

Employer eServices®

Welcome to the Manipulating Report Data Tutorial

Audience: Employers & Brokers

Module Length: Approx. 8 min.

Last Updated: 12/12/06

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

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

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.

Employer eServices®

Welcome to the Manipulating Report Data Tutorial

Audience: Employers & Brokers

Module Length: Approx. 8 min.

Last Updated: 12/12/06

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

(X:0; Y:470)

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

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.

Employer eServices®

Welcome to the Manipulating Report Data Tutorial

Audience: Employers & Brokers

Module Length: Approx. 8 min.

Last Updated: 12/12/06

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

(X:0; Y:470)

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

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.

Manipulating Report Data

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)
2003-02	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
	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.

Manipulating Report Data

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)
2003-02	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
	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.

Manipulating Report Data

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)
2003-02	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
	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 2. Reorient Data 3. Reset Data 4. Try It!

(X:0; Y:470)

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.

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.

Manipulating Report Data

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)
2003-02	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
	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)

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.

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.

Manipulating Report Data

The screenshot displays the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, and Recent Reports. Below these is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments By Month->Book Quarter->Transaction Type Category. A menu bar includes File, View, Data, and Format. A toolbar contains various icons for report manipulation. The main area shows a table with the following data:

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
	Pooled Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
	Refund Transactions	Q12003		\$0	\$0	\$0	\$0
	Bulk Recovery Transactions	Q12003		(\$396,256)	\$0	(\$43)	(\$396,299)
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)

At the bottom left, there is a navigation menu with buttons: 1. Introduction, 2. Reorient Data, 3. Reset Data, and 4. Try It! (X:0; Y:470). A text box on the right contains the instruction: "Let's begin by moving the Transaction Type Category column to the left. Click its Move Left icon." A blue callout box points to the "Move Left" icon in the Transaction Type Category header cell.

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

Manipulating Report Data

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: 22 Data columns: 4

Transaction Type Category	Book Year/Month	Book Quarter	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
Original Transactions	2003-01	Q12003		\$15,564,585	\$42,920	\$1,342	\$15,608,847
	2003-02	Q12003		\$17,234,359	\$45,686	\$1,267	\$17,281,312
	2003-03	Q12003		\$19,419,284	\$38,248	\$1,328	\$19,458,860
	2003-04	Q22003		\$18,798,717	\$43,601	\$1,285	\$18,843,602
Total				\$71,016,946	\$170,455	\$5,222	\$71,192,622
Non-Financial Transactions (X:13; Y:160)	2003-01	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
	2003-02	Q12003		(\$34,308)	(\$360)	\$0	(\$34,668)
	2003-03	Q12003		(\$19,095)	(\$451)	\$0	(\$19,547)
	2003-04	Q22003		(\$37,473)	(\$52)	\$0	(\$37,525)
Total				(\$133,812)	(\$1,068)	\$0	(\$134,881)
Pooled Transactions	2003-01	Q12003		\$0	\$0	\$0	\$0
	Total			\$0	\$0	\$0	\$0
Refund	2003-01	Q12003		(\$396,256)	\$0	(\$43)	(\$396,299)
	2003-02	Q12003		(\$151,371)	\$0	(\$103)	(\$151,474)

Click the Move Right icon

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

(X:0; Y:470)

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 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.

Manipulating Report Data

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: 26 Data columns: 4

Transaction Type Category	Book Quarter	Book Year/Month	Benefit Payment Metrics	Medical	Managed Pharmacy	Capitation	Total
				Payments	Payments	Payments	Payments
Original Transactions	Q12003	2003-01		\$15,564,585	\$42,920	\$1,342	\$15,608,847
		2003-02		\$17,234,359			\$17,281,312
		2003-03		\$19,419,284			\$19,458,860
	Total		\$52,218,229	\$126,854	\$3,937	\$52,349,020	
Q22003	2003-04		\$18,798,717	\$43,601	\$1,285	\$18,843,602	
	Total		\$18,798,717	\$43,601	\$1,285	\$18,843,602	
	2003-01		(\$42,936)	(\$205)	\$0	(\$43,141)	
Non-Original Transactions	Q12003	2003-01		(\$34,308)	(\$360)	\$0	(\$34,668)
		2003-02		(\$19,095)	(\$451)	\$0	(\$19,547)
		Total		(\$96,340)	(\$1,016)	\$0	(\$97,356)
	Q22003	2003-04		(\$37,473)	(\$52)	\$0	(\$37,525)
Total			(\$37,473)	(\$52)	\$0	(\$37,525)	
Pooled Transactions	Q12003	2003-01		\$0	\$0	\$0	\$0
		Total		\$0	\$0	\$0	\$0

