



Medicaid Information Technology System

**State & Local Government Solutions
Medicaid Information Technology System (MITS)**

Intermediate BIAR Participant Guide

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Course Overview

Overview

The goal of this course is to provide you with the skills and knowledge necessary to create and modify ad hoc reports required for your role.

Requirements

You must have completed the *Overview of InfoView Reporting* course before taking this training.

Objectives

After completing this course, you should be able to:

- Log on to Desktop Intelligence
- Create an ad hoc report
- Format a report
- Sort data in a report
- Apply a section break
- Outline data
- Create and modify a chart
- Create a crosstab
- Add a rank
- Add an alerter
- Use drill-down mode
- Insert calculations
- Add free-standing cells
- Import a report from the repository
- Export data

Agenda

Topic	Time in Minutes
Welcome and Introductions	10
Course Overview	5
Getting Started	10
Logging on to Desktop Intelligence	5
Desktop Intelligence Layout	20

Topic	Time in Minutes
Creating an Ad Hoc Report	45
Break	15
Formatting a Report	15
Sorting Data	15
Applying a Section Break	20
Outlining Data	15
Creating and Modifying a Chart	20
Creating a Crosstab	20
Lunch Break	60
Adding a Rank	20
Adding an Alerter	20
Using Drill-Down Mode	20
Break	15
Inserting Calculations	25
Adding Free-Standing Cells	15
Importing a Report from the Repository	10
Exporting Data	10
Review	10
Total	420

Getting Started

Overview

In this topic, you learn descriptions of Desktop Intelligence and BusinessObjects terminology.

For your convenience and future reference, report categories for BIAR, MAR, and SUR are also provided.

Desktop Intelligence

Desktop Intelligence is a BusinessObjects application with a graphical user interface that gives you access to detailed data in the BIAR data warehouse.

The Query panel contains non-technical descriptions of each object available. Point-and-click functionality allows you to create queries, analyze data, and produce reports easily to meet your business needs.

You can use Desktop Intelligence in online mode through InfoView, as you are doing in this course, or you can access the application directly on your computer. Either way, the application must be installed on your computer.

IF you want to create and manage reports using:	THEN use this mode:
Data from the centralized database, known as the "BIAR data warehouse"	Online
Only data on your computer	Offline

BusinessObjects Terminology

The following terms are commonly used in Desktop Intelligence. *Appendix A* lists additional and more detailed terminology.

- **Universe:** The database view that allows you to create queries and retrieve data
- **Classes:** Logical groupings of data in each universe
- **Objects:** Data elements that form classes; there are dimension, detail, and measure objects:
 - **Dimension Object:** Retrieves data that provides the basis for analysis in a report. Dimension objects typically retrieve character-type data, such as provider names.
 - **Detail Object:** Provides additional information. For example, an address is a detail object associated with a provider. Addresses provide additional information about providers.
 - **Measure Object:** Retrieves numeric data that is the result of calculations on data in the database.



Document Versus Report

In Desktop Intelligence, one or more reports represents a "document." A document may have multiple tabs, with each tab containing a different report or notes about the report(s). The structure is similar to an Excel file with multiple worksheets.

Traditionally, this is the distinction between terms, but in the application itself, the terms are **not** used consistently. In practice, the terms are used **interchangeably**, as we are going to do in this course.

Report Blocks

Each report tab contains a separate report block, and a cell is the most basic element in each block.

These are the **main block types**:

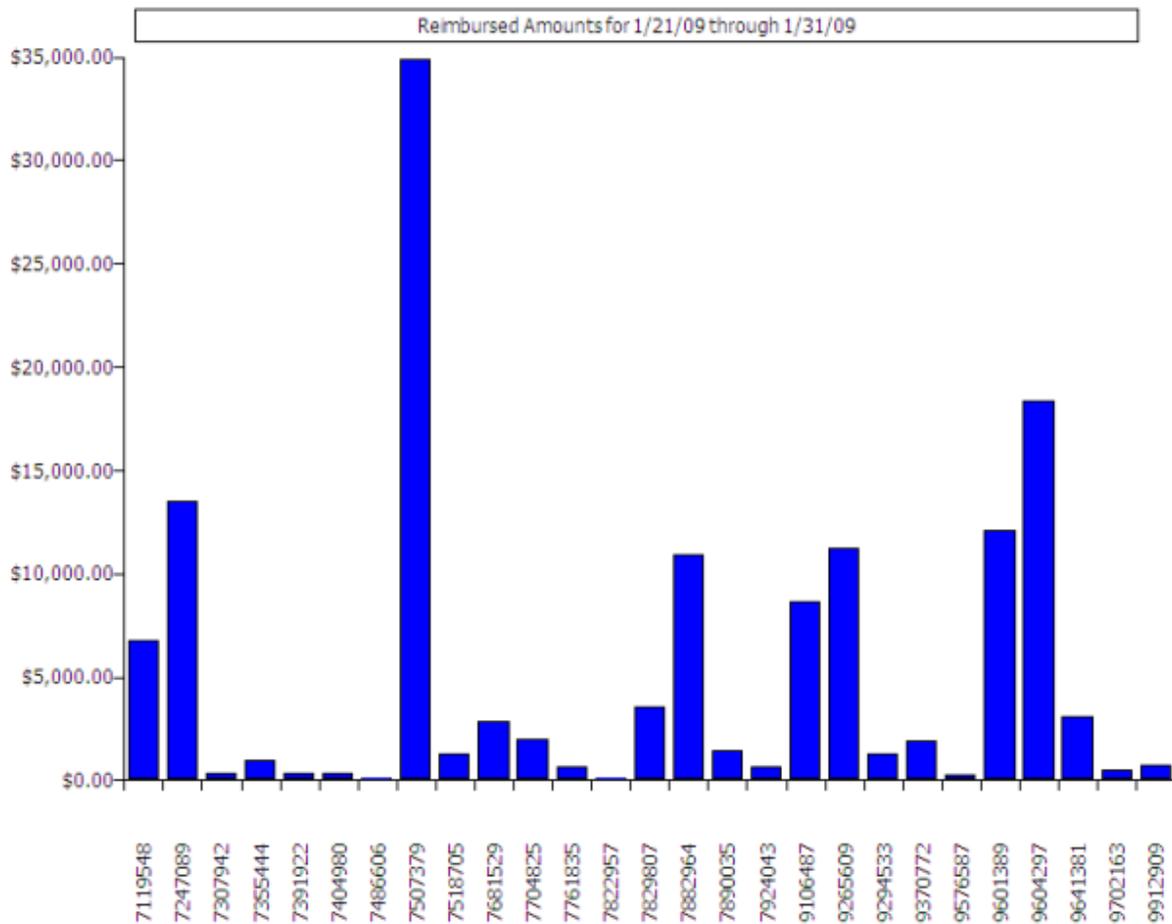
- **Table:** Has headings for columns

Provider Medicaid ID and Name	County Code & Desc
7018200 - GREENFIELD FAMILY HLTH CNT	36 - Highland
7018219 - RIPLEY FAMILY HEALTH CTR	09 - Butler
7018291 - NEW RICHMOND FAMILY HLTH C	13 - Clermont
7019003 - CAO OF SCIOTO CO HLTH CL	73 - Scioto
7041069 - MONROE COUNTY CLINIC	56 - Monroe
7051021 - MEDICENT INC	99 - OTHER
7277252 - CHESAPEAKE FAMILY MEDICAL	44 - Lawrence
7277261 - SOUTH POINT MEDICAL CTR	44 - Lawrence

- **Crosstab:** Has headings for columns and rows, and data at the intersection of the columns and rows

	01/07/2009	01/14/2009	01/22/2009	01/28/2009
7049007 - VALLEY PATHOLOGISTS INC	\$0.00	\$0.00	\$88.07	\$0.00
7066677 - BRUCE BLAND BANIAS MD LLC	\$0.00	\$1,395.39	\$0.00	\$466.56
7164150 - DAYTON PEDIATRIC IMAGING	\$275.18	\$254.78	\$406.20	\$20.08
7265587 - DAYTON CTR FOR NEURO DISORDERS	\$0.00	\$0.00	\$0.00	\$79.90
7297178 - PEDIATRIC ASSOC OF DAYTON INC	\$217.48	\$857.99	\$89.33	\$0.00
7301386 - MEIJER PHARMACY #102	\$44.95	\$0.00	\$0.00	\$0.00
7336723 - ADVANCED DERMATOLOGY	\$0.00	\$74.12	\$0.00	\$0.00
7371364 - DAYTON HEAD & NECK SURGEONS	\$0.00	\$75.23	\$54.03	\$0.00
7481110 - WRIGHT STATE PHYSICIANS	\$1,004.58	\$2,176.36	\$2,983.77	\$312.31

- **Chart:** Displays data graphically



Query

A query is a request for information that uses a specific set of instructions for extracting data from a database.

You build a query containing objects from a universe and then run the query to retrieve data from the BIAR data warehouse to generate a report. This helps you to narrow data results to meet your specific reporting needs.

BIAR, MAR, and SUR Report Categories

The following lists describe BIAR, MAR, and SUR report categories at a high level.

BIAR: Generates reports that range from simple queries to more complex reporting and data analysis. General users can manage reports through InfoView and super users can create and modify ad hoc reports in Desktop Intelligence.

- **Balancing Reports:** Reports in this category are reviewed after BIAR is loaded, and are used to validate the claim and non-claim loads.
- **BIAR Targeted Queries:** Reports in this category focus on provider and recipient claim history, as well as home health visits. These are some of the items in the targeted reports:
 - Home health visits and costs by provider
 - Provider history, with detailed information about the provider, diagnosis, procedures, and places of service that have been used by a specific provider
 - Recipient history, with detailed information about medical visits, emergency room visits, and prescriptions
- **Executive Information System (EIS):** Reports in this category provide high-level summary, aggregate-type data that is useful for executives or those in leadership positions. The reports display information such as:
 - Provider and recipient count information per county, with the ten counties having the lowest provider-to-recipient ratio identified at the top of the report
 - Trending data that summarizes eligible recipients by geography and Medicaid plan in three ways for a three-month period
 - Totals in a graphical format for the Nursing Facility Services Program to support legislature-appropriated funding
 - Paid claims by provider type for a calendar quarter for the present year and comparison data for the previous year
 - Summary information for payments by provider type
 - The number of providers in each status based on provider type within each county
 - A list of recipient and provider counts for each county
 - The top 20 providers ranked by number of claims processed for a specified date range
 - The top 25 NDC codes
 - Enrollment counts by assistance category
 - Summary information for pharmacy claims by specific therapeutic class for a payment date range, ordered by therapeutic class code and description
- **ODJFS Corporate Documents:** Reports in this category were specifically requested by ODJFS.

MAR: These reports provide financial and statistical data to assist the state and federal government with fiscal planning, new program and policy development, and monitoring and controlling state medical assistance programs. You can find more detailed descriptions of each report in iTRACE. MAR reports are divided into three categories described below.

- **MAR Batch Reports:** Accessed using FileNet (COLD)
 - Abortion Detail
 - Sterilization Detail
 - MAR Reconciliation
 - Default State Category of Service
 - Federal Reporting – Cash Recoupment Summary
 - Federal Reporting – Cash Recoupment Detail
 - Capitation Summary by Region
 - CMS 372 Annual Reports on HCBS Waivers
 - Assisted Living
 - Home Care Waiver
 - Individual Options Waiver
 - Level One Waiver
 - Choices Waiver
 - Passport Waiver
 - Transitions Aging Carve-Out Waiver
 - Transitions MRDD Waiver
 - Unknown MAS—BOE Assignment

- **MAR BusinessObjects Reports:** Accessed using InfoView or Desktop Intelligence
 - **MAR—Payment Register by Fund Code Group Reports**
 - Money Follows the Person
 - Regular Medicaid Program
 - SCHIP Program
 - State Funds Only
 - Provider Type Reimbursement by Fund Code Summary
 - **Ohio Medicaid Paid Claims Detail**
 - **Ohio Medicaid Paid Claims Summary**

Note: There are two MAR-related universes available for ad hoc querying in Desktop Intelligence: CMS 372 and MSIS.

- **MAR Online Panel Reports:** Accessed using MAR interChange panels. These reports are divided into the following categories.
 - **Expenditures:** These reports analyze expenditures by benefit plan, aid category, COS, fund code, provider type, participation, and place of service.
 - **Long Term Care:** This category contains the Long Term by Revenue report.
 - **Operations:** Reports in this category provide analysis on filing errors, provider errors, as well as operational performance reports and throughput analysis reports.
 - **Provider:** These reports analyze provider participation, provider ranking, and payment comparisons by COS and provider type. The Third Party Payment Ranking report is also included in this category.
 - **Recipient:** This category contains Medicare A, B, and AB-related reports, as well as reports that analyze recipient ranking and participation.

SUR: Provides a statistical screening tool primarily designed to identify those providers with medical resource use that is substantially different from their peers. It provides an in-depth view of utilization patterns and associated costs and allows for profiling of providers and consumers.

- **Case Tracking:** Reports in this category are useful to the SUR unit--specifically for the Case Tracking process. This information can be found in some of the Case Tracking reports:
 - Case Tracking information for cases in Open, Closed, and Purged status
 - Providers who have been suspended
 - Recipient Lock-In data
- **Random Sample Reports:** This category contains the Random Sample Claim Detail report, which provides a detailed list of claims returned by a random-sample request.
- **SUR Profiler Reports:** This category contains quarterly and yearly reports that assist with identifying providers who have medical resource use that is substantially different from their peers.
- **SUR Targeted Queries:** This category contains pre-defined reports that identify specific questionable practice patterns and potential instances of fraud or abuse. Reports in this category display information such as:
 - Providers, without particular specialties, who bill certain MRI or CT scans during any one calendar quarter
 - All inpatient claims containing a surgical code where the surgical date is greater than the From Date of Service
 - A summary of all diagnosis codes billed by the criteria selected by the user for a specific time frame
 - Exception Professional claims submitted by a provider meeting the defined criteria for the report
 - Providers who bill a lower number of codes than their peers
 - Inpatient claims and home and community care service claims with overlapping time periods for the same recipient
 - Recipients who visited multiple pharmacies and multiple non-pharmacy providers for a given date-of-service range



When you have access to Desktop Intelligence and a standard report does not meet your needs, you can either modify a standard report in Desktop Intelligence or create your own ad hoc report.

