Ohio | Medicaid Information Technology System

State & Local Government Solutions

Medicaid Information Technology System (MITS)

Advanced BIAR Participant Guide

October 28, 2010

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Course Overview

Overview

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

Requirements

You must have completed the Overview of InfoView Reporting and Intermediate BIAR courses before taking this training.

When you work with ad hoc reports, it is very important to use objects from the correct classes for the results you are seeking. If you have specific questions about what classes and objects to use for your job, ask your BusinessObjects administrator for assistance.

Objectives

After completing this course, you should be able to:

- Create formulas
- Create and insert a local variable
- Create and insert a user object
- Create a subquery
- Create, use, and delete a study group
- Extract large files

Agenda

Topic	Time in Minutes
Welcome and Introductions	10
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Creating a Subquery	30
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Extracting Large Files	10
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Total	**210**

Logging on to Desktop Intelligence

Log on to Desktop Intelligence using this information:

1) Access Desktop Intelligence.
2) In the **User Identification** window, type or select the logon information given to you by the instructor.
3) Click **OK**.
4) Click **Cancel** to close the New Report Wizard.

Creating Formulas

Overview

In this topic, you learn how to create these formulas in a report:

- Format Date
- Concatenate Text
- If/Then/Else

Who

TBD

When

It is helpful to create formulas when you want to perform additional data analysis in a report or when you want to attach text to objects to enhance a report's layout.

Requirements

When you create a formula, you must follow these requirements:

- Begin with an equals sign
- Surround any variables with a less than sign (<) and greater than sign (>), such as <Provider ID>
- Enclose any text in double quotation marks, such as "ABC"

Relevance

Creating formulas lets you analyze data and enhance a report's layout beyond using only the built-in objects in each universe.

Guidelines

Formulas can consist of functions, operators, and variables.

Variable

A variable is a named formula that can be used on its own or within another formula. In the next topic, you learn how to create and insert a local variable.

How To

Follow these steps from the Report window to create formulas:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Display the desired report.</td></tr>
<tr><td>2</td><td>Create the desired formula by following these steps:
<table>
<tr><th>TO CREATE this formula:</th><th>THEN:</th></tr>
<tr><td>Format Date</td><td>a. Select the cell that contains the date you want to format.
b. Click Formula Editor on the Formula Bar.
c. In the Formulas field, click to the right of the equals sign.
d. In the Functions section, expand the Character functions folder.
e. Double-click FormatDate.
f. Cut and paste the original date formula so it is inside the first parenthesis.
g. To the right of the comma, type the desired date format, enclosed in quotation marks.
h. Click OK.</td></tr>
<tr><td>Concatenate Text</td><td>a. Select the cell for which you want to concatenate text.
b. Click Formula Editor on the Formula Bar.
c. In the Formulas field, click to the right of the equals sign.
d. Type the desired text, enclosed in quotation marks.
e. Type a plus sign.
f. Click OK.</td></tr>
<tr><td>If/Then/Else</td><td>a. Insert a blank cell and make sure the cell is selected.
b. Click Formula Editor on the Formula Bar.
c. In the Formulas field, type an equals sign.
d. Type If.
e. In the Variables section, double-click the desired variable.
f. Type the desired operator and operand.
g. Type Then.
h. Type or select the desired result, enclosed in quotation marks as applicable.
i. Type Else If.
j. In the Variables section, double-click the desired variable.</td></tr>
</table></td></tr>
</table>

			k. Type the desired operator and operand. l. Type **Then**. m. Type or select the desired result, enclosed in quotation marks as applicable. n. Click **OK**.

Success

You have successfully completed this task when your report displays information based on these formulas:

- Format Date
- Concatenate Text
- If/Then/Else

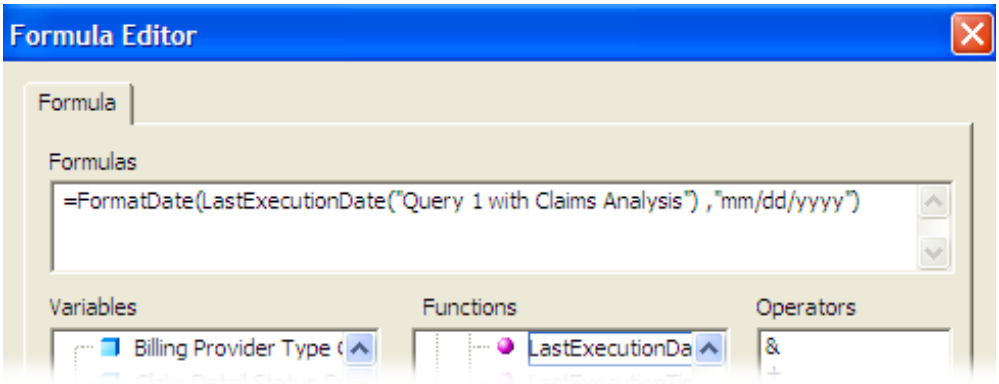
Practice

Create formulas using this information:

1) Open the **Create Formulas** report from the **userDocs** folder.