Click the Sort icon

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

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

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

Manipulating Report Data

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: 26 Data columns: 4

Transaction Type Category	Book Quarter	Book Year/Month	Benefit Payment	Medical	Managed Pharmacy	Capitation	Total
Non-Original Transactions	Q12003	2003-01					
		2003-02					
		2003-03					
		2003-04					
Pooled Transactions	Q12003	2003-01					
		2003-02					
		2003-03					
		2003-04					
Bulk Recovery Transactions	Q12003	2003-01					
		2003-02					
		2003-03					
		2003-04					
Original Transactions	Q12003	2003-01					
		2003-02					
		2003-03					
		2003-04					

Click the Move Down icon

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.

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

(X:0; Y:470)

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.

Manipulating Report Data

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: 26 Data columns: 4

Transaction Type Category	Book Quarter	Book Year/Month	Metrics				Payments			
			Benefit Payment	Medical	Managed Pharmacy	Capitation	Total			
Non-Original Transactions	Q12003	2003-01		(\$42,936)	(\$205)	\$0	(\$43,141)			
		2003-02		(\$360)	(\$451)	\$0	(\$34,668)			
		2003-03					(\$19,547)			
Pooled Transactions	Q22003	2003-04		(\$37,473)	(\$52)	\$0	(\$37,525)			
		2003-01		\$0	\$0	\$0	\$0			
Bulk Recovery Transactions	Q12003	2003-01		(\$36,798)	\$0	\$0	(\$36,798)			
		2003-02		(\$24,123)	\$0	\$0	(\$24,123)			
		2003-03		(\$12,996)	\$0	\$0	(\$12,996)			
Original Transactions	Q22003	2003-04		(\$22,460)	\$0	\$0	(\$22,460)			
		2003-01		\$15,564,585	\$42,920	\$1,342	\$15,608,847			
		2003-03		\$19,419,284	\$38,248	\$1,328	\$19,458,860			
	Q12003	2003-04		\$18,798,717	\$43,601	\$1,285	\$18,843,602			
		2003-02		\$17,234,359	\$45,686	\$1,267	\$17,281,312			

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

(X:0; Y:470)

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

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

Manipulating Report Data

The screenshot shows the Employer eServices interface with a report titled "Payments By Month -> Book Quarter -> Transaction Type Category". The report is displayed in a grid format with columns for Transaction Type Category, Book Quarter, Book Year/Month, Benefit Payment, Medical Payments, Managed Pharmacy Payments, Capitation Payments, and Total Payments. The data is grouped by Transaction Type Category, with sub-groups for Non-Original Transactions, Pooled Transactions, Bulk Recovery Transactions, and Original Transactions. The report shows data for the year 2003, with quarters Q1 and Q2. The total payments for each category are shown in bold. The interface includes a navigation menu at the top, a toolbar with various icons, and a status bar at the bottom. A red box highlights the "Page By" icon in the Book Year/Month column header, and a blue callout box points to it with the text "Click the Page By icon".