Check Your Understanding

This activity contains questions to assess your understanding of key concepts in this topic. Review the topic if your score is below your standards.

To create and modify ad hoc reports, you must have Desktop Intelligence installed on your computer.

- A. True
- B. False

What is a universe in BusinessObjects?

- A. A series of tables in a database
- B. Database view that allows you to create queries
- C. Data elements that form groups of objects
- D. A group of modules within an application

Summary

In this topic, you learned descriptions of Desktop Intelligence and BusinessObjects terminology. Report categories for BIAR, MAR, and SUR were also provided for your convenience and future reference.

Logging on to Desktop Intelligence

Overview

In this topic, you learn how to log on to Desktop Intelligence.

You can access Desktop Intelligence directly through your computer (offline) or through InfoView. In this training, you are only going to log on through InfoView; however, this topic describes both methods for your convenience and future reference.

Who

TBD

When

You can log on to Desktop Intelligence at any time, as long as you have the application installed on your computer and the appropriate logon information. If you want to work online through InfoView, you must also have Internet connectivity and the correct URL.



You must log on at least once in online mode before you can log on in offline mode.



You can only **attempt** to log on three times consecutively. If you try to use an incorrect password more than three times, your user ID is locked and you must contact your administrator.

Requirements

You must have this information to complete the topic:

- InfoView URL
- System name
- Valid username and password
- Authentication name



The **authentication** method is how BusinessObjects communicates with security that is set up for interChange. In this training, we are using "Enterprise." For your job, the default selection is going to be "LDAP," which allows you to have the same user ID and password for InfoView and interChange.

How To

Follow the steps in the tables below to log on to Desktop Intelligence using both methods.

Logging on through InfoView

Step	Action
1	Open Internet Explorer or an available browser with Internet connectivity.
2	Access the InfoView URL .
3	In the InfoView Logon window, type or select the applicable information for these fields: <ul style="list-style-type: none"> • System • User Name • Password • Authentication
4	Click Logon . Note: The InfoView Home page displays.
5	Select Desktop Intelligence in the New drop-down list or click New Desktop Intelligence Document in the workspace.
6	If prompted with the New Report Wizard , click Cancel or proceed with the wizard.

Logging on Directly through Computer

Step	Action
1	Click Start and follow these steps: a. Point to All Programs . b. Point to BusinessObjects XI 3.1 . c. Point to BusinessObjects Enterprise . d. Select Desktop Intelligence .
2	In the User Identification window, type or select the applicable information for these fields: <ul style="list-style-type: none"> • System • User Name • Password • Authentication
3	Click OK .
4	If prompted with the New Report Wizard , click Cancel or proceed with the wizard.



When you access the InfoView Logon page, mark the page in your Internet Favorites folder.



By default, the New Report Wizard displays when you open Desktop Intelligence. You can change this default setting by either deselecting **Run this Wizard at Startup** in the New Report Wizard or deselecting **Show Welcome Wizard** under Tools, Options, General tab.

Success

You have successfully completed this task when the Desktop Intelligence application opens.

Practice

Log on to Desktop Intelligence using this information:

- 1) Access the URL given to you by the instructor.
- 2) In the **InfoView Logon** window, type or select the logon information given to you by the instructor.
- 3) Click **Log On**.
- 4) **Click** Cancel **to close the** New Report Wizard.

Summary

In this topic, you learned how to log on to Desktop Intelligence.

Desktop Intelligence Layout

Overview

In this topic, you learn the basic layout of Desktop Intelligence.

Relevance

By learning the layout of Desktop Intelligence, you can create, modify, and locate ad hoc reports more quickly and efficiently.

Workspace

The Desktop Intelligence workspace has **four main sections**:

- **Menu bar**
- **Toolbars**
- **Report Manager window**
 - The **Data tab** displays the list of objects in a report and allows you to manage variables and formulas
 - The **Map tab** helps you to navigate in a report quickly and easily by clicking the item you want to display
- **Report window**

These images show examples of a report open in the Report window, with basic workspace components labeled, as well as the Map tab for the report:

Example of Report Open in Workspace

Menu Bar – File Edit View Insert Format Tools Data Analysis Window Help

Toolbars

Report Manager Window, Data Tab

Report Window

Report Tab

Note: When a document contains more than one report, additional report tabs display.

Paid, FFS, Inpatient Claims Grouped by Primary Diagnosis Code & Description for Mercy Hospital for First Quarter of 2009

Section: Primary Diagnosis Code & Desc

1231 - Cysticercosis

ICN	Recipient ID	Recipient Full Name	Payment Date	Reimbursed Amount
4009016054449	854401182366	RALSTON, MARANA	01/22/2009	\$3,177.83

Section: Primary Diagnosis Code & Desc

042 - Human immuno virus dis

ICN	Recipient ID	Recipient Full Name	Payment Date	Reimbursed Amount
4009015057609	850348149866	HALPIN, SABELA	01/22/2009	\$18,048.41
4009064056505	855033908766	SASSE, BEAU	03/11/2009	\$11,264.60

Section: Primary Diagnosis Code & Desc

03843 - Pseudomonas septicemia

ICN	Recipient ID	Recipient Full Name	Payment Date	Reimbursed Amount
4009015056270	850216180266	VARELA, CLYDE	01/22/2009	\$7,054.17

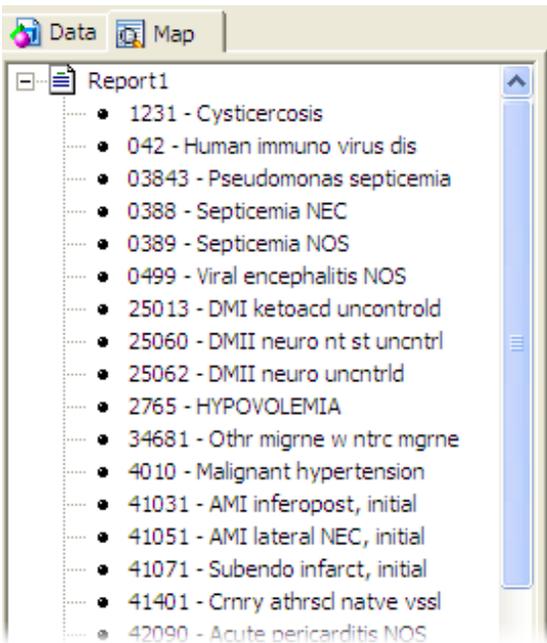
Section: Primary Diagnosis Code & Desc

0388 - Septicemia NEC

ICN	Recipient ID	Recipient Full Name	Payment Date	Reimbursed Amount
4009030055549	740719871278	HARTZELL, KRISTIAN	02/04/2009	\$7,054.17

Section: Primary Diagnosis Code & Desc

Report1

Example of Map Tab

To see all of the toolbars available for display, select **Toolbars** in the **View** menu; then choose the toolbars you want.



Rest your mouse pointer over the toolbar buttons to see screen tips for each button.

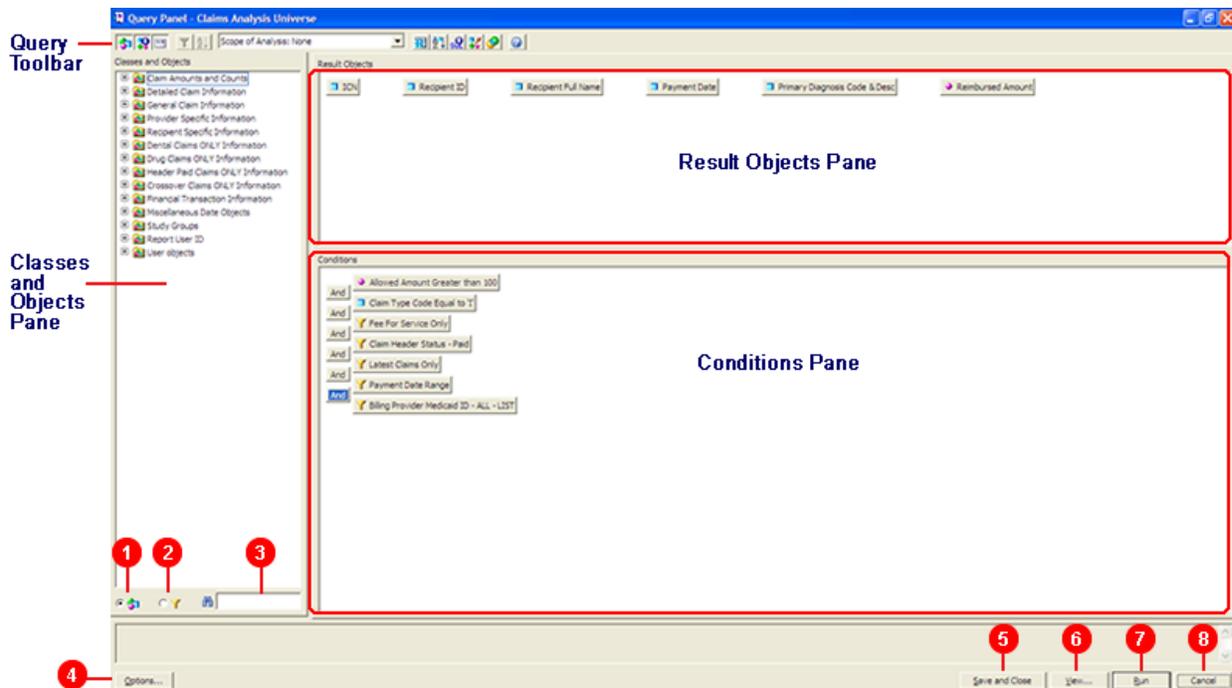
Query Panel

The Query panel displays the contents of the Desktop Intelligence universe you selected for the report and lets you choose what data you want to display.

There are **four main sections**:

- **Query toolbar:** Contains buttons that help you to create reports more easily
- **Classes and Objects pane:** Displays objects divided into classes (groups) that you use to create a report
- **Result Objects pane:** Contains objects you have chosen to display as columns in your report
- **Conditions pane:** Shows conditions you have established to narrow your query results

These images show examples of the Query panel, with basic components labeled:



- 1) **Classes and Objects radio button:** Selected by default and shows the Classes and Objects pane
- 2) **Filters radio button:** Displays the universe's Predefined Conditions pane that contains filters created by the administrator to save you time when using the Conditions pane
- 3) **Search field:** Allows you to search for objects by name instead of having to look for objects by scrolling through the Classes and Objects or Predefined Conditions pane
- 4) **Options:** Displays the Query Options window, which gives you further options for defining a query, such as limiting the number of rows in the results
- 5) **Save and Close:** Lets you save and close the Query panel without running the query; you can return later to run it

- 6) **View:** Displays the raw data retrieved by the query in the Data Manager; from there, you can edit, accept, or cancel the query
- 7) **Run:** Connects the query to the database and displays the report in the Report window
- 8) **Cancel:** Lets you cancel the query without saving your changes

The screenshot shows the BIAR software interface with the following components and annotations:

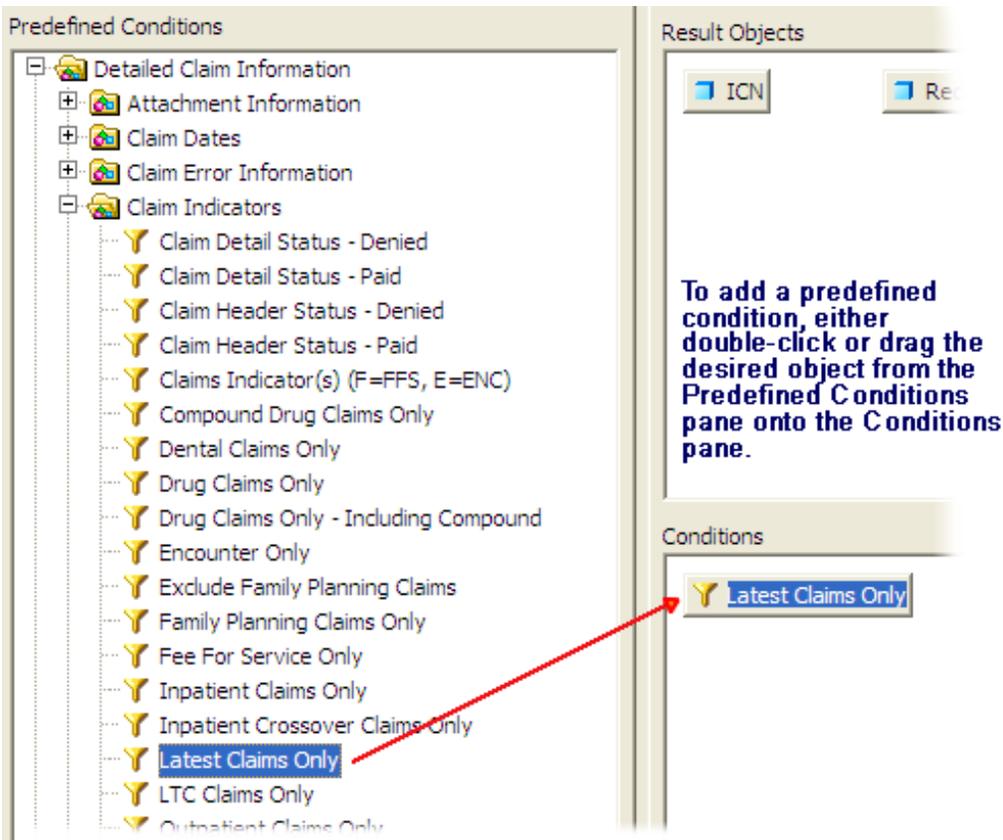
- Classes and Objects pane:** A tree view on the left containing categories like 'Claim Amounts and Counts', 'Counts', 'Detailed Claim Information', etc. The 'Reimbursed Amount' object is selected and highlighted in blue. A red arrow points to this selection with the text: "Reimbursed Amount object selected; the object's description displays below".
- Result Objects pane:** A pane on the right showing selected objects: 'ICN', 'Recipient ID', 'Recipient Full Name', and 'Payment Date Range'. A red arrow points to the top of this pane with the text: "Displays the Classes and Objects pane".
- Conditions pane:** A pane on the right showing a list of conditions connected by 'And' operators, including 'Allowed Amount Greater than 100', 'Claim Type Code Equal to I', 'Fee For Service Only', 'Claim Header Status - Paid', 'Latest Claims Only', 'Payment Date Range', and 'Billing Provider Medicaid ID - ALL - LIST'. A red arrow points to the bottom of this pane with the text: "Allows descriptions of objects to display at the bottom of the window when you select an object".
- Footer text:** A red arrow points from the 'Reimbursed Amount' object in the 'Classes and Objects' pane to a text box at the bottom of the window that reads: "This field is either the reimbursed amount associated with the Fee-for-Service claim or the MCP paid amount associated with the encounter claim."