Format Date

2) Select the date in the upper-right corner of the report.
3) Click **Formula Editor** on the **Formula Bar**.
4) In the **Formulas** field, click to the right of the **equals sign**.
5) In the **Functions** section, expand the **Character functions** folder.
6) Double-click **FormatDate**.
7) Cut and paste the original date formula so it is inside the first parenthesis.
8) To the right of the comma, type this date format, enclosed in quotation marks: **mm/dd/yyyy**.
9) Compare your results with this image:



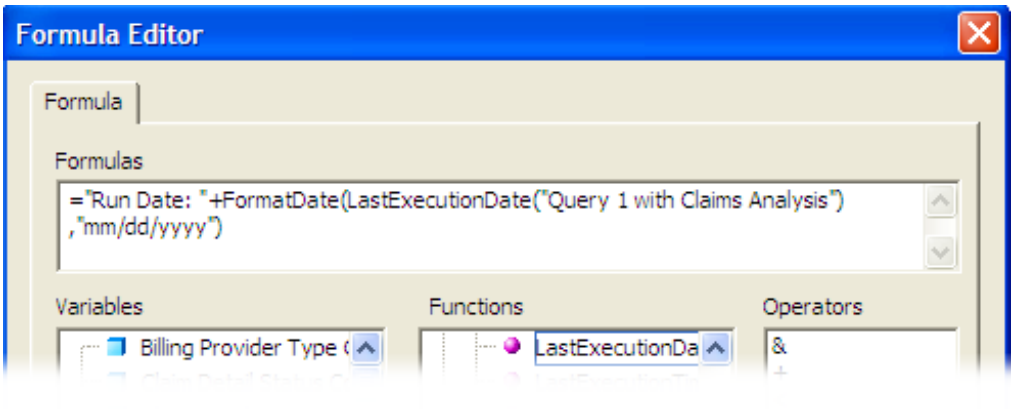
10) Click **OK**.
11) Resize the cell as applicable.

Concatenate Text

12) Select the date in the upper-right corner of the report.
13) Click **Formula Editor** on the **Formula Bar**.
14) In the **Formulas** field, click to the right of the **equals sign**.
15) Type this text, enclosed in quotation marks, and include a space after the colon: **Run Date:**
16) Type a **plus sign**.

Note: This concatenates strings. To concatenate numbers, use either the ToText function or the ampersand (&) concatenation operator.

17) Compare your results with this image:



18) Click **OK**.

If/Then/Else

19) Select the blank cell at the top of the first section break in the report.
20) Click **Formula Editor** on the **Formula Bar**.
21) In the **Formulas** field, type an **equals sign**.
22) Type **If**.
23) In the **Variables** section, double-click **Sum of Total Claim Count**.
24) Continue the formula until it matches this when you are finished:

= If <Sum of Total Claim Count> >25000 Then "Total Claim Count Greater Than 25,000" Else If <Sum of Total Claim Count> <=25000 Then "Total Claim Count Less Than or Equal to 25,000"

25) Click **OK**.
26) Compare your results at a high level with the image at the end of this exercise.
27) Save the report as **Formulas** and close the file.

Run Date: 06/09/2010

Section: Billing Provider Type Code & Desc

01 - Hospital | Total Claim Count Greater Than 25,000

FFS/Enc Indicator	Claim Header Status Code & Desc	Claim Detail Status Code & Desc	Claim Type Code & Desc	Recipient Undup Count	Sum Of Allowed Amount	Sum Of Billed Amount	Sum Of Reimbursed Amount	Sum Of Total Claim Count
F	D - Denied	D - Denied	B - CMS 1500 XOVER CLAIMS	1,931	$0.00	$1,571,885.89	$174,984.99	4,286
F	D - Denied	D - Denied	M - CMS 1500 CLAIMS	5,461	$0.00	$5,366,202.01	$69,284.83	14,666
F	P - Paid	D - Denied	B - CMS 1500 XOVER CLAIMS	9	$0.00	$2,860.90	$980.08	28
F	P - Paid	D - Denied	M - CMS 1500 CLAIMS	530	$0.00	$244,373.00	$71.61	796
F	P - Paid	P - Paid	B - CMS 1500 XOVER CLAIMS	9,519	$8,824.45	$8,141,186.21	$1,406,391.25	25,040
F	P - Paid	P - Paid	M - CMS 1500 CLAIMS	10,578	$1,405,406.59	$8,444,606.14	$33,860.26	25,258

Section: Billing Provider Type Code & Desc

02 - Mental Hospital | Total Claim Count Less Than or Equal to 25,000

FFS/Enc Indicator	Claim Header Status Code & Desc	Claim Detail Status Code & Desc	Claim Type Code & Desc	Recipient Undup Count	Sum Of Allowed Amount	Sum Of Billed Amount	Sum Of Reimbursed Amount	Sum Of Total Claim Count
F	D - Denied	D - Denied	B - CMS 1500 XOVER CLAIMS	150	$0.00	$60,164.54	$36,772.19	1,060

Section: Billing Provider Type Code & Desc

Because you placed the formula object in the section break, the results reflect the total claim count **by provider type**. If instead, you had inserted a column and put the formula as part of the data-row results, the formula would have reflected the total claim count **by claim type code**.

Summary

In this topic, you learned how to create these formulas in a report:

- Format Date
- Concatenate Text
- If/Then/Else

Creating and Inserting a Local Variable

Overview

In this topic, you learn how to create and insert a local variable.

A local variable is a formula that you name. You use variables in the same way you use other objects to build report blocks, and you can reuse variables easily in the same document.

Variables have advantages over formulas because there are some things you can do with variables that you cannot do using formulas alone. With variables, you can:

- Apply alerters, filters, sorts, and breaks on columns or rows containing formulas
- Include variables qualified as dimensions in drill hierarchies
- Reuse variables easily in the same document
- Use (and reuse) variables in complex formulas so you do not need to type the same formulas multiple times. Variables make complex formulas easier to decipher because they divide the formulas into easy-to-manage pieces.

