Welcome to the Manipulating Report Data Tutorial

Audience: Employers & Brokers

Module Length: Approx. 8 min.

Last Updated: 12/12/06

Welcome to the Manipulating Report Data tutorial. In this tutorial, you will learn how to reorient and reset report data by using the results of a Payments By Month report.

Welcome to the Manipulating Report Data Tutorial

Audience: Employers & Brokers

Module Length: Approx. 8 min.

Last Updated: 12/12/06

Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

Welcome to the Manipulating Report Data Tutorial

Audience: Employers & Brokers

Module Length: Approx. 8 min.

Last Updated: 12/12/06

Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.

Employer eServices®

Reports Home   Automated Reports   Custom Reports   Recent Reports   Help & Training   News

Reports Home > ECR > Custom Reports > Financial > **Payments By Month->Book Quarter->Transaction Type Category**

File ▾   View ▾   Data ▾   Format ▾   Last update:

PAGE-BY: none   ? ✕

Data rows: 18   Data columns: 4

Book Year/Month ▲	Transaction Type Category ▲	Book Quarter ▲	Benefit Payment Metrics	Medical	Managed Pharmacy	Capitation	Total
				Payments ▾	Payments ▾	Payments ▾	Payments ▾
2003-01	Original Transactions	Q12003		$15,564,585	$42,920	$1,342	$15,608,847
	Non-Original Transactions	Q12003		($42,936)	($205)	$0	($43,141)
	Pooled Transactions	Q12003		$0	$0	$0	$0
	Refund Transactions	Q12003		($396,256)	$0	($43)	($396,299)
	Bulk Recovery Transactions	Q12003		($36,798)	$0	$0	($36,798)
2003-02	Original Transactions	Q12003		$17,234,359	$45,686	$1,267	$17,281,312
	Non-Original Transactions	Q12003		($34,308)	($360)	$0	($34,668)
	Refund Transactions	Q12003		($151,371)	$0	($103)	($151,474)

1. Introduction   3. Reset Data
2. Reorient Data   4. Try It!
(X:0; Y:470)

In this section, you will learn how to reorient report data using various manipulation icons.

In this section, you will learn how to reorient report data using various manipulation icons.

Employer eServices®

Employer eServices®

| Reports Home | Automated Reports | Custom Reports | Recent Reports | Help & Training | News |

Reports Home > ECR > Custom Reports > Financial > **Payments By Month->Book Quarter->Transaction Type Category**

File ▾ | View ▾ | Data ▾ | Format ▾   Last update: ◄

PAGE-BY: none   ? ✕

Data rows: 18   Data columns: 4

Book Year/Month ▲	Transaction Type Category ▲	Book Quarter ▲	Benefit Payment Metrics	Medical Payments ▾	Managed Pharmacy Payments ▾	Capitation Payments ▾	Total Payments ▾
2003-01	Original Transactions	Q12003		$15,564,585	$42,920	$1,342	**$15,608,847**
	Non-Original Transactions	Q12003		($42,936)	($205)	$0	**($43,141)**
	Pooled Transactions	Q12003		$0	$0	$0	**$0**
	Refund Transactions	Q12003		($396,256)	$0	($43)	**($396,299)**
	Bulk Recovery Transactions	Q12003		($36,798)	$0	$0	**($36,798)**
2003-02	Original Transactions	Q12003		$17,234,359	$45,686	$1,267	**$17,281,312**
	Non-Original Transactions	Q12003		($34,308)	($360)	$0	**($34,668)**
	Refund Transactions	Q12003		($151,371)	$0	($103)	**($151,474)**

| 1. Introduction | 3. Reset Data |
| 2. Reorient Data | 4. Try It! |

(X:0; Y:470)

We'll demonstrate options available by viewing and manipulating report data.

We'll demonstrate options available by viewing and manipulating report data.

Employer eServices®

Notice the icons below the column headers, like those for the Transaction Type Category variable on this page. They enable you to alter the way the report results display.

Employer eServices®

Note that the time it takes to process a manipulation will vary, depending on the size and complexity of the report. A Processing Request box may display while the report is being reoriented.

Employer eServices®

Let's begin by moving the Transaction Type Category column to the left. Click its Move Left icon.

Employer eServices®

The Transaction Type Category column has moved to the left. Now let's move the Book Year/Month column to the right. Click its Move Right icon.

The Book Year/Month column has moved to the right. Next, we'll resort the Capitation Payments data by clicking its Sort icon.

Employer eServices®

The elements in the Capitation Payments column have been resorted. Data can also be moved up or down. Click the Move Down icon to move the Benefit Payment heading below the Metrics heading.

Employer eServices®

The Benefit Payment heading has been moved down. You can move it back up by clicking its Move Up icon.

Employer eServices®

The Benefit Payment heading moved back to the top of the column. Let's see how the Page By function will let us view one element's group of data at a time. Click the Page By icon for the Book Year/Month column.

Employer eServices®

The Book Year/Month column has been removed from the report grid. The report now displays only the results for the elements of the Book Year/Month variable.

Employer eServices®

Notice that the Page By action displayed near the top of the page shows the title of the element chosen.

This area also includes Move icons to return the data back to rows or columns. These icons also appear below each column variable. Also, there is a drop-down field for paging from one element to another.

Employer eServices®

Display the Book Year/Month variable as a heading by clicking its Move to Columns icon. This is represented by an upturning arrow when the variable is displayed as a column, as shown on the Book Quarter column.

The Book Year/Month variable now appears as a heading. Now let's expand this data back into a full column on the grid by clicking its Move to Rows icon.

The Book Year/Month column reappears on the grid.

In this section, you will learn how to reverse multiple report data manipulations at once by resetting the data.

Employer eServices®

We just learned how to use manipulation icons to reorient report data, and how these functions also enable us to reverse a manipulation.

There may be times when you've made a number of changes and then decide you want to return to the original report results. We can do this quickly by using the Reset Data option. Click the Data menu item.

Employer eServices®

From the Data menu select Reset Data to return to the original report results.

The report data has returned to its original format. Selecting Reset Data undoes all of the manipulations you applied. You should not reset data if you want to retain the manipulations.

Employer eServices®

Congratulations! You have completed the Manipulating Report Data tutorial. In this tutorial, you learned how to manipulate your report results by reorienting and resetting the data.