Query Panel Conditions Pane

In the Conditions pane, you can add conditions to narrow your query results. You can use predefined conditions or create your own.

These images show examples of how to add conditions in the Conditions pane:

Adding a Predefined Condition



Creating a Condition

1 To create a condition, drag the desired object from the Classes and Objects pane onto the Conditions pane.

2 The object displays in the Conditions pane and the Operators pane displays with a list of operators from which to choose when creating the condition.

3 Double-click the desired operator to put it next to the object you placed on the Conditions pane. The Operands pane displays.

4 Double-click the desired operand, and either type or select the applicable value(s).

5 Example of created condition.



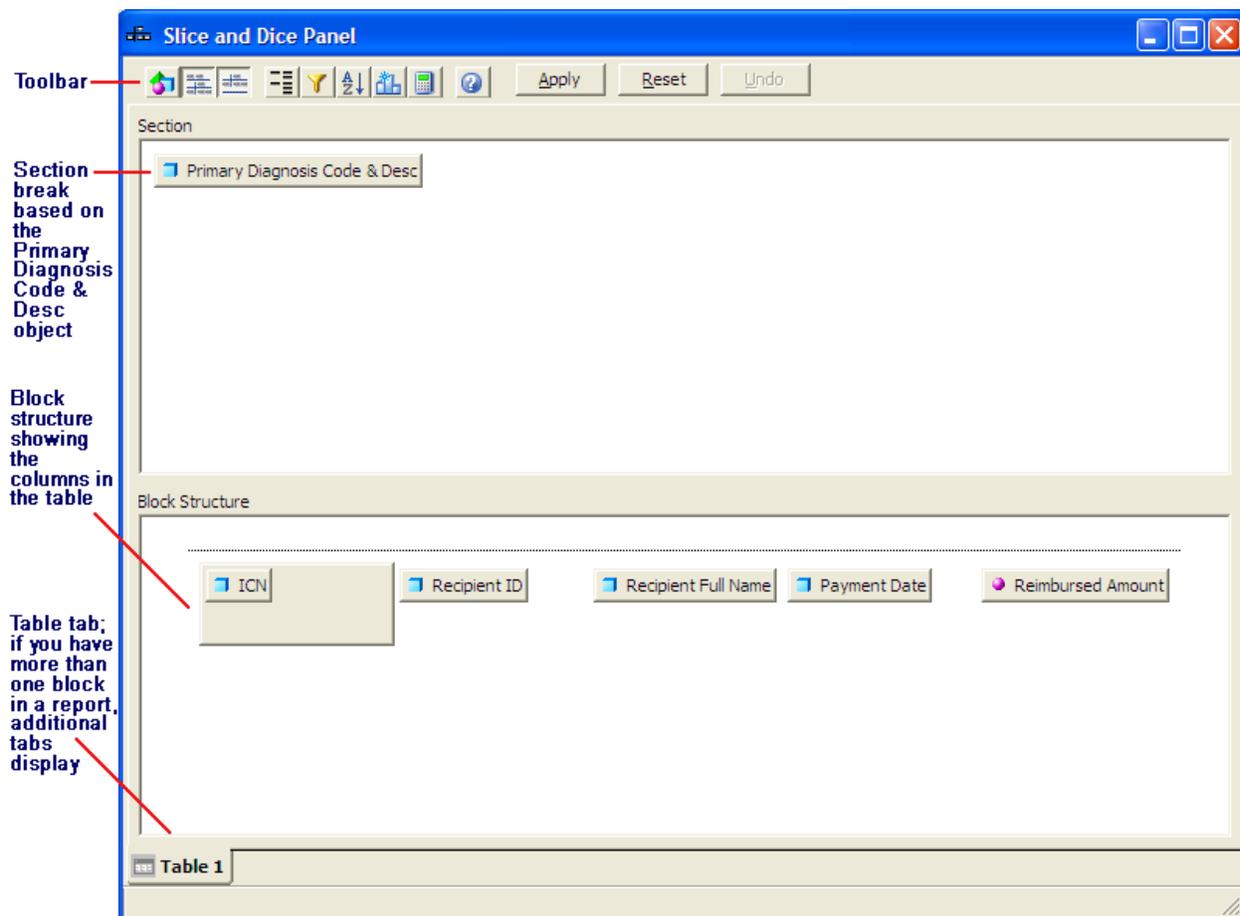
See *Appendix B* for a list of common BusinessObjects operators and examples.

Slice and Dice Panel

The Slice and Dice panel gives you an interface to help you reorganize data in a report. For example, you can sort data or move columns to rows to create a crosstab.

You can also use the Slice and Dice panel to perform other functions, such as adding, editing, and deleting section breaks, filters, and calculations.

This image shows an example of the Slice and Dice panel, with basic components labeled:



Check Your Understanding

This activity contains questions to assess your understanding of key concepts in this topic. Review the topic if your score is below your standards.

In which pane do you place objects that you want to have as columns in your report?

- A. Classes and Objects
- B. Conditions
- C. Result Objects
- D. Report

In which of these panes can you place objects to narrow your data results?

- A. Data
- B. Conditions
- C. Map
- D. Result Objects

Summary

In this topic, you learned the basic layout of Desktop Intelligence.

Creating an Ad Hoc Report

Overview

In this topic, you learn how to create an ad hoc report using the New Report Wizard.

You are going to create two reports—a basic report using the Provider universe, and a more detailed report using the Claims Analysis universe.

Who

TBD

When

You can create an ad hoc report at any time; however, you can only use the **New Report Wizard** to construct the **first query** in a document. When you want **additional queries**, you must use the **New Document** option.

Relevance

Creating ad hoc reports lets you tailor reports to meet the specific needs of your job. You can incorporate a wide variety of data-analysis functions in addition to the standard reports in InfoView.

Guidelines

You can create an ad hoc report with or without using the New Report Wizard.

When you use the New Report Wizard, you make selections in the wizard to create a new document and table block. You can only use the wizard to construct the first query in a document.

When you create a report **without** using the New Report Wizard, you use the New Document option. With this option, you create a blank document and then insert a table, crosstab, or chart.

For your convenience and future reference, these are the steps for using the **New Document** option:

- 1) Select **Options** in the Tools menu.
- 2) Click the **New Document** tab.
- 3) Select **Systematically Create a Blank Document**.
- 4) Click **OK**.
- 5) Click **New** on the **Standard** toolbar.
- 6) Select **Table**, **Crosstab**, or **Chart** in the **Insert** menu, depending on the type of report block you want.
- 7) Move your mouse pointer onto the blank report area.
- 8) Click where you want the top-left corner of the report block to display, and release the mouse button.
- 9) Click **Begin** to proceed with the wizard.

Note: The title of the first page of the wizard reflects the type of report block you chose in Step 6: *Insert a New Table, Insert a New Crosstab, or Insert a New Chart.*

No matter what your starting point is for creating a report, you use the Query panel to add and organize objects, and apply query conditions. This is where you choose what data you want to have in your report.

In the **Query panel**, make sure the **first three buttons** are selected on the toolbar:

- **Show/hide all classes:** Displays the Classes and Objects pane
- **Show/hide help on selection item:** Displays descriptions in the Information pane for objects you select in the Classes and Objects pane; this helps you to choose the appropriate objects for your reports
- **Wrap Result Objects:** Wraps objects in the Result Objects pane so you do not have to scroll to see them

How To

Follow these steps from the main Desktop Intelligence window to create an ad hoc report using the New Report Wizard:

Step	Action						
1	Click New on the Standard toolbar.						
2	Select Generate a standard report.						
3	Click Begin.						
4	Specify the desired data access by following these steps: <table border="1" data-bbox="371 1184 1375 1625"> <thead> <tr> <th>TO use:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>A universe</td> <td> <ul style="list-style-type: none"> a. Select Universe. b. Click Next. c. Select the desired universe. d. Click Finish. e. Proceed with Step 5. </td> </tr> <tr> <td>An Excel, dBase, or ASCII file</td> <td> <ul style="list-style-type: none"> a. Select Others. b. Select the desired option from the Others drop-down list. c. Follow the desired prompts until the wizard finishes. d. Proceed with Step 10. </td> </tr> </tbody> </table>	TO use:	THEN:	A universe	<ul style="list-style-type: none"> a. Select Universe. b. Click Next. c. Select the desired universe. d. Click Finish. e. Proceed with Step 5. 	An Excel, dBase, or ASCII file	<ul style="list-style-type: none"> a. Select Others. b. Select the desired option from the Others drop-down list. c. Follow the desired prompts until the wizard finishes. d. Proceed with Step 10.
TO use:	THEN:						
A universe	<ul style="list-style-type: none"> a. Select Universe. b. Click Next. c. Select the desired universe. d. Click Finish. e. Proceed with Step 5. 						
An Excel, dBase, or ASCII file	<ul style="list-style-type: none"> a. Select Others. b. Select the desired option from the Others drop-down list. c. Follow the desired prompts until the wizard finishes. d. Proceed with Step 10. 						
5	Expand the desired class(es).						
6	Drag the desired objects to the Result Objects pane. Note: You can also double-click an object to add it to the Result Objects pane.						

Step	Action
	With this method, the object automatically displays at the end of the query.
7	Drag objects and filters as desired to the Conditions pane to narrow your results.
8	Click Run .
9	If the prompts window displays, respond to the prompts and click OK .
10	After the report displays, select Save As in the File menu.
11	Name the file and save it to the desired folder on your computer. Note: userDocs is the default folder.



You can remove an object two different ways--by dragging or right-clicking.

Either drag the object from the Result Objects pane or Conditions pane, as applicable, to the Classes and Objects pane **OR** right-click the object and choose **Remove** or **Delete**.

Note: Remove displays when you right-click an object in the **Result Objects** pane and **Delete** displays when you right-click an object in the **Conditions** pane.



To close a report, select **Close** in the **File** menu.

Success

You have successfully completed this task when you have created an ad hoc report using the New Report Wizard.

Practice 1

Create an ad hoc report using the Provider universe that shows a list of rural health clinics by county.

Wizard

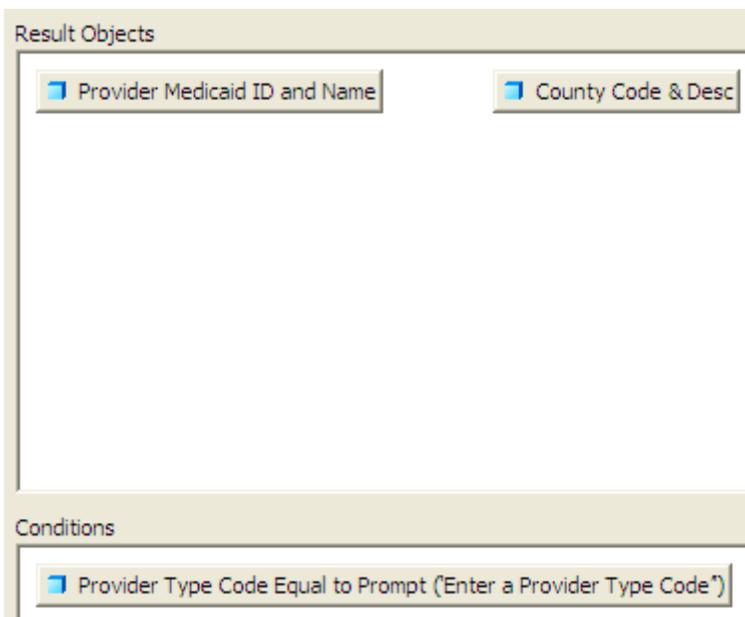
- 1) Click **New** on the **Standard** toolbar.
- 2) Select **Generate a standard report**.
- 3) Click **Begin**.
- 4) Select **Universe**.
- 5) Click **Next**.
- 6) Select **Provider** in the **Available Universes** list.
- 7) Click **Finish**.

Classes and Objects/Result Objects Pane

- 8) Expand **Base Information**.
- 9) Add this object:
 - **Provider Medicaid ID and Name**
- 10) Expand **Address**.
- 11) Add this object:
 - **County Code & Desc**

Classes and Objects/Conditions Pane

- 12) Scroll down and expand **Type Information**.
- 13) Add this condition:
 - **Provider Type Code Equal to Prompt ('Enter a Provider Type Code')**
- 14) Compare your Query panel with this image:



- 15) Click **Run**.

Prompts Window

- 16) Click **Values** and select **05** for the **Enter a Provider Type Code** field.
- 17) Click **OK** to close the **List of Values** window.
- 18) Click **OK** to close the prompts window.

Report Window

- 19) After the report displays, compare your results with the image at the end of this exercise.