Who

TBD

When

It is helpful to create local variables when you want to analyze data beyond what you can do with formulas alone or when you want to save time by not having to type the same formula again in a document.

Relevance

Creating local variables provides these advantages over using only formulas:

- You can reuse variables easily in the same document.
- You can insert variables in other formulas in a document so you do not have to type the same formulas again. This also makes complex formulas easier to understand because variables show manageable components.

Guidelines

When you create a local variable, you have a choice of two main methods:

- Turn an existing formula into a variable
- Use the Variable Editor window

With either method, the variable you create displays in the Variables folder in the Report Manager Data tab. Then you can drag the variable onto the report where you want the variable to display.

In this training, you are going to use the Variable Editor window to create a local variable.

How To

Follow these steps from the Report window to create and insert a local variable:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Display the desired report.</td></tr>
<tr><td>2</td><td>Create the desired local variable by following these steps:
<table>
<tr><th>TO CREATE a local variable:</th><th>THEN:</th></tr>
<tr><td>From an existing formula</td><td>a. Select the cell(s) containing the desired formula.
b. Click Define as Variable on the Formula Bar.
c. Type the desired name for the variable.
d. Click OK.</td></tr>
<tr><td>Through the Variable Editor window</td><td>a. Right-click an empty space in the Data tab of the Report Manager.
b. Select New Variable.
c. Click the Definition tab.
d. In the Name field, type the desired name for the variable.
e. Select the desired object type.
f. Click the Formula tab.
g. Type the desired formula.
h. Click OK.</td></tr>
</table></td></tr>
<tr><td>3</td><td>Insert a local variable by following these steps:
a. Expand the Variables folder in the Report Manager Data tab.
b. Drag the desired variable and drop it where you want it to display in the report.</td></tr>
</table>

Success

You have successfully completed this task when your report displays data through a local variable.

Practice

Create and insert a local variable that groups recipients by age ranges, using this information:

1) Open the **Create a Local Variable** report from the **userDocs** folder.

Creating

2) Right-click an empty space in the **Data** tab of the **Report Manager**.
3) Select **New Variable**.
4) Click the **Definition** tab.
5) Type "**Recipient Age Group**" in the **Name** field.
6) If necessary, select the **Dimension** radio button.
7) Click the **Formula** tab.
8) Type this formula in the **Formulas** field: **= If < 20 Then "< 20" Else If >= 20 And <= 25 Then "20 - 25" Else ">25"**
9) Click **OK**.

Inserting

10) If necessary, expand the **Variables** folder in the **Report Manager Data** tab.
11) Drag the **Recipient Age Group** object to just above the table block to create a section break based on the variable you created.
12) Compare your results at a high level with the image at the end of this exercise.
13) Save the report as **Local Variable** and close the file.

<20

ICN	Billing Provider Medicaid ID & Name	Recipient ID	Recipient Full Name	Recipient Age	F S
4009033235266	2354945 - MERCY HOSPITAL FAIRFIELD	741754663571	BEAUFORD, AUREO B	19	1
4009048187567	2354945 - MERCY HOSPITAL FAIRFIELD	855384192266	BATTY, MARGARETTE	19	0
4009023465966	2354945 - MERCY HOSPITAL FAIRFIELD	741754663571	BEAUFORD, AUREO B	19	1
4009075115731	2354945 - MERCY HOSPITAL FAIRFIELD	855393079266	DEWEESE, SHERRON	19	1
4008365308661	2354945 - MERCY HOSPITAL FAIRFIELD	742886799970	BAGWELL, CODY	19	1
4009069074490	2354945 - MERCY HOSPITAL FAIRFIELD	061075561771	POWELL, LAKISHA	18	0

20 - 25

ICN	Billing Provider Medicaid ID & Name	Recipient ID	Recipient Full Name	Recipient Age	F S
4009009064555	2354945 - MERCY HOSPITAL FAIRFIELD	854984829866	TEMPLIN, NACSTOR	20	1
4009033235279	2354945 - MERCY HOSPITAL FAIRFIELD	855758113566	MERLINO, BARBRA	20	0
4009028073005	2354945 - MERCY HOSPITAL FAIRFIELD	852766230366	KUESTER, NARELA	20	0
4008365307102	2354945 - MERCY HOSPITAL FAIRFIELD	852716604066	WOODRING, MYRON O	20	1

>25

ICN	Billing Provider Medicaid ID & Name	Recipient ID	Recipient Full Name	Recipient Age	F S
4009027081678	2354945 - MERCY HOSPITAL FAIRFIELD	859269783166	KNOTTS, ELADIO E	82	1
4009056095402	2354945 - MERCY HOSPITAL FAIRFIELD	859269783166	KNOTTS, ELADIO E	82	0
4009006191440	2354945 - MERCY HOSPITAL FAIRFIELD	850167091066	MUSIAL, DIXIE	71	1

Summary

In this topic, you learned how to create and insert a local variable.

Creating and Inserting a User Object

Overview

In this topic, you learn how to create and insert a user object.

When you need additional objects beyond what the BusinessObjects administrator has set up, you can create your own user objects. These objects reside on your computer's hard drive. You can use them in queries the same way you use regular objects. You base user objects on existing objects.

Who

TBD

When

It is helpful to create user objects whenever you must have additional objects beyond those created by the universe designer.

Relevance

Creating user objects gives you additional flexibility to produce reports that match your data needs.

Requirements

Because user objects are stored locally on your computer, you cannot share user objects with other users. They can view reports that contain user objects you have created, but if they want to refresh the reports, they need to create the same kinds of user objects on their computers.

