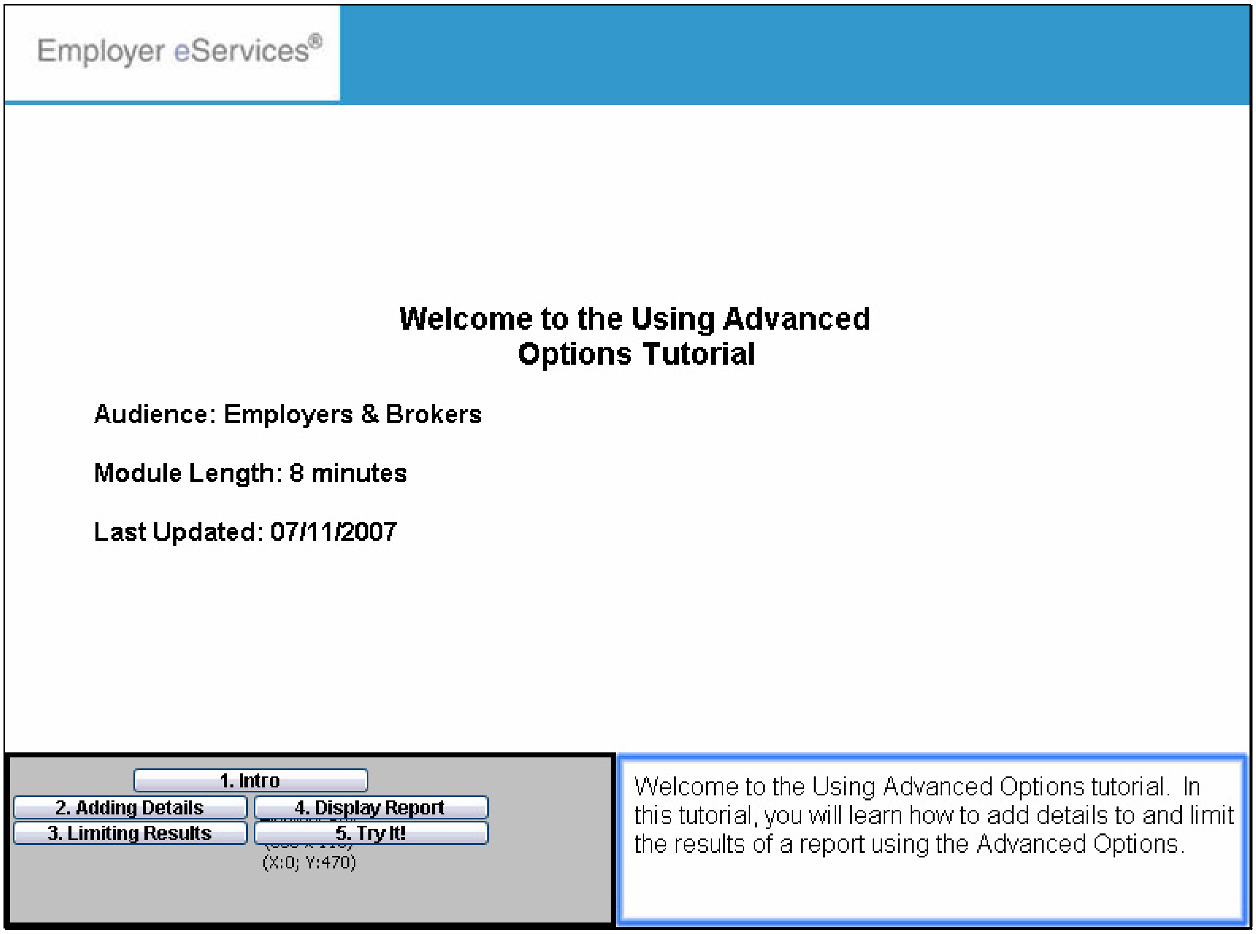
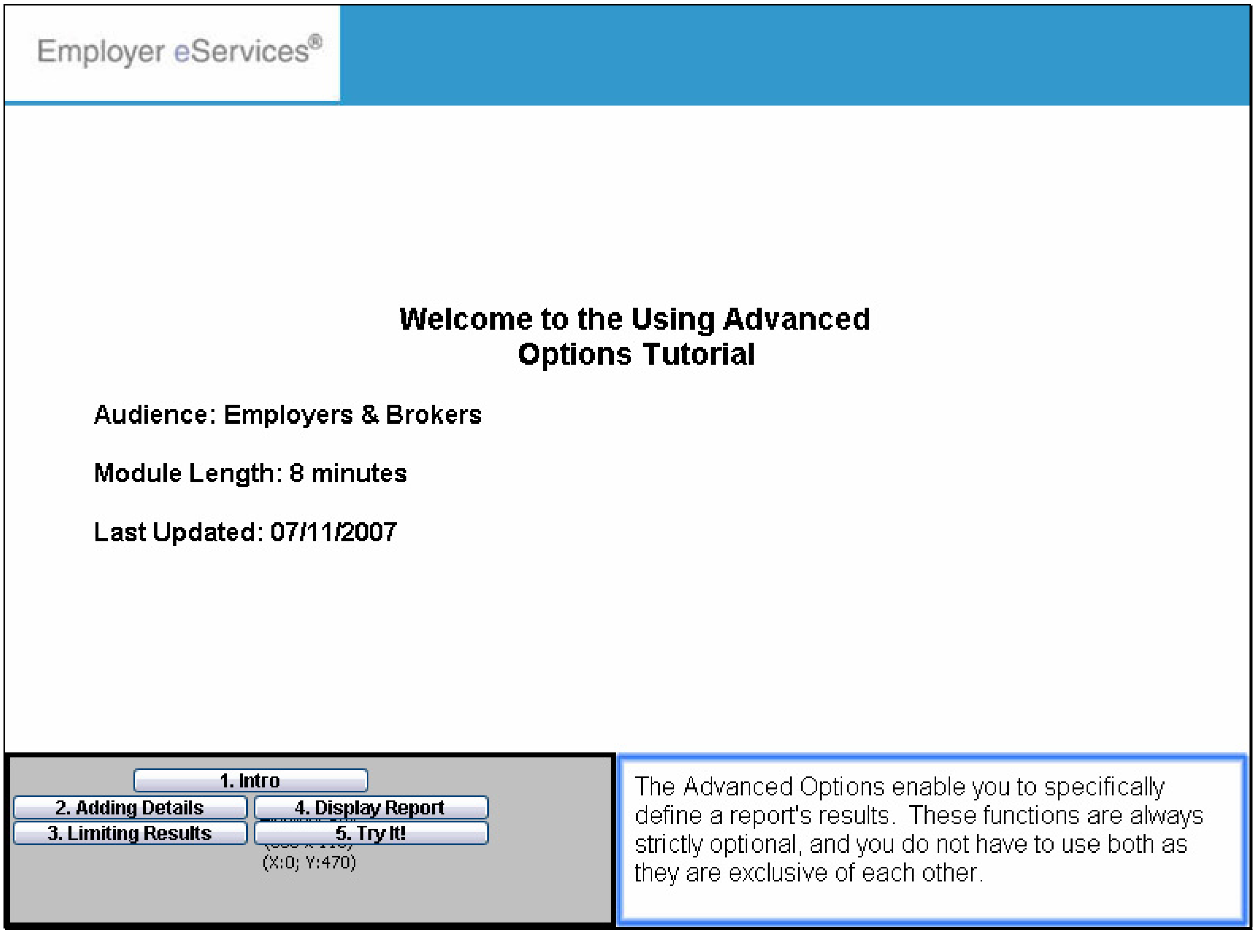
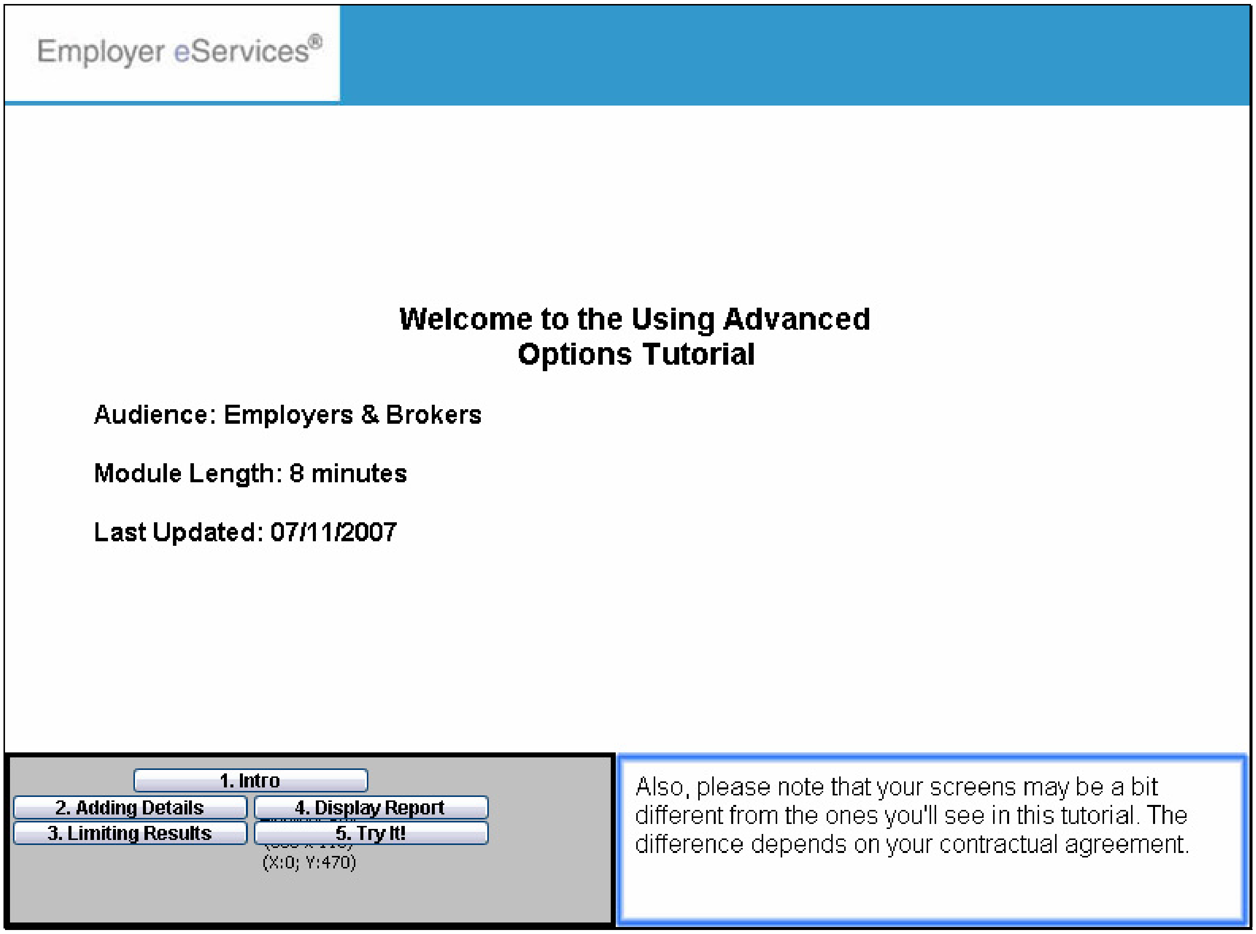


