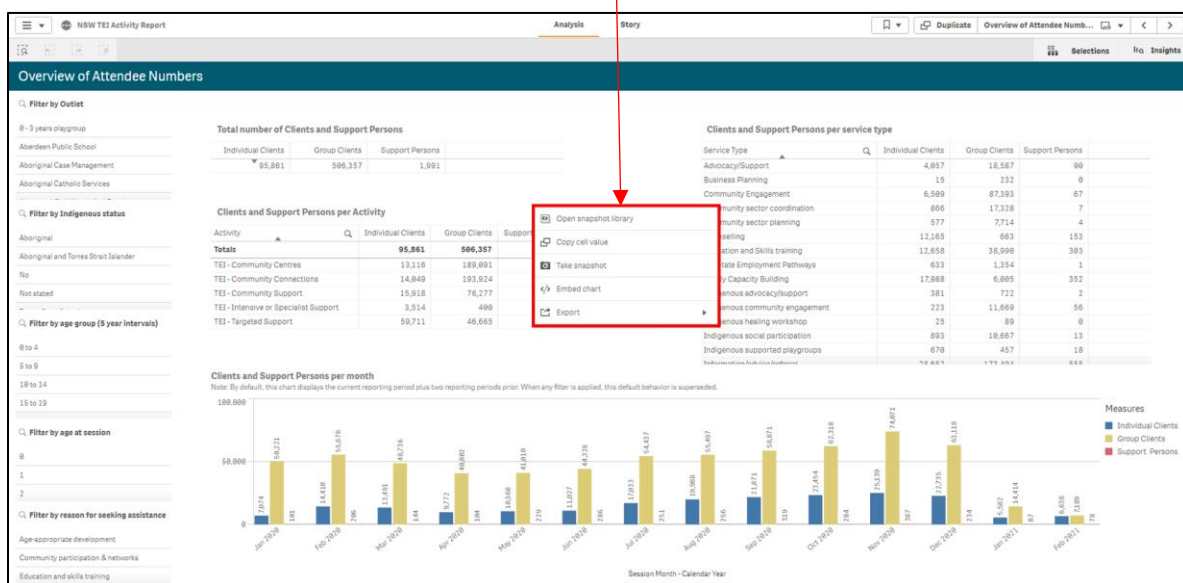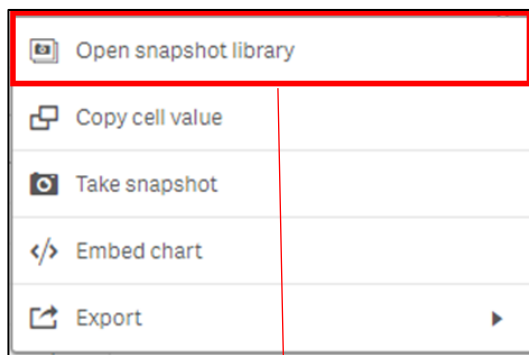
Your snapshot library will then appear underneath the graph or table.

In Figure 41, you can see we have saved two snapshots:

- Number of clients per program activity Jan-June 2020
- Number of clients per program activity July-Dec 2020

Figure 41. Snapshot library

You can use the snapshot library to quickly edit or delete a snapshot.
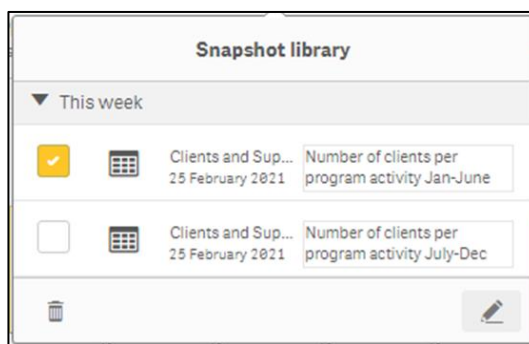
Click the pencil icon:

Delete a snapshot by selecting the relevant box on the left-hand side and click on the bin icon:

You can edit a description of the snapshot by typing new text into the text field (see Figure 42).

Figure 42. Edit or delete a snapshot

The snapshots that appear in your library are specific to the graph or table you select.

For example, when we view the snapshot library for another table it is empty, because we have not created any snapshots of that table yet (see Figure 43).

Figure 43. Snapshot library are specific to each graph and table
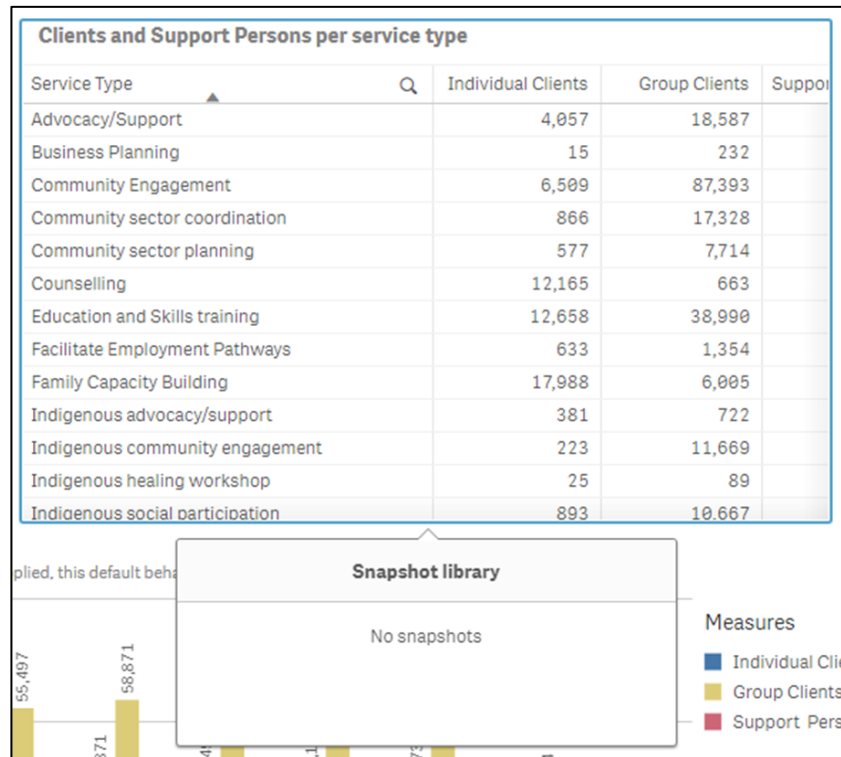
Hot tip: A snapshots is a static 'point in time' copy of your data. Snapshots are used to build a story and highlight key findings in your data. You must take snapshots of your data before you can 'create a story'.

Your snapshot library can be used to remind you what snapshots you've already taken. It can help you identify any additional snapshots to take to add to your story.

2. Create a story

To create a story, click the stories button on the report overview page: ▶️ Stories .

Here you can open previous stories you have created. You can also create a new story by selecting the 'Create new story' tile (see Figure 44).

Figure 44. Create a new story
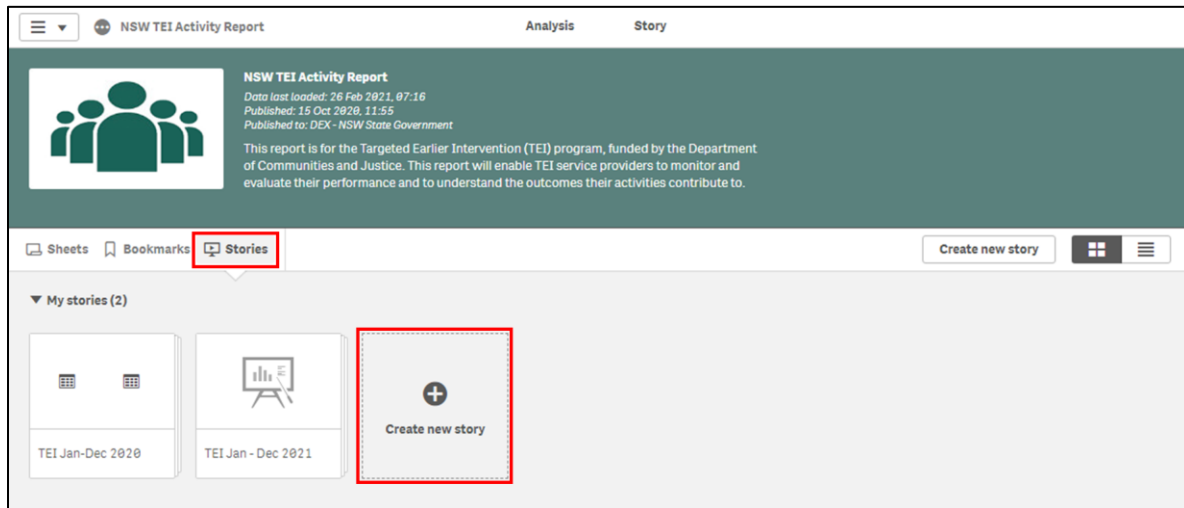
When you click 'create new story', a new story will appear as a tile on the screen (see point A in Figure 45). A dark grey box will appear below the story with text fields. Give your new story a title (point B) and description (point C).