Transaction Type Category	Book Quarter	Book Year/Month	Benefit Payment	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
Non-Original Transactions	Q12003	2003-01	(\$42,936)	(\$205)	\$0	(\$43,141)	
		2003-03	(\$34,308)	(\$360)	\$0	(\$34,668)	
	Q22003	2003-03	(\$19,095)	(\$451)	\$0	(\$19,547)	
		2003-04	(\$37,473)	(\$52)	\$0	(\$37,525)	
Pooled Transactions	Q12003	2003-01	\$0	\$0	\$0	\$0	
		2003-01	(\$36,798)	\$0	\$0	(\$36,798)	
Bulk Recovery Transactions	Q12003	2003-02	(\$24,123)	\$0	\$0	(\$24,123)	
		2003-03	(\$12,996)	\$0	\$0	(\$12,996)	
	Q22003	2003-04	(\$22,460)	\$0	\$0	(\$22,460)	
			2003-01	\$15,564,585	\$42,920	\$1,342	\$15,608,847
Original Transactions	Q12003	2003-03	\$19,419,284	\$38,248	\$1,328	\$19,458,860	
		Q22003	2003-04	\$18,798,717	\$43,601	\$1,285	\$18,843,602
	Q12003	2003-02	\$17,234,359	\$45,686	\$1,267	\$17,281,312	
		2003-01	\$15,564,585	\$42,920	\$1,342	\$15,608,847	

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

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.

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.

Manipulating Report Data

The screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, and News. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments By Month->Book Quarter->Transaction Type Category. A menu bar includes File, View, Data, and Format. A toolbar contains various icons for report manipulation. The 'PAGE-BY:' dropdown is set to 'Book Year/Month' and is highlighted with a red box. The main data area shows a table with 5 rows and 4 columns. The table headers are Transaction Type Category, Book Quarter, Benefit Payment Metrics, Medical Payments, Managed Pharmacy Payments, Capitation Payments, and Total Payments. The data rows are: Non-Original Transactions Q12003 (\$42,936, \$205, \$0, \$43,141), Pooled Transactions Q12003 (\$0, \$0, \$0, \$0), Bulk Recovery Transactions Q12003 (\$36,798, \$0, \$0, \$36,798), Original Transactions Q12003 (\$15,564,585, \$42,920, \$1,342, \$15,608,847), and Refund Transactions Q12003 (\$396,256, \$0, (\$43), \$396,299). Below the table is a copyright notice: © 2006 UnitedHealth Group @, Inc. All Rights Reserved. Confidential. At the bottom left, there is a navigation panel with buttons for 1. Introduction, 2. Reorient Data, 3. Reset Data, and 4. Try It! (X:0; Y:470). A text box on the right explains: '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.'

Transaction Type Category	Book Quarter	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
Original Transactions	Q12003		\$15,564,585	\$42,920	\$1,342	\$15,608,847
Refund Transactions	Q12003		(\$396,256)	\$0	(\$43)	(\$396,299)

© 2006 UnitedHealth Group @, Inc. All Rights Reserved. Confidential.

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

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.

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.

Manipulating Report Data

The screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, and News. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments By Month->Book Quarter->Transaction Type Category. A menu bar includes File, View, Data, and Format. A toolbar contains various icons for report manipulation. A 'PAGE-BY:' dropdown menu is highlighted with a red box, showing 'Book Year: Q1 2003-01'. Below the menu, it indicates 'Data rows: 5' and 'Data columns: 4'. The main data table is as follows:

Transaction Type Category	Book Quarter	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
Original Transactions	Q12003		\$15,564,585	\$42,920	\$1,342	\$15,608,847
Refund Transactions	Q12003		(\$396,256)	\$0	(\$43)	(\$396,299)

At the bottom left, there are four buttons: 1. Introduction, 2. Reorient Data, 3. Reset Data, and 4. Try It! Below these buttons is the text '(X:0; Y:470)'. At the bottom right, a blue-bordered box contains the text: 'Notice that the Page By action displayed near the top of the page shows the title of the element chosen.'

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

Manipulating Report Data

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: Book Year/Month: 2003-01

Data rows: 5 Data columns: 4

Transaction Type Category	Book Quarter	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
Original Transactions	Q12003		\$15,564,585	\$42,920	\$1,342	\$15,608,847
Refund Transactions	Q12003		(\$396,256)	\$0	(\$43)	(\$396,299)

© 2006 UnitedHealth Group @, Inc. All Rights Reserved. Confidential.

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

(X:0; Y:470)

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.

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.