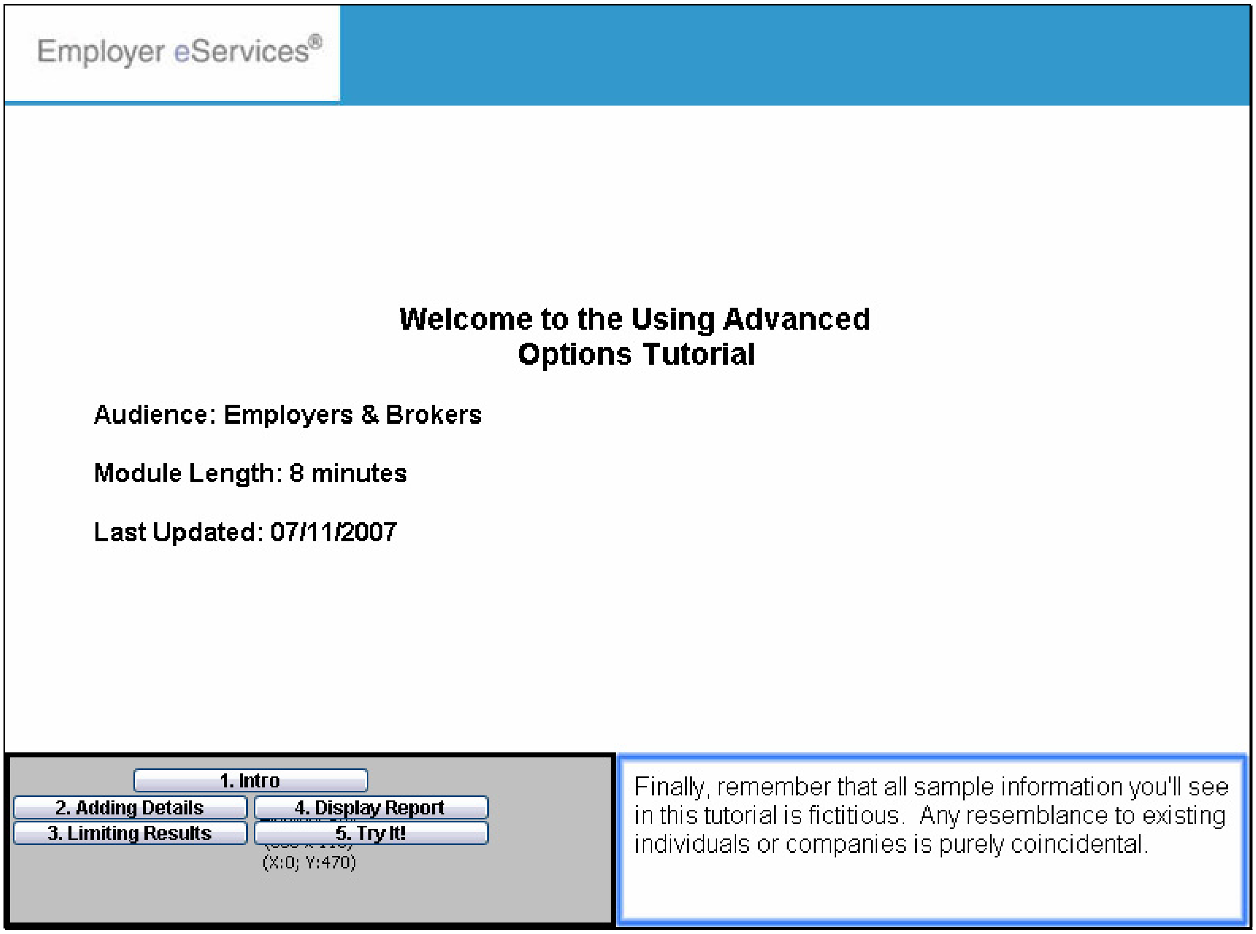
Welcome to the Using Advanced Options tutorial. In this tutorial, you will learn how to add details to and limit the results of a report using the Advanced Options.



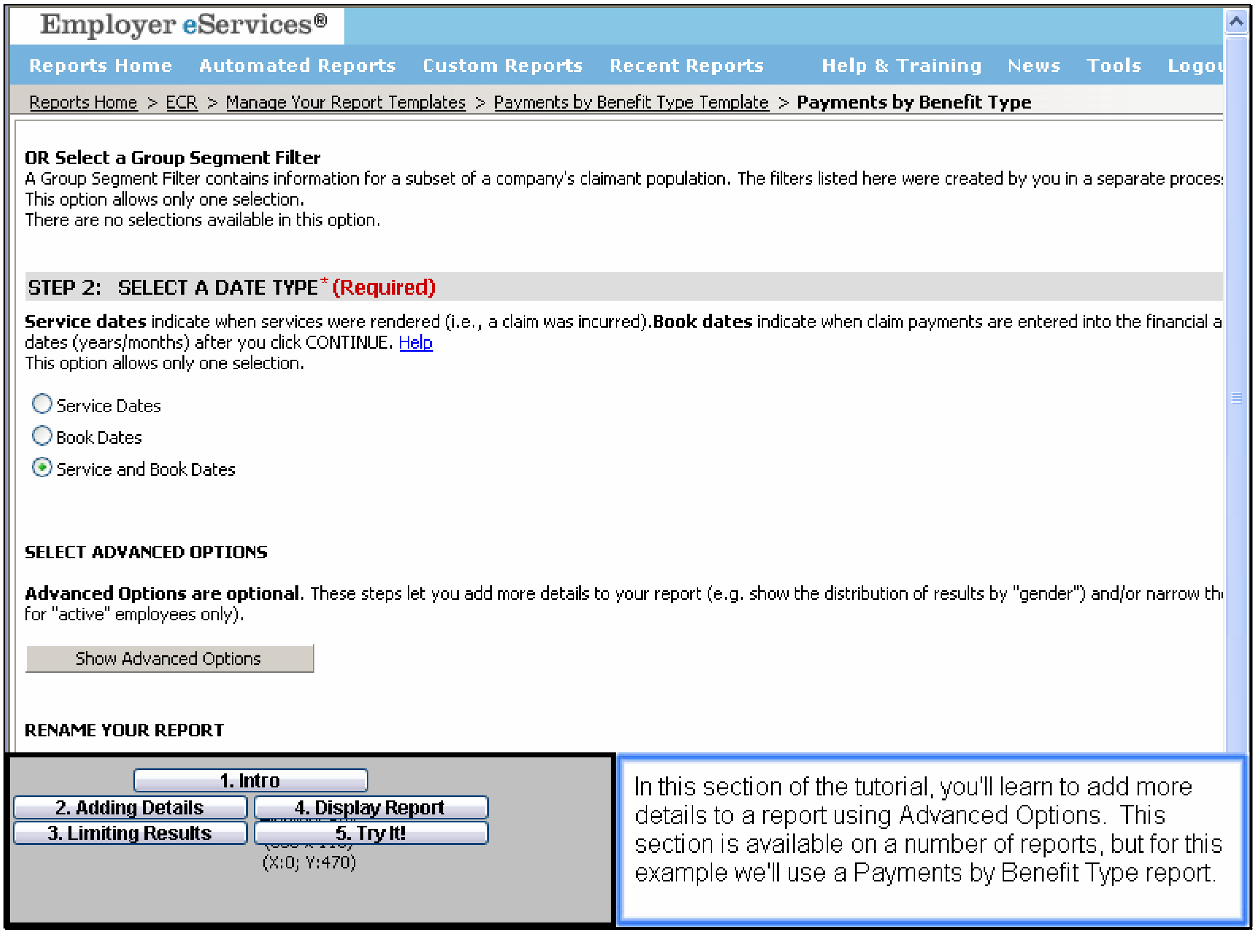
The Advanced Options enable you to specifically define a report's results. These functions are always strictly optional, and you do not have to use both as they are exclusive of each other.



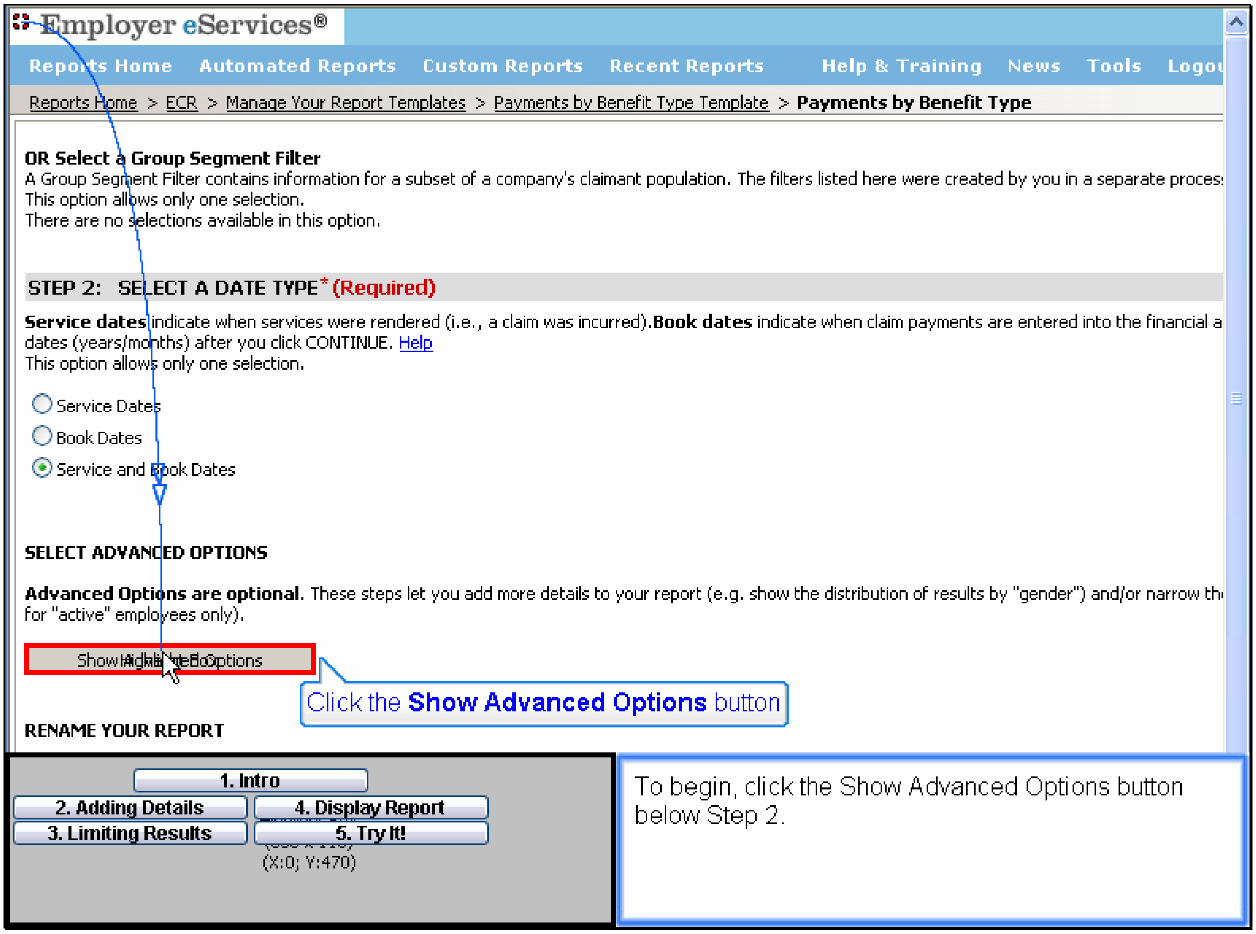
Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.



