

Introduction to Excel Reporter

Joe Grazioso
Matt Van Laanen
Advanced Planning

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STRATA DECISION SUMMIT
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Introductions

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Objectives

- Give a basic understanding of the tools in the Excel Report Builder
- Minimize occurrences you must reach out to Strata Decision with issues to existing reports, or to build a new report

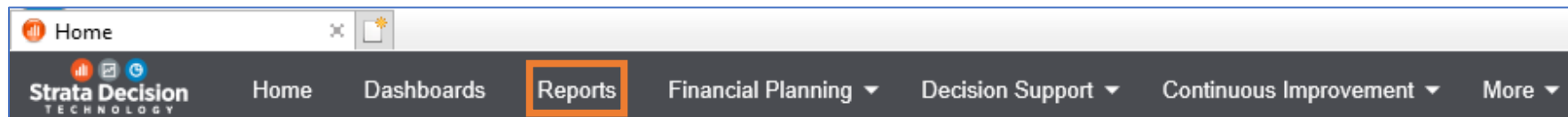
Benefits of Learning Excel Reporter Basics

- Roll forward custom Excel Reports
- Ability to create your own Excel Reports without Strata help
- Quick updates to existing Excel Reports including format changes and filter updates
- Troubleshoot Reporting issues

Agenda

Topics In Order
Reporting Navigation
Basic Report Build
Report Security and Access
Testing and Troubleshooting

Reporting Navigation



System Reports

- Subset of reports “published” by administrators for use

My Reports

- Reports created by the logged-in user

Report Management

- Full library of reports
- Administrators only

Report Navigation

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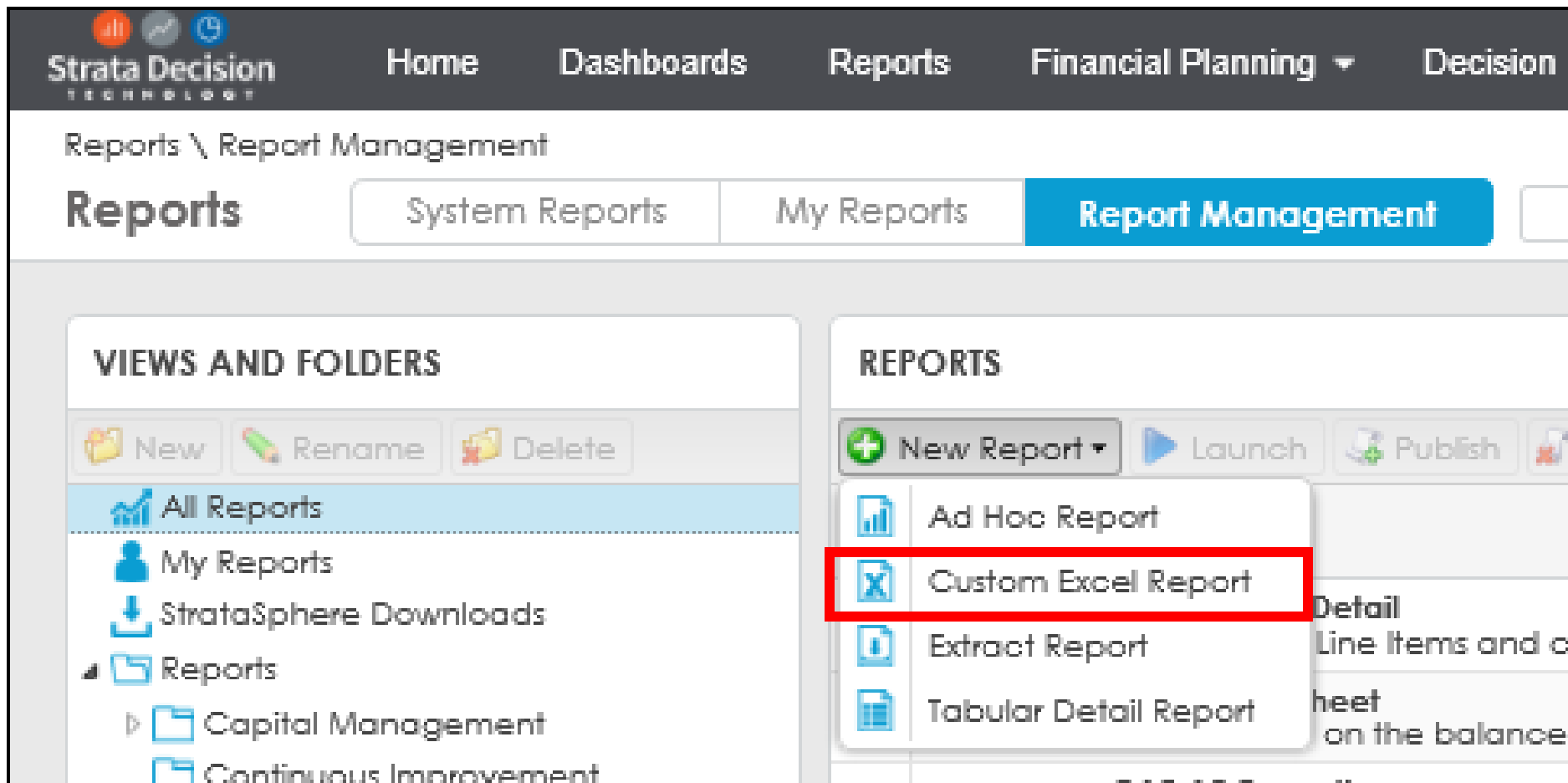