Figure 45. Name and describe your new story
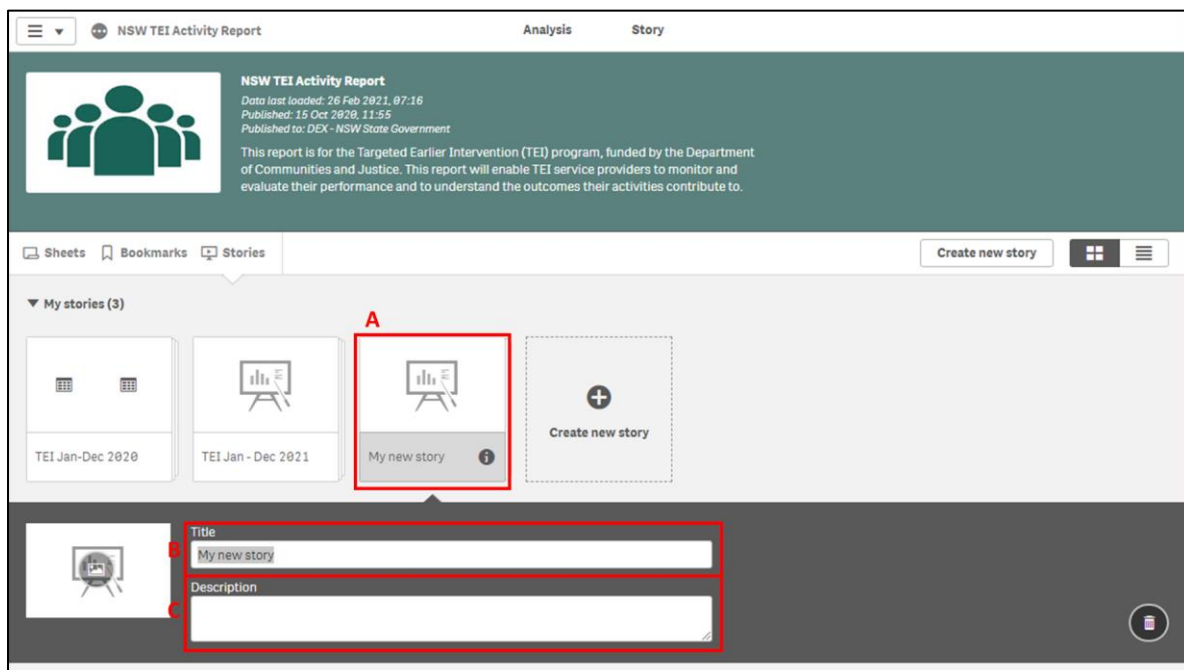
Click on the story tile – the story page will display (see Figure 46). There are lots of different things you can do to create your story:

|	
📷	Snapshot library: view and add snapshots to your story
A	Text objects: add text to your story
▲●	Shapes library: add shapes to your story
🪄	Effects library: add effects to your story
🖼	Media library: add media files to your story
▭	Sheet library: add a whole sheet to your story
✚	Add slide: add another slide to your story
✂	Cut: cut an image/graph/text etc.
🗐	Copy: copy an image/graph/text etc.
🗎	Paste: paste an image/graph/text etc.
🗑	Delete: paste an image/graph/text etc.
↩	Undo: undo an action
↪	Redo: redo an action

Figure 46. Create your story
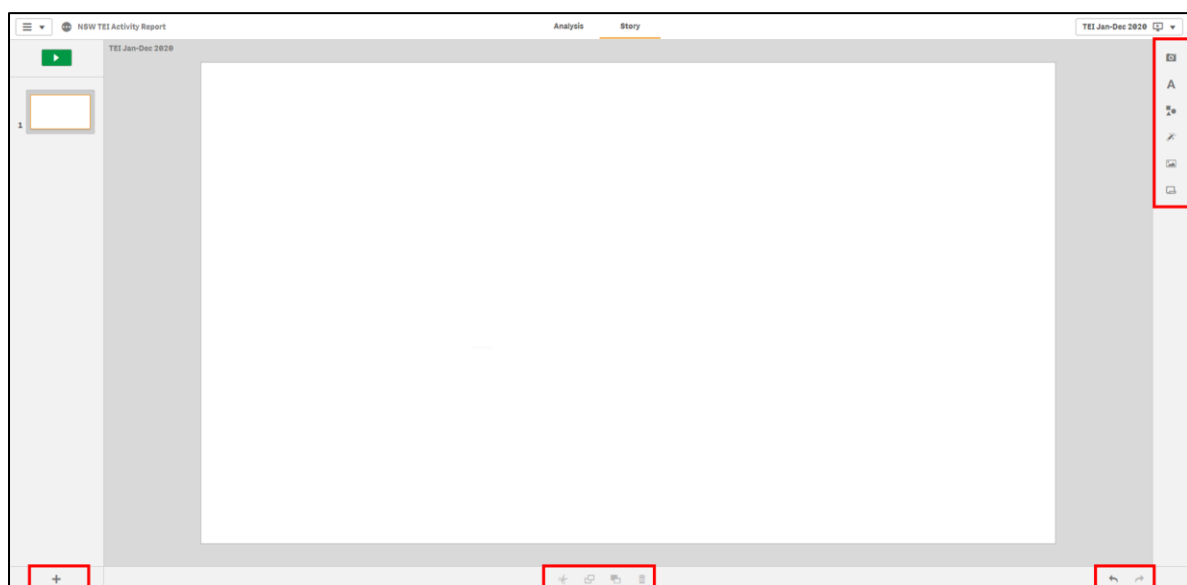
2a. Add a snapshot to your story

Select [camera icon] in the top left corner of your screen and your snapshot library will appear (see Figure 47).

The snapshot library will only include snapshots from the report you're currently in.
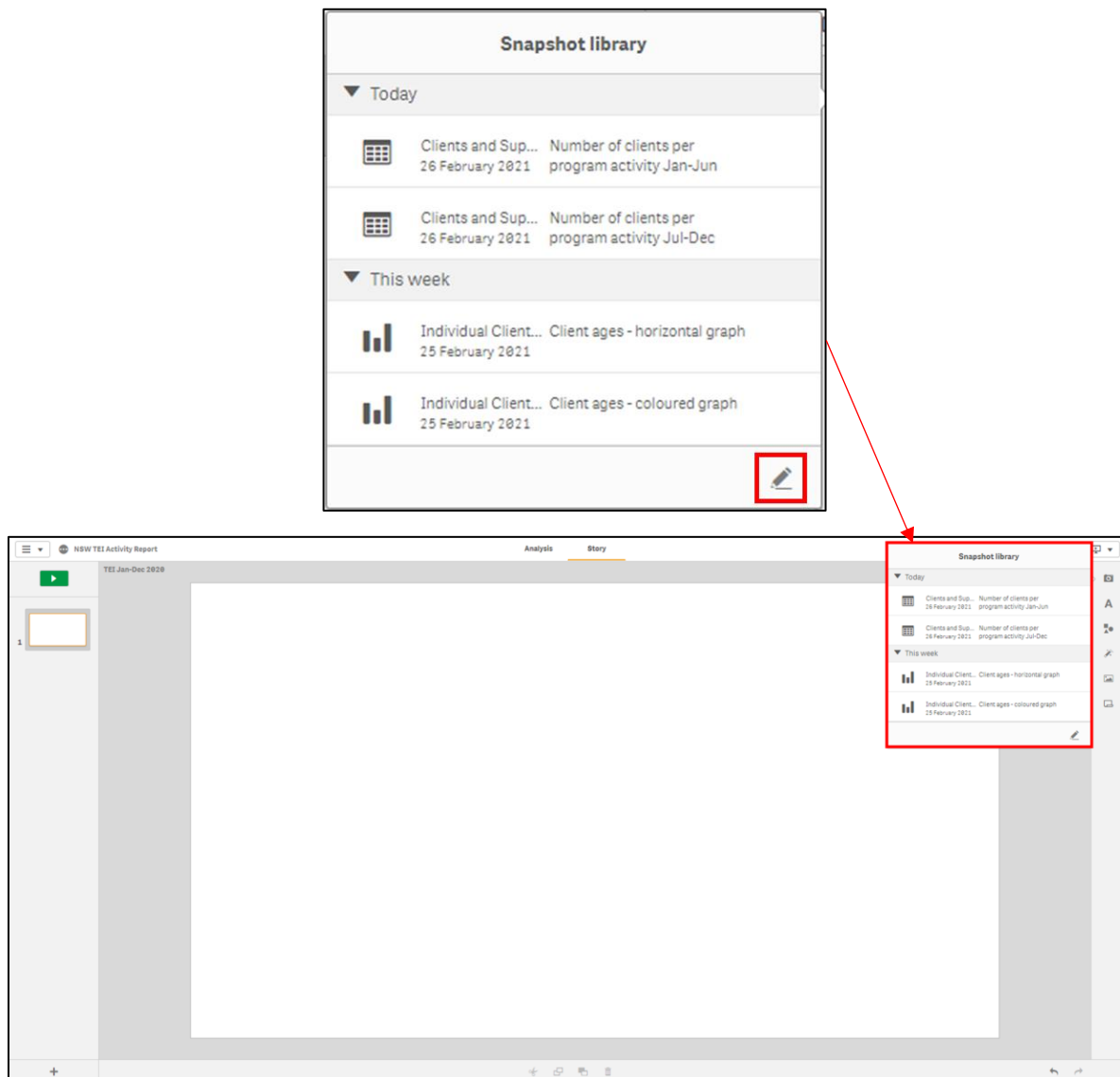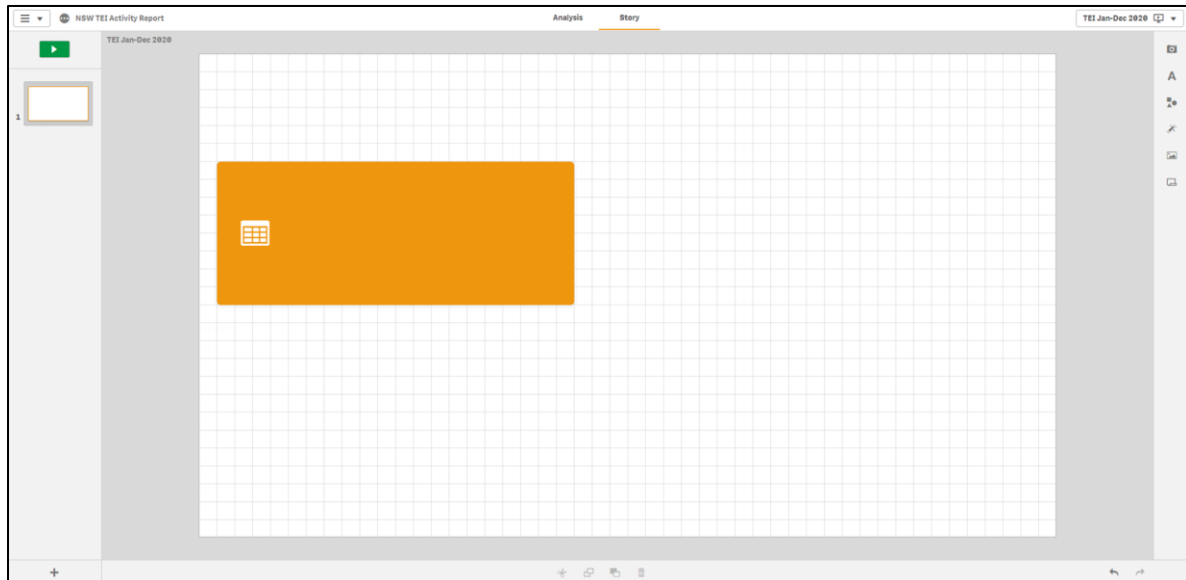
You can also edit your snapshots from here. Click the pencil icon: [pencil icon]

Figure 47. Snapshot library

Click the snapshot you want and drag and drop it onto the slide (see Figure 48).