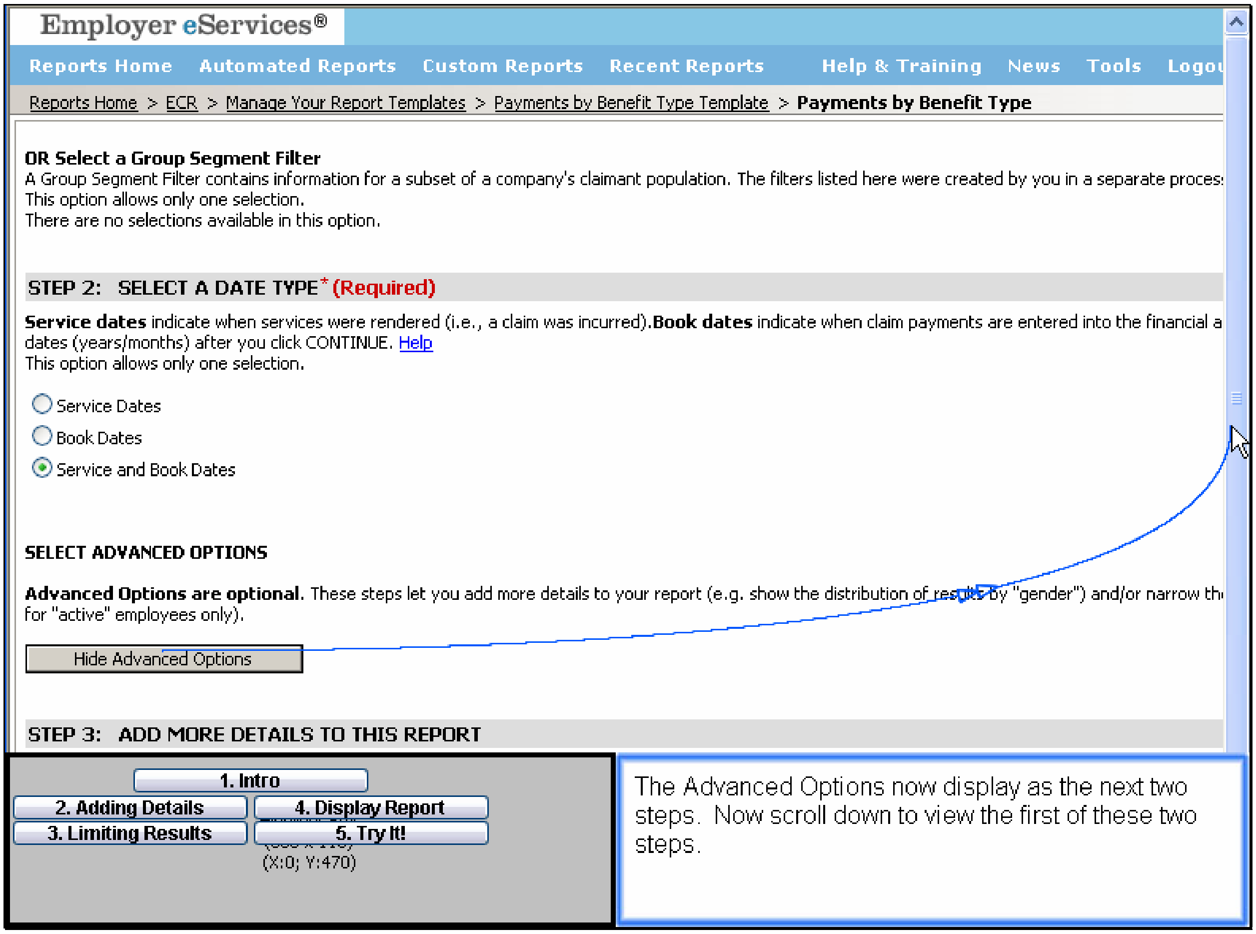
Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.



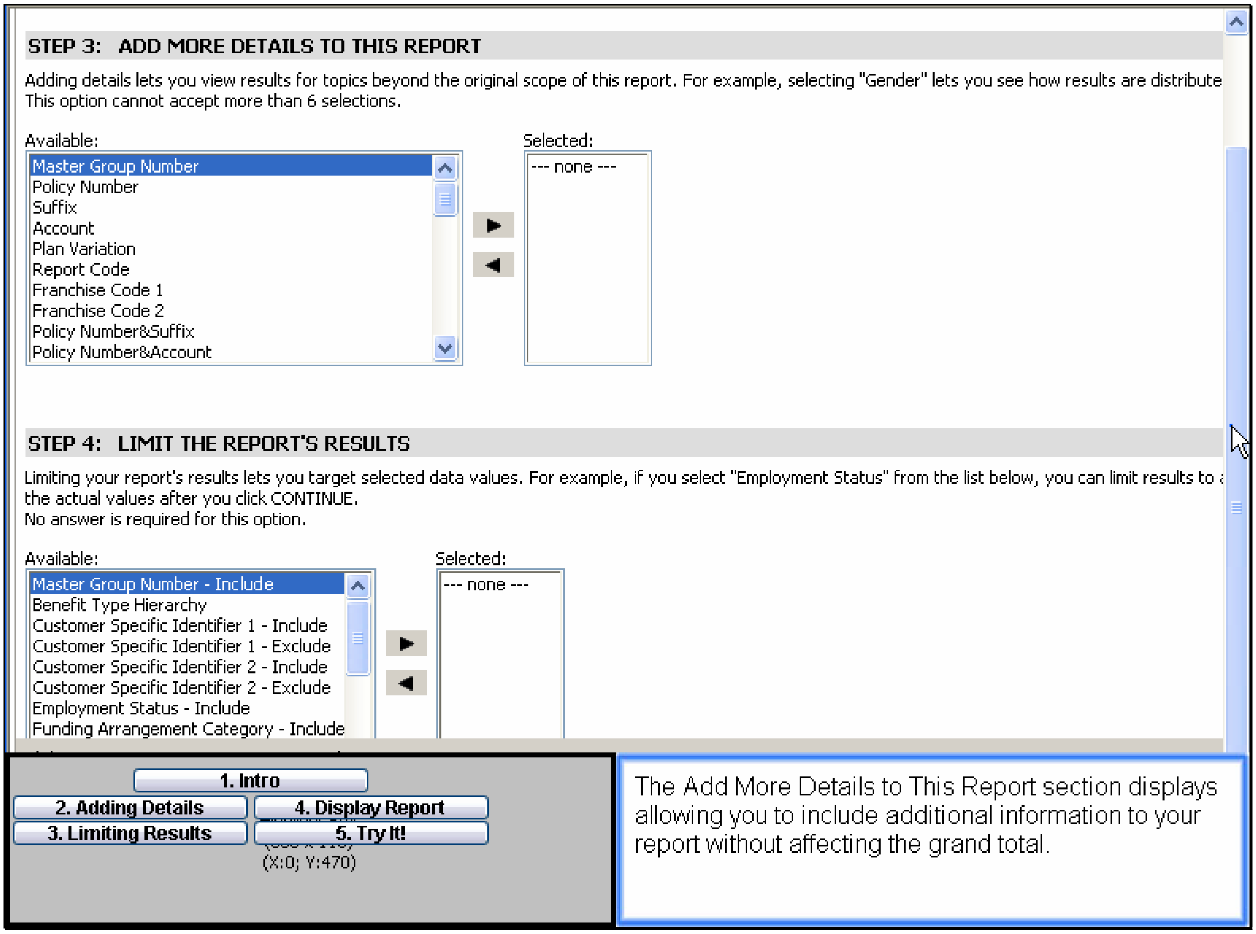
In this section of the tutorial, you'll learn to add more details to a report using Advanced Options. This section is available on a number of reports, but for this example we'll use a Payments by Benefit Type report.



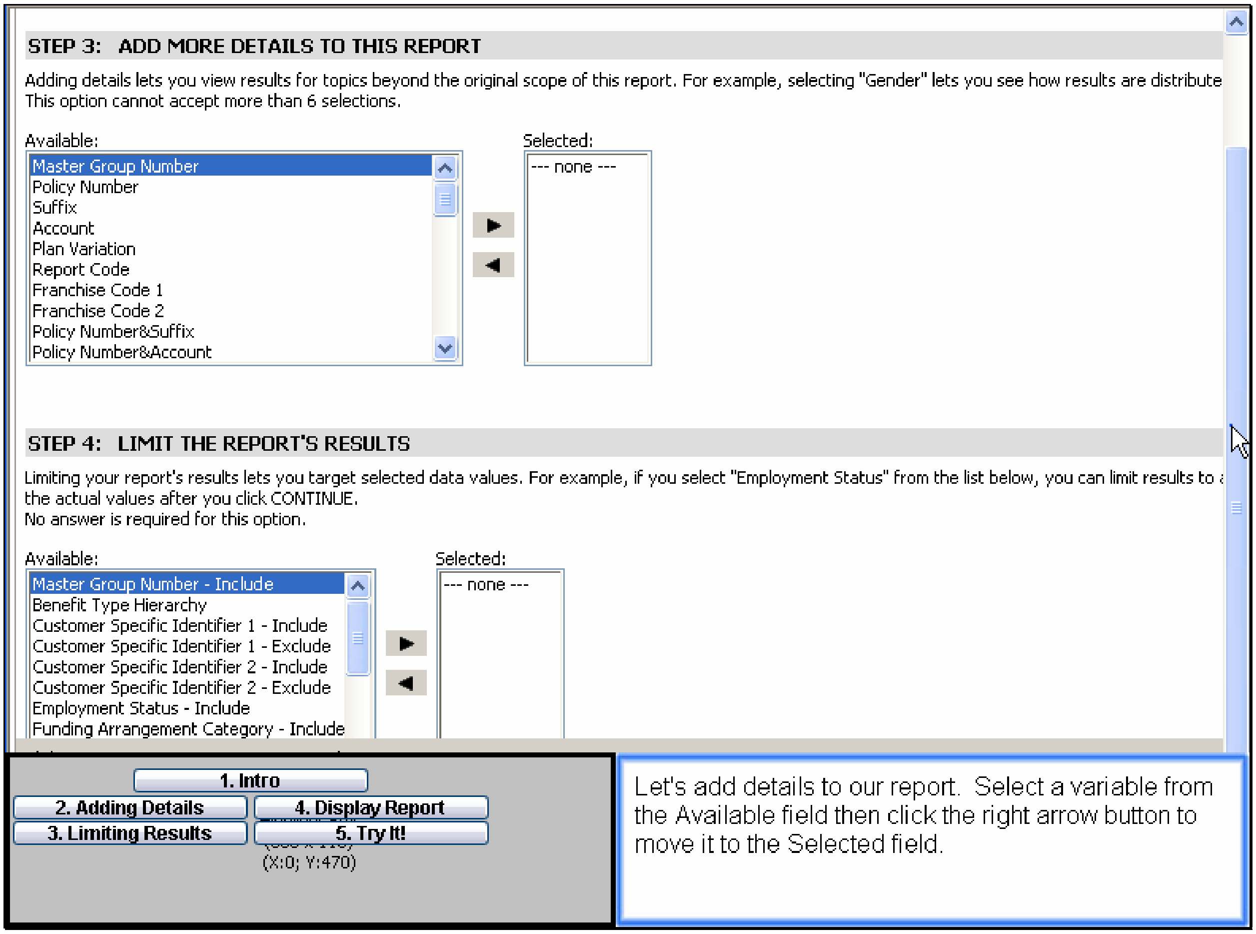
To begin, click the Show Advanced Options button below Step 2.