Manipulating Report Data

The screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, and Recent Reports. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments By Month->Book Quarter->Transaction Type Category. A menu bar includes File, View, Data, and Format. A toolbar contains various icons for report manipulation. The 'PAGE-BY:' section shows 'Book Year/Month: 2003-01' with a red box around the 'Move to Columns' icon. A callout box points to this icon with the text 'Click the Move to Columns icon'. Below the toolbar is a table with 5 data rows and 4 data columns. The table has columns for Transaction Type Category, Book Quarter, Medical Payments, Managed Pharmacy Payments, Capitation Payments, and Total Payments. The 'Book Quarter' column has an upturning arrow icon. Below the table is a copyright notice: © 2006 UnitedHealth Group @, Inc. All Rights Reserved. Confidential. At the bottom left, there are four buttons: 1. Introduction, 2. Reorient Data, 3. Reset Data, and 4. Try It!. At the bottom right, a text box explains: '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.'

Transaction Type Category	Book Quarter	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
Non-Original Transactions	Q12003	(\$42,936)	(\$205)	\$0	(\$43,141)
Pooled Transactions	Q12003	\$0	\$0	\$0	\$0
Bulk Recovery Transactions	Q12003	(\$36,798)	\$0	\$0	(\$36,798)
Original Transactions	Q12003	\$15,564,585	\$42,920	\$1,342	\$15,608,847
Refund Transactions	Q12003	(\$396,256)	\$0	(\$43)	(\$396,299)

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.

Manipulating Report Data

The screenshot shows the Employer eServices interface with a report titled "Payments By Month -> Book Quarter -> Transaction Type Category". The report is for the period 2003-01. A red box highlights the cell for "Book (2003, 4)" in the "Book Quarter" column. A blue arrow points to this cell with the text "Highlight Box: Book (2003, 4)". Another blue arrow points to the "Move to Rows" icon in the "Book Quarter" column header with the text "Click the Move to Rows icon".

Transaction Type Category	Book Quarter	2003-01					
		Benefit Payment	Managed acy	Capitation	Total	Medical	Manage Pharma
Original Transactions	Q12003	\$15,564,585	\$42,920	\$1,342	\$15,608,847	\$17,234,359	\$45,
Non-Original Transactions	Q22003	\$0	\$0	\$0	\$0	\$0	\$0
Pooled Transactions	Q12003	(\$42,936)	(\$205)	\$0	(\$43,141)	(\$34,308)	(\$3,
Refund Transactions	Q22003	\$0	\$0	\$0	\$0	\$0	\$0
Bulk Recovery Transactions	Q12003	(\$396,256)	\$0	(\$43)	(\$396,299)	(\$151,371)	\$0
	Q22003	\$0	\$0	\$0	\$0	\$0	\$0
	Q12003	(\$36,798)	\$0	\$0	(\$36,798)	(\$24,123)	\$0
	Q22003	\$0	\$0	\$0	\$0	\$0	\$0

Navigation buttons: 1. Introduction, 2. Reorient Data, 3. Reset Data, 4. Try It!

Coordinates: (X:0; Y:470)

Text box: 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 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.

Manipulating Report Data

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 ? x

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	Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
	Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
2003-02	Non-Original Transactions	Q12003		(\$34,308)	(\$360)	\$0	(\$34,668)
	Bulk Recovery Transactions	Q12003		(\$24,123)	\$0	\$0	(\$24,123)
	Non-Original Transactions	Q12003		(\$19,095)	(\$451)	\$0	(\$19,547)
2003-03	Bulk Recovery Transactions	Q12003		(\$12,996)	\$0	\$0	(\$12,996)
	Non-Original Transactions	Q12003					

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

(X:0; Y:470)

The Book Year/Month column reappears on the grid.

The Book Year/Month column reappears on the grid.