If another user tries to edit a query or refresh a report that contains a user object you created, Desktop Intelligence removes the object from the query and report. An exception to this rule is that the BusinessObjects administrator has the authority to convert user objects into regular objects to make them available for other users.

Guidelines

User objects are only available in the universe in which you create them.

A user object contains these components:

- Name
- Type (character, date, or numeric)
- Qualification (dimension, measure, or detail)
- Formula (combination of functions, objects, operators, and text)

How To

Follow these steps from the Report window to create and insert a user object:

Step	Action
1	Display the **Query panel** for the desired report.
2	Click **User Objects** on the **Query panel** toolbar.
3	Click **Add**.
4	In the **Definition** tab of the **User Object** window, type or select information for these fields: a. **Name** b. **Type** c. **Description** d. **Qualification**
5	Click the **Formula** tab.
6	Type or select information for these sections/fields: e. **Count function** f. **Field for count**
7	Click **Test**.
8	Click **OK** to close the confirmation window.
9	Click **OK** to close the **User Object** window.
10	Click **OK** to close the **User Objects** window. **Note:** This is a different window than in Step 9.
11	In the **Classes and Objects** pane, expand **User Objects**.
12	Add the desired user object to the **Result Objects** pane.
13	Click **Run**.

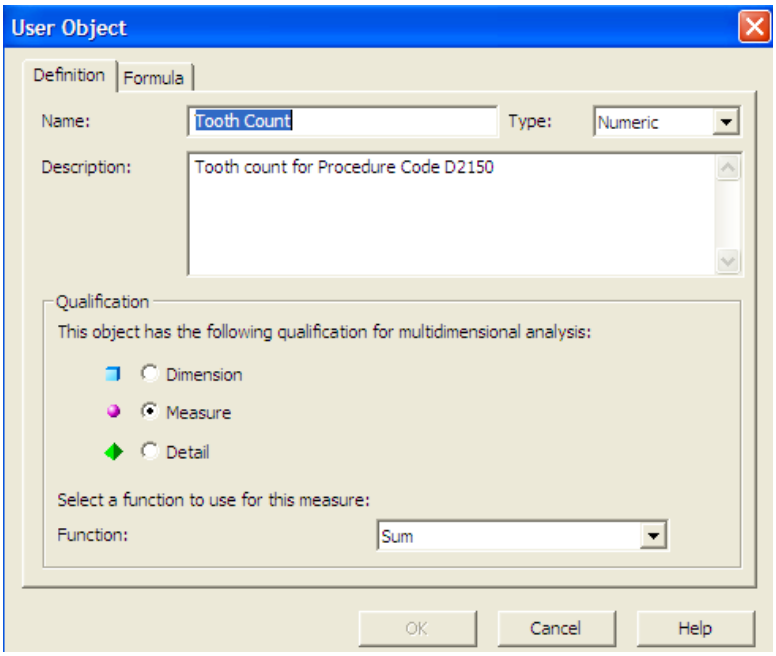
Success

You have successfully completed this task when your report displays data through the user object you created.

Practice

Create and insert a user object that shows a tooth count for Procedure Code D2150, using this information:

1) Open the **Create a User Object** report from the **userDocs** folder.
2) Switch to the **Query panel** view.
3) Click **User Objects** on the **Query panel** toolbar.
4) Click **Add**.
5) In the **Definition** tab, type or select information for these fields:
   - Name: **Tooth Count**
   - Type: **Numeric**
   - Description: **Tooth count for Procedure Code D2150**
   - Qualification: **Measure**
   - Function: **Sum**
6) Compare your results with this image:



7) Click the **Formula tab**.
8) In the **Functions** section, expand **All Functions**.
9) Double-click **Count**.
10) In the **Classes and Objects** section, expand **Dental Claims ONLY Information**.
11) Double-click **Tooth Number**.
12) The formula should look like this: **Count ({Dental Claims ONLY Information\Tooth Number})**
13) Click **OK**.
14) Click **Test**.
15) Click **OK** to close the confirmation window.
16) Click **OK** to close the **User Object** window.

17) Click **OK** to close the **User Objects** window.

Note: This is a different window than in Step 16.

18) In the **Classes and Objects** pane, expand **User Objects**.
19) Add the **Tooth Count** object to the **Result Objects** pane.
20) Click **Run**.
21) After the report refreshes, format the report as desired.
22) Compare your results at a high level with the image at the end of this exercise.
23) Save the report as **User Object** and close the file.

Billing Provider Medicaid ID & Name	ICN Undup Count	Tooth Count
1944550 - JOHN T F JORDAN DDS	1	1
2402375 - MIAMI VALLEY HOSPITAL	4	5
3451427 - R W POEPPELMEIER DDS	2	2
3821321 - ROBERT A NELSON DDS	2	4
4654760 - DANIEL L RANKIN DDS	1	1
5399008 - LUCAS COUNTY AUDITOR	1	1
6837523 - CWRU-DENTAL SCHOOL	2	2
7000933 - JUDSON WYNKOOP II DDS	4	6
7002039 - RICHARD PALLEN DDS	4	4
7008140 - FRANCINE PIATT MILLER DDS	1	1

Summary

In this topic, you learned how to create and insert a user object.

Creating a Subquery

Overview

In this topic, you learn how to create a subquery. A subquery is a query within a query. You use the subquery to narrow the results of the first query. You can also create more than one subquery in a report.

For example, you could create a report that shows current Medicaid recipients for a specific county, and use a subquery to show only recipients of a certain aid category within that county.