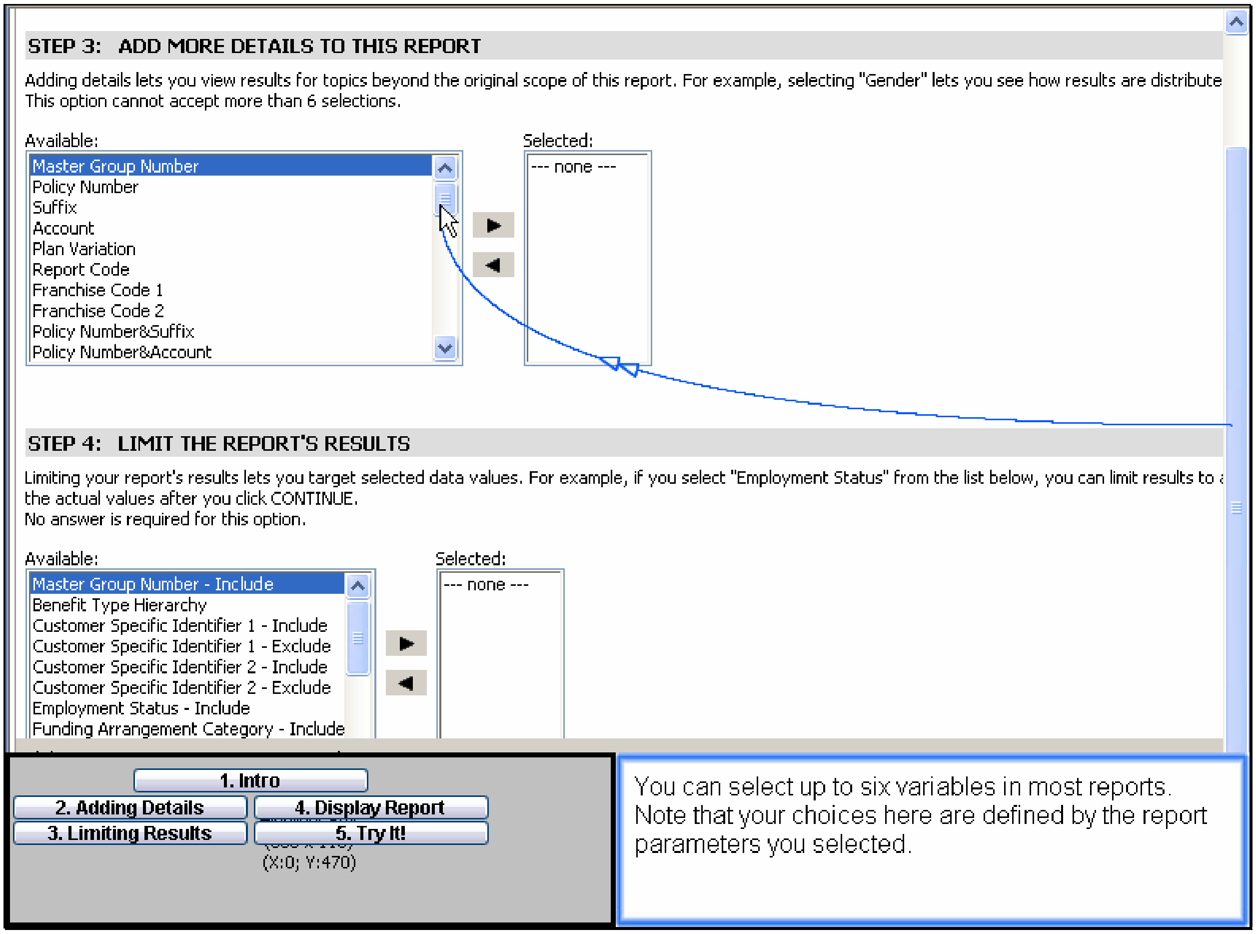
The Advanced Options now display as the next two steps. Now scroll down to view the first of these two steps.



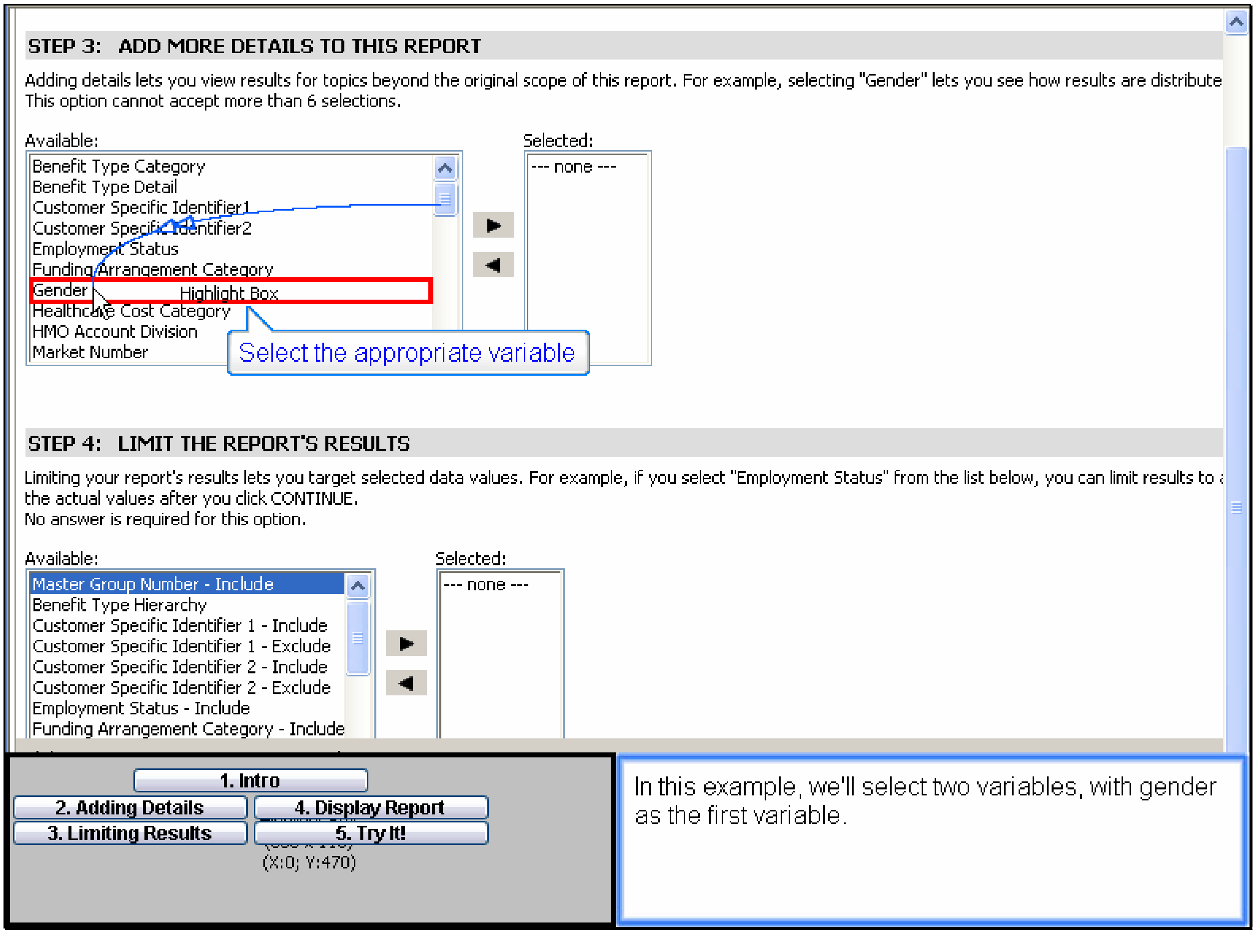
The Add More Details to This Report section displays allowing you to include additional information to your report without affecting the grand total.



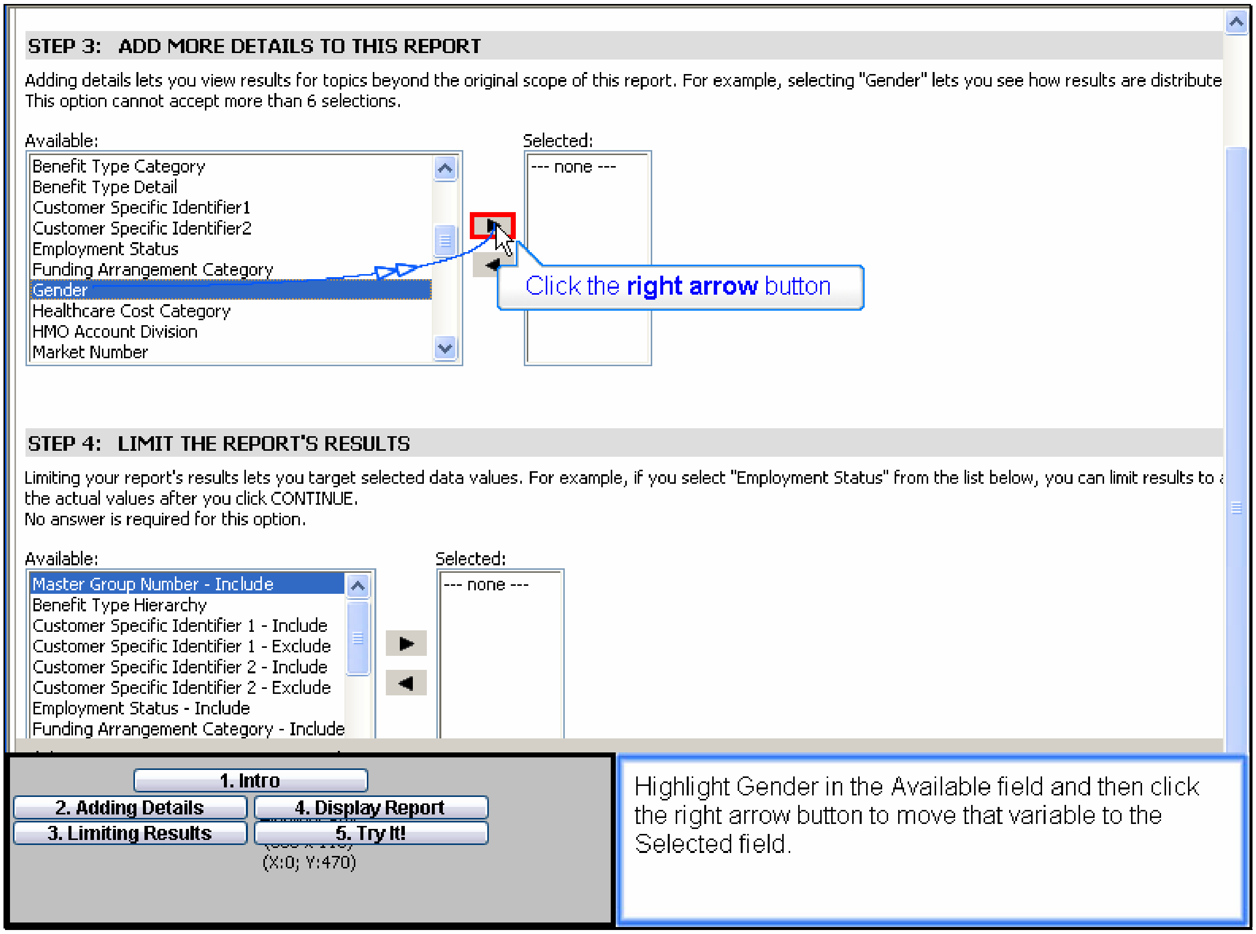
Let's add details to our report. Select a variable from the Available field then click the right arrow button to move it to the Selected field.