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Why use Excel Reporter instead of Ad Hoc Reporter?

- Need to combine multiple data sources in a single report, such as GL, Payroll, and Stats
- Using advanced Excel functionality and formulas
 - NPV
 - IRR
 - Conditional Statements (IF/SUMIF)
- Formatting flexibility
- Static report without future changes needed

Creating a New Report



The screenshot displays the Strata Decision Reports interface. The top navigation bar includes 'Home', 'Dashboards', 'Reports', 'Financial Planning', and 'Decision'. The main content area is titled 'Reports \ Report Management' and features three tabs: 'System Reports', 'My Reports', and 'Report Management' (which is active). On the left, the 'VIEWS AND FOLDERS' section contains a tree view with 'All Reports' selected, and sub-folders like 'My Reports', 'StrataSphere Downloads', and 'Reports' (containing 'Capital Management' and 'Continuous Improvement'). On the right, the 'REPORTS' section has a '+ New Report' dropdown menu open, showing options: 'Ad Hoc Report', 'Custom Excel Report' (highlighted with a red box), 'Extract Report', and 'Tabular Detail Report'. Other buttons like 'Launch', 'Publish', and 'Detail' are also visible.

Logging in to Strata for the Purposes of Today

Creating a New Report

Demonstration & Hands-On Activity

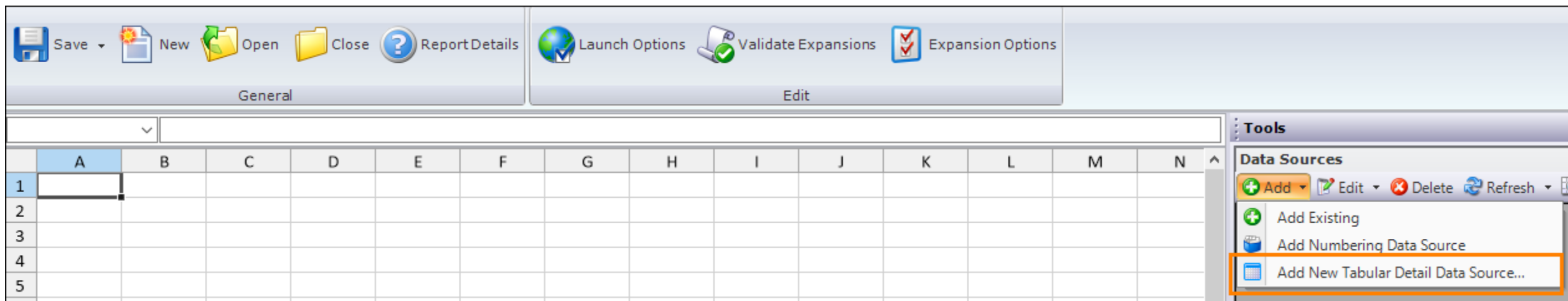
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Creating a New Data Source



The screenshot displays a software interface with a menu bar and a data grid. The menu bar includes options like 'Save', 'New', 'Open', 'Close', 'Report Details', 'Launch Options', 'Validate Expansions', and 'Expansion Options'. Below the menu bar is a data grid with columns labeled A through N and rows 1 through 5. On the right side, there is a 'Tools' panel with a 'Data Sources' section. The 'Data Sources' section contains a list of options: 'Add', 'Edit', 'Delete', and 'Refresh'. Below these are three options: 'Add Existing', 'Add Numbering Data Source', and 'Add New Tabular Detail Data Source...'. The 'Add New Tabular Detail Data Source...' option is highlighted with an orange border.

