Getting Started With UHealth Insight

This document explains how to access the UMMG Business Intelligence portal where you can access, among other things, the Excel workbooks that will enable you to view existing reports and perform your own ad-hoc analyses. Remember that the site is still under development so some of the information or images below may differ from your particular screen.

ABOUT SITE SECURITY
The site's security is designed to only give you access to the information that pertains to your department. In order to do that, the infrastructure depends on an access "ticket" that your computer gets when you log on to the Medical network. This ticket is good for 8 hours and is only renewed when you log on to the network, therefore in order to access the UHealth Insight portal you must log off the network and log back on once a day. Please note that this does not mean you have to restart your computer...logging off and back on will suffice.

ACCESSING THE UHEALTH INSIGHT PORTAL
The portal is accessible by visiting the http://UHealthInsight/ URL and will look something like the following image when accessed. Please note:
- The site is only accessible using Windows XP or Vista, and you must use Internet Explorer (Firefox or other browsers are not supported).
- Additionally, you must use Excel 2007 in order to open up the Excel workbooks to perform any modifications or customizations to the reports.
- You should see your name in the upper right corner of the page when it opens...as in the image below.

Welcome to the Miller School of Medicine Business Reporting & Analytics Portal

As we all know, information technologies have unleashed a torrent of data that threatens to drown us in minutia...essentially keeping us from seeing the forest because of the trees.

Wouldn’t it be great if we could keep an eye on the details while also being able to stand back and see the bigger picture?

UHealth Insight aims to do just that. This site is about putting the power of analytics in our hands since we are the ones who need to make the daily fact-based decisions. How else will we be able to set outcomes that are in line with the larger business goals?
ACCESSING THE REPORTS SECTION OF THE SITE

In order to access the Excel report that was demonstrated at the recent meeting, you must navigate to the Reports tab of the site and click on Excel Services, this will open the Excel Services library, containing all available workbooks (currently we only have one workbook but this workbook has several tabs covering the majority of information concerning the University's clinical practice).

Clicking on the desired workbook (in this case the "Strategic Operations Summary") will open it in Excel Services (see below) allowing you to easily browse the information it contains.
Once the page opens, you will see a series of tabs at the bottom of your web page as in the image below. Clicking these tabs will allow you to navigate the different sections of the Excel Services report.

The image below pertains to the "Posted Charges & Collections" tab. Remember that Excel Services is not Excel...you can view, change filter parameters and drill down, but if you wish to change the report in any other way, you will have to open a local copy of the report in Excel (see next section).

"EXCEL SERVICES" VS EXCEL...WHAT'S THE DIFFERENCE?
Excel Services is a new Microsoft technology that allows you to deploy and view an Excel workbook as a simple web page - this is beneficial in allowing many people to access a single Excel workbook without having to distribute the workbook to them first, as well as protecting the integrity of the document (avoiding unauthorized changes or version conflicts). This is especially valuable for data that is "read-only" since the report is easy to distribute and maintain. A workbook viewed in your browser looks very much like it would in Excel; however most of the spreadsheet functionality is unavailable. Remember, the value of reports viewed using Excel Services is in many people being able to easily access the report to simply VIEW the information it contains.

What if I want to customize my report? This is where Microsoft Excel 2007 itself is required, so if you don't have it installed on your computer, please contact MediT to arrange for someone to perform the installation. Once you open the web version of the report (see above), select the Open menu (available on the top left corner of your webpage) and select "Open in Excel". This will allow you to use all the functionality of Excel to modify your document to fit your specific needs (see image below).
Note that once you open the workbook in Excel on your computer you will have to allow data connections (this is an Excel security feature) in order to gain access to the data on our server (see image below). Click the "Options..." button and select the "Enable this content" radio button on the window that pops up and press OK to dismiss the Microsoft Office Security Options window.

REPORT MODIFICATIONS
Ok, now you have a copy of the workbook opened locally on YOUR computer...What can you do? The workbook is set up as a regular pivot table, which means that **anything you can do in an Excel pivot table, you can do here**. It is therefore essential that if you are new to Excel 2007 or to pivot tables (or both) that you receive training on the use of this most useful feature. Training is available from Med IT in self-paced web courses as well as instructor-led programs through ULearn. Please contact either of these departments to get more information on availability.
UNDERSTANDING THE REPORT STRUCTURE
In order to get the most out of the Strategic Operations Summary workbook, it is beneficial to understand how the data in the workbook is organized.

At the highest level, the workbook connects to an analytic database called a *cube* (so called because of its capability to look at more than 2 dimensions at a time, unlike a simple row and column matrix). This cube is further divided into 2 basic components: **measures** and **dimensions**.

A **measure** is simply a numerical fact about the business, like charges, collections, patient counts, RVUs, etc.; or to put it more simply, things regarding the business you want to know about.

**Dimensions**, on the other hand, are the views that can be used to analyze the data by ‘slicing and dicing’. The dimensions provide the structure that allows you to filter, group and label the business facts such as by date, provider, department, division, etc.

So when you say that you want to see all charges and collections (which are measures) by fiscal year, for all department and billing areas (dimensions) it is interesting to note that we naturally use measures and dimensions to specify reports, we just don’t call them that. In addition to being the slicers and dicers of data, dimensions are very frequently arranged in hierarchies such as the “date” dimension (year, quarter, month, etc.) which give analytic reports the capability to drill down from the general to the specific. It is these analytic report capabilities like slicing, dicing and drilling down that give them such strong appeal and power over a static row and column matrix.

As was previously mentioned, the Strategic Operation Summary workbook contains several tabs at the bottom, which help organize around 150 measures and pertaining dimensions. They are organized in the following general business perspectives:

- **Posted Charges and Collections** – reflecting the practice’s cash flow
- **Posting Lag** – reflecting charge entry into the Billing and Accounts Receivable system
- **Provider Activity** – reflecting provider work RVU and other activity
- **Payer Analysis** – reflecting payer performance and composition
- **AR Management** – providing insight into outstanding Accounts Receivable and their aging

Please note that although all the data contained in the workbook resides in one database cube, each perspective mentioned above is tailored to each particular business scenario, and only has the measures and dimensions that pertain to it. For example, you cannot use the **Posted Charges and Collections** perspective tab to analyze **Posting Lag** data because that perspective does not have any lag measures. This was done to manage the numerous measures into manageable groups, especially if you are a new user of the system. At some point, we will be adding a “Rollup Tab” perspective that will give you access to all 150 measures in one place. Please let us know if you need to “cross” perspectives before this is released.

**NOTE:** Cube time (the date of data available for querying) starts on June 2004 (FY2005). This means you cannot effectively create reports that look back further than that date.
PARTING SHOT
The first thing you may notice when you open the Excel workbook is that the pivot table field list is not visible...getting that to show up is simple...click on any cell inside the pivot table and a "Pivot Table Tools" menu will appear (see below).

Once that appears, click on the "Options" button to get the PivotTable options to show up then click the "Field List" button and the PivotTable Field List will instantly appear.

Please contact Luis Muench, Business Systems Analyst, UMMG Decision Support at 305-243-9752 if you have any difficulties accessing the data.