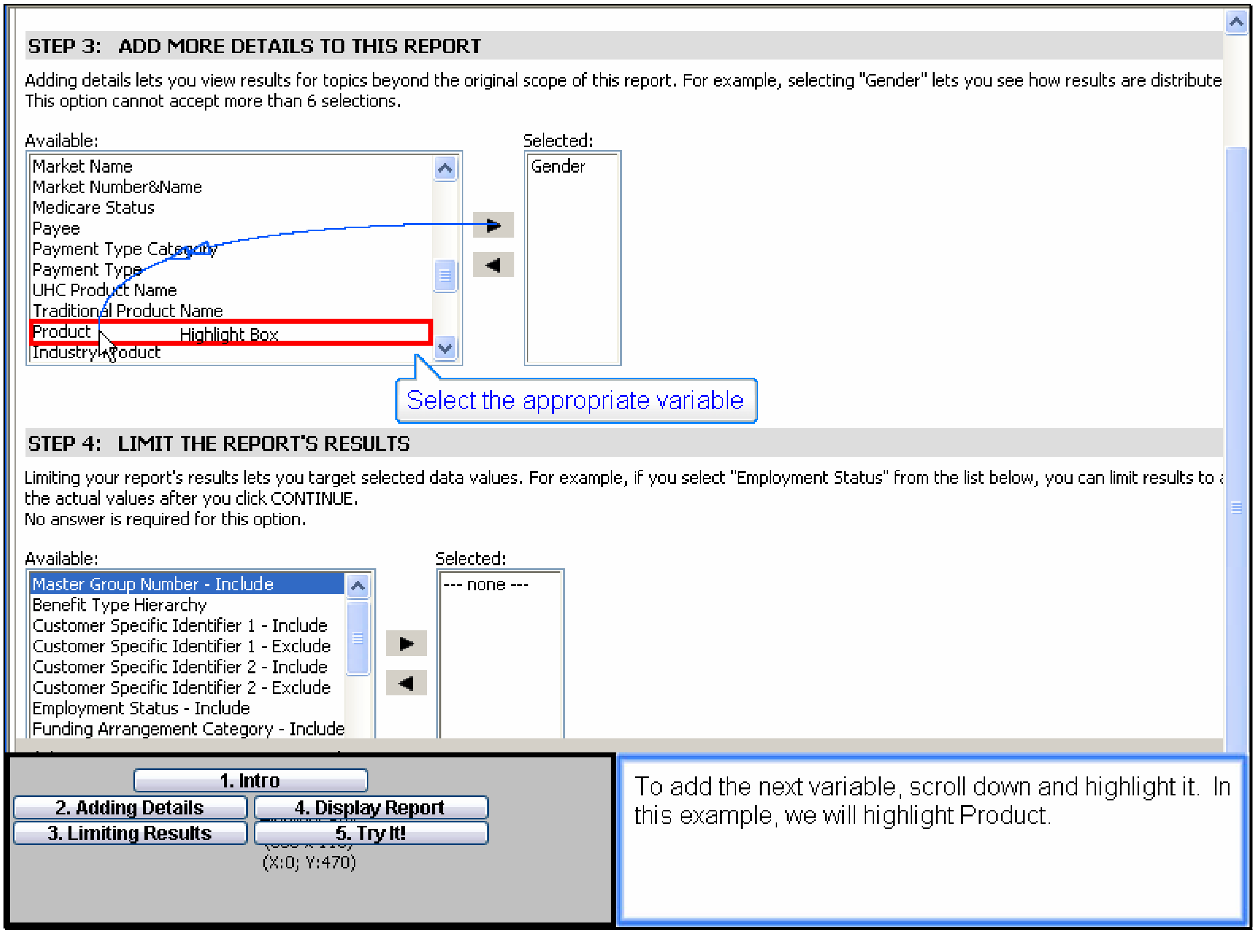
You can select up to six variables in most reports. Note that your choices here are defined by the report parameters you selected.



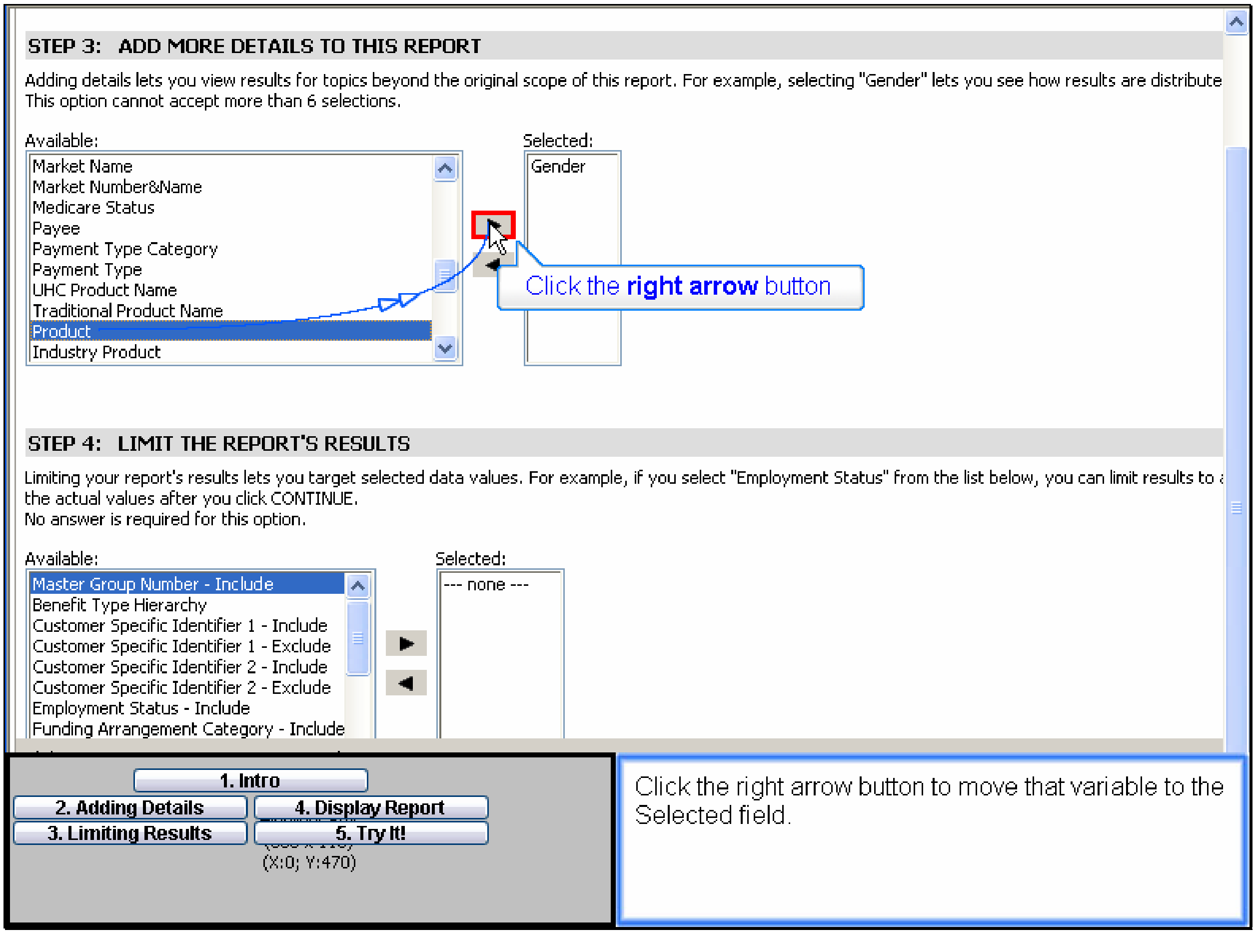
In this example, we'll select two variables, with gender as the first variable.