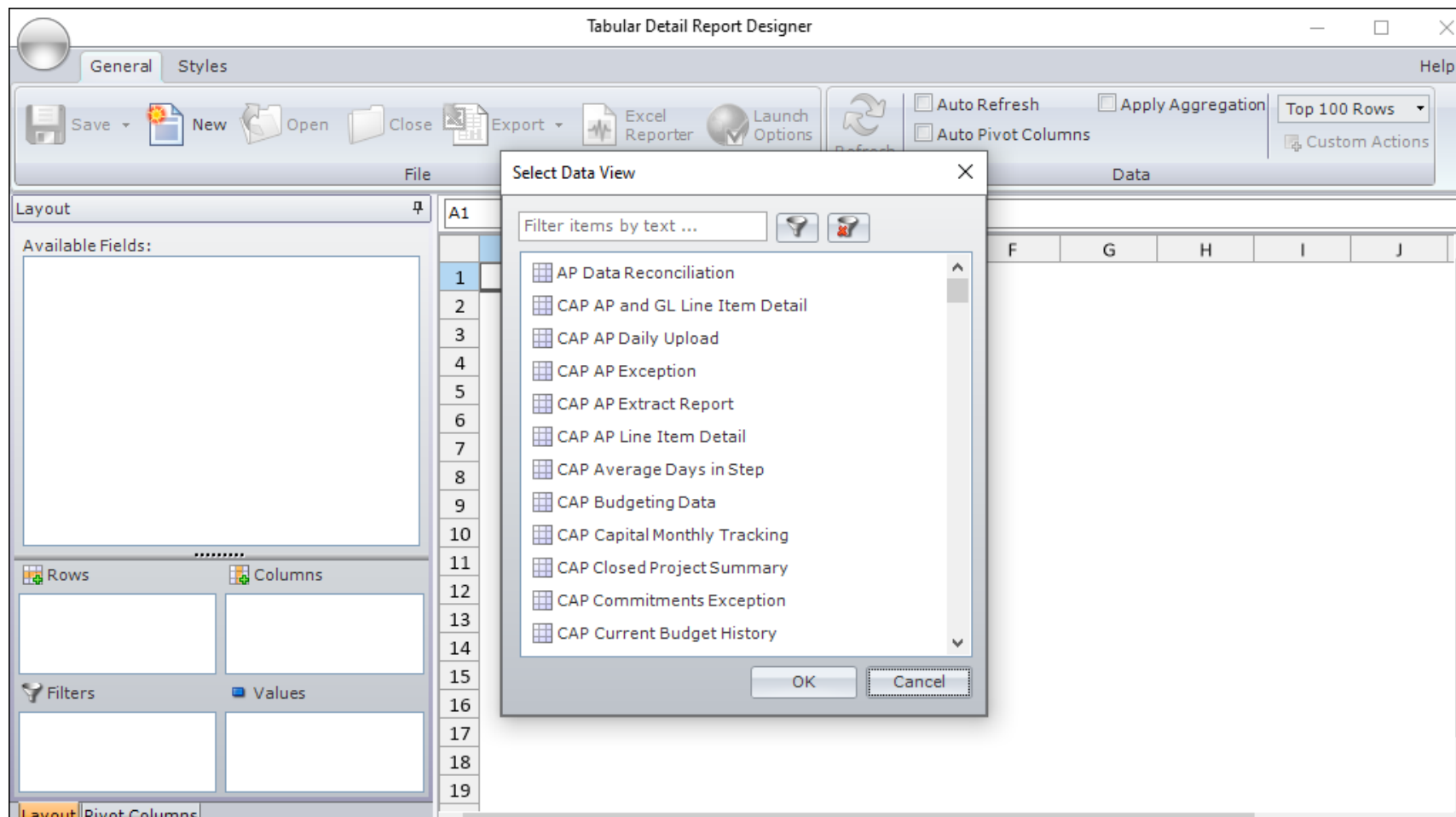
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1														
2														
3														
4														
5														

Tools

Data Sources

- + Add
- Edit
- Delete
- Refresh
- + Add Existing
- + Add Numbering Data Source
- + Add New Tabular Detail Data Source...