Figure 48. Drag and drop your snapshot

You can resize your table or graph. Select the corners of the orange border and drag it to the size you want (see Figure 49).

You can also move the table or graph. Click on the table or graph and drag it to the location you want.

Figure 49. Resize and move your snapshot
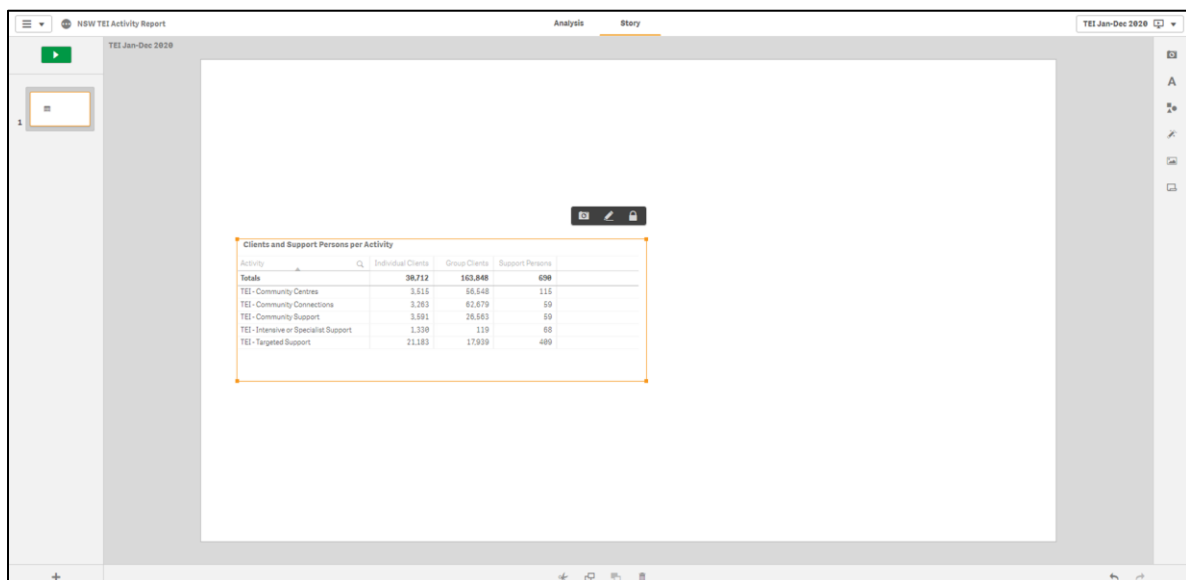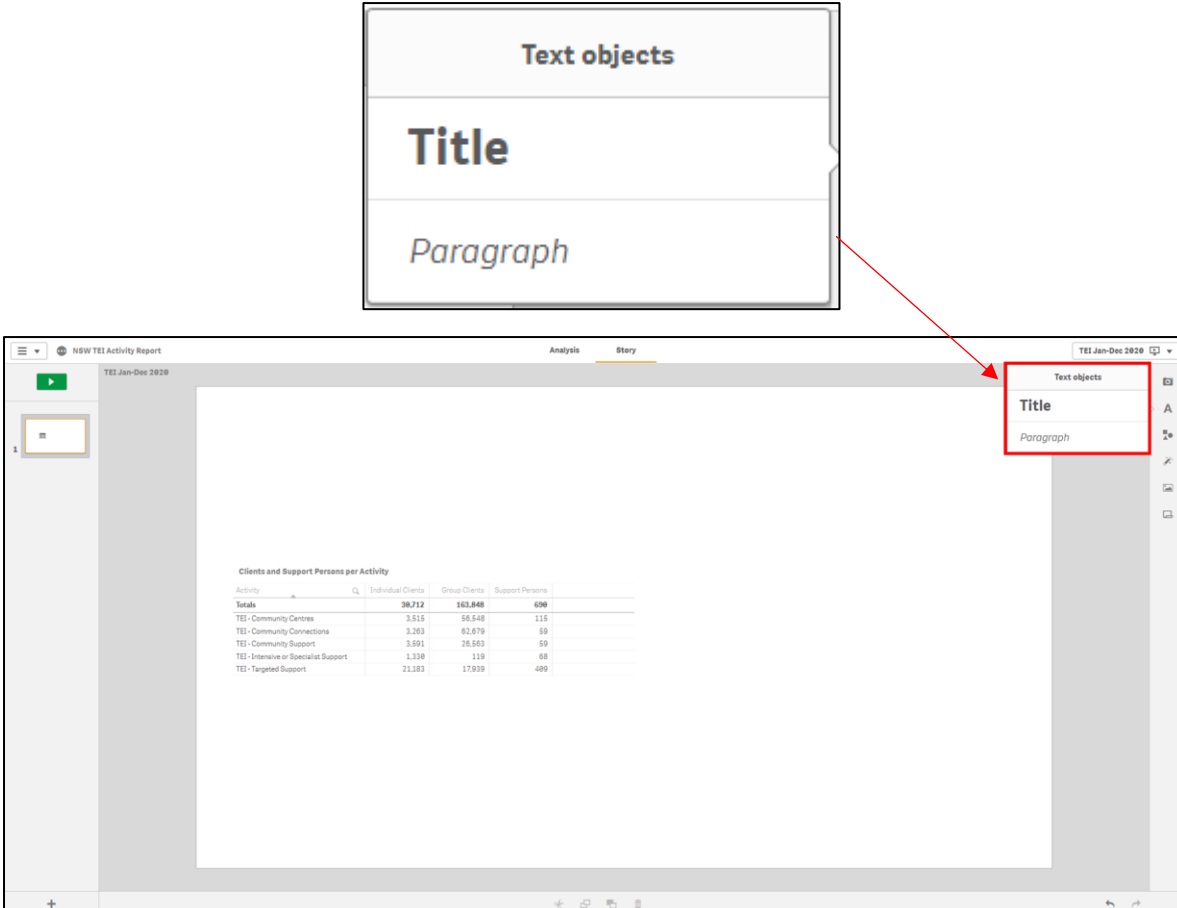
2b. Add text to your story

You can add text to your story to explain your data. You can talk about what the key findings are, what this means for your organisation's practice, and you can provide context to help others understand your data.

Select **A** in the top left corner of your screen.

A pop-up menu will appear (see Figure 50). You can choose to add a title or a paragraph of text.

Select the option you want and drag and drop it onto the slide.

Figure 50. Add text to your story

Just like with your snapshots, you can resize the text. Select the corners of the orange border and drag it to the size you want.

You can also move the text. Click on the text box and drag it to the location you want.

You can also edit your text (see Figure 51).

Select the text box and click on the edit icon:

Highlight the text you want to edit and make any necessary changes.

	Change the colour of the text. The coloured square will display the current colour of the text.
B	Bold the text
I	Italicise the text
U	Underline the text
	Hyperlink the text. You can hyperlink to a saved bookmark in your report. You can also insert a hyperlink to any website.

Figure 51. Edit your titles

When you insert a paragraph of text, additional editing options are available:

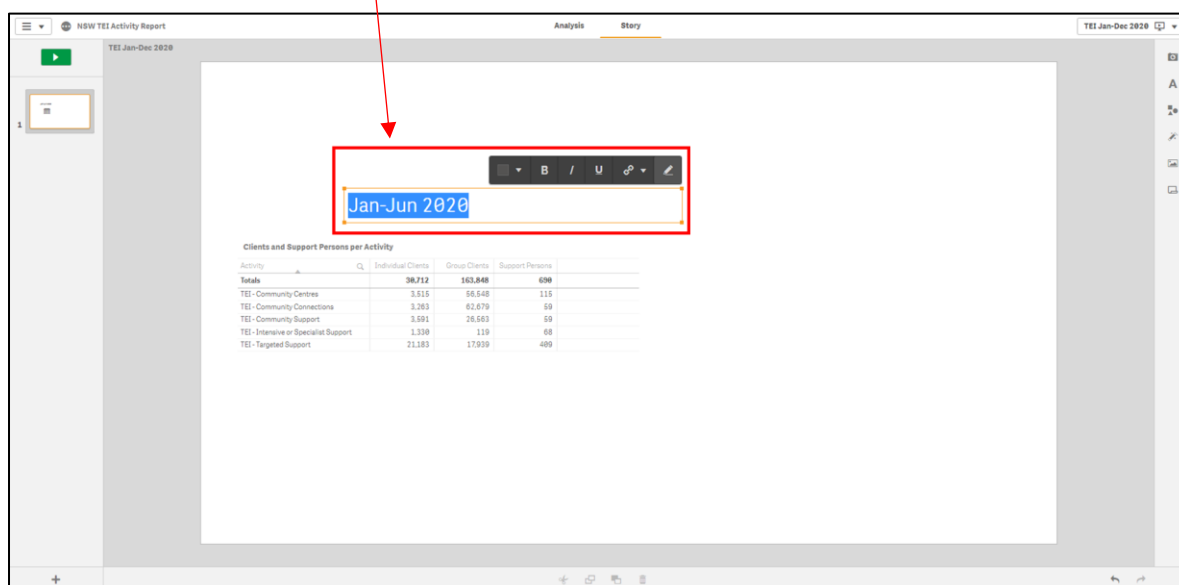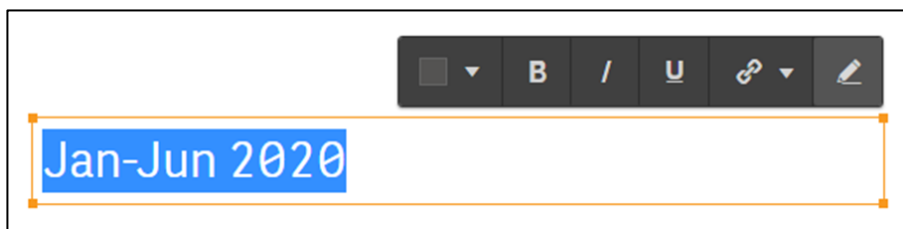|	
M ▼	Change the size of the text. Options include XS, S, M, L, XL.
≡	Left align the text
≡	Centre the text
≡	Right align the text