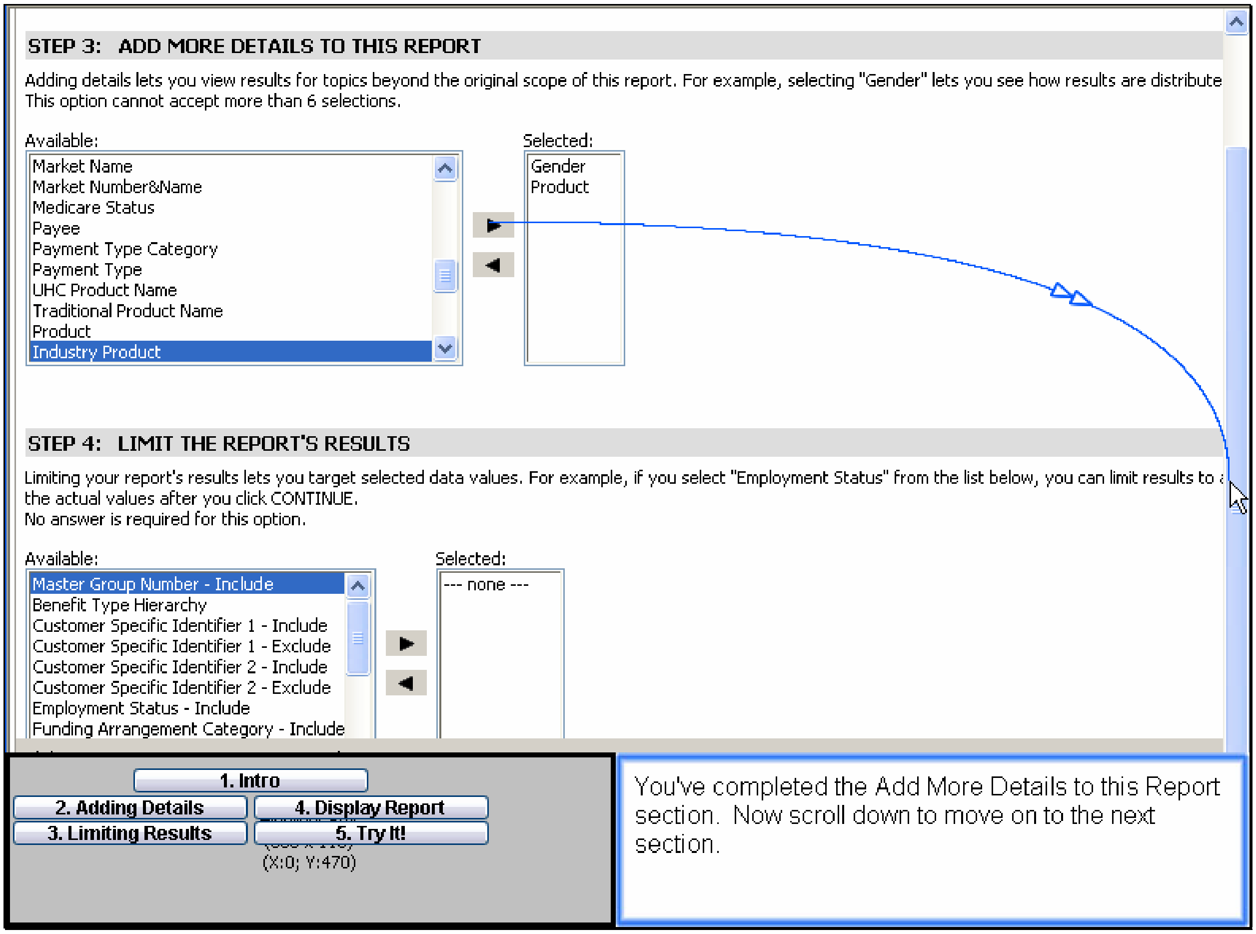
Highlight Gender in the Available field and then click the right arrow button to move that variable to the Selected field.



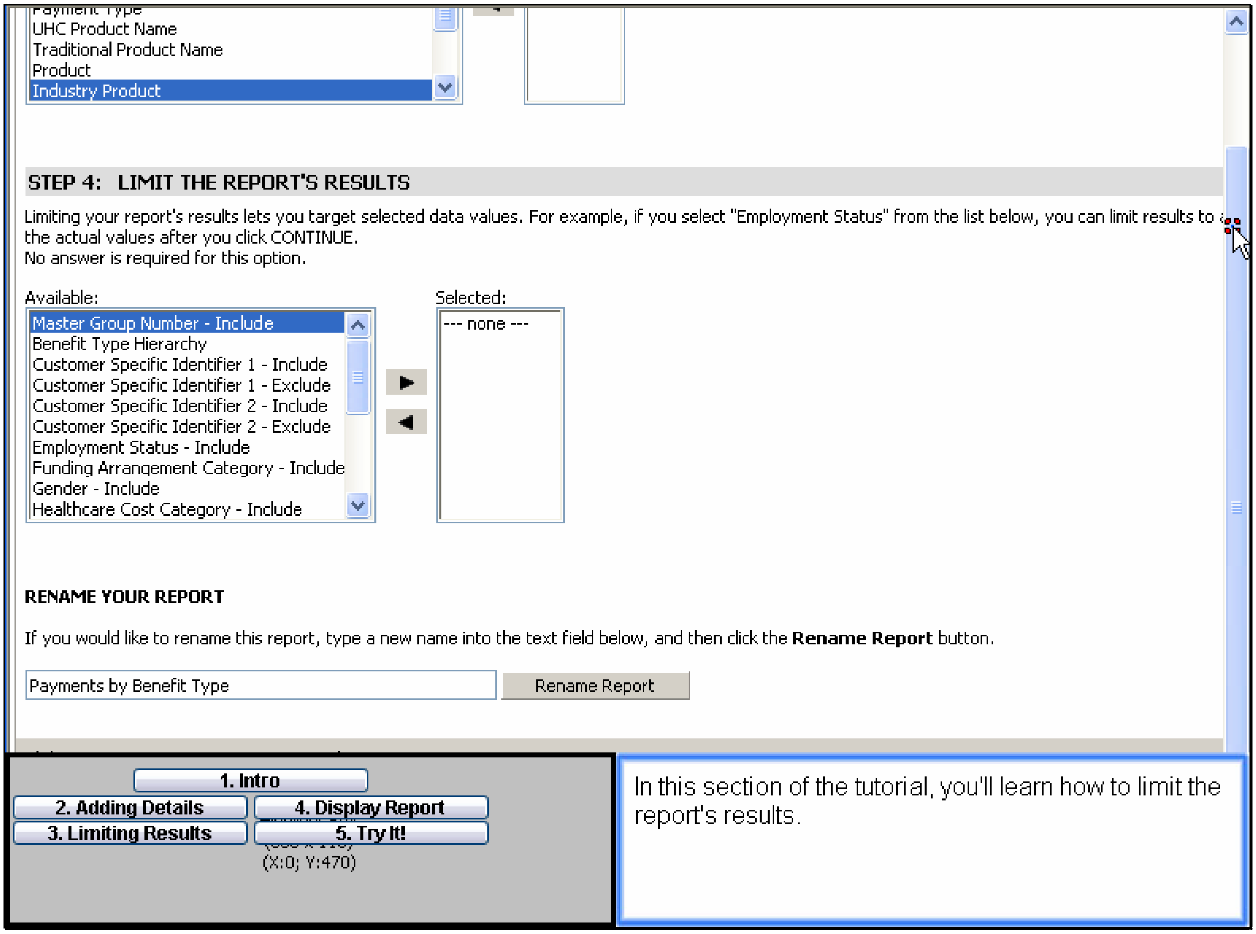
To add the next variable, scroll down and highlight it. In this example, we will highlight Product.



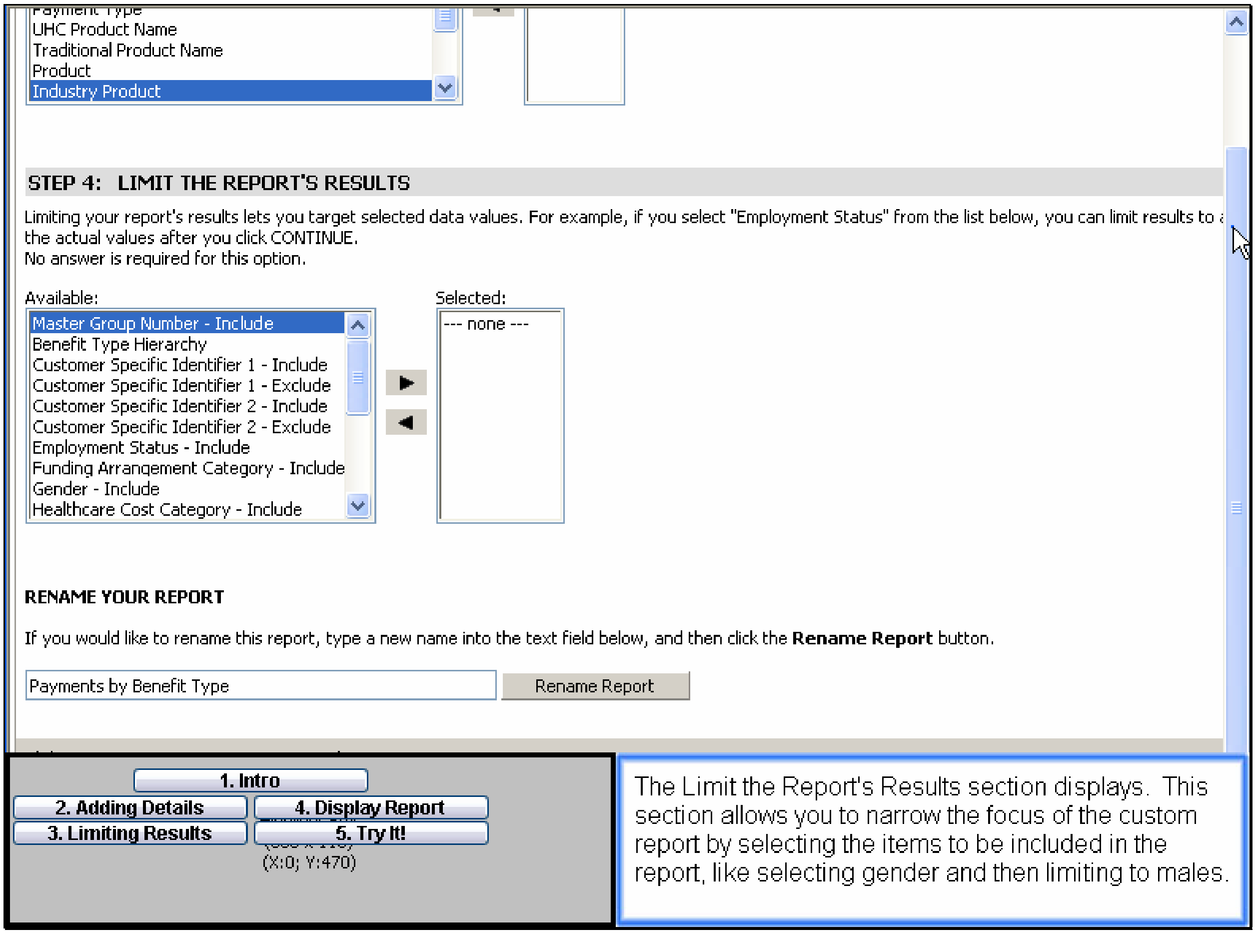
Click the right arrow button to move that variable to the Selected field.