Creating a New Data Source



Bring in Additional Data Source

Demonstration & Hands-On Activity

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Filter New Data Source

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Finalize Report Build

Demonstration & Hands-On Activity

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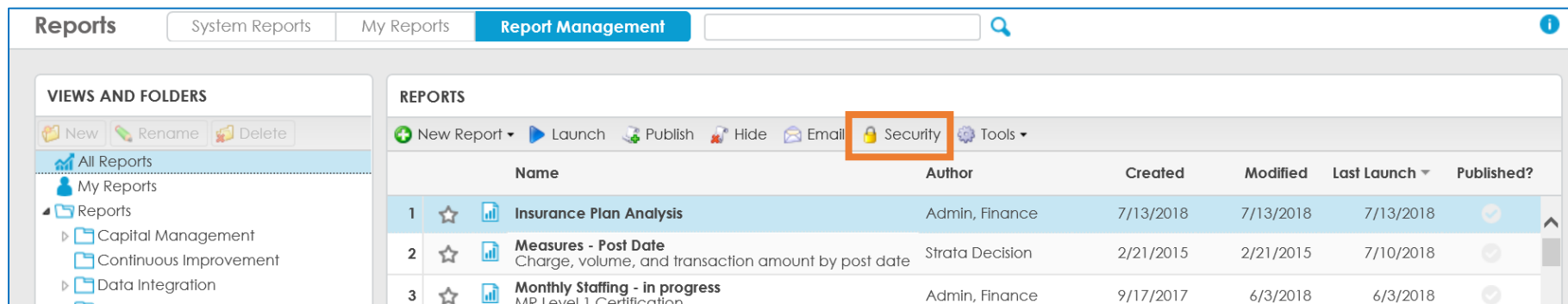
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Report Security

- Only you have access to new report by default
- Edit via Report Management section



The screenshot shows the 'Reports' interface with the 'Report Management' tab selected. The left sidebar shows a tree view of folders including 'All Reports', 'My Reports', and 'Reports' with sub-folders like 'Capital Management', 'Continuous Improvement', and 'Data Integration'. The main area displays a table of reports with columns for Name, Author, Created, Modified, Last Launch, and Published?. A toolbar above the table includes icons for 'New Report', 'Launch', 'Publish', 'Hide', 'Email', 'Security' (highlighted with an orange box), and 'Tools'.

	Name	Author	Created	Modified	Last Launch	Published?
1	Insurance Plan Analysis	Admin, Finance	7/13/2018	7/13/2018	7/13/2018	✓
2	Measures - Post Date Charge, volume, and transaction amount by post date	Strata Decision	2/21/2015	2/21/2015	7/10/2018	✓
3	Monthly Staffing - in progress MR Level 1 Certification	Admin, Finance	9/17/2017	6/3/2018	6/3/2018	✓

Launching Your Report

Report Setup

Cancel Run Report | Parameter Set: [New Parameter Set]

— Time Class —

Actual

— MR Department —

*10 - 2514 - IU 7T CVICU

— Launch Options —

Break Out Report By:

Troubleshooting

- Test your report before giving security to anyone else
 - Run the report on a control group (i.e. 1 department and then 1 hospital)
 - Compare against ad hoc report
 - Compare against source system
- If your report is incorrect check the following:
 - Picked the correct [backing] Data Source
 - All filters are set
 - Your Data Source refreshed when building
 - Your formulas are successfully bringing in any dynamic filters
 - Everything is SPELLED correctly in the DSVVALUESUM formula
- Many issues will require a Strata Team member's assistance

Tips and Tricks (if time allows)

- Default Parameters
- Sort order for Accounts/Departments
- **ctrl + shift + alt** to access Excel Designer

Questions

Question and Answer

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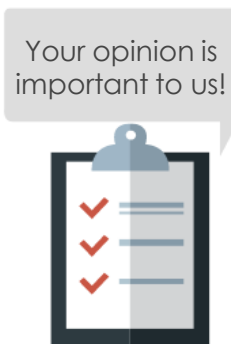
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Training Evaluation

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<https://stratadecision.getfeedback.com/trainingday>

Training Session:
Introduction to Excel Reporter