- 20) Select **Save As** in the **File** menu.
- 21) Name the report "**Ad Hoc 1**" and save the file to the **userDocs** folder on your computer.
- 22) Close the report.

Provider Medicaid ID and Name	County Code & Desc
7018200 - GREENFIELD FAMILY HLTH CNT	36 - Highland
7018219 - RIPLEY FAMILY HEALTH CTR	09 - Butler
7018291 - NEW RICHMOND FAMILY HLTH C	13 - Clermont
7019003 - CAO OF SCIOTO CO HLTH CL	73 - Scioto
7041069 - MONROE COUNTY CLINIC	56 - Monroe
7051021 - MEDICENT INC	99 - OTHER
7277252 - CHESAPEAKE FAMILY MEDICAL	44 - Lawrence
7277261 - SOUTH POINT MEDICAL CTR	44 - Lawrence

Practice 2

Create an ad hoc report using the Claims Analysis universe that shows basic claim information for paid, Fee For Service (FFS), inpatient claims for the first quarter of 2009.

Note: You are going to use this report as a base for the next topic.

Wizard

- 1) Click **New** on the **Standard** toolbar.
- 2) Select **Generate a standard report**.
- 3) Click **Begin**.
- 4) Select **Universe**.
- 5) Click **Next**.
- 6) Select **Claims Analysis** in the **Available Universes** list.
- 7) Click **Finish**.

Classes and Objects/Result Objects Pane

- 8) Expand **Detailed Claim Information**.
- 9) Add this object:
 - o **ICN**
- 10) Scroll down and expand **Provider Specific Information** and then expand **Billing Provider**.
- 11) Add this object:
 - o **Billing Provider Medicaid ID & Name**
- 12) Scroll down and expand **Recipient Specific Information**.
- 13) Add these objects:
 - o **Recipient ID**
 - o **Recipient Full Name**
 - o **Recipient Age**
- 14) Scroll up and expand **Claim Dates**.
- 15) Add these objects:

- **From Date of Service**
 - **To Date of Service**
 - **Payment Date**
- 16) Scroll down and expand **Diagnosis Code Information**.
- 17) Add this object:
- **Primary Diagnosis Code & Desc**
- 18) Scroll down and expand **Header Paid Claims ONLY Information** and then expand **ICD-9 Procedure Code Info**.
- 19) Add this object:
- **ICD-9 Procedure Code 1 & Desc**
- 20) Scroll up and expand **Claim Amounts and Counts** and then expand **Amounts**.
- 21) Add these objects:
- **Billed Amount**
 - **Allowed Amount**
 - **Reimbursed Amount**

Classes and Objects/Conditions Pane

- 22) Add this condition:
- **Allowed Amount Greater than 100**
- 23) Scroll down and expand **General Claim Information**.
- 24) Add this condition to the **Conditions** pane:
- **Claim Type Code Equal to I**
- 25) Select the **Filters** radio button.
- 26) Expand **Detailed Claim Information** and then expand **Claim Indicators**.
- 27) Add these filters:
- **Fee for Service Only**
 - **Claim Header Status – Paid**
 - **Latest Claims Only**
- 28) Expand **Claim Dates**.
- 29) Add this filter:
- **Payment Date Range**
- 30) Scroll down and expand **Provider Specific Information** and then expand **Billing Provider**.
- 31) Add this filter:
- **Billing Provider Medicaid ID – ALL – LIST**

32) Compare your Query panel with this image:

The screenshot shows a query panel with two main sections: Result Objects and Conditions.

Result Objects:

- ICN
- Billing Provider Medicaid ID & Name
- Recipient ID
- Recipient Full Name
- Recipient Age
- From Date Of Service
- To Date Of Service
- Payment Date
- Primary Diagnosis Code & Desc
- ICD-9 Procedure Code 1 & Desc
- Billed Amount
- Allowed Amount
- Reimbursed Amount

Conditions:

- Allowed Amount Greater than 100
- And Claim Type Code Equal to 'I'
- And Fee For Service Only
- And Claim Header Status - Paid
- And Latest Claims Only
- And Payment Date Range
- And Billing Provider Medicaid ID - ALL - LIST

33) Click **Run**.

Prompts Window

34) Type this information in the fields:

- o Billing Provider Medicaid ID or % for ALL: **2354945**
- o Payment Date Begin (MM/DD/YYYY): **01/01/2009**
- o Payment Date End (MM/DD/YYYY): **03/31/2009**

35) Click **OK**.

Report Window

36) After the report displays, compare your results at a high level with the image at the end of this exercise.

37) Select **Save As** in the **File** menu.

38) Name the report "**Ad Hoc 2**" and save the file to the **userDocs** folder on your computer.

39) Keep the report open for the next topic.

ECN	Billing Provider	Recipient ID	Recipient Full N.	Recipient Age	From Date Of Sr	To Date Of Serv	Payment Date	Primary Diagno	RTD Procedure	Billed Amount	Allowed Amount	Reimbursed Am
400030102867	2354846-MERC	051767772100	MAHES, JOYA		44-04/13/2007	04/14/2007	01/22/2009	4310-Abignatt	****	\$4,558.00	\$2,829.47	\$2,829.47
400030102741	2354846-MERC	054702041000	SHUSTER, SICH		29-03/12/2007	03/17/2007	01/22/2009	0541-Intestib	4010-Sm Bowel	\$17,751.00	\$3,024.34	\$3,024.34
400030103111	2354846-MERC	054702041000	SHUSTER, SICH		29-03/15/2007	03/25/2007	01/22/2009	0989-Urethral	0586-Urethral Dis	\$13,873.02	\$4,492.78	\$4,492.78
400030104347	2354846-MERC	051006731100	KELLE, BRACIA		49-03/22/2007	03/27/2007	02/18/2009	95102-Poisoning	3722-Left Heart	\$42,529.00	\$16,356.24	\$16,356.24
4000302120063	2354846-MERC	054206531200	PLANTE, NICOLE		61-04/21/2007	04/25/2007	03/04/2009	48121-Obs chr b	****	\$5,358.00	\$3,105.57	\$3,105.57
4000302120064	2354846-MERC	054206531200	PLANTE, NICOLE		61-03/27/2006	03/30/2006	03/04/2009	48121-Obs chr b	****	\$3,184.00	\$3,116.95	\$3,116.95
4000301054719	2354846-MERC	051272742000	DONERS, GALV		0-09/10/2000	09/11/2000	01/07/2009	13300-Single lb	****	\$1,376.00	\$995.51	\$995.51
4000301054720	2354846-MERC	051169280000	MATTON, DEAN		64-09/19/2000	09/25/2000	01/07/2009	4359-Trans care	3812-Hosp & Ho	\$42,304.00	\$6,253.11	\$6,253.11
4000301054723	2354846-MERC	048796030070	ASHLEY, YIL		36-12/15/2000	12/16/2000	01/07/2009	73029-Danzolo	****	\$3,310.00	\$2,857.31	\$2,857.31

Summary

In this topic, you learned how to create an ad hoc report using the New Report Wizard.

Formatting a Report

Overview

In this topic, you learn how to format a report by using a variety of formatting techniques.

Many formatting options are available in Desktop Intelligence. In this training, you are going to use these formatting techniques:

- Edit, move, and resize a report title
- Change font style, size, and color
- Wrap and align text
- Modify a numeric style
- Resize a row and column

Who

TBD

When

You can format a report any time after the report is open in the Report window; however, it is often helpful to format a report after you have finalized the data layout.

Relevance

Formatting a report can make your data more readable and provide a polished look. This is helpful when you analyze data and share reports with other users.

Requirements

To complete this topic, you must be familiar with these Windows formatting techniques:

- Using the **Shift** key to select multiple items next to each other
- Using the **Ctrl** key to select noncontiguous items

Guidelines

You can use the menu bar, right-click option, or Formatting toolbar to apply formatting to a report.

In this training, you are going to use the Formatting toolbar and right-click option; however, feel free to experiment with menu formatting options as well.

Use the **Shift** or **Ctrl** key to select more than one cell at a time.

How To

Follow these steps from the Report window to format a report:

Step	Action														
1	Display the desired report.														
2	Apply the desired formatting by following these steps: <table border="1" data-bbox="371 590 1373 1766"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Edit the report title</td> <td> a. Double-click the title cell. b. Type a new title. c. Click anywhere outside the cell to stop edit mode. </td> </tr> <tr> <td>Move and resize the report title</td> <td> a. Select the title cell. b. Drag and resize the title cell so the text is centered above the width of your report. </td> </tr> <tr> <td>Change font style, size, and color</td> <td> a. Select the desired cell(s). b. Click the desired formatting button(s) on the Formatting toolbar. </td> </tr> <tr> <td>Wrap and align text</td> <td> a. Right-click the desired cell(s) and select Format Cell from the list. b. Click the Alignment tab. c. Select Wrap Text in the Settings section. d. Select the desired options in the Horizontal and Vertical sections. e. Click OK. </td> </tr> <tr> <td>Modify a numeric style</td> <td> a. Right-click anywhere below the header in the column that contains the desired measure object. b. Select Format Cell. c. Click the Number tab. d. Select the desired category and format. e. Click OK. </td> </tr> <tr> <td>Resize a column or row</td> <td> a. Rest your mouse pointer between the column or row you want to resize and the column/row next to it, so the pointer becomes a double-headed arrow. b. Either drag or double-click to resize the column/row. Note: When you double-click, the column to the left of the mouse pointer, or the row above the mouse pointer, automatically resizes to match the width of the widest text in the column/row. </td> </tr> </tbody> </table>	TO:	THEN:	Edit the report title	a. Double-click the title cell. b. Type a new title. c. Click anywhere outside the cell to stop edit mode.	Move and resize the report title	a. Select the title cell. b. Drag and resize the title cell so the text is centered above the width of your report.	Change font style, size, and color	a. Select the desired cell(s). b. Click the desired formatting button(s) on the Formatting toolbar.	Wrap and align text	a. Right-click the desired cell(s) and select Format Cell from the list. b. Click the Alignment tab. c. Select Wrap Text in the Settings section. d. Select the desired options in the Horizontal and Vertical sections. e. Click OK .	Modify a numeric style	a. Right-click anywhere below the header in the column that contains the desired measure object. b. Select Format Cell . c. Click the Number tab. d. Select the desired category and format. e. Click OK .	Resize a column or row	a. Rest your mouse pointer between the column or row you want to resize and the column/row next to it, so the pointer becomes a double-headed arrow. b. Either drag or double-click to resize the column/row. Note: When you double-click , the column to the left of the mouse pointer, or the row above the mouse pointer, automatically resizes to match the width of the widest text in the column/row.
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Edit the report title	a. Double-click the title cell. b. Type a new title. c. Click anywhere outside the cell to stop edit mode.														
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Success

You have successfully completed this task when you have used these formatting techniques:

- Edit, move, and resize a report title
- Change font style, size, and color
- Wrap and align text
- Modify a numeric style
- Resize a row and column

Practice

Format a report using this information:

Edit, Move, and Resize Report Title

- 1) With the **Ad Hoc 2** report open from the previous topic, double-click the title cell.
- 2) Type a title of your choice.
- 3) Click anywhere outside the cell.
- 4) Select the title cell.
- 5) Drag and resize the cell so the text is centered above the width of your report.

Change Font Style, Size, and Color

- 6) Use the **Shift** key to select all of the column headings.
- 7) Click the desired formatting button(s) on the **Formatting** toolbar.
- 8) Click anywhere outside the cells to see the changes.

Wrap Headings

- 9) Use the **Shift** key to select all of the column headings.
- 10) Right-click one of the headings and select **Format Cell** from the list.
- 11) Click the **Alignment** tab.
- 12) Select **Wrap Text** in the **Settings** section.
- 13) Select **Top** in the **Vertical** section.
- 14) Click **OK**.

Align Text

- 15) Use the **Shift** key to select all of the column headings.
- 16) Click an alignment button of your choice on the **Formatting** toolbar.
- 17) Click anywhere outside the cells to see the alignment change.

Change Number Format

- 18) Use the **Shift** key to select all of the measure columns.
- 19) Right-click one of the columns below the header and select **Format Cell** from the list.
- 20) Click the **Number** tab.
- 21) Select a category and format of your choice.
- 22) Click **OK**.

Resize Heading Row and Columns

- 23) Rest your mouse pointer between the heading row and first data row.
- 24) Double-click to resize the heading row.
- 25) Rest your mouse pointer between the **Billing Provider Medicaid ID and Name** and **Recipient ID** columns.
- 26) Drag to resize the **Billing Provider Medicaid ID and Name** column.
- 27) Resize other columns as desired.
- 28) Save the changes and keep the report open for the next topic.

Summary

In this topic, you learned how to format a report using a variety of formatting techniques.

Sorting Data

Overview

In this topic, you learn how to sort data in a report.

You can sort data in ascending, descending, or custom order. By default, rows are sorted in ascending order. A custom sort lets you reorder data in a non-alphabetical fashion, such as sorting the months of the year in chronological order.

Who

TBD

When

It is helpful to sort data when you want to locate information in a report more easily or when a hierarchical structure will help you to analyze data.

Relevance

Sorting data allows you to locate information in a report more quickly, and can help you to analyze data more efficiently by viewing results in a hierarchical fashion.

Guidelines

There are several ways to sort data in a report. In this training, you learn how to sort data using the Report toolbar and Slice and Dice panel.

When you use the Slice and Dice panel, you can see the order of the sorts from the number on the right side of the Sort icon in the block structure. This shows you what column you sorted first, second, third, and so on.

Click the drop-down arrow next to the Insert Sort button to access these options:

- Apply Ascending Sort
- Apply Descending Sort
- Custom Sort



Although it may seem strange, you click the **Insert Sort** button to both add **and remove** sorts.