Who

TBD

When

It is helpful to create a subquery when you want to narrow the results of a query further by performing an analysis of a certain population or scenario.

Relevance

Creating a subquery gives you additional flexibility for data analysis by keeping the original query and narrowing the results further through another tab in the Conditions pane. This is especially helpful when you are working with complex query conditions.

Guidelines

When you create a subquery, Desktop Intelligence inserts a new tab in the Conditions pane and increments the subquery number to show the relationship between the starting query and its subquery. For example, "Query 1," "Subquery 1.1," and "Subquery 1.2."

One of the most common operators used for creating subqueries is "In list."

You **cannot** use these operators to create a subquery:

- Both
- Between
- Match pattern

How To

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

Step	Action
1	Create or display the desired report.
2	In the Query panel, drag the desired object you want to use as the basis for the subquery to the **Conditions** pane.
3	Double-click the desired operator.
4	Double-click the **Create a subquery** operand.
5	In the subquery tab, drag the desired object to the **Result Objects** pane. **Note:**: You can only have **one** result object in the subquery.
6	Apply the desired conditions.
7	Click **Run**.

Success

You have successfully completed this task when data in a report has been narrowed by the subquery you created.

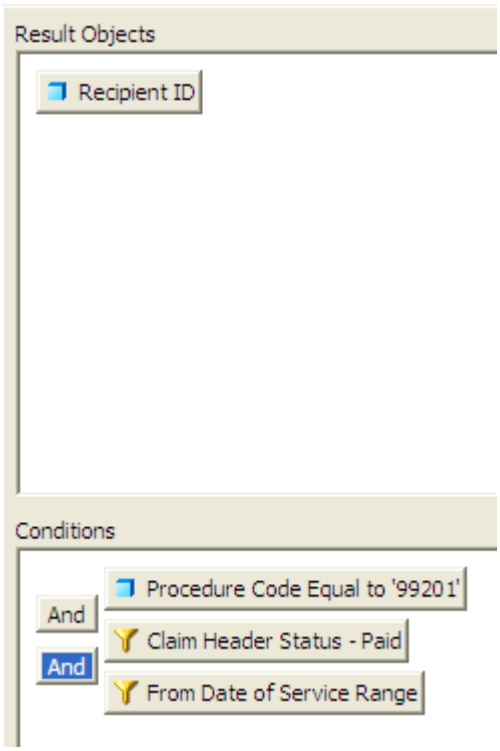
Practice

Create a subquery that shows reimbursed amounts on a certain day for a particular drug for recipients who also had a doctor's office visit during the previous six months, using this information:

1) Open the **Create a Subquery** report from the **userDocs** folder.
2) Display the Query panel.
3) Expand **Recipient Specific Information** in the **Classes and Objects** pane.
4) Drag **Recipient ID** to the **Conditions** pane.
5) Add **In List** as the operator.
6) Add **Create a subquery** as the operand.

   Note: A blank subquery tab displays.

7) Create a subquery that matches this image:



8) Click **Run**.
9) Type this information in the **Prompts** window fields:
   - From Date of Service Begin (MM/DD/YYYY): **06/30/2008**
   - From Date of Service End (MM/DD/YYYY): **12/31/2008**
10) Click **OK**.
11) Compare your results at a high level with the image at the end of this exercise.
12) Save the report as **Subquery** and close the file.

Reimbursed Amounts for Cymbalta on 1/22/2009 for Recipients Who Had a Doctor's Office Visit During Previous Six Months

Recipient ID	Reimbursed Amount
120468069078	$6.64
138119010978	$4.27
150774505978	$8.62
150777250878	$0.15
152770159571	$7.24
256739415678	$12.78
350705971278	$4.54
490791866478	$90.54
568773361178	$4.27
571771096978	$6.64
700790077378	$1.59

Summary

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

Creating, Using, and Deleting a Study Group

Overview

In the **last** topic, you learned how to create a subquery to narrow the results of another query.

In **this** topic, you learn how to create, use, and delete a study group. A study group is similar to a subquery, but contains **reusable filters** so you can apply the filters easily to multiple reports.

Who

TBD

When

It is helpful to create a study group whenever you want to run reports periodically for the same group of providers or recipients.

Relevance

Instead of having to create a subquery in multiple reports, a study group lets you link provider or recipient IDs in a table to other reports quickly and easily so only data for those providers or recipients is included.

Requirements

To create a study group, you must have the proper security rights from your BusinessObjects administrator.

The following files must be stored at this location on your computer: **My Documents>My Business Objects Documents>addins**:

- StudyGroupUtility.rea
- StudyGroup_#####.xml, where ##### is replaced by the system name you use when you log on to Desktop Intelligence
  - For example, if MS-MITS-A02:20000 is the system name you use in the InfoView or Desktop Intelligence logon window, then the XML file would be *StudyGroup_MS-MITS-A02.xml*. The port number (in this case, "20000") is **not** used.

You also need to **install** the **StudyGroupUtility.rea** file by following these steps:

1) Select **Add-Ins** from the **Tools** menu.
2) Click **Browse**.
3) Select the **StudyGroupUtility.rea** file.
4) Click **Open**.
5) Select the **StudyGroupUtility** checkbox.
6) Click **OK**.

To verify that the installation was successful, open a report of your choice and confirm that **Manage Study Groups** displays in the **Data** menu. A report must be open to see this menu selection.

Guidelines

Cartesian Product

When you run a report in which you have used a study group based on one universe to narrow the results from another universe, you get a message stating the results will return a Cartesian product. This means that each row from the study group is joined to a row in the first universe. It is safe to run this report.