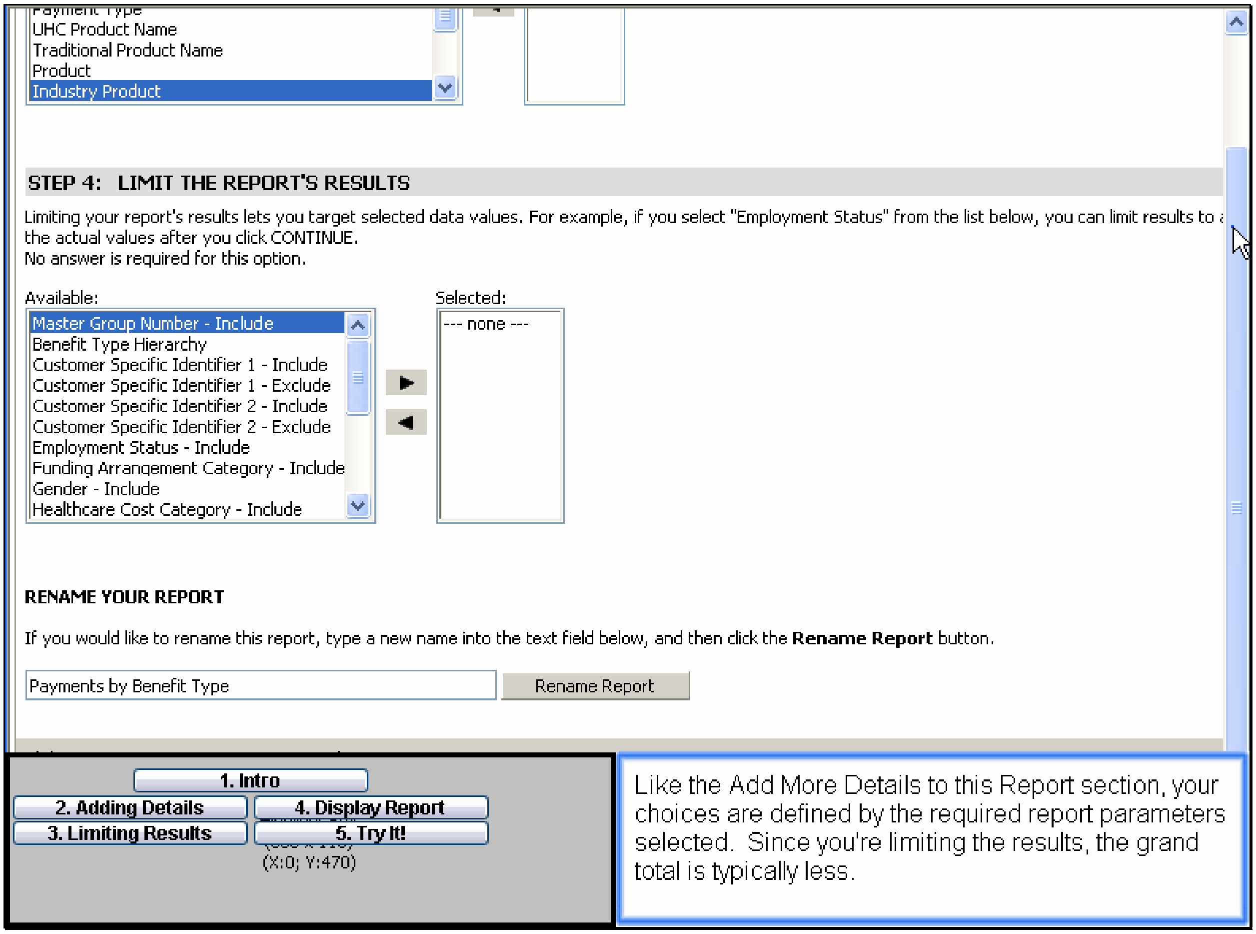
You've completed the Add More Details to this Report section. Now scroll down to move on to the next section.



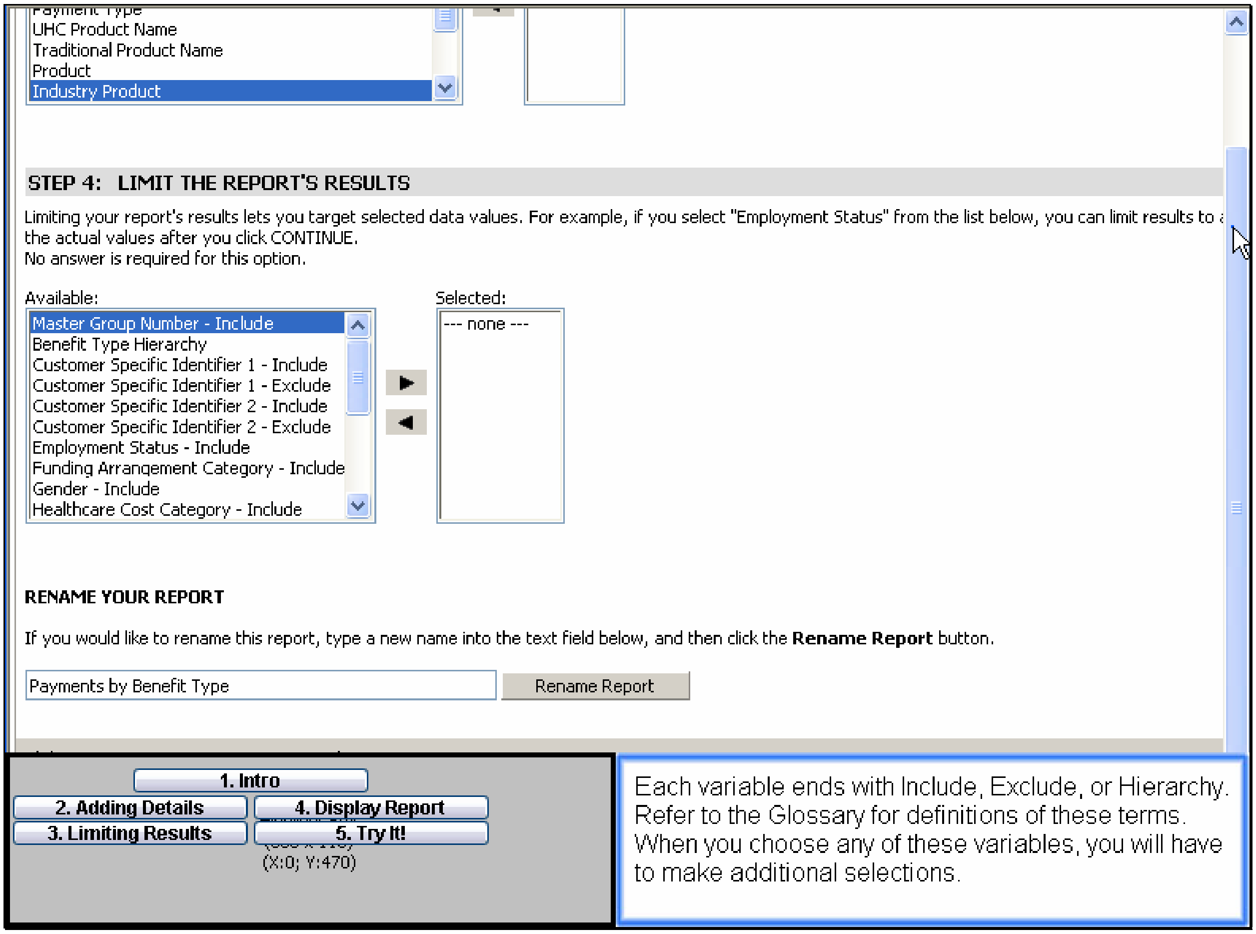
In this section of the tutorial, you'll learn how to limit the report's results.



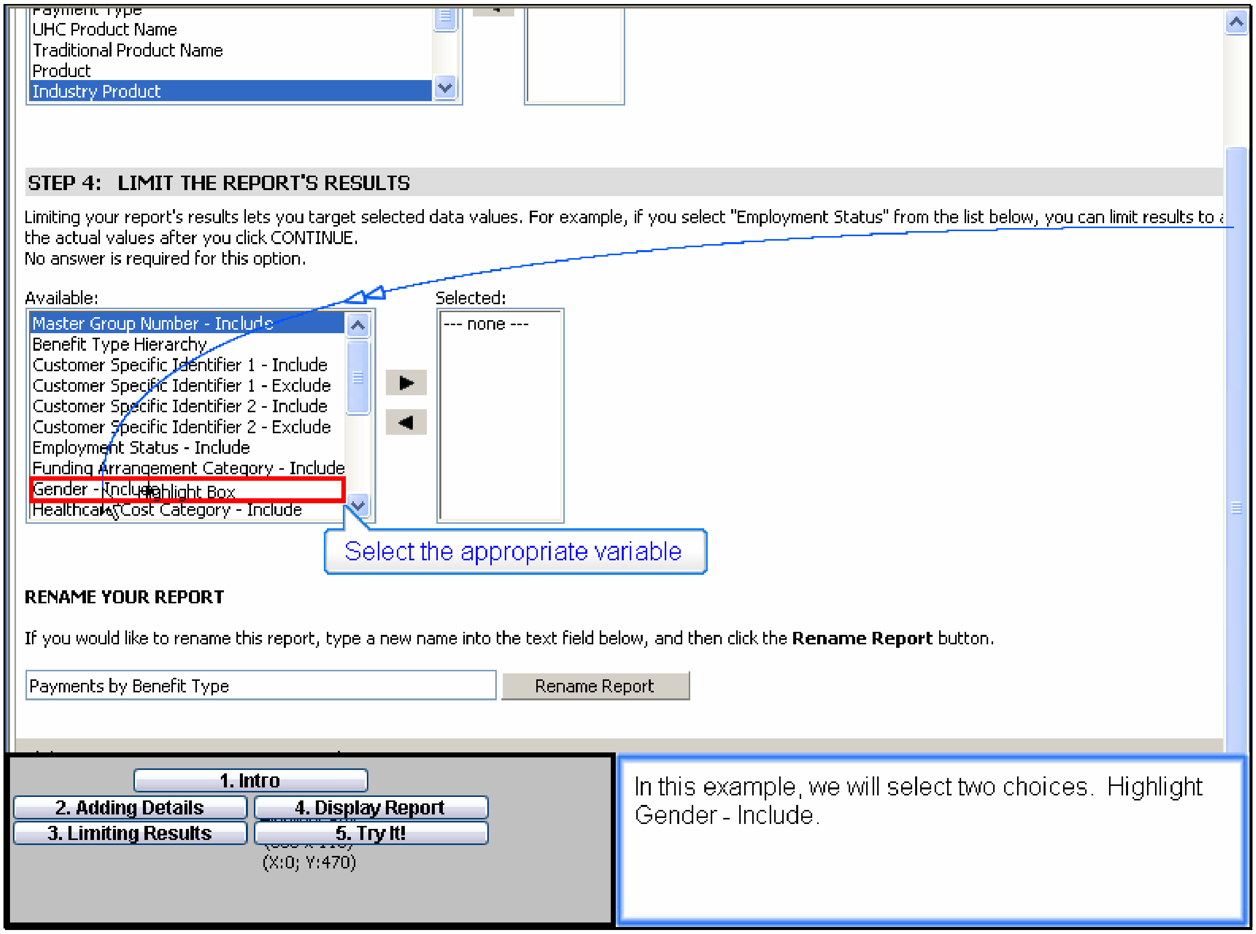
The Limit the Report's Results section displays. This section allows you to narrow the focus of the custom report by selecting the items to be included in the report, like selecting gender and then limiting to males.