How To

Follow these steps from the Report window to sort data:

Step	Action										
1	Display the desired report.										
2	<p>Specify the desired sort options using the Report toolbar by following these steps:</p> <table border="1"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Apply a descending sort</td> <td> a. Click anywhere below the header in the column you want to sort. b. Click Apply Descending Sort. </td> </tr> <tr> <td>Apply an ascending sort</td> <td> a. Click anywhere below the header in the column you want to sort. b. Click Apply Ascending Sort. </td> </tr> <tr> <td>Remove a sort</td> <td> a. Click anywhere below the header in the column for which you want to remove a sort. b. Click Insert Sort. Note: The Insert Sort button changes from being active to inactive. </td> </tr> <tr> <td>Apply a custom sort</td> <td> a. Click anywhere below the header in the column you want to sort. b. Click Custom Sort. c. Either drag and drop values, use the Move Up and Move Down buttons, or select a value in the Sort Option list as desired. d. Click OK. </td> </tr> </tbody> </table>	TO:	THEN:	Apply a descending sort	a. Click anywhere below the header in the column you want to sort. b. Click Apply Descending Sort .	Apply an ascending sort	a. Click anywhere below the header in the column you want to sort. b. Click Apply Ascending Sort .	Remove a sort	a. Click anywhere below the header in the column for which you want to remove a sort. b. Click Insert Sort . Note: The Insert Sort button changes from being active to inactive.	Apply a custom sort	a. Click anywhere below the header in the column you want to sort. b. Click Custom Sort . c. Either drag and drop values, use the Move Up and Move Down buttons, or select a value in the Sort Option list as desired. d. Click OK .
TO:	THEN:										
Apply a descending sort	a. Click anywhere below the header in the column you want to sort. b. Click Apply Descending Sort .										
Apply an ascending sort	a. Click anywhere below the header in the column you want to sort. b. Click Apply Ascending Sort .										
Remove a sort	a. Click anywhere below the header in the column for which you want to remove a sort. b. Click Insert Sort . Note: The Insert Sort button changes from being active to inactive.										
Apply a custom sort	a. Click anywhere below the header in the column you want to sort. b. Click Custom Sort . c. Either drag and drop values, use the Move Up and Move Down buttons, or select a value in the Sort Option list as desired. d. Click OK .										
3	<p>Specify the desired sort options using the Slice and Dice panel by following these steps:</p> <ol style="list-style-type: none"> Click anywhere below the header in the column you want to sort. Click Slice and Dice on the Standard toolbar. Click Apply Sort. If desired, double-click the Sort icon to change the sort type. Note: The Sort icon displays A Z for ascending and Z A for descending. Double-click the Sort icon to toggle from ascending to descending. To sort additional objects, click each object as desired and then click Apply Sort. Click Apply. Close the Slice and Dice panel. 										



The Sorts window displays all of the objects to which a sort has been applied. You can change the order of the sorts by moving them up or down the list to place them in any order. You can also add, remove, and invert sorts in the window.

Sometimes it is difficult to remove multiple sorts using only the Report toolbar because you may need to remove the sorts in a specific order. As an alternative, you can use the Sorts window.

To open the Sorts window, click anywhere in the table block and select **Sorts** in the **Format** menu.

Success

You have successfully completed this task when you have applied sorts as desired.

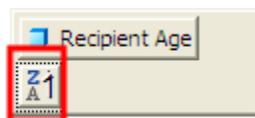
Practice

Sort data in a report using this information:

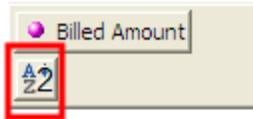
- 1) With the **Ad Hoc 2** report open from the previous topic, click anywhere below the header in the **Billed Amount** column.
- 2) Click **Apply Ascending Sort**.
- 3) To remove the sort, click **Insert Sort**.
- 4) To apply a custom sort:
 - a) Click anywhere below the header in the **Primary Diagnosis Code & Desc** column.
 - b) Click **Custom Sort**.
 - c) Move code **1231** to the top of the list.
 - d) Click **OK**.
- 5) To remove the sort, click **Insert Sort**.
- 6) To apply sorts using the **Slice and Dice** panel, follow these steps:
 - a) Click anywhere below the header in the **Recipient Age** column.
 - b) Click **Slice and Dice** on the **Standard** toolbar.
 - c) Click **Apply Sort**.



- d) Double-click the **Sort** icon to change the sort to descending order.



- e) To apply a second sort, select **Billed Amount**.
- f) Click **Apply Sort**.



- g) Click **Apply**.
- h) Close the Slice and Dice panel.

7) Save the changes and close the report.

Summary

In this topic, you learned how to sort data in a report.

Applying a Section Break

Overview

In this topic, you learn how to group data in a report by applying a section break. A section break eliminates repeated values for a column by organizing data into subgroups based on the value you select.

For example, you could group a report by the **Claim Type Code & Description** object.

There are several ways to apply a section break. In this training, you learn to apply the method that allows the grouped value to display as a header outside of the report block, which makes navigating to the sections quick and easy.

Who

TBD

When

It is helpful to apply a section break to a report when turning repeated values into subgroups will help you to analyze data for your job.

Relevance

Applying a section break helps you to view, locate, and analyze data more efficiently by organizing common values into subgroups. You can also add a total for each subgroup quickly and easily to enhance your analysis further.

Requirements

To apply a section break, a report must have repeated values for a dimension or detail object in at least one column. You cannot apply a section break based on a measure object.

How To

Follow these steps from the Report window to apply a section break:

Step	Action
1	Click anywhere below the header in the column that contains repeated values for which you want to apply a section break.
2	Click Set as Master on the Report toolbar.



You can apply more than one section break to a report to add further subgroups for analyzing data.



You can navigate to any group in a report by clicking the **Map** tab in the **Report Manager** and then selecting the group you want.

Success

You have successfully completed this task when a section break displays in a report.

Practice

Apply two section breaks using this information:

- 1) Open the **Ad Hoc Summary** report from the **userDocs** folder.
- 2) Click anywhere below the header in the **FFS/Enc Indicator** column.
- 3) Click **Set as Master** on the **Report** toolbar.
- 4) Click anywhere below the header in the **Claim Type Code & Desc** column.
- 5) Click **Set as Master** on the **Report** toolbar.
- 6) Compare your results at a high level with the image at the end of this exercise.
- 7) Save the report as "**Ad Hoc Summary Section Breaks**" and close the report.

E

M - CMS 1500 CLAIMS

Claim Header Status Code & Desc	Claim Detail Status Code & Desc	Billing Provider Type Code & Desc	Recipient Undup Count
P - Paid	P - Paid	12 - Federally Qualified Health Center	1
P - Paid	P - Paid	20 - Physician/Osteopath Individual	108
P - Paid	P - Paid	21 - Physician/Osteopath Group	6
P - Paid	P - Paid	35 - Optometrist Individual	2
P - Paid	P - Paid	39 - Physical Therapist Individual	1
P - Paid	P - Paid	50 - Clinic	2
P - Paid	P - Paid	60 - MC Home Health Agency	4

Summary

In this topic, you learned how to apply a section break.

Outlining Data

Overview

In this topic, you learn how to outline data in a report. Outlining data lets you hide the details of a report temporarily so you only see the group headers and summary figures. This is especially useful for large reports that contain a lot of information. This way, you can scroll through a report more easily.

When you find a group you want to view in more detail, you can expand the outline view to see the details for that particular group.



Hiding the details of a report is also known as **folding** the data.

Who

TBD

When

You can outline data in a report when the report contains at least one section break.

Outlining data is helpful when you want to hide and expand details to make analyzing data easier.

Relevance

An outline view of a report gives you the flexibility to show only the headings of groups or expand one or more groups to view the details. This makes it easier to locate and analyze data, thus improving time and efficiency.

Requirements

To outline data, a report must have at least one section break.

You must be familiar with section breaks before completing this topic.

How To

Follow these steps from the Report window to outline data:

Step	Action
1	Display the desired report.
2	Select Outline in the View menu. Note: An outline view displays with twisties (arrows) next to each header, and a number at the bottom of the outline for each section in the report. For example, if there is one section, a 1 displays; if there are two sections, a 2 displays. The numbers and twisties act as toggle buttons to hide and view details.
3	Click the desired number(s) to hide/view the details of the corresponding section(s).
4	Click the twistie for the desired heading(s) to hide/view details for the group(s).

Success

You have successfully completed this task when you have outlined data in a report.

Practice

Outline data using this information:

- 1) Open the **Create Outline** report from the **userDocs** folder.
- 2) Select **Outline** in the **View** menu.
- 3) Experiment with the outline feature by clicking **2** and then clicking **1**.
- 4) Compare your results at a high level with the images at the end of this exercise.
- 5) Save the report as "**Outline**" and close the file.

Outline Expanded

0388 - Septicemia NEC			
740719871278			
ICN	Recipient Full Name	Recipient Age	From Date Of Service
4009030055549	HARTZELL, KRISTIAN	31	01/19/2009
0389 - Septicemia NOS			
850216180266			
ICN	Recipient Full Name	Recipient Age	From Date Of Service
4009036058871	VARELA, CLYDE	62	01/26/2009
854137515566			
ICN	Recipient Full Name	Recipient Age	From Date Of Service

Outline Collapsed

▷	0388 - Septicemia NEC
▷	0389 - Septicemia NOS
▷	042 - Human immuno virus dis
▷	0499 - Viral encephalitis NOS

Summary

In this topic, you learned how to outline data.

Creating and Modifying a Chart

Overview

In this topic, you learn how to create and modify a chart based on an existing table block.

You can convert a table or crosstab to a variety of chart types to display your data graphically, and can apply many formatting options.

Who

TBD

When

You can create a chart when the report contains at least one measure object. It is helpful to create a chart when you want a visual representation of the data to assist in your data analysis.

Relevance

Creating a chart lets you analyze data quickly at a high level through a visual representation of the information. This can help you to notice problem areas and trends more easily for further study.

Requirements

To create a chart, a report must contain at least one measure object.

How To

Follow these steps from the Report window to create and modify a chart:

Step	Action
1	Display the desired report.
2	Right-click anywhere in the table block and select Turn to Chart .
3	Select the desired chart type and style. Note: The chart type and style that lend themselves the best to the block structure are selected by default.
4	Click OK .
5	Modify the chart as desired by following these steps:

Step	Action						
	<table border="1"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Resize the chart</td> <td> a. Select the chart image. b. Drag the sizing handles as desired. Note: Make sure the whole chart image is selected and not just pieces of the chart or the surrounding area. The sizing handles should surround the whole chart image. When you resize the chart, the rest of the chart objects should automatically resize at the same time in proportion. </td> </tr> <tr> <td>Format the chart</td> <td> a. Right-click the desired area of the chart. b. Select the desired formatting option. Note: The formatting options are context-sensitive, so each area of the chart you right-click provides a different menu. c. Modify the formatting as desired. d. Click OK. e. Repeat Steps a through d as desired. </td> </tr> </tbody> </table>	TO:	THEN:	Resize the chart	a. Select the chart image. b. Drag the sizing handles as desired. Note: Make sure the whole chart image is selected and not just pieces of the chart or the surrounding area. The sizing handles should surround the whole chart image. When you resize the chart, the rest of the chart objects should automatically resize at the same time in proportion.	Format the chart	a. Right-click the desired area of the chart. b. Select the desired formatting option. Note: The formatting options are context-sensitive, so each area of the chart you right-click provides a different menu. c. Modify the formatting as desired. d. Click OK . e. Repeat Steps a through d as desired.
TO:	THEN:						
Resize the chart	a. Select the chart image. b. Drag the sizing handles as desired. Note: Make sure the whole chart image is selected and not just pieces of the chart or the surrounding area. The sizing handles should surround the whole chart image. When you resize the chart, the rest of the chart objects should automatically resize at the same time in proportion.						
Format the chart	a. Right-click the desired area of the chart. b. Select the desired formatting option. Note: The formatting options are context-sensitive, so each area of the chart you right-click provides a different menu. c. Modify the formatting as desired. d. Click OK . e. Repeat Steps a through d as desired.						

Success

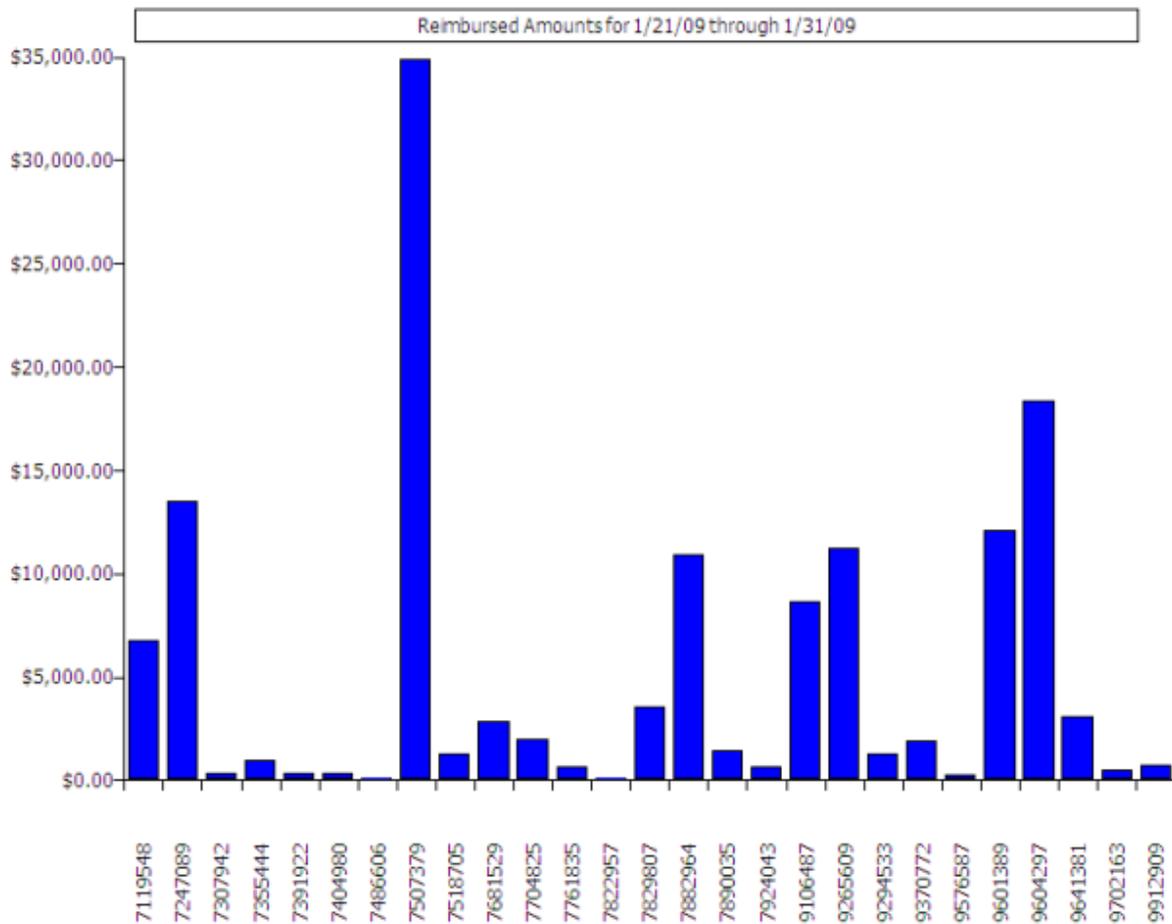
You have successfully completed this task when you have created a chart and modified it as desired.

