

Strata Decision Technology

Introduction to Excel Reporter

PARTICIPANT GUIDE

October 21, 2019



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Creating a New Report

Create a New Report

1. Click **Reports**.
2. Click **New Report**.
3. Click **Custom Excel Reports**
4. Click **Run**
5. Enter the following:
 - a. Username: Financeadmin
 - b. Password: Password1
6. Click **Login**

Create a New Data Source

7. Under Tools > Data Sources click **Add > Add New Tabular Detail Data Source**
8. Select **MR Monthly GL > OK**
9. Under Available Fields check:
 - a. Section
 - b. Account
 - c. FiscalMonth
 - d. FiscalYear
 - e. Department
 - f. TimeClass
 - g. Dollars
10. Under Available Fields drag **TimeClass** under Filters
11. When the popup comes up click **Cancel**
12. Under Available Fields drag **Department** under Filters
13. When the popup comes up click **Cancel**
14. Click **Save > OK > OK**
15. Close Tabular Detail Report Designer
16. Click **Save > OK**
17. Name your report **Historical Expenses per UOS**
18. Click **OK**

Filter Your Report

19. Within the Custom Excel Report, click on the **Parameters** tab located at the bottom right of your screen
20. Click **Add**
21. Highlight **MR Monthly GL – Time Class**
22. Click the right arrow to move MR Monthly GL – Time Class under Linked parameters
23. Click on the ellipsis next to Section
24. Click the box next to Actual
25. Click **OK > OK**
26. Click **Add**
27. Highlight **MR Monthly GL – MR Department**
28. Click the right arrow to move MR Monthly GL – MR Department under Linked parameters
29. Click on the ellipsis next to Section

30. Click on the plus sign next to **Northern Valley Health System**
31. Click on the plus sign next to **01 – Metro (2830)**
32. Click on the plus sign next to **100 – Central Metro (2229)**
33. Click on the plus sign next to **10 – Northern Valley Medical Center (485)**
34. Click on the box sign next to ***10 – 2515 – IU 7T CVICU**
35. Click **OK > OK > OK**
36. Click **Save > OK > OK**
37. Under Data Sources highlight **MR Monthly GL**
38. Click **Refresh > Refresh Selected Datasources**

Build Your Report

39. In cell C5 type **=DSValuesum("MR Monthly GL", "FiscalYear!"&C1, "Section!"&\$A\$5, "Measure!Dollars")**
40. In cell C1 type **2017**
41. In cell A5 type **Expenses:**
42. Copy cell C5 over to D5
43. In cell D1 type **2018**

Bring in Additional Data Source

44. Under Tools > Data Sources click **Add > Add New Tabular Detail Data Source**
45. Select **MR Monthly Statistic > OK**
46. Under Available Fields check:
 - a. OBUUnitsFinancialReporting
 - b. Account
 - c. FiscalMonth
 - d. FiscalYear
 - e. Department
 - f. TimeClass
 - g. Amount
47. Under Available Fields drag **TimeClass** under Filters
48. When the popup comes up click **Cancel**
49. Under Available Fields drag **Department** under Filters
50. When the popup comes up click **Cancel**
51. Click **Save > OK > OK**
52. Close Tabular Detail Report Designer
53. Click **Save > OK > OK**

Filter new Data Source

54. On the bottom right click on the **Parameters** tab
55. Highlight Time Class and click **Edit**
56. Highlight MR Monthly Statistic – Time Class and click the right facing arrow
57. Highlight MR Department and click **Edit**
58. Highlight MR Monthly Statistic – MR Department and click the right facing arrow

Finalize Your Report Build

59. In cell C5 type **=DSValuesum("MR Monthly
Statistic", "FiscalYear!"&C1,"OBUUnitsFinancialReporting!"&\$A\$5,"Measure!Amount")**
60. In cell A6 type **Metrics – UOS - Inpatient**
61. Copy cell C6 over to D6
62. In cell C8 type =C5/C6
63. Copy cell C8 to D8

	A	B	C	D	E	F	G	H	I	J	K
1			2017	2018							
2											
3											
4											
5	EXPENSES:		8621741.034	9292904.203							
6	Metrics - UOS - Inpatient		3478.1255	3619.1021							
7											
8			2478.847021	2567.737507							
9											

Tools

Data Sources

+ Add - Edit - Delete

- MR Monthly GL
- MR Monthly Statistic

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