Manipulating Report Data

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 ? x

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	Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
	Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
2003-02	Non-Original Transactions	Q12003		(\$34,308)	(\$360)	\$0	(\$34,668)
	Bulk Recovery Transactions	Q12003		(\$24,123)	\$0	\$0	(\$24,123)
2003-03	Non-Original Transactions	Q12003		(\$19,095)	(\$451)	\$0	(\$19,547)
	Bulk Recovery Transactions	Q12003		(\$12,996)	\$0	\$0	(\$12,996)
	Non-Original Transactions	Q22003		(\$37,473)	(\$52)	\$0	(\$37,525)

1. Introduction 3. Reset Data

2. Reorient Data 4. Try It!

(X:0; Y:470)

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

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

Manipulating Report Data

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	Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
	Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
2003-02	Non-Original Transactions	Q12003		(\$34,308)	(\$360)	\$0	(\$34,668)
	Bulk Recovery Transactions	Q12003		(\$24,123)	\$0	\$0	(\$24,123)
2003-03	Non-Original Transactions	Q12003		(\$19,095)	(\$451)	\$0	(\$19,547)
	Bulk Recovery Transactions	Q12003		(\$12,996)	\$0	\$0	(\$12,996)
	Non-Original Transactions	Q22003		(\$37,473)	(\$52)	\$0	(\$37,525)

1. Introduction 3. Reset Data

2. Reorient Data 4. Try It!

(X:0; Y:470)

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

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

Manipulating Report Data

Employer eServices®

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

File View **Data** Format

PAGE-BY: none Click the Data menu item

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	Non-Original Transactions	Q12003		(\$42,936)	(\$205)	\$0	(\$43,141)
	Pooled Transactions	Q12003		\$0	\$0	\$0	\$0
	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
2003-02	Non-Original Transactions	Q12003		(\$34,308)	(\$360)	\$0	(\$34,668)
	Bulk Recovery Transactions	Q12003		(\$24,123)	\$0	\$0	(\$24,123)
2003-03	Non-Original Transactions	Q12003		(\$19,095)	(\$451)	\$0	(\$19,547)
	Bulk Recovery Transactions	Q12003		(\$12,996)	\$0	\$0	(\$12,996)
	Non-Original Transactions	Q22003		(\$37,473)	(\$52)	\$0	(\$37,525)

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

(X:0; Y:470)

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.

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.

Manipulating Report Data

The screenshot displays the Employer eServices interface. The breadcrumb trail is: Reports Home > ECR > Custom Reports > Financial > Payments By Month->Book Quarter->Transaction Type Category. The 'Data' menu is open, showing options: Swap Rows and Columns, Sort..., Drill..., Filter on Selections..., **Reset Data**, Reprint, Show Totals, and Edit Totals... A red box highlights the 'Reset Data' option, and a blue callout box points to it with the text 'Select the Reset Data link'. The main report table shows data for 2003-01, 2003-02, and 2003-03, with columns for Medical, Managed Pharmacy, Capitation, and Total. A bottom panel contains four numbered steps: 1. Introduction, 2. Reorient Data, 3. Reset Data, 4. Try It!.

Book Year/Month	Transaction Type Category	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2003-01	Non-Original Transactions	(\$42,936)	(\$205)	\$0	(\$43,141)
	Pooled Transactions	\$0	\$0	\$0	\$0
	Bulk Recovery Transactions	(\$36,798)	\$0	\$0	(\$36,798)
2003-02	Non-Original Transactions	(\$34,308)	(\$360)	\$0	(\$34,668)
	Bulk Recovery Transactions	(\$24,123)	\$0	\$0	(\$24,123)
2003-03	Non-Original Transactions	(\$19,095)	(\$451)	\$0	(\$19,547)
	Bulk Recovery Transactions	(\$12,996)	\$0	\$0	(\$12,996)
	Non-Original Transactions	(\$37,473)	(\$52)	\$0	(\$37,525)

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

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

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

Manipulating Report Data

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)
2003-02	Bulk Recovery Transactions	Q12003		(\$36,798)	\$0	\$0	(\$36,798)
	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 2. Reorient Data 3. Reset Data 4. Try It!

(X:0; Y:470)

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.

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.

The screenshot shows the Employer eServices interface. At the top left, the text "Employer eServices®" is displayed. The main content area features a congratulatory message: "Congratulations! You have completed the Manipulating Report Data Tutorial". At the bottom left, there is a navigation menu with four buttons: "1. Introduction", "2. Reorient Data", "3. Reset Data", and "4. Try It!". Below the "3. Reset Data" button, the coordinates "(X:1; Y:470)" are visible. On the bottom right, a text box contains the message: "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."

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.