Practice

Create and modify a chart using this information:

- 1) Open the **Create a Chart** report from the **userDocs** folder.
- 2) Right-click anywhere in the table block and select **Turn to Chart**.
- 3) Select **Column** in the **Chart Types** section.
- 4) Select the **second chart style** from the left in the **Styles for Selected Chart Type** section.
- 5) Resize the chart to approximately six inches wide by five inches tall.
- 6) Add a title to the chart by following these steps:
 - a) Right-click a blank area of the chart and select **Format Chart** from the list.
 - b) In the **Name** field of the **General** tab, type a title of your choice.
 - c) Select **Title** in the **Show** section.
 - d) Click **OK**.
- 7) Change the color of the data series by following these steps:
 - a) Right-click the data series and select **Format Data Series** from the list.
 - b) In the **Fill** section, change the **Foreground Color** to a color of your choice.
 - c) Click **OK**.

- 8) Compare your results at a high level with the image at the end of this exercise.
- 9) Save the report as "**Chart**" and close the file.



Summary

In this topic, you learned how to create and modify a chart.

Creating a Crosstab

Overview

In this topic, you learn how to create a crosstab based on an existing table block. A crosstab looks similar to an Excel spreadsheet with data presented in cells and cross-referenced by headings on the vertical and horizontal axes.

For example, this crosstab shows billing providers on the left, the payment date at the top, and the reimbursed amount at the intersection of those axes:

	01/07/2009
7499567 - TUSCAN INC	\$9.28
7301386 - MEIJER PHARMACY #102	\$44.95
9815863 - FAMILY MEDICINE CARE LLC	\$67.47
9017305 - RADIOLOGY PHYSICIANS INC	\$93.04
9149477 - BEAVERCREEK DERMATOLOGY, LLC	\$161.21
7297178 - PEDIATRIC ASSOC OF DAYTON INC	\$217.48
7164150 - DAYTON PEDIATRIC IMAGING	\$275.18
7604666 - HARRISON TOWNSHIP FIRE DEPT	\$307.50
9857961 - PROVIDENCE MEDICAL GROUP INC	\$381.69
9793137 - TROTWOOD FIRE & RESCUE	\$395.54
9622115 - ORTHOPAEDIC CNTR FOR SPINAL	\$807.66
7481110 - WRIGHT STATE PHYSICIANS	\$1,004.58
9176849 - DAYTON PHYSICIANS LLC	\$3,505.60

Who

TBD

When

It is helpful to create a crosstab when turning repeated values into a cross-referenced layout will help you to analyze data for your job.

Relevance

When a report contains repeated column values, you can make the data easier to read and analyze by changing the format to a crosstab to eliminate the repetition.

Requirements

To create a crosstab, a report must have repeated values in at least one column.

How To

Follow these steps from the Report window to create a crosstab:

Step	Action
1	Display the desired report.
2	Click anywhere in the table block.
3	Select Table in the Format menu.
4	Click the Pivot tab.
5	Drag the desired objects into the appropriate folders in the Used Variables section.
6	Click OK .
7	If desired, apply one or more section breaks to enhance the crosstab.

Success

You have successfully completed this task when you have created a crosstab.

Practice

Create a crosstab using this information:

- 1) Open the **Create a Crosstab** report from the **userDocs** folder.
- 2) Click anywhere in the table block.
- 3) Select **Table** in the **Format** menu.
- 4) Click the **Pivot** tab.
- 5) Update the **Used Variables** section by following these steps:
 - a) Drag the **Billing Provider Medicaid ID & Name** object to the **Columns** folder.
 - b) Drag the **Payment Date** object to the **Rows** folder.
 - c) Click **OK**.
- 6) Follow these steps to create a section break by payment month:
 - a) Click anywhere below the header in the **Payment Month** column.
 - b) Click **Set as Master** on the **Report** toolbar.
- 7) Follow these steps to change the formatting of the **Payment Month** object:
 - a) Right-click the **Payment Month** object and select **Format Cell**.
 - b) Click the **Number** tab.
 - c) Select **Number** in the **Category** section.
 - d) Select **0** (zero) in the **Format** section.
 - e) Click **OK**.
- 8) Compare your results at a high level with the image at the end of this exercise.

9) Save the report as "**Crosstab**" and close the file.

	01/07/2009	01/14/2009	01/22/2009	01/28/2009
7049007 - VALLEY PATHOLOGISTS INC	\$0.00	\$0.00	\$88.07	\$0.00
7066677 - BRUCE BLAND BANIAS MD LLC	\$0.00	\$1,395.39	\$0.00	\$466.56
7164150 - DAYTON PEDIATRIC IMAGING	\$275.18	\$254.78	\$406.20	\$20.08
7265587 - DAYTON CTR FOR NEURO DISORDERS	\$0.00	\$0.00	\$0.00	\$79.90
7297178 - PEDIATRIC ASSOC OF DAYTON INC	\$217.48	\$857.99	\$89.33	\$0.00
7301386 - MEIJER PHARMACY #102	\$44.95	\$0.00	\$0.00	\$0.00
7336723 - ADVANCED DERMATOLOGY	\$0.00	\$74.12	\$0.00	\$0.00
7371364 - DAYTON HEAD & NECK SURGEONS	\$0.00	\$75.23	\$54.03	\$0.00
7481110 - WRIGHT STATE PHYSICIANS	\$1,004.58	\$2,176.36	\$2,983.77	\$312.31

Summary

In this topic, you learned how to create a crosstab.

Adding a Rank

Overview

In this topic, you learn how to add a rank. A rank lets you view the largest or smallest numbers in a report, and hides the rest of the data.

For example, you could apply a rank to show the top five billing providers for anesthesiology based on the total claim reimbursed amount for a specific year.



For your convenience and future reference, the **How To** table also provides information on how to modify and remove a rank.

Who

TBD

When

It is helpful to add a rank to a report when you want to view top or bottom values based on at least one measure to aid in data analysis.

Relevance

Adding a rank lets you show only the extreme ranges of your data and hides the rest. This can help you to research problem areas and trends more easily by having a good starting point from which to base further analysis.

Requirements

To add a rank, a report must have at least one measure object on which to base the rank.

Guidelines

A rank lets you view the **top or bottom three or more** results for a particular dimension based on a specific measure. It is good practice to begin in the column that contains the dimension you want to rank.

How To

Follow these steps from the Report window to add, modify, and remove a rank:

Step	Action						
1	Display the desired report.						
2	Click anywhere below the header in the column for which you want to apply a rank.						
3	Click Apply Ranking on the Report toolbar.						
4	Select the Top or Bottom checkbox as desired.						
5	Change the number as desired.						
6	Change the Based on measure as desired.						
7	Click OK .						
8	Modify and remove a rank as desired by following these steps: <table border="1" data-bbox="371 1010 1377 1486"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Modify a rank</td> <td> a. Click Slice and Dice on the Standard toolbar. b. Double-click the Apply Ranking icon next to the desired object. c. Modify the information as desired. d. Click OK. e. Click Apply. f. Close the Slice and Dice panel. </td> </tr> <tr> <td>Remove a rank</td> <td> a. Click anywhere below the header in the column for which you want to remove a rank, b. Click Apply Ranking on the Report toolbar. Note: The Apply Ranking button changes from being active to inactive. </td> </tr> </tbody> </table>	TO:	THEN:	Modify a rank	a. Click Slice and Dice on the Standard toolbar. b. Double-click the Apply Ranking icon next to the desired object. c. Modify the information as desired. d. Click OK . e. Click Apply . f. Close the Slice and Dice panel.	Remove a rank	a. Click anywhere below the header in the column for which you want to remove a rank, b. Click Apply Ranking on the Report toolbar. Note: The Apply Ranking button changes from being active to inactive.
TO:	THEN:						
Modify a rank	a. Click Slice and Dice on the Standard toolbar. b. Double-click the Apply Ranking icon next to the desired object. c. Modify the information as desired. d. Click OK . e. Click Apply . f. Close the Slice and Dice panel.						
Remove a rank	a. Click anywhere below the header in the column for which you want to remove a rank, b. Click Apply Ranking on the Report toolbar. Note: The Apply Ranking button changes from being active to inactive.						

Success

You have successfully completed this task when you have added, modified, and removed a rank from a report.

Practice

Add a rank that shows the top billing providers in Adams county, based on the reimbursed amount, for the last ten days in January 2009.

- 1) Open the **Add a Rank** report from the **userDocs** folder.
- 2) Click anywhere below the header in the **Billing Provider** column.
- 3) Click **Apply Ranking** on the **Report** toolbar.
- 4) Select the **Top** checkbox.
- 5) Change the **Top** number to a number of your choice.
- 6) Click **OK**.
- 7) Compare your results at a high level with the image at the end of this exercise.
- 8) Save the report as "**Top Rank**" and close the file.

Billing Provider	Reimbursed Amount
7507379	\$34,864.24
9604297	\$18,370.08
7247089	\$13,483.85
9601389	\$12,087.50
9265609	\$11,194.96

Summary

In this topic, you learned how to add a rank.

Adding an Alerter

Overview

In this topic, you learn how to add an alerter. An alerter lets you highlight data in a report through special formatting to draw attention to data that fits certain conditions.

For example, you could add an alerter to shade any monetary amounts over \$50,000 received by a provider for a specific service.



For your convenience and future reference, the **How To** table also provides information on how to modify and remove an alerter.

Who

TBD

When

It is helpful to add an alerter to a report when you want to monitor and explore specific conditions based on at least one measure. This can save you time in reviewing data and performing data analysis.



Importing standard reports from InfoView and adding alerters to the reports is especially helpful for information you want to monitor regularly.

Relevance

Adding an alerter draws attention to data that meets certain conditions in your report. This helps to show trends and exceptions to aid you in data analysis.

Requirements

To add an alerter, a report must have at least one measure object on which to base the alerter.

You must be familiar with basic operator concepts and conditions to create an alerter. For example, it is important to understand the meaning of this statement:

"If the Total Reimbursed Amount is greater than \$100,000 and less than \$150,000 for a provider, then apply light-gray shading with dark-blue text to the Provider ID cell."

For more information about operators, see *Appendix B*.

Guidelines

To apply an alerter, it is good practice to begin in the column that contains the dimension you want to use for the alerter.

There are four main steps to creating an alerter:

- Select the data you want to use
- Name/describe the alerter
- Choose the range of values on which to base the alerter
- Set up how you want the alerter to display in the cells—for example, light-gray shading with dark-blue text

How To

Follow these steps from the Report window to add, modify, and remove an alerter:

Step	Action
1	Display the desired report.
2	Click anywhere below the header in the column for which you want to apply an alerter.
3	Click Alerters on the Report toolbar.
4	Click Add .
5	Type the desired name in the Name field.
6	Type the desired description in the Description field.
7	Click the Conditions tab.
8	Verify that the Variable to Compare field contains the desired variable; otherwise, select the desired variable from the list.
9	Select the desired operator(s), value(s), and result.
10	Click OK to close the Edit Alerters window.
11	Click OK to close the Alerters window.

Step	Action						
12	<p>Modify and remove an alerter as desired by following these steps:</p> <table border="1" data-bbox="375 394 1377 835"> <thead> <tr> <th data-bbox="375 394 727 447">TO:</th> <th data-bbox="727 394 1377 447">THEN:</th> </tr> </thead> <tbody> <tr> <td data-bbox="375 447 727 688">Modify an alerter</td> <td data-bbox="727 447 1377 688"> <ol style="list-style-type: none"> Click anywhere in the table block. Click Alerters on the Report toolbar. Select the desired alerter and click Edit. Modify the information as desired. Click OK to accept the changes and close the Edit Alerters window. Click OK to close the Alerters window. </td> </tr> <tr> <td data-bbox="375 688 727 835">Remove an alerter</td> <td data-bbox="727 688 1377 835"> <ol style="list-style-type: none"> Click anywhere in the table block, Click Alerters on the Report toolbar. Select the desired alerter and click Remove. Click OK. </td> </tr> </tbody> </table>	TO:	THEN:	Modify an alerter	<ol style="list-style-type: none"> Click anywhere in the table block. Click Alerters on the Report toolbar. Select the desired alerter and click Edit. Modify the information as desired. Click OK to accept the changes and close the Edit Alerters window. Click OK to close the Alerters window. 	Remove an alerter	<ol style="list-style-type: none"> Click anywhere in the table block, Click Alerters on the Report toolbar. Select the desired alerter and click Remove. Click OK.
TO:	THEN:						
Modify an alerter	<ol style="list-style-type: none"> Click anywhere in the table block. Click Alerters on the Report toolbar. Select the desired alerter and click Edit. Modify the information as desired. Click OK to accept the changes and close the Edit Alerters window. Click OK to close the Alerters window. 						
Remove an alerter	<ol style="list-style-type: none"> Click anywhere in the table block, Click Alerters on the Report toolbar. Select the desired alerter and click Remove. Click OK. 						