In other instances when you are **not** using a study group and you receive a Cartesian-product message, you should reevaluate your query (or queries) for errors.

How To

Follow the steps in the tables below to create, use, and delete a study group.

Create a Study Group

Follow these steps to create a study group:

Step	Action
1	Create a report with either a single-column table or one in which the **first column** of the table contains the object from which you want to create the study group.
2	Select **Manage Study Groups** in the **Data** menu. **Note:** The Manage Study Groups window displays.
3	Type a study group name in the **Study Group Name** field.
4	Select the desired column in the **Study Group Identifier** drop-down list.
5	If you are the only one who should have access to this study group, select the **Private** radio button **OR** select the **Public** radio button if you want to share the study group with others.
6	Click **Add** to start the upload process.
7	After the upload completes, click **Quit** to close the Manage Study Groups window. **Note:** The study group is now ready for you to use.
8	Close the report.

Use a Study Group

Follow these steps to use a study group:

Step	Action
1	Create a report that contains objects in the Result Objects pane that you want to use with a study group.
2	Expand **Study Groups** in the **Classes and Objects** pane.
3	Drag **Link Object** to the **Conditions** pane.
4	Add the **Equal to** operator.
5	Double-click the **Select an object** operand. **Note:** After you double-click the **Select an object** operand, the **Classes and Objects** pane allows you to link the object you want for the study group.
6	Double-click the desired object in the **Classes and Objects** pane
7	Select the **Filters** radio button.
8	Expand the **Study Groups** class.
9	Drag the **Study Group Name** filter to the **Conditions** pane.
10	Click **Run**. **Note:** The **SQL Generation** window displays with a warning that states, "This query will create a Cartesian product. Do you want to continue?"
11	Click **Yes**. **Note:** The **Enter or Select Values** window displays.
12	Click **Values**. **Note:** The **List of Values of Study Group Name** window displays. This shows a list of all the study groups you have created.
13	Select the desired study group.
14	Click **OK** to close the **List of Values of Study Group Name** window and run the report.

Delete a Study Group

You should delete study groups you no longer need so more space is available in the database. Follow these steps to delete a study group:

Step	Action
1	With a report open in the Report window, select **Manage Study Groups** in the **Data** menu.
2	Select the study group you want to delete in the **Study Group Name** drop-down list.
3	Click **Delete**.
5	Click **Yes** to confirm the deletion.
6	Click **Quit** to close the Manage Study Groups window.

Success

You have successfully completed this task when a report has been narrowed by the study group you created, and you have subsequently deleted the study group.

Practice

Create and use a study group that shows active providers in Adams county, using this information:

Creating

1) Open the **Create a Study Group** report from the **userDocs** folder.

   Note: This report was created using the Provider universe and shows active providers in Adams county.

2) Select **Manage Study Groups** in the **Data** menu.

   Note: The Manage Study Groups window displays.

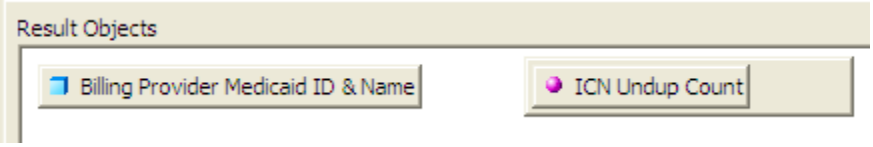
3) Type "**Active Providers in Adams County**" in the **Study Group Name** field.
4) Select **Provider Medicaid ID** in the **Study Group Identifier** drop-down list.
5) Select the **Public** radio button.
6) Click **Add** to start the upload process.
7) After the upload is finished, click **Quit** to close the Manage Study Groups window.

   Note: The study group is now ready for you to use.

8) Close the report.

Using

9) Use the **Claims Analysis** universe to create a report that contains these objects in the **Result Objects** pane, but do **not** run the report: **Billing Provider Medicaid ID & Name** and **ICN Undup Count**.
10) Compare your results with this image:

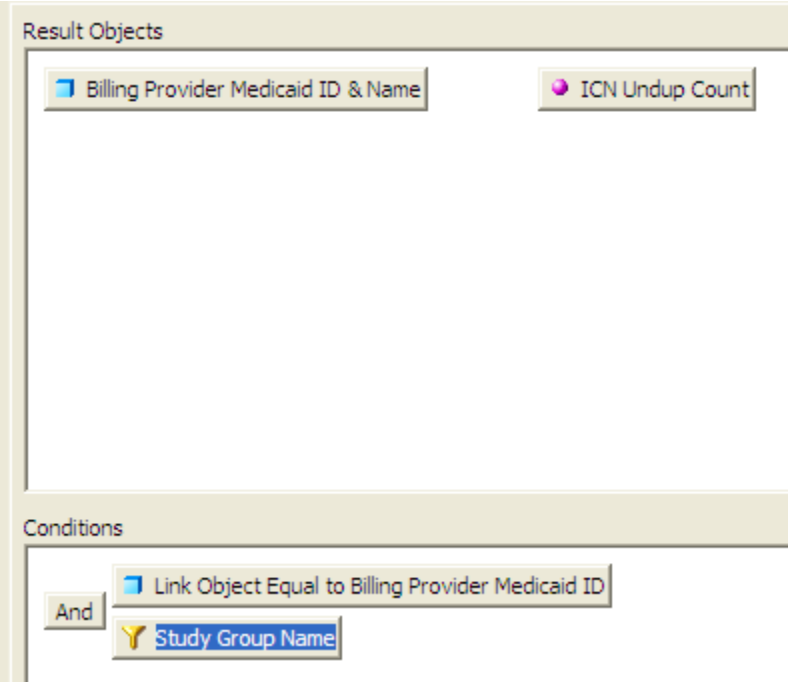


11) Expand **Study Groups** in the **Classes and Objects** pane.
12) Drag **Link Object** to the **Conditions** pane.
13) Add **Equal to** as the operator.
14) Double-click the **Select an object** operand.