To edit a paragraph, select the text box and click on the edit icon:

Highlight the text you want to edit and make any necessary changes (see Figure 52).
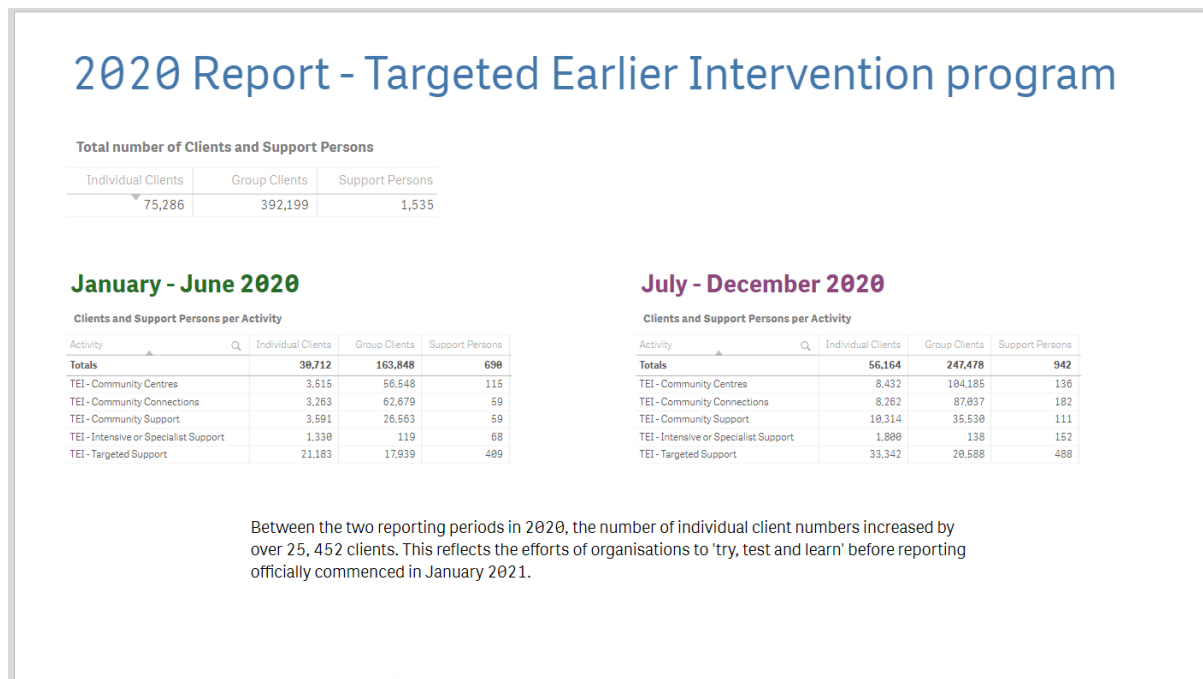
Figure 52. Edit your paragraphs
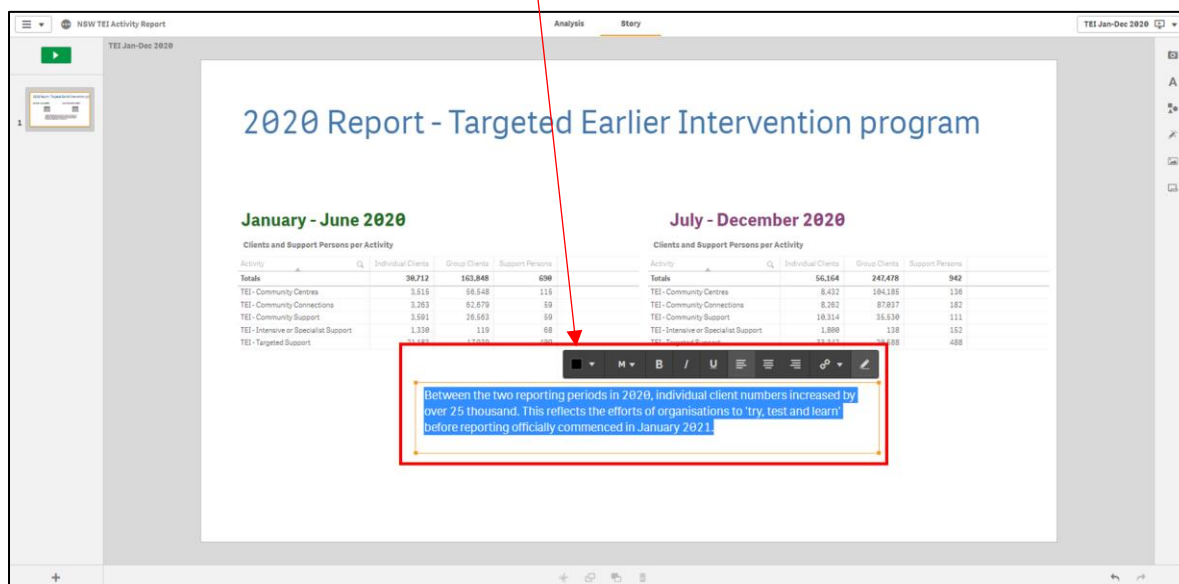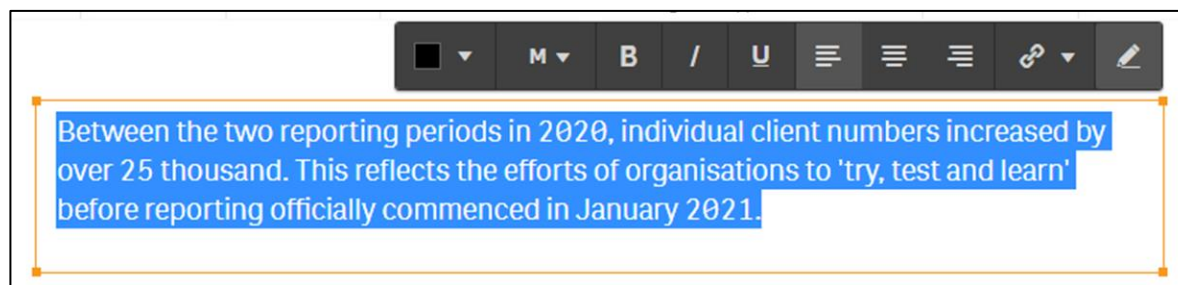
You can add as titles and paragraphs as you like. Use the 'add text' feature to explain your data, highlight key findings and make it easier to understand.

In Figure 53, we've included a title for the report. We've also added headings for two of the graphs to show that they are from different reporting periods. This is very important as we don't want anyone to misinterpret our data. We've also added a paragraph of text to start to explain the data and highlight some interesting findings.

Figure 53. Example of using stories

2020 Report - Targeted Earlier Intervention program

Total number of Clients and Support Persons

Individual Clients	Group Clients	Support Persons
75,286	392,199	1,535

January - June 2020

Clients and Support Persons per Activity

Activity	Individual Clients	Group Clients	Support Persons
Totals	30,712	163,848	690
TEI - Community Centres	3,515	56,548	115
TEI - Community Connections	3,263	62,679	59
TEI - Community Support	3,591	26,563	59
TEI - Intensive or Specialist Support	1,330	119	68
TEI - Targeted Support	21,183	17,939	409

July - December 2020

Clients and Support Persons per Activity

Activity	Individual Clients	Group Clients	Support Persons
Totals	56,164	247,478	942
TEI - Community Centres	8,432	104,185	136
TEI - Community Connections	8,262	87,037	182
TEI - Community Support	10,314	35,530	111
TEI - Intensive or Specialist Support	1,800	138	152
TEI - Targeted Support	33,342	20,588	488