Success

You have successfully completed this task when you have added, modified, and removed an alerter from a report.

Practice

Add an alerter using this information:

- Open the **Ad Hoc 2** report from the **userDocs** folder.
- Click anywhere below the header in the **Reimbursed Amount** column.
- Click **Alerters** on the **Report** toolbar.
- Click **Add**.
- Type "**Reimbursed Amount Greater Than 12,000**" in the **Name** field of the **Definition** tab.
- Type "**Highlight reimbursed amounts greater than \$12,000**" in the **Description** field.
- Click the **Conditions** tab.
- Select **>** (greater than) in the **Operator 1** drop-down list.
- Type **12000.00** in the **Value 1** field.
- Select **None** in the **Operator 2** drop-down list.
- Select **Format** in the **Result** drop-down list.
- Click the **Font** tab.
- Select the **Custom** radio button and choose a color.
- Click **OK** to close the Color window.
- Click the **Shading** tab.
- In the **Background Color** section, select the **Custom** radio button and choose a color.
- Click **OK** to close the **Color** window.
- Click **OK** to close the **Cell Format** window.
- Click **OK** to close the **Edit Alerters** window.

- 20) Click **OK** to close the **Alerters** window.
 21) Click anywhere outside the Reimbursed Amount column to see the results.
 22) Compare your results at a high level with the image at the end of this exercise.
 23) Save the report as "**Alerter**" and keep the file open for the next topic.

Billed Amount	Allowed Amount	Reimbursed Amount
\$3,437.70	\$3,520.18	\$3,520.18
\$13,871.50	\$3,243.28	\$7,050.80
\$43,798.68	\$11,630.01	\$11,630.01
\$38,316.18	\$6,218.25	\$6,218.25
\$15,569.20	\$13,932.61	\$13,932.61
\$40,304.68	\$6,253.11	\$6,253.11
\$55,915.38	\$10,407.97	\$10,407.97
\$14,272.38	\$3,064.83	\$3,064.83
\$18,013.50	\$3,749.56	\$3,749.56
\$18,711.40	\$5,712.19	\$5,712.19
\$32,655.35	\$7,054.17	\$7,054.17
\$32,948.50	\$7,054.17	\$7,054.17
\$6,058.50	\$3,105.57	\$3,105.57
\$8,184.50	\$3,116.95	\$3,116.95
\$15,160.40	\$3,464.72	\$3,464.72
\$18,590.10	\$4,368.34	\$4,368.34
\$13,449.85	\$6,988.72	\$6,988.72
\$23,188.60	\$12,820.59	\$12,820.59
\$56,311.03	\$14,655.91	\$14,655.91

Summary

In this topic, you learned how to add an alerter.

Using Drill-Down Mode

Overview

In this topic, you learn how to use drill-down mode. Drill-down mode lets you analyze data in a report at a more detailed level. You start with a higher-level view and **drill down** to one or more detail-level views.

For example, you could start with a report that shows the top five billing providers based on the Total Claim Paid Amount for a given quarter, and then drill down to more specific information, such as the procedure code and description for each claim.

Who

TBD

When

It is helpful to use drill-down mode when you want to see a high-level view of the data first and be able to drill down to more detailed views. This can save you time in reviewing data and performing data analysis.

Relevance

Using drill-down mode lets you start with higher-level data and progress to more detailed views without having to run separate reports. This helps you to analyze data more quickly and offers an efficient way to capture your data-analysis process through filters that track the various levels of detail as you drill down in a report.

Requirements

To use drill-down mode, a report must have at least one object on which to drill.

Guidelines

When you use drill-down mode, the detail levels are available based on hierarchies the universe designer created when setting up each universe. Therefore, you cannot drill down on all objects--only on objects included in the hierarchy structure as being "drillable."

How To

Follow these steps from the Report window to drill down in a report:

Step	Action
1	Display the desired report.
2	Click anywhere in the table block.
3	Click Drill on the Standard toolbar. Note: Desktop Intelligence inserts a new report tab and displays the same table block in drill mode.
4	Click anywhere in the table block for the new report tab.
5	Select Scope of Analysis in the Analysis menu. Note: The Scope of Analysis window shows all available objects in a hierarchy. You can select one or more objects to include in the scope available for drilling. You can also select filter objects to limit your results.
6	Select the desired classes and objects.
7	Click OK .
8	Right-click the cell on which you want to drill.
9	Point to Drill By and select the desired object. Note: Desktop Intelligence moves the original column data to the top of the Report window and displays the data in a filter drop-down list. The object you chose for drilling replaces the former data in the column.
10	As desired, continue to drill down to the bottom level of data by repeating Steps 8 and 9. Note: When you perform additional drill-downs, a new filter displays each time you drill down.
11	Use the drill filters at the top of the Report window as desired to display the data you want to analyze. Note: To move the filter data to the table block, scroll to the bottom of the filter list and select Move to Block . Desktop Intelligence inserts the data as a new column in the report.
12	To drill back up, follow these steps: a. Right-click the cell on which you want to drill up. b. Point to Drill Up and select the desired object.



Drill Down lets you drill down one level, compared with **Drill By** in which you can choose any available level from the list.

Drill Through is similar to the Scope of Analysis window. The main differences are that with Drill Through, you can only select one object at a time and cannot apply filter objects.

Success

You have successfully completed this task when you have drilled down in a report.

Practice

Drill down in a report to see recipients' Social Security Numbers using this information:

- 1) With the **Alerter** report open from the previous topic, click anywhere in the table block.
- 2) Click **Drill** on the **Standard** toolbar.
- 3) Click anywhere in the table block for the new report tab.
- 4) Select **Scope of Analysis** in the **Analysis** menu.
- 5) Scroll down to **Recipient Specific Information**.
- 6) Select **Recipient SSN**.
- 7) Click **OK**.

Prompts Window

- 8) Type this information in the fields:
 - o Billing Provider Medicaid ID or % for ALL: **2354945**
 - o Payment Date Begin (MM/DD/YYYY): **01/01/2009**
 - o Payment Date End (MM/DD/YYYY): **03/31/2009**
- 9) Click **OK**.

Report Window

- 10) Right-click the first data row in the **Billing Provider Medicaid ID & Name** column.
- 11) Point to **Drill By** and select **Recipient SSN**.
- 12) Compare your results at a high level with the image at the end this exercise.
- 13) Save the report as "**Drill Down**" and close the file.

ICN	Recipient SSN	Recipient ID
4009027081678	830-05-3520	859269783166
4009056095402	830-05-3520	859269783166
4009006191440	408-92-2878	850167091066
4009070084439	996-30-7288	853619282066
4009075115739	487-30-5617	854286076966
4008361094720	286-17-4420	855116828866
4009006191442	770-15-4115	851145187166

Summary

In this topic, you learned how to use drill-down mode.

Inserting Calculations

Overview

In this topic, you learn how to insert these calculations in a report:

- Sum
- Count
- Average
- Subtraction
- Running Total



These calculations are also known as "functions." A function performs a specific operation on one or more values you specify, such as counting how many providers are listed in a report.

Who

TBD

When

It is helpful to insert calculations when you want to perform additional analysis using formulas. The types of calculations you can use are based on the kinds of objects in each report.

For example, you can apply the Insert Sum function to total measure objects and the Insert Count function to total dimension objects.

Requirements

When inserting calculations, it is important to be familiar with these types of objects described in the *Getting Started* topic:

- Measure
- Dimension
- Detail

The kind of calculation you can insert depends on the type of object you are using in the calculation. For example, the Insert Sum function only works with measure objects, while the Insert Count function can be used for dimension, detail, or measure objects.

Relevance

Inserting calculations lets you analyze data beyond using only the built-in objects in each universe. You can obtain totals, averages, and other results quickly and easily.

Guidelines

You can add subtotals to reports with sections breaks through the Insert Sum and Insert Count functions by following the same steps as you would for a report without section breaks. Desktop Intelligence automatically applies the total functions you add to one group in a section to all groups in the section.

How To

Follow these steps from the Report window to insert calculations:

Step	Action										
1	Display the desired report.										
2	<p>Insert the desired calculation(s) by following these steps:</p> <table border="1"> <thead> <tr> <th>TO insert:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>A Sum</td> <td> a. Click anywhere below the header in the column for which you want to insert the sum. b. Click Insert Sum on the Report toolbar. </td> </tr> <tr> <td>A Unique Count, not including duplicates</td> <td> a. Click anywhere below the header in the column for which you want to insert the count. b. Click Insert Count on the Report toolbar. </td> </tr> <tr> <td>A Complete Count, including duplicates</td> <td> a. Right-click anywhere below the header in the column for which you want to insert the count. b. Point to Calculations and select Count All. </td> </tr> <tr> <td>An Average</td> <td> a. Right-click anywhere below the header in the column for which you want to insert the average. b. Point to Calculations and select Average. </td> </tr> </tbody> </table>	TO insert:	THEN:	A Sum	a. Click anywhere below the header in the column for which you want to insert the sum. b. Click Insert Sum on the Report toolbar.	A Unique Count, not including duplicates	a. Click anywhere below the header in the column for which you want to insert the count. b. Click Insert Count on the Report toolbar.	A Complete Count, including duplicates	a. Right-click anywhere below the header in the column for which you want to insert the count. b. Point to Calculations and select Count All .	An Average	a. Right-click anywhere below the header in the column for which you want to insert the average. b. Point to Calculations and select Average .
TO insert:	THEN:										
A Sum	a. Click anywhere below the header in the column for which you want to insert the sum. b. Click Insert Sum on the Report toolbar.										
A Unique Count, not including duplicates	a. Click anywhere below the header in the column for which you want to insert the count. b. Click Insert Count on the Report toolbar.										
A Complete Count, including duplicates	a. Right-click anywhere below the header in the column for which you want to insert the count. b. Point to Calculations and select Count All .										
An Average	a. Right-click anywhere below the header in the column for which you want to insert the average. b. Point to Calculations and select Average .										
3	<p>To prepare for inserting a subtraction, add a column on the far-right by following these steps:</p> <ol style="list-style-type: none"> Click anywhere below the header in the last column of the report. Select Column in the Insert menu. Select Insert a Column to the Right of the Selection. Click OK. Double-click the new column header and type a name for the column. Press Enter on your keyboard. 										

Step	Action
4	Insert a subtraction by following these steps: <ol style="list-style-type: none"> Right-click the first empty cell under the header of the blank column and select Variables. Click Add. Click the Formula tab. In the Variables section, double-click the first object desired for the subtraction calculation. Press the Minus Sign on your keyboard. In the Variables section, double-click the second object desired for the subtraction calculation. Click OK to close the Variable Editor window. Click Insert to close the Variables window and see the formula results in the column.
5	To prepare for inserting a running total, add a column on the far-right by following Step 3 above.
6	Insert a running total by following these steps: <ol style="list-style-type: none"> Right-click the first empty cell under the header of the blank column and select Variables. Click Add. Click the Formula tab. In the Functions section, expand the Aggregates folder. Double-click RunningSum. In the Variables section, double-click the object for which you want to have a running total. Click OK to close the Variable Editor window. Click Insert to close the Variables window and see the formula results in the column.

Success

You have successfully completed this task when you have inserted these calculations in a report:

- Sum
- Count
- Average
- Subtraction
- Running total

Practice

Insert calculations using this information:

- 1) Open the **Insert Calculations** report from the **userDocs** folder.

Sum

- 2) Click anywhere below the header in the **Reimbursed Amount** column.
- 3) Click **Insert Sum** on the **Report** toolbar.

Count

- 4) Click anywhere below the header in the **Billing Provider Medicaid ID & Name** column.
- 5) Click **Insert Count** on the **Report** toolbar.

Average

- 6) Right-click anywhere below the header in the **Billed Amount** column.
- 7) Point to **Calculations** and select **Average** from the list.

Subtraction

- 8) Click anywhere below the header in the last column of the report.
- 9) Select **Column** in the **Insert** menu.
- 10) Select the **Insert a Column to the Right of the Selection** radio button.
- 11) Click **OK**.
- 12) Double-click the new column header and type this name for the column: "**Allowed Minus Billed.**"
- 13) Press **Enter** on your keyboard.
- 14) Right-click the first empty cell under the header of the blank column and select **Variables**.
- 15) Click **Add**.
- 16) Click the **Formula** tab.
- 17) In the **Variables** section, double-click **Allowed Amount**.
- 18) Press the **Minus Sign** on your keyboard.
- 19) In the **Variables** section, double-click **Billed Amount**.
- 20) Click **OK** to close the Variable Editor window.
- 21) Click **Insert** to close the Variables window and see the formula results in the column.

Running Total

- 22) Click anywhere below the header in the last column of the report.
- 23) Select **Column** in the **Insert** menu.
- 24) Select the **Insert a Column to the Right of the Selection** radio button.
- 25) Click **OK**.
- 26) Double-click the new column header and type this name for the column: "**Running Total of Reimbursed Amount by Specialty Code.**"
- 27) Press **Enter** on your keyboard.

- 28) Right-click the first empty cell under the header of the blank column and select **Variables**.
- 29) Click **Add**.
- 30) Click the **Formula** tab.
- 31) In the **Functions** section, expand the **Aggregates** folder.
- 32) Double-click **RunningSum**.
- 33) In the **Variables** section, double-click **Reimbursed Amount**.
- 34) Click **OK** to close the Variable Editor window.
- 35) Click **Insert** to close the Variables window and see the formula results in the column.
- 36) Compare your results at a high level with the image at the end of this exercise.
- 37) Save the report as "**Calculations**" and close the file.