    Note: After you double-click the **Select an object** operand, the Classes and Objects pane allows you to link the object you want for the study group.

15) Double-click the **Billing Provider Medicaid ID** object in the **Classes and Objects** pane.
16) Select the **Filter** radio button.
17) Expand the **Study Groups** class.
18) Drag the **Study Group Name** filter to the **Conditions** pane.

19) Compare your results with this image:



20) Click **Run**.

Note: The **SQL Generation** window displays with a warning that states, "This query will create a Cartesian product. Do you want to continue?"

21) Click **Yes**.

Note: The **Enter or Select Values** window displays.

22) Click **Values**.

Note: The **List of Values of Study Group Name** window displays.

23) Select the **Active Providers in Adams County** study group.
24) Click **OK** to close the **List of Values of Study Group Name** window and run the report.
25) Compare your results at a high level with the image at the end of this exercise.
26) Save the report as **Study Group** and close the file.

Billing Provider Medicaid ID & Name	ICN Undup Count
0417130 - CONGREGATE LIVING OF AMERICA	460
3638422 - H&G NURSING HOME INC	108
7098991 - JAMES R FRANKLIN DDS	4
7119548 - BLAKE PHARMACY INC	2,136
7212795 - WILLIAM E HABLITZEL MD	68
7225610 - MATTHEW A GREENE DC	11
7247089 - WALMART PHARMACY 101368	2,981
7307942 - DAVID P HERR DO	236
7347659 - NEW RICHMOND EMERGENCY MED SERV	16
7355444 - CURTIS B EVERSON MD	711
7391922 - SOUTHERN OH HEALTH SERV NETWRK	11,233
7400288 - BARRY E BATES MD	3

Summary

In this topic, you learned how to create, use, and delete a study group.

Extracting Large Files

Overview

In this topic, you learn how to extract large files through the LVX (Large Volume Extract) Scheduler. You are going to see a demonstration, but will not be able to practice this task in class due to the training-environment setup. Please refer to the How To table when you are in the production environment.

Who

TBD

When

It is helpful to use the LVX Scheduler when you have a large query and want to save time by running the query through the scheduler instead of directly in Desktop Intelligence.

For example, a claims detail query that spans multiple years would be a good candidate for the LVX Scheduler.

Relevance

Running a large query in Desktop Intelligence takes time away from working on other reports in the application while the query is running. By using the LVX Scheduler, you can continue to create and modify ad hoc reports, and later obtain the completed extracted files.

Guidelines

After you run the LVX Scheduler, the large-volume extract is split, zipped into individual files based on the file size, and sent through a secure FTP method to an ODJFS server. Then a batch process picks up the job.

The size of a file is based on its storage size, and **not** on the number of rows in the report. When a file is larger than 2 GB, a separate CSV file is created and zipped.

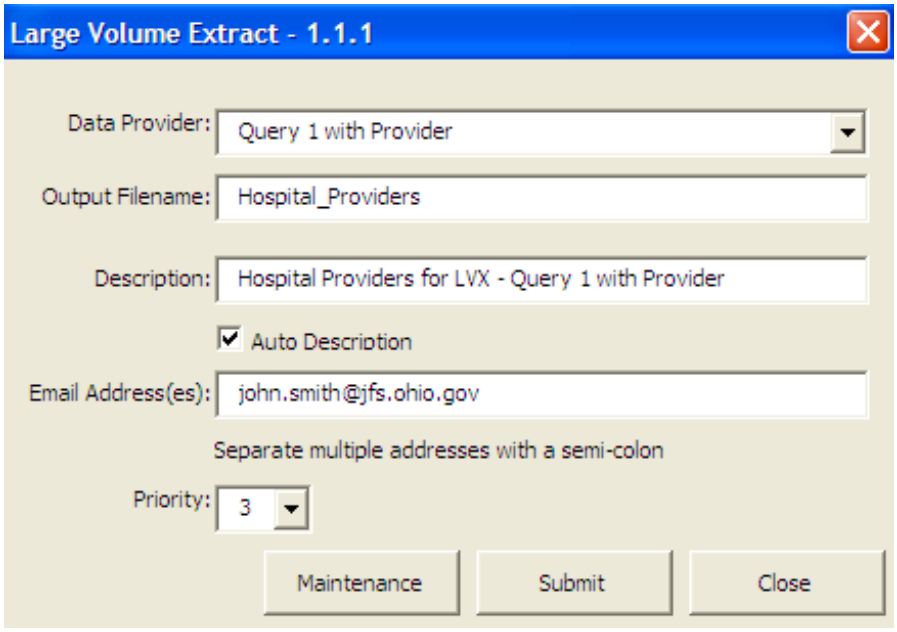
After the extract is finished, an email notification is sent to the address(es) you provided when you ran the LVX Scheduler. When you receive the email notification, you must follow your department's business process to retrieve the file(s).