Between the two reporting periods in 2020, the number of individual client numbers increased by over 25, 452 clients. This reflects the efforts of organisations to 'try, test and learn' before reporting officially commenced in January 2021.
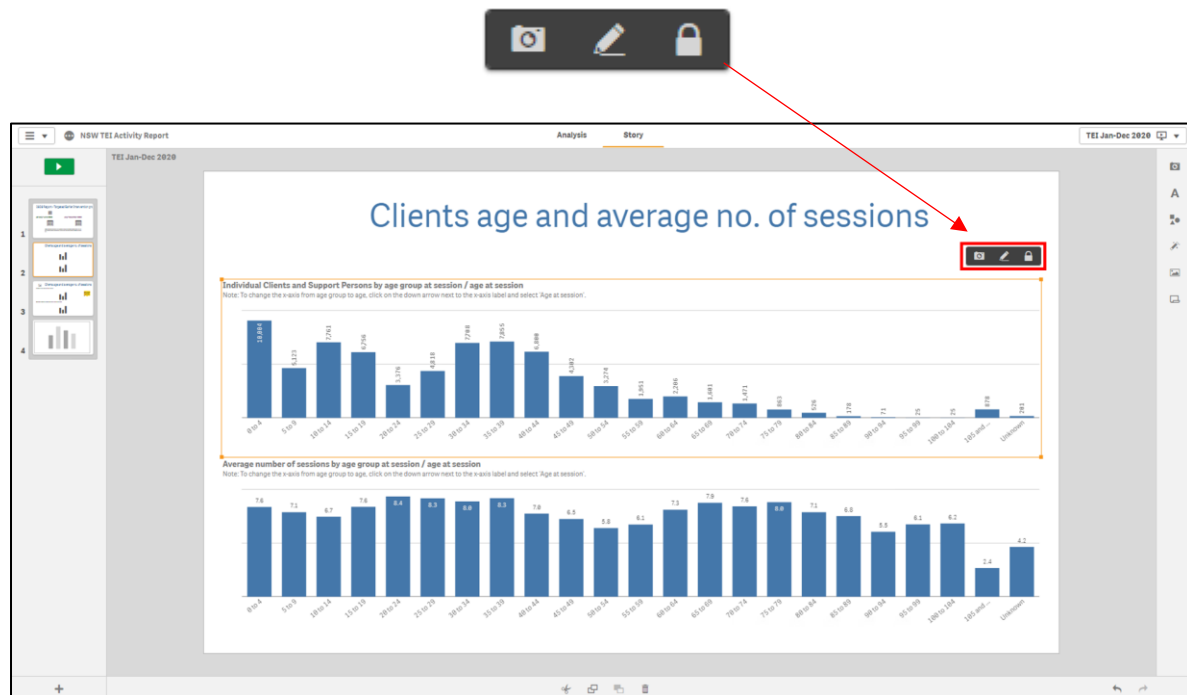
2c. Edit your snapshot

You can edit snapshots once they've been added to your story.

Click on the snapshot you want to edit. A small menu will appear in the top right corner

above the snapshot (see Figure 54). Click the edit icon:

**Figure 54. Edit your snapshot**

An editing page will appear (see Figure 55). From here you can:

- Show or hide the title of your table, graph or chart
- Show or hide the grid lines in your graph
- Show or hide the labels for data in your graph or chart
- Show or hide the legend for your graph or chart
- Show or hide the labels and titles for x and y-axis of charts
- Change value and dimension labels

The features that are available here, will depend on the type of data visualisation you have. For example, with tables you can only show or hide the title. For pie charts, they don't have an x or y-axis, so you can't edit them. But you can change the labels from % to raw numbers.

Click 'done' to save your changes.

Figure 55. Edit your snapshot
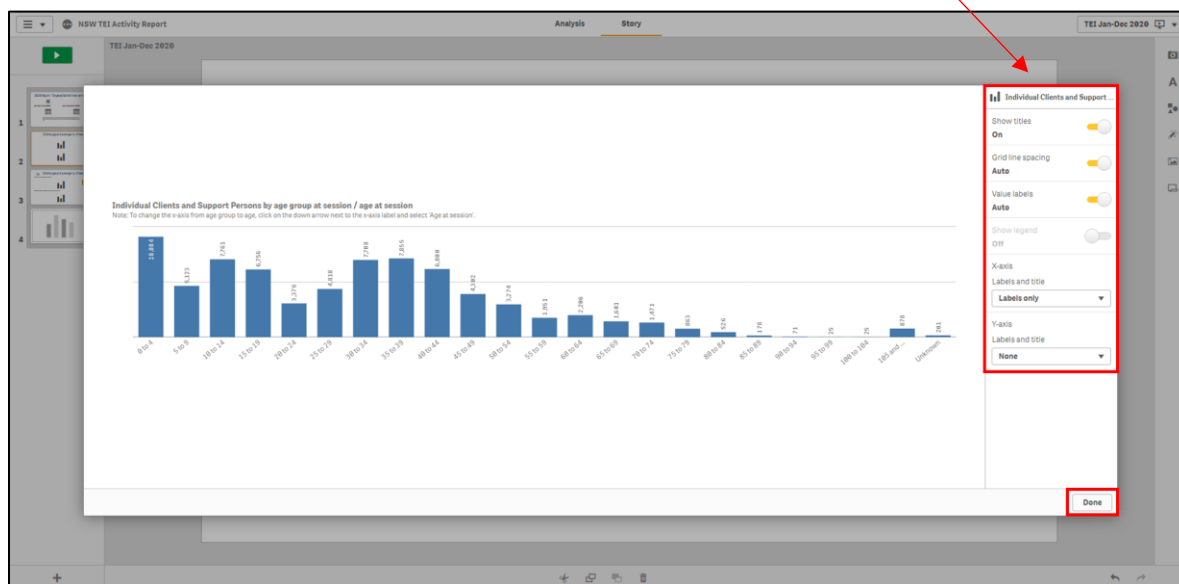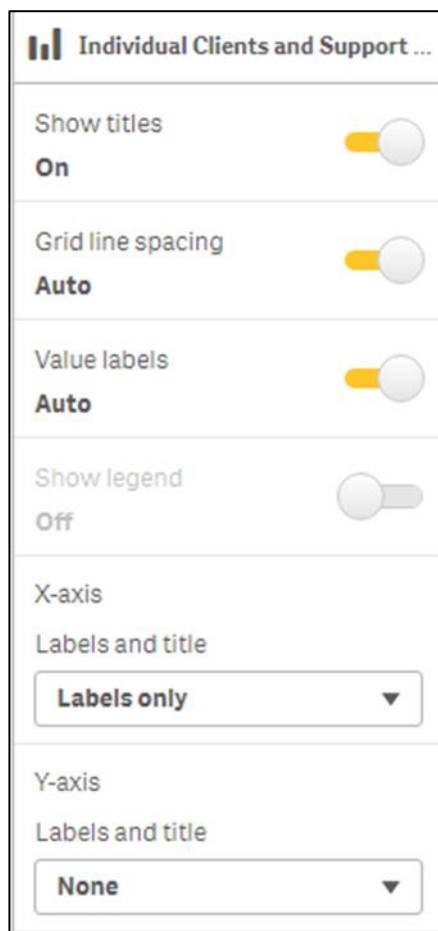
Note: Figure 55 is just one example of edits that can be made to a column graph. Different types of data visualisation (e.g. table, line graphs, pie charts) have different editing options.

2d. Use the effects library

You can use the effects library to add effects to your snapshots:

Effects can only be applied to graphs and charts. They cannot be used on tables.

You can use the effects library to highlight the highest or lowest value in a graph, or any value you want to draw attention to.

Select   in the top left corner of your screen.

The effects library will appear (see Figure 51). Select the type of effect you want. Drag and drop it over the graph or chart you want to apply the effect to.

In Figure 56, we've applied the 'highest value' effect to both graphs.

Figure 56. Use the effects library

To apply the any value effect, drag and drop the effect over the graph. Click on the graph. A small menu will pop up in the top right corner above the graph (see Figure 57).

Click the effect icon:

A 'select data point' menu will appear. Use the drop-down menu to select the data point you want to highlight. In Figure 57, we selected '105 and over'. We've also used a shape and some text to explain why we've highlighted this data point.
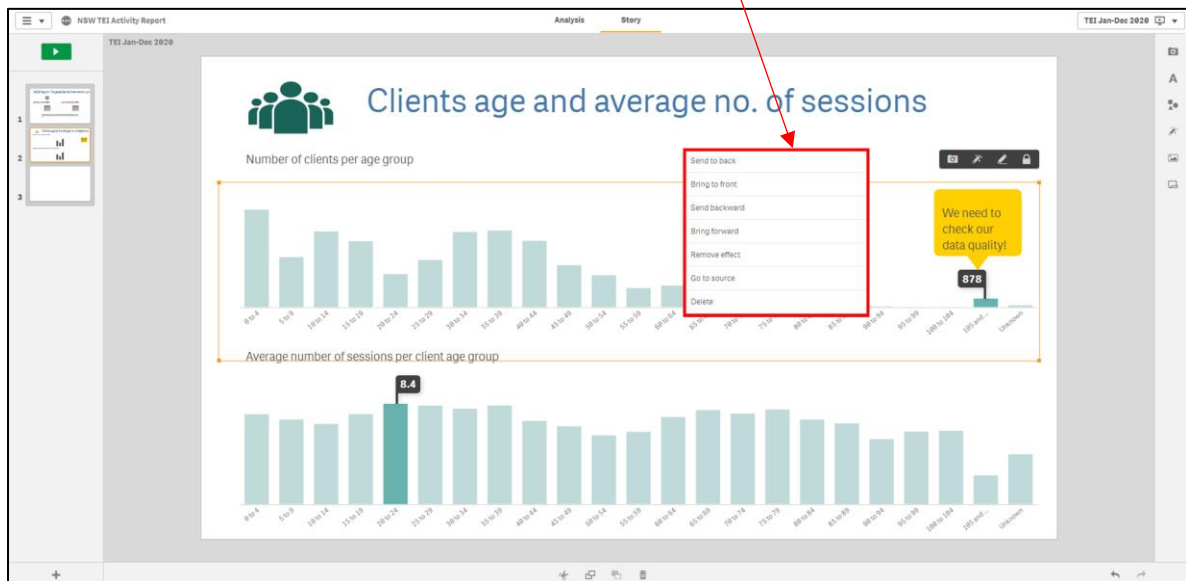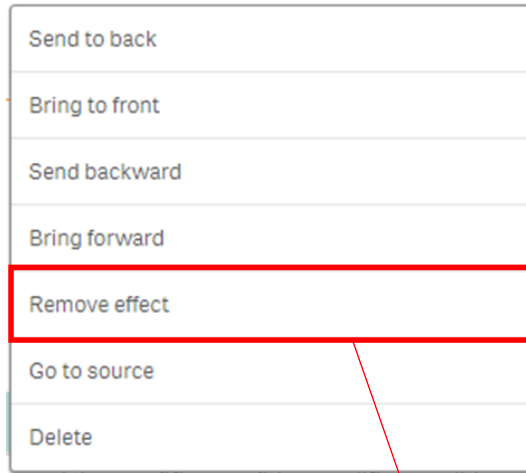
Figure 57. Apply the 'any value' effect
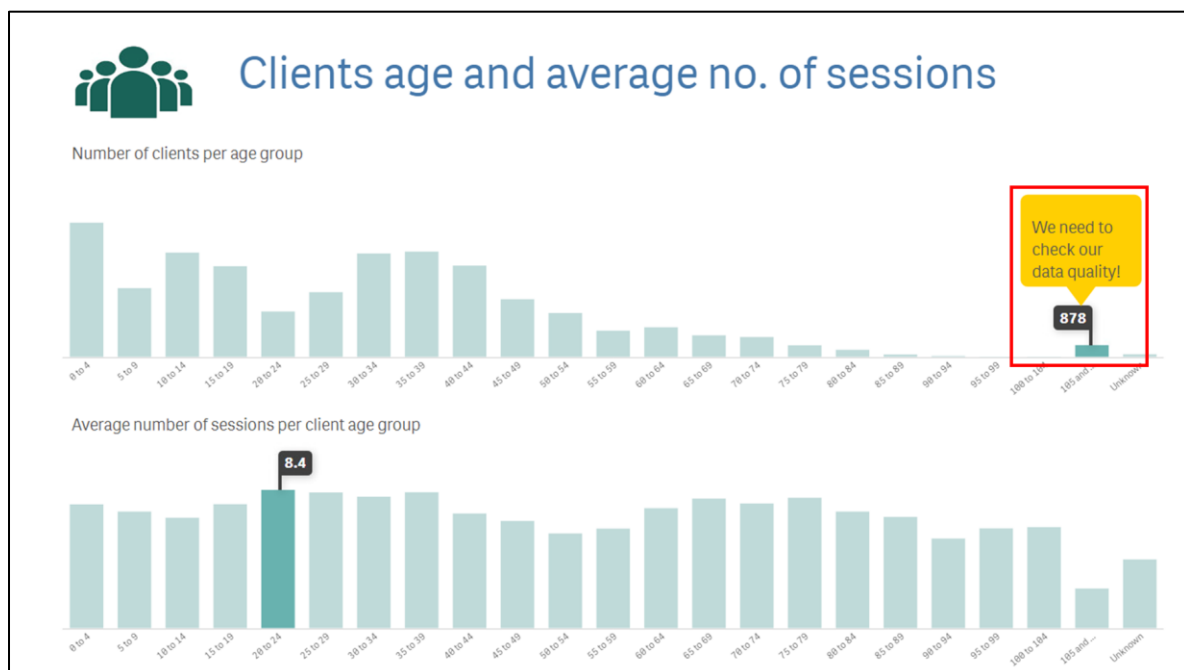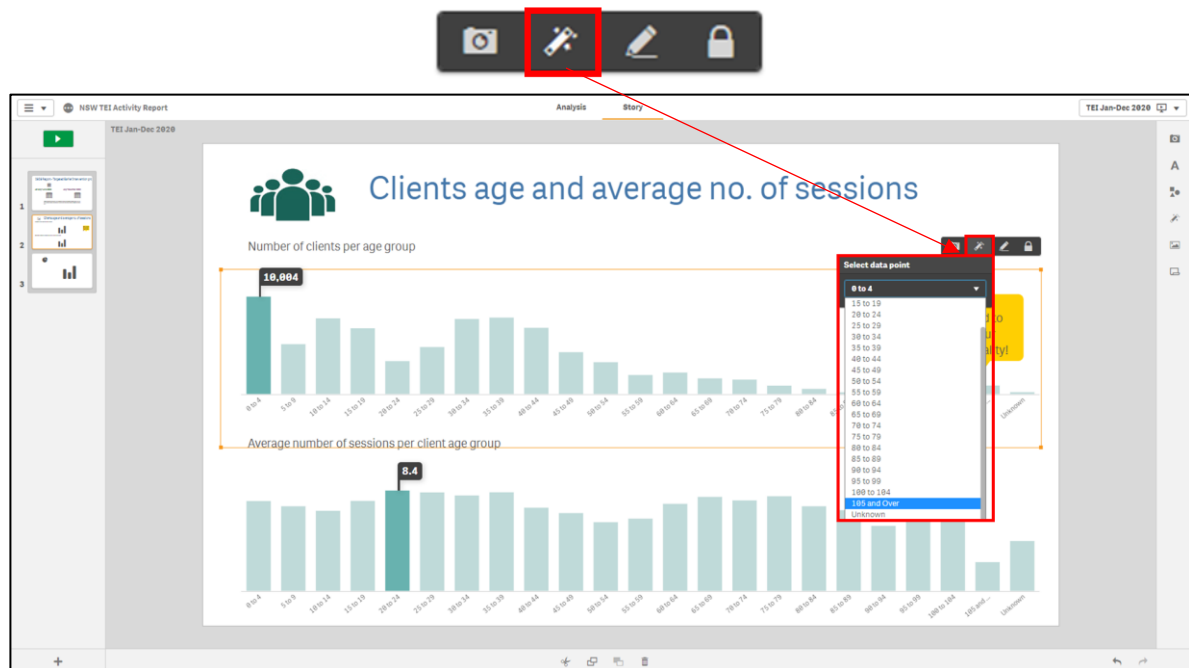
To remove an effect, right click on the graph or chart.

A menu will pop up (see Figure 58). Click remove effect. The graph will revert to its original settings.

Figure 58. Remove an effect

2e. Add shapes to your story

Select [icon] in the top left corner of your screen.

A pop-up menu will appear (see Figure 59). Select the shape you want and drag and drop it onto the slide.

You can resize your shape. Click on the shape, select the corners of the orange border and drag it to the size you want.

You can move your shape. Click on the shape and drag it to the location you want.

Figure 59. Add shapes to your story
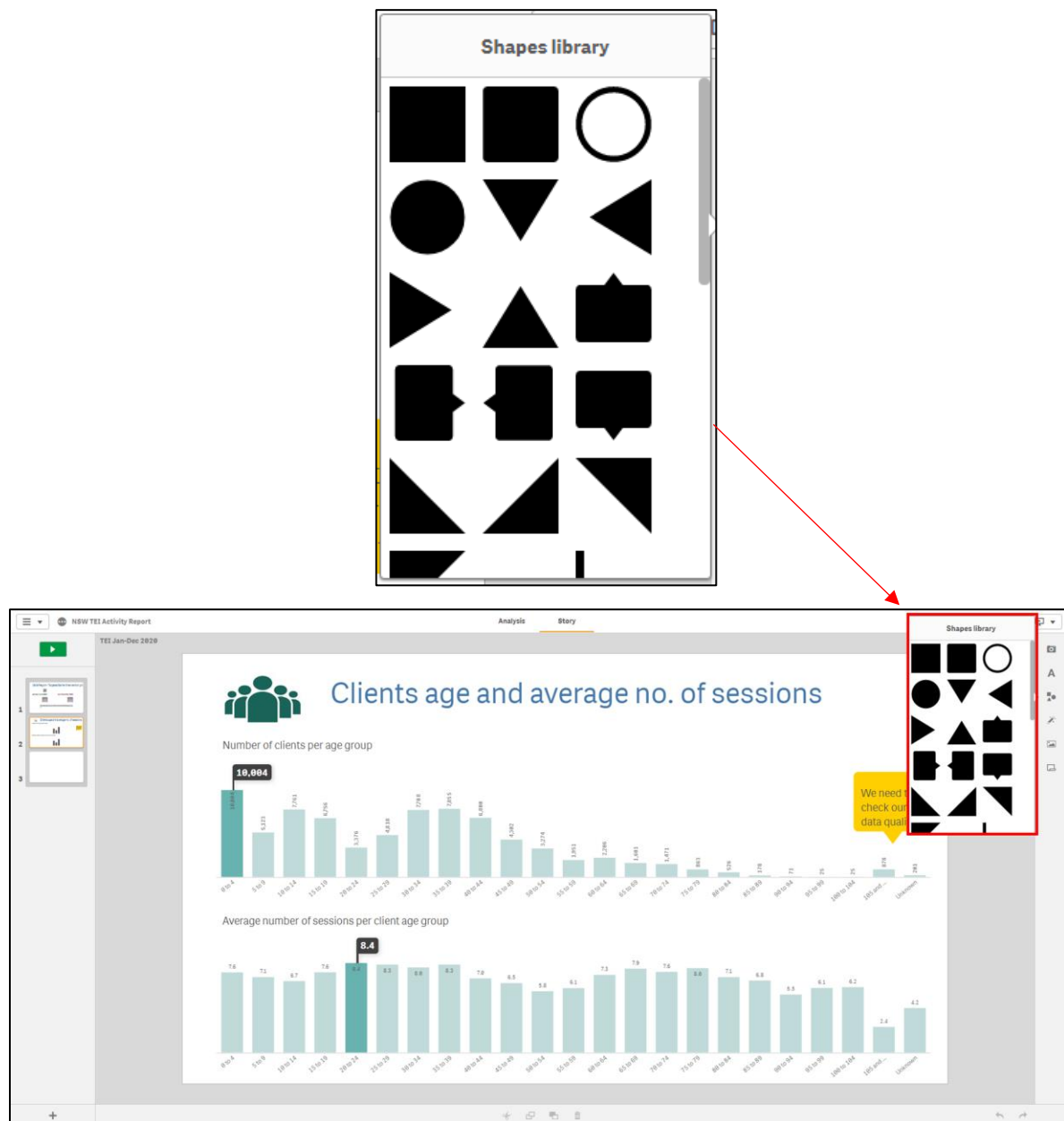
2f. Add media objects to your story

Select ![icon] in the top left corner of your screen.