Summary

In this topic, you learned how to insert these calculations in a report:

- Sum
- Count
- Average
- Subtraction
- Running Total

Adding Free-Standing Cells

Overview

In this topic, you learn how to add free-standing cells to a report. Free-standing cells are not attached to other report elements and can be used in a variety of ways, such as for report titles, introductory text for other cells, dates, or to draw attention to specific variables.

Who

TBD

When

It is helpful to add free-standing cells to a report when you want to display information in addition to the available elements or draw attention to specific variables.

Relevance

Adding free-standing cells to a report lets you display information beyond using only the current table block. This gives you increased flexibility to tailor reports to meet your needs.

How To

Follow these steps from the Report window to add free-standing cells to a report:

Step	Action								
1	Display the desired report.								
2	<p>Add free-standing cells by following these steps:</p> <table border="1"> <thead> <tr> <th>TO add:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Text</td> <td> <ol style="list-style-type: none"> Select Cell in the Insert menu. Click where you want the cell to be placed. Type the desired text. Click anywhere outside the cell. Format the cell as desired. </td> </tr> <tr> <td>A special field</td> <td> <ol style="list-style-type: none"> Point to Special Field in the Insert menu. Select the desired option. Click where you want the cell to be placed. Format the cell as desired. </td> </tr> <tr> <td>An existing variable or formula</td> <td> <ol style="list-style-type: none"> Expand the desired folder in the Report Manager Data tab. Drag the desired variable or formula onto the report and release the mouse button where you want to place the cell. Format the cell as desired. </td> </tr> </tbody> </table>	TO add:	THEN:	Text	<ol style="list-style-type: none"> Select Cell in the Insert menu. Click where you want the cell to be placed. Type the desired text. Click anywhere outside the cell. Format the cell as desired. 	A special field	<ol style="list-style-type: none"> Point to Special Field in the Insert menu. Select the desired option. Click where you want the cell to be placed. Format the cell as desired. 	An existing variable or formula	<ol style="list-style-type: none"> Expand the desired folder in the Report Manager Data tab. Drag the desired variable or formula onto the report and release the mouse button where you want to place the cell. Format the cell as desired.
TO add:	THEN:								
Text	<ol style="list-style-type: none"> Select Cell in the Insert menu. Click where you want the cell to be placed. Type the desired text. Click anywhere outside the cell. Format the cell as desired. 								
A special field	<ol style="list-style-type: none"> Point to Special Field in the Insert menu. Select the desired option. Click where you want the cell to be placed. Format the cell as desired. 								
An existing variable or formula	<ol style="list-style-type: none"> Expand the desired folder in the Report Manager Data tab. Drag the desired variable or formula onto the report and release the mouse button where you want to place the cell. Format the cell as desired. 								



You can copy and paste free-standing cells among reports.



Use the **Shift** or **Ctrl** key to select more than one cell at once. This allows you to copy or format multiple cells at the same time.

Success

You have successfully completed this task when your report has been enhanced by displaying information through free-standing cells.

Practice

Add free-standing cells using this information:

- 1) Open the **Add Free-Standing Cells** report from the **userDocs** folder.

Text:

- 2) Select **Cell** in the **Insert** menu.
- 3) Click in the upper-left corner of the report to place the cell.
- 4) Type this text: "**Total Sum of Billed Amount:**," including the colon after "Amount."
- 5) Click anywhere outside the cell.
- 6) Resize the cell as needed and apply formatting to remove the borders.

Variable:

- 7) Drag the **Sum of Billed Amount** object from the **Variables** folder in the **Report Manager Data** tab to the right of the "**Total Sum of Billed Amount:**" cell.
- 8) Resize the object so all of the numbers show.
- 9) Format and align the object as desired.

Special Field/Date and Time:

- 10) In the **Insert** menu, point to **Special Field** and then point to **Date and Time**.
- 11) Select **Last Refresh**.
- 12) Click in the upper-right corner of the report to place the Last Refresh field.
- 13) Add this text to the left of the field: "**Last Refresh:**," including the colon after "Refresh."
- 14) Format and align both cells as desired.
- 15) Make sure both cells are **deselected** before moving to the next step.

Special Field/Query Prompt:

- 16) In the **Insert** menu, point to **Special Field** and then point to **Query Prompt**.
- 17) Select **Payment Date Begin (MM/DD/YYYY)**.
- 18) Click **OK**.
- 19) Click in a blank area towards the top-center of the report to place the Query Prompt field.
- 20) Add this text cell to the left of the field: "**Beginning Payment Date:**," including the colon after "Date."
- 21) Format and align both cells as desired.
- 22) Make sure both cells are **deselected** before moving to the next step.
- 23) In the **Insert** menu, point to **Special Field** and then point to **Query Prompt**.
- 24) Select **Payment Date End (MM/DD/YYYY)**.
- 25) Click **OK**.
- 26) Click in a blank area towards the top-center of the report to place the Query Prompt field.
- 27) Add this text cell to the left of the field: "**Ending Payment Date:**," including the colon after "Date."
- 28) Format and align both cells as desired.
- 29) Compare your results at a high level with the image at the end of this exercise.

30) Save the report as “**Free-Standing Cells**” and close the file.

Total Sum of Billed Amount: \$725,685,254.69

Beginning Payment Date: 03/01/2009

Last Refresh: 6/9/2010

Ending Payment Date: 03/31/2009

E

M - CMS 1500 CLAIMS

Claim Header Status Code & Desc	Claim Detail Status Code & Desc	Billing Provider Type Code & Desc	Recipient Undup Count	Sum Of Allowed Amount	Sum Of Billed Amount	Sum Of Reimbursed Amount	Sum Of Total Claim Count
P - Paid	P - Paid	12 - Federally Qualified Health Center	1	\$78.96	\$78.96	\$0.00	5
P - Paid	P - Paid	20 - Physician/Osteopath Individual	108	\$29,463.32	\$29,463.32	\$0.00	330
P - Paid	P - Paid	21 - Physician/Osteopath Group	6	\$424.25	\$424.25	\$0.00	43
P - Paid	P - Paid	35 - Optometrist Individual	2	\$269.80	\$269.80	\$0.00	12

Summary

In this topic, you learned how to add free-standing cells to a report.

Importing a Report from the Repository

Overview

In this topic, you learn how to import a report from the BusinessObjects repository. The repository gives you access to the same standard and personal reports you see in InfoView.

Who

TBD

When

It is helpful to import a report from the BusinessObjects repository when you want to use a standard report as a base and add, edit, or remove information instead of creating a brand new an ad hoc report.

Relevance

Importing and modifying a report from the BusinessObjects repository can save time and increase efficiency without having to create a new ad hoc report. This is especially helpful if there are complex formulas in the standard report that match what you are seeking or if the report's layout is similar to what you need.

How To

Follow these steps from the main Desktop Intelligence window to import a report from the BusinessObjects repository:

Step	Action
1	Select Import from Repository in the File menu.
2	Select the desired folder in the Browse Folders pane.
3	Select the desired report(s). Note: Use the Shift key to select reports next to each other and the Ctrl key to select noncontiguous reports.
4	Click Retrieve . Note: The report(s) download to the userDocs folder.
5	Click OK to close the successful-import message.
6	Click Close .

Step	Action
7	Open and modify the report(s) as desired.

Success

You have successfully completed this task when you have imported a report from the BusinessObjects repository.

Practice

Import a report from the BusinessObjects repository using this information:

- 1) Select **Import from Repository** in the **File** menu.
- 2) Select a folder of your choice in the **Browse Folders** pane.
- 3) Select a report of your choice.
- 4) Click **Retrieve**.
- 5) Click **OK** to close the successful-import message.
- 6) Click **Close**.
- 7) From the **userDocs** folder, open the report you downloaded.
- 8) Close the report.

Summary

In this topic, you learned how to import a report from the BusinessObjects repository.

Exporting Data

Overview

In this topic, you learn how to export data from Desktop Intelligence to another application on your computer.

Who

TBD

When

It is helpful to export data when you want to analyze information using another file format, or when you want to share reports with users who do not have access to Desktop Intelligence.



You can export data to these file types:

- Text Files (*.asc; *.prn; *.txt; *.csv)
- Microsoft Excel Files (*.xls)
- dBASE Files (*.dbf)
- Microsoft Excel 97 Files (*.xls)
- XML Files (*.xml)

Relevance

Exporting data allows you to analyze and share information outside of Desktop Intelligence. This gives you additional flexibility for your reporting needs.

How To

Follow these steps from the Report window to export data:

Step	Action
1	Create or display the desired report.
2	Click View Data on the Standard toolbar.
3	If necessary, select the desired data provider.
4	Click Export .
5	Select the desired file format in the Format drop-down list. These are the choices: <ul style="list-style-type: none"> • Text Files (*.asc; *.prn; *.txt; *.csv) • Microsoft Excel Files (*.xls) • dBASE Files (*.dbf) • Microsoft Excel 97 Files (*.xls) • XML Files (*.xml)
6	Click Browse and select the desired location for the exported file.
7	Click Save .
8	Click OK .
9	Click OK when the export completion message displays.
10	Click OK to close the Data Manager window.



When you export data to Excel, the size limitation is 65,536 rows.

Success

You have successfully completed this task when the exported file has been saved to your computer.

Practice

Export data to Excel using this information:

- 1) Open the **Ad Hoc 2** report from the **userDocs** folder.
- 2) Click **View Data** on the **Standard** toolbar.
- 3) Click **Export**.
- 4) Select **Microsoft Excel Files (*.xls)** in the **Format** drop-down list.
- 5) Click **Browse** and select **My Documents**.
- 6) Change the file name to "**Ad Hoc 2 Export**."
- 7) Click **Save**.
- 8) Click **OK**.
- 9) Click **OK** when the export completion message displays.
- 10) Click **OK** to close the Data Manager window.
- 11) View the Excel workbook and close the file.

Summary

In this topic, you learned how to export data from Desktop Intelligence to another application on your computer.

Review

In this course, you learned how to:

- Log on to Desktop Intelligence
- Create an ad hoc report
- Format a report
- Sort data in a report
- Apply a section break
- Outline data
- Create and modify a chart
- Create a crosstab
- Add a rank
- Add an alert
- Use drill-down mode
- Insert calculations
- Add free-standing cells
- Import a report from the repository
- Export data

Appendix A

Additional and More Detailed Terminology

This table provides additional and more detailed BusinessObjects terminology than is covered in the *Getting Started* topic:

Term	Description
Alerter	A feature that applies specified formats or contents to cells if the data in the cells falls within a given range of values or satisfies set conditions.
Class	A logical grouping of data in a universe, displayed as a folder in the Classes and Objects or Predefined Conditions pane. A single class folder can contain many objects, as well as other class folders that also hold numerous objects.
Crosstab	A table that displays data in columns, rows, and at the intersection (crosstab body) of the columns and rows. A crosstab looks similar to an Excel spreadsheet.
Drill Down	The process of navigating from less detailed information to more detailed data.
Filter	A feature that lets you narrow the data that displays in a report. Filters are formulas that consist of three elements: objects, operators, and operands.
Function	A pre-defined operation, such as "sum," "average," "maximum," etc.
Object	<p>A universe element that represents a set of data from a relational database. Objects are included in a query to retrieve data from the database and are grouped into classes. There are dimension, detail, and measure objects.</p> <p>A dimension object retrieves the data that provides the basis for analysis in a report. Dimension objects typically retrieve character-type data, such as provider names.</p> <p>A detail object provides additional information. For example, an address is a detail object associated with a provider. Addresses provide additional information about providers.</p> <p>A measure object retrieves numeric data that is the result of calculations on data in the database.</p>
Operand	Identifies the value being compared to an object using a specified operator.
Operator	A relational or logical calculation used to determine the relationship

Term	Description
	between an object and an operand.
Prompt	A sentence or question that asks you to select or enter values to narrow your query results.
Query	A request for information that uses a specific set of instructions for extracting data from a database in a readable format according to criteria you establish. You build a query containing objects from a universe and then run the query to generate a report.
Query Result	Data returned by a query.
Refresh	An action that updates the data returned by a report's query.
Sort	A feature you can apply to cause data to display in ascending, descending, or custom order.
Universe	A database view comprised of a logical grouping of classes and objects that allows you to create queries and retrieve data

Note: The descriptions above are based on information found at <http://www.businessobjects.com/businessintelligence/glossary.asp> and in the BusinessObjects Glossary, 2003, (3 May 2008), BusinessObjects S.A., downloaded from <http://technicalsupport.businessobjects.com/KanisaSupportSite>.

Appendix B

BusinessObjects Operators

This table provides a description of common BusinessObjects operators:

Name	To Obtain Data...	Example
Equal to	Equal to a value you specify	[Provider ID] Equal to 00112233445
Not equal to	Not equal to a value you specify	[Specialty Code] Not equal to 05
Greater than	Greater than a value you specify	[Claim Paid Amount] Greater than 500
Greater than or equal to	Greater than or equal to a value you specify	[Claim Paid Amount] Greater than or equal to 500
Less than	Less than a value you specify	[Claim Billed Amount] Less than 200
Less than or equal to	Less than or equal to a value you specify	[Claim Billed Amount] Less than or equal to 200
Between	Between two values you specify that includes those two values	[Date of Birth] Between 1/1/1950 and 12/31/1980
Not between	Outside the range of two values you specify	[Date of Birth] Not between 1/1/1900 and 12/31/1950
In list	The same as multiple values you specify	[Zip Code] In list 43754, 44301, 45856
Not in list	Different from multiple values you specify	[Zip Code] Not in list 43754, 44301, 45856
Is null	For which there is no value entered in the database	[First Name] Is null
Is not null	For which there is a value entered in the database	[First Name] Is not null
Matches pattern	For which there is a like value in the database	[Procedure Code] Matches pattern D%
Different from pattern	For which there is not a like value in the database	[Procedure Code] Different from pattern D%

Note: The descriptions above are based on information found in the BusinessObjects user manual *Performing On-Report Analysis with Web Intelligence, Chapter 14: Filtering Results on Reports*, pp. 214-216. Copyright 2004 by Business Objects.