How To

Follow these steps from the Query panel to extract large files:

Step	Action
1	Drag the desired objects to the Result Objects and Conditions panes. **Note:** You **cannot** use pre-defined conditions or query prompts. You must create your own conditions using objects, operators, and operands.
2	Click **Save and Close** instead of running the query. **Note:** Although clicking **Save and Close** is the preferred method, you could also run the query for a small number of rows to make sure the results are what you want.
3	Select **Extract as Large File** in the **Data** menu.
4	Type the desired file name in the **Output Filename** field. **Note:** Do **not** use spaces in the file name. Underscores are acceptable.
5	Type a description in the **Description** field.
6	Type the desired email address(es) in the **Email Address(es)** field for notification when the extract is finished.
7	Select the appropriate priority in the **Priority** drop-down list. **Note:** Use **Priority 1** sparingly because multiple Priority 1 requests slow down the server. The server runs Priority 1 requests every 15 minutes from 8:00 a.m. to 5:00 p.m. **Priority 2** and **Priority 3** requests run after 5:00 p.m. each day.
8	Click **Submit**.
9	Click **OK**. **Note:** After the extract is finished, an email notification is sent to the address(es) you provided in Step 6.
10	After you receive the email notification from Step 9, follow your department's business process to obtain the file(s).

This image shows an example of the Large Volume Extract window:



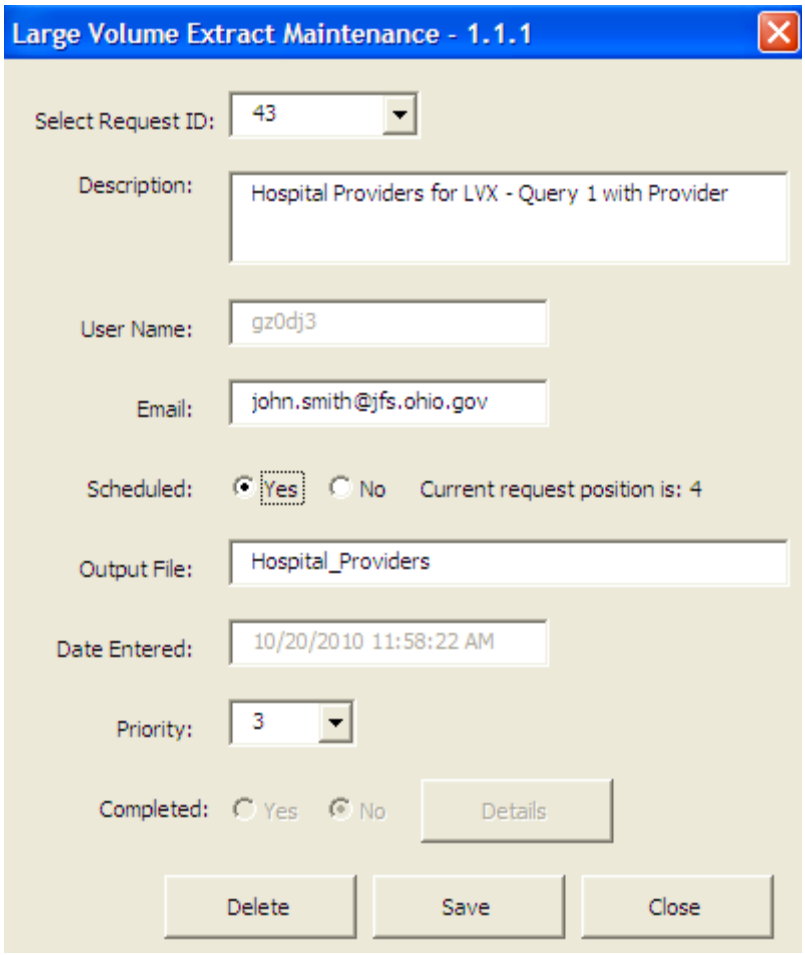
The following image shows an example of the confirmation window that displays after you click **Submit** in the Large Volume Extract window. Notice that the confirmation includes your request ID and its current position in the queue.

After you submit an LVX request, and before it is completed, you can modify this information in the Large Volume Extract Maintenance window:

- Description
- Email address(es)
- File name
- Priority

You can remove the request from being scheduled by selecting the **No** radio button for the **Scheduled** field. You can also delete the request by clicking **Delete**.

The following image shows an example of the Large Volume Extract Maintenance window.



Success

You have successfully completed this task when a confirmation message displays indicating the LVX Scheduler has submitted your request.

After you receive an email notification stating the extract is finished, follow your department's business process to obtain the file(s).

This image shows a sample email notification:

From: LVX_Process@hp-orlando.com [mailto:LVX_Process@hp-orlando.com]
Sent: Monday, October 25, 2010 2:16 PM
To: Smith, John
Subject: LVX_Process - Test Prov

Request ID < 45 >

Test Prov generated 1 file(s) named as follows:

TestProv21010_01.csv.gz

The (combined) file size is .051 Mb
The (combined) row count for this process is 4117

Start Time : 10/25/2010 14:15:29
Finish Time: 10/25/2010 14:15:30

Query Status: Completed Successfully.

The generated file(s) have been submitted to the /export/home/kzt1sz/develop/ftp/biar/outbound location on the HP Server.

Please note that an interface will process this file over to the ODJFS Server for retrieval via Secure FTP.
Depending on the number and sizes of files that are already in the queue, you may have access to your files within several minutes or several hours.

Please account for this and do not contact support until a 24 hour period has elapsed.
~~~~~~

14:15:30 on Monday October 25, 2010

Summary

In this topic, you learned how to extract large files.
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Review

In this course, you learned how to:

- Create formulas
- Create and insert a local variable
- Create and insert a user object
- Create a subquery
- Create, use, and delete a study group
- Extract large files