A media library will appear with a list of media objects (see Figure 60). Select the name of the media object (point A) to see a preview (point B).

Click 'insert' (point C) to insert the media object into your story.

The media object will then appear in the middle of your slide.

You can resize your media object. Click on the media object, select the corners of the orange border and drag it to the size you want.

You can move your media object. Click on the shape and drag it to the location you want.

To get out of the media library, click 'close' (point D).

Figure 60. Add media objects to your story
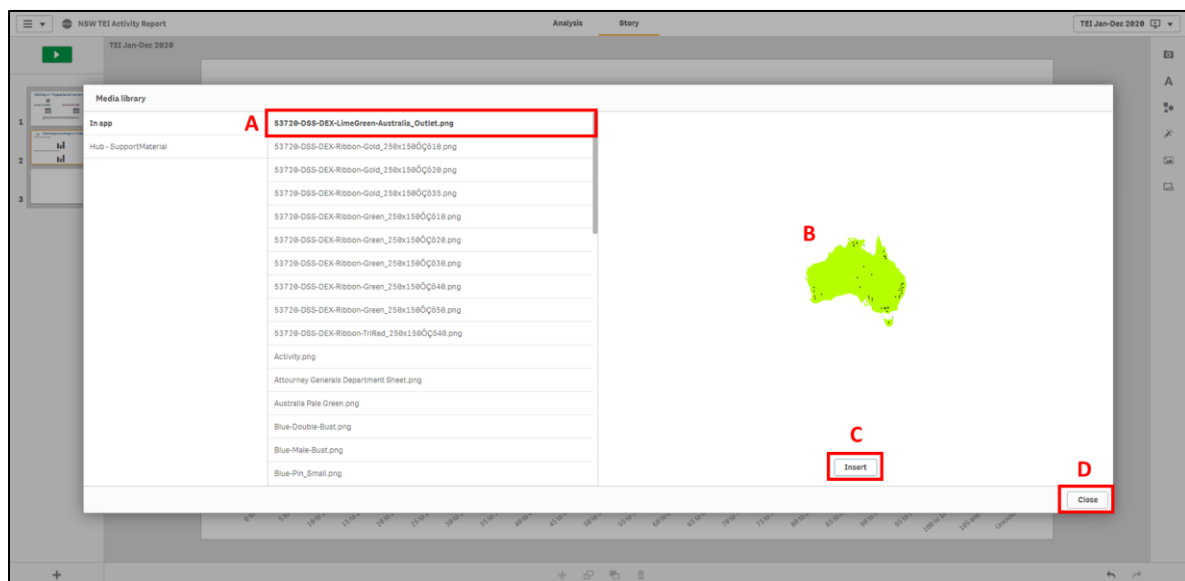
2g. Add a live data sheet to your story

You can use the sheets library to add a live data sheet to your story.

This means you can still interact with the graphs and tables and filters.

Click on the sheet library icon:

A menu will appear with all sheets available in your report (see Figure 61).

Click on the sheet you want to add to your story.

Figure 61. Add a live data sheet to your story
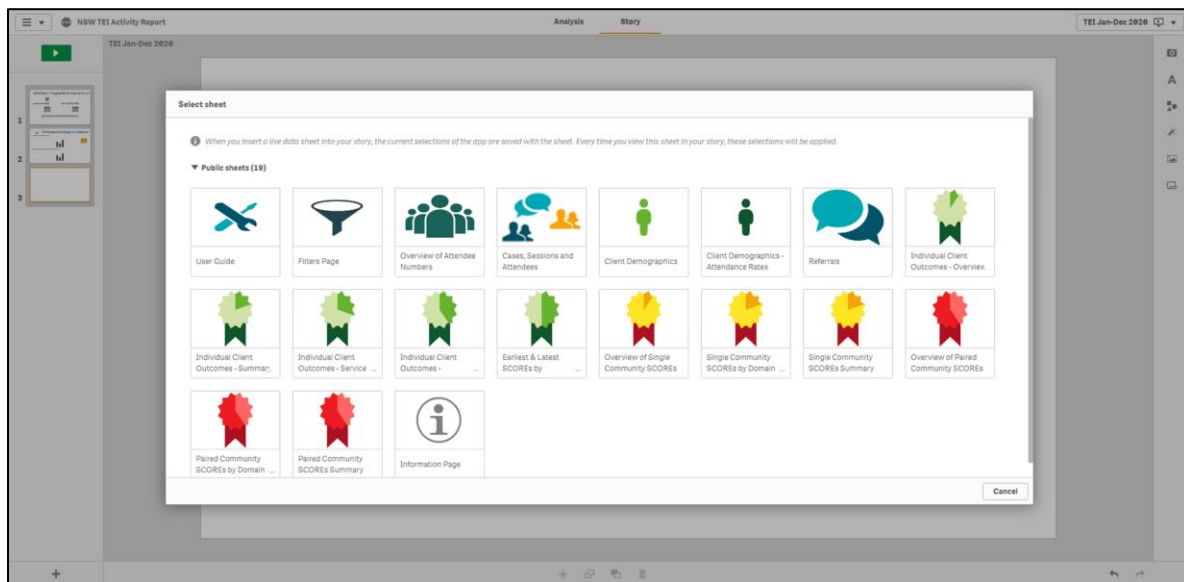
The sheet you select will appear in your report as a new slide. The sheet will have a small menu over the top of it (see Figure 62).

To delete the sheet, click the bin icon:

To change the sheet to another, click on the name of the sheet (point B). A menu will appear with all the sheets available in your report (see Figure 54). Click on the sheet you want to change it to.

You can left align, right align or centre the sheet (point C). Click on the option you want.

Because it is a live data sheet, you cannot edit the graphs and tables. However, when you play your story [play icon] , you can interact with the graphs and filters the same way you can in the report.

Figure 62. Add a live data sheet to your story
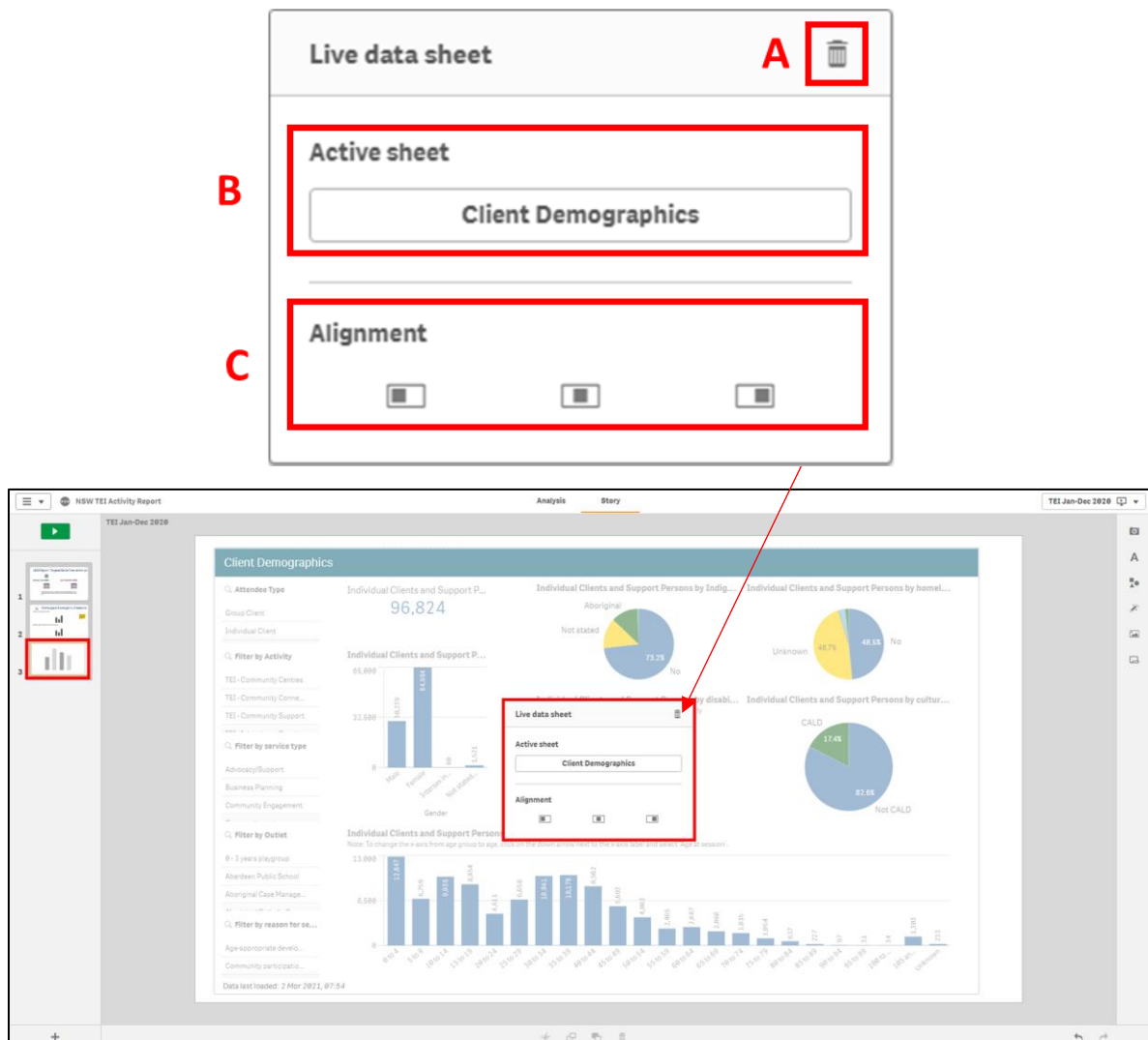
2h. Preview your story

You can preview your story at any time.

Click the preview button in the top left corner (see Figure 63):

Figure 63. Preview your story

A preview of your story will display (see Figure 64).

Figure 64. Preview of a story
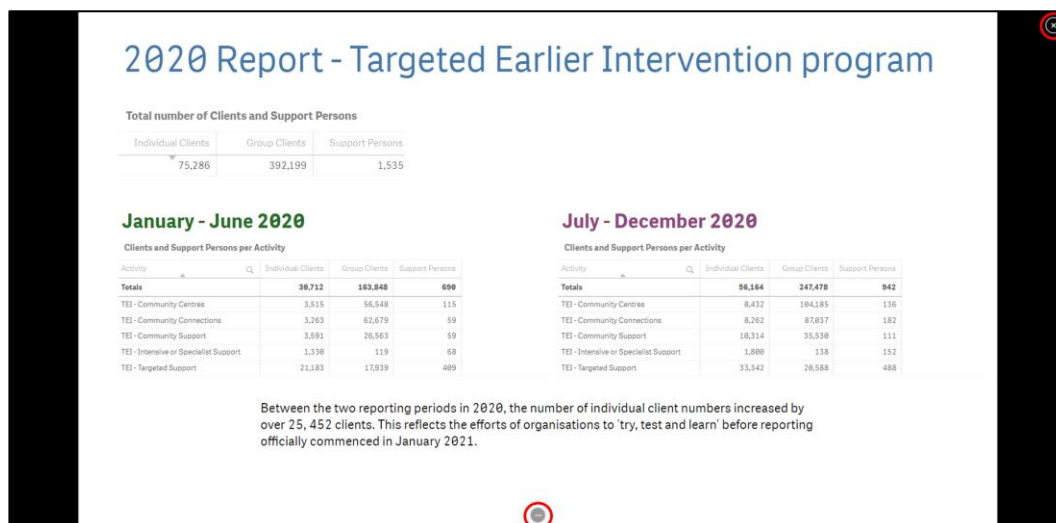
Click the exit button in the top left corner to exit the preview.

Select the ellipsis on the bottom of the screen to navigate the preview.
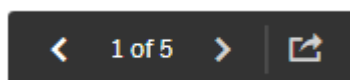
A small menu will appear:

Use the left and right arrow to go the next and previous slide.

Click the export icon to export your story:

Export your data

You can export your data any time you want.

All the data is de-identified so it can be shared with other service providers, funding bodies, Peak bodies etc.

There are numerous ways you can export your data. You can:

1. [Download a single graph or table](#)
2. [Download an entire sheet](#)
3. [Export a story](#)

The option you choose will depend on the information you want.

1. Download a single graph or table

To download a single graph or table, right-click on the graph or table.

Select the ellipsis icon. A menu will pop up. Click Export (see Figure 65).

Another menu with three options will appear (see Figure 65). You can:

- Export as an image. This will download the graph/table as a png file.
- Export to PDF. This will download the graph/table as a pdf file.
- Export data. This will download an excel file. If you choose to export data as an excel file, all graphs and pie charts will be converted to tables.

Figure 65. Download a single graph or table
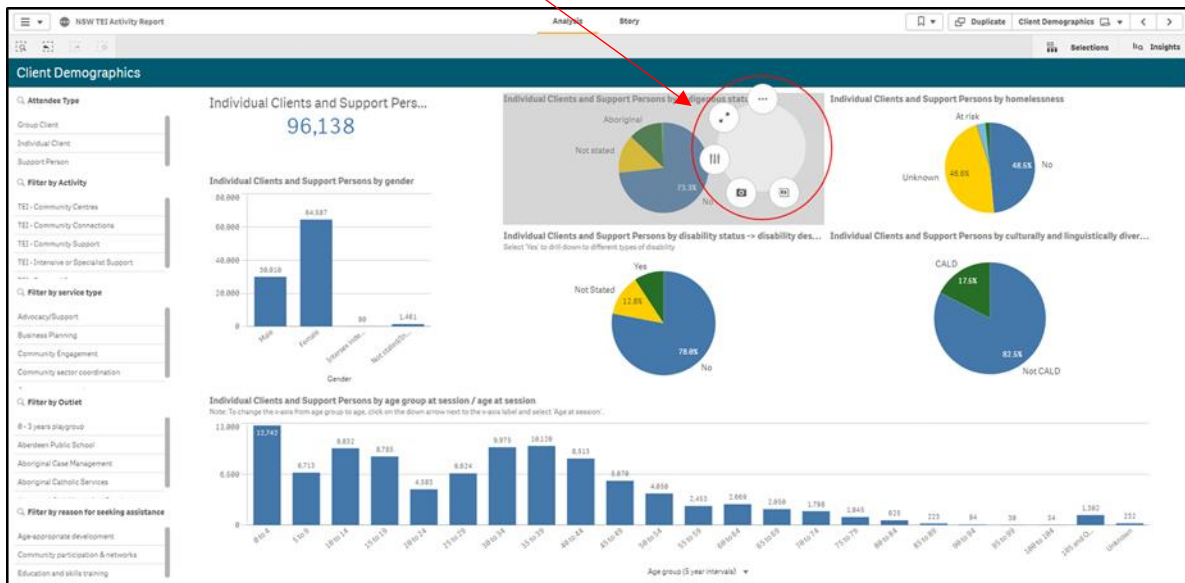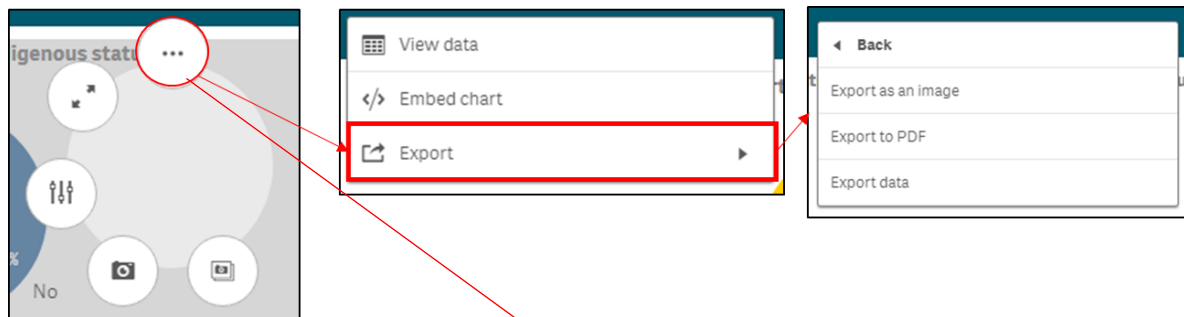
2. Download an entire sheet

To download an entire sheet, click on the navigation button in the top left corner of your screen (see point A in Figure 66).

A dropdown menu will appear. Select the Export sheet to PDF (see point B).

Figure 66. Download an entire sheet

3. Export a story

You can export your story two different ways:

A. Preview and export the story
B. Export the story via the navigation button
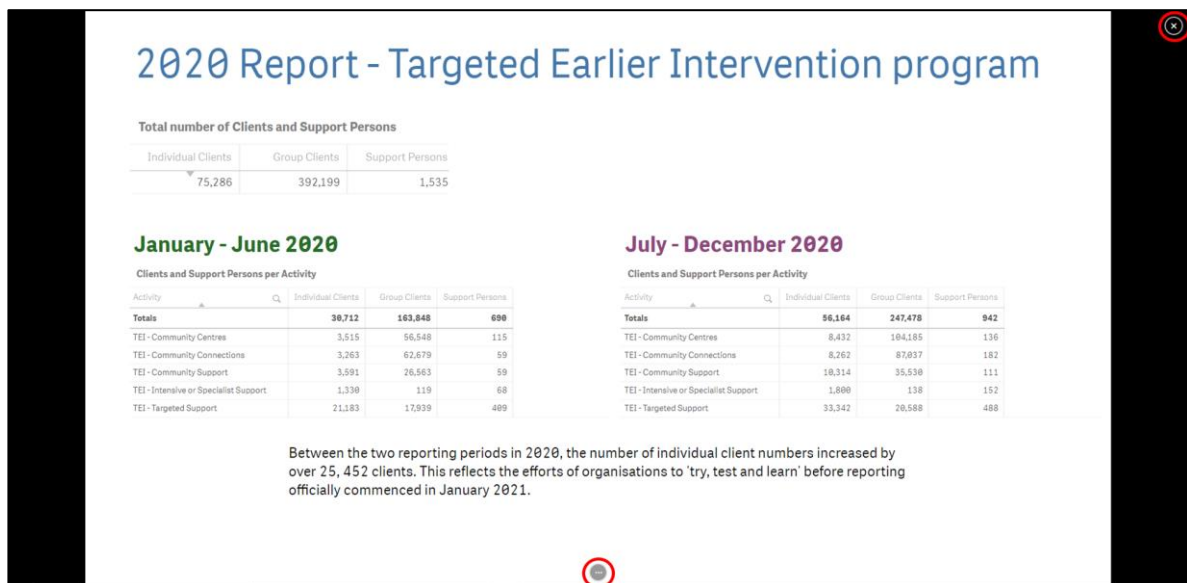
A. Preview and export the story

Click the preview button in the top left corner (see Figure 67):

Figure 67. Preview your story

Select the ellipsis on the bottom of the screen (see Figure 68):

Figure 68. Export your story

A small menu will appear:

Click the export icon to export your story: ⤴

You can export the story as a PowerPoint or as a pdf (see Figure 69).

Figure 69. Export your story

Select the options for your export and click **Export** (see Figure 70).

Figure 70. Select options for export

B. Export story via navigation button

Click on the navigation button in the top left corner of your screen.

A dropdown menu will appear. Export the story as a PowerPoint or as a pdf (see Figure 71).

Select the preferred options for your export and click **Export** (see Figure 70).

Figure 71. Export story via navigation button