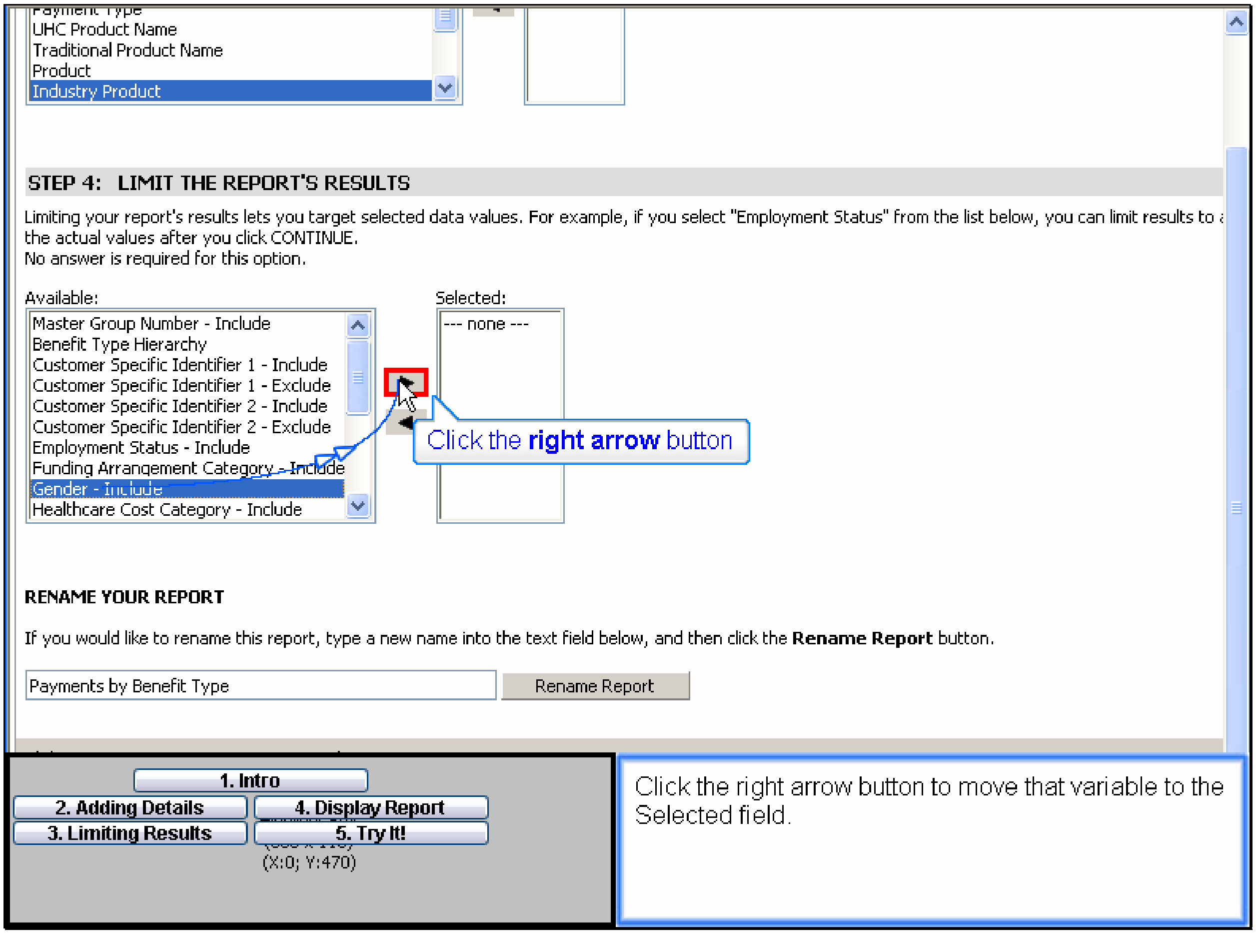
Like the Add More Details to this Report section, your choices are defined by the required report parameters selected. Since you're limiting the results, the grand total is typically less.



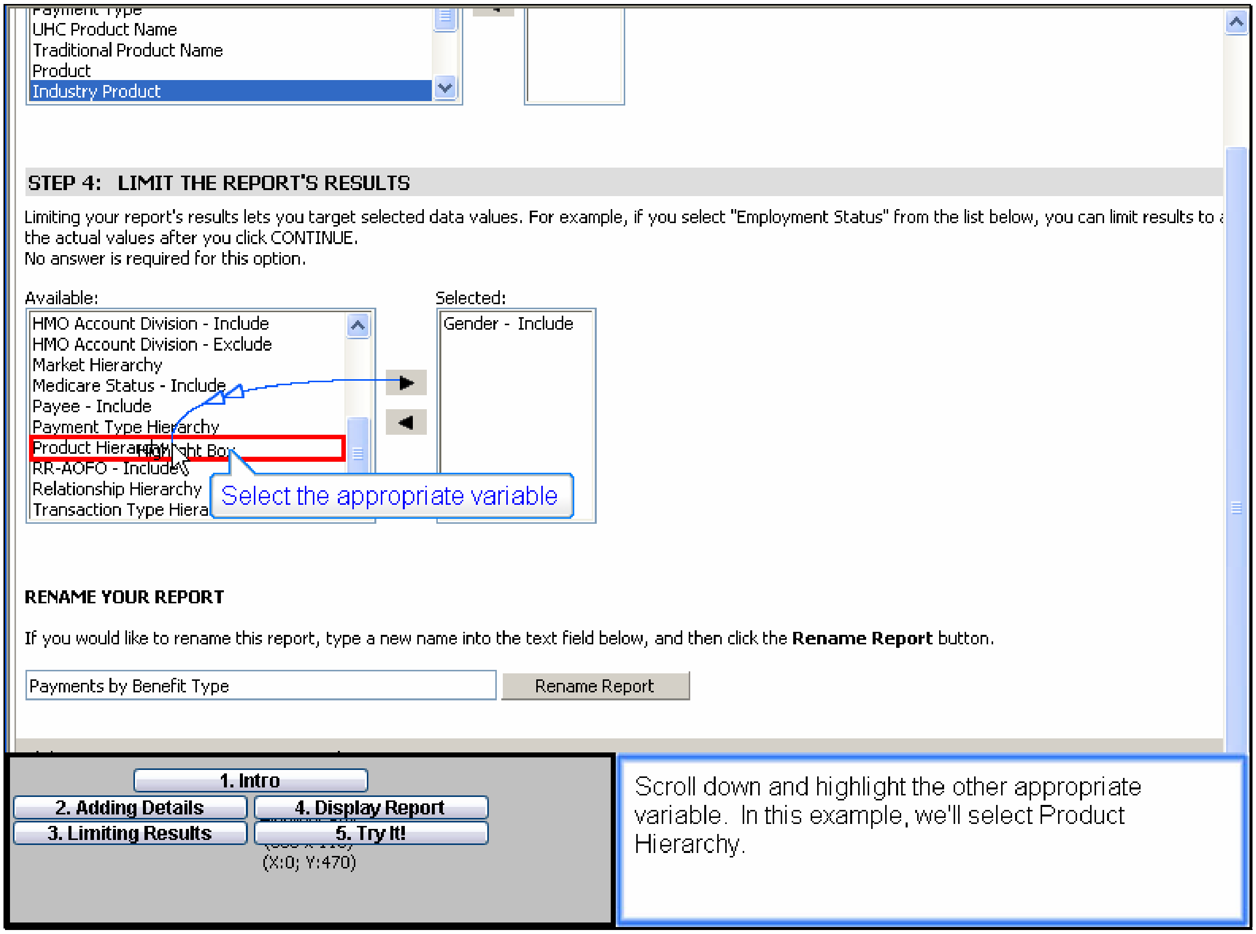
Each variable ends with Include, Exclude, or Hierarchy. Refer to the Glossary for definitions of these terms. When you choose any of these variables, you will have to make additional selections.



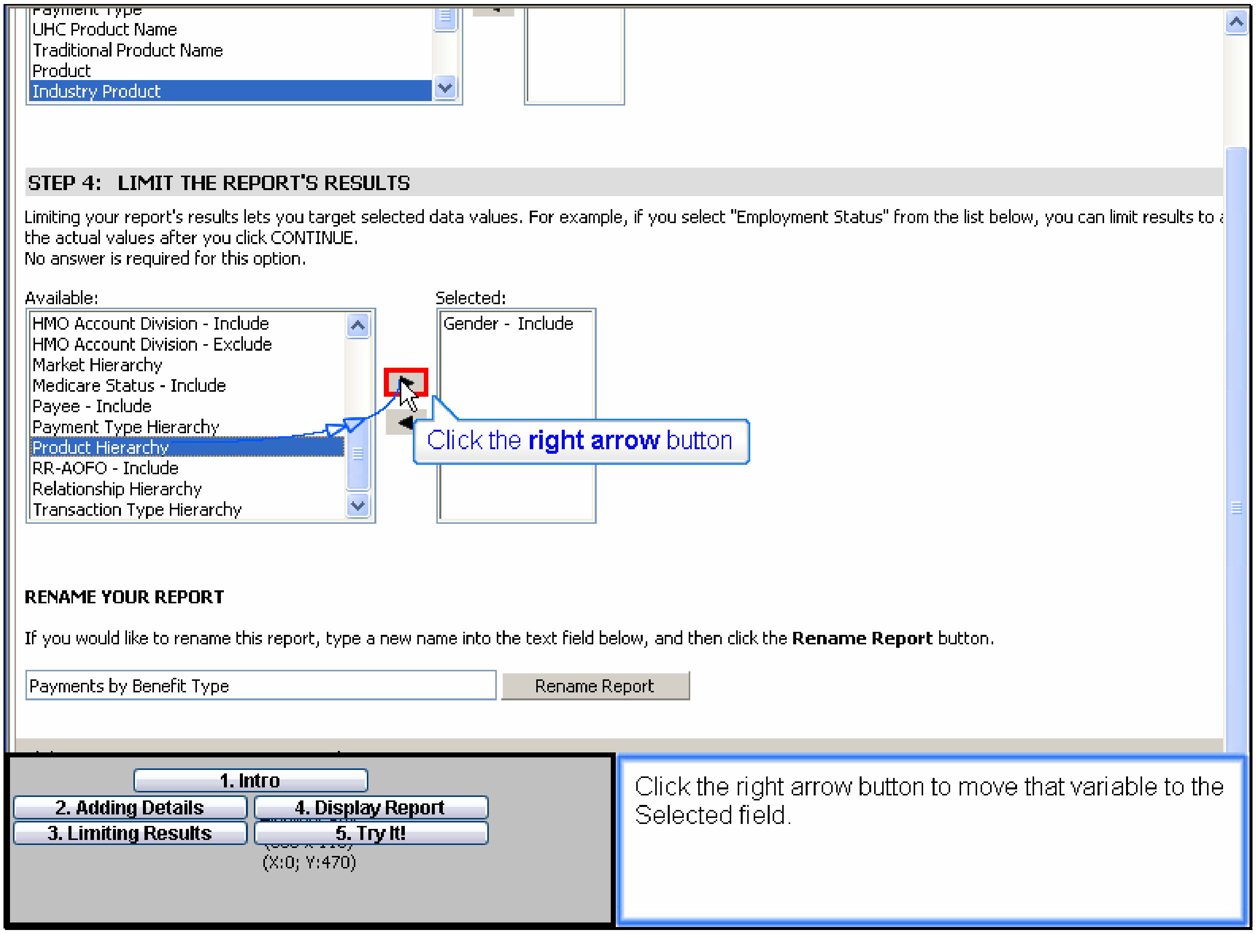
In this example, we will select two choices. Highlight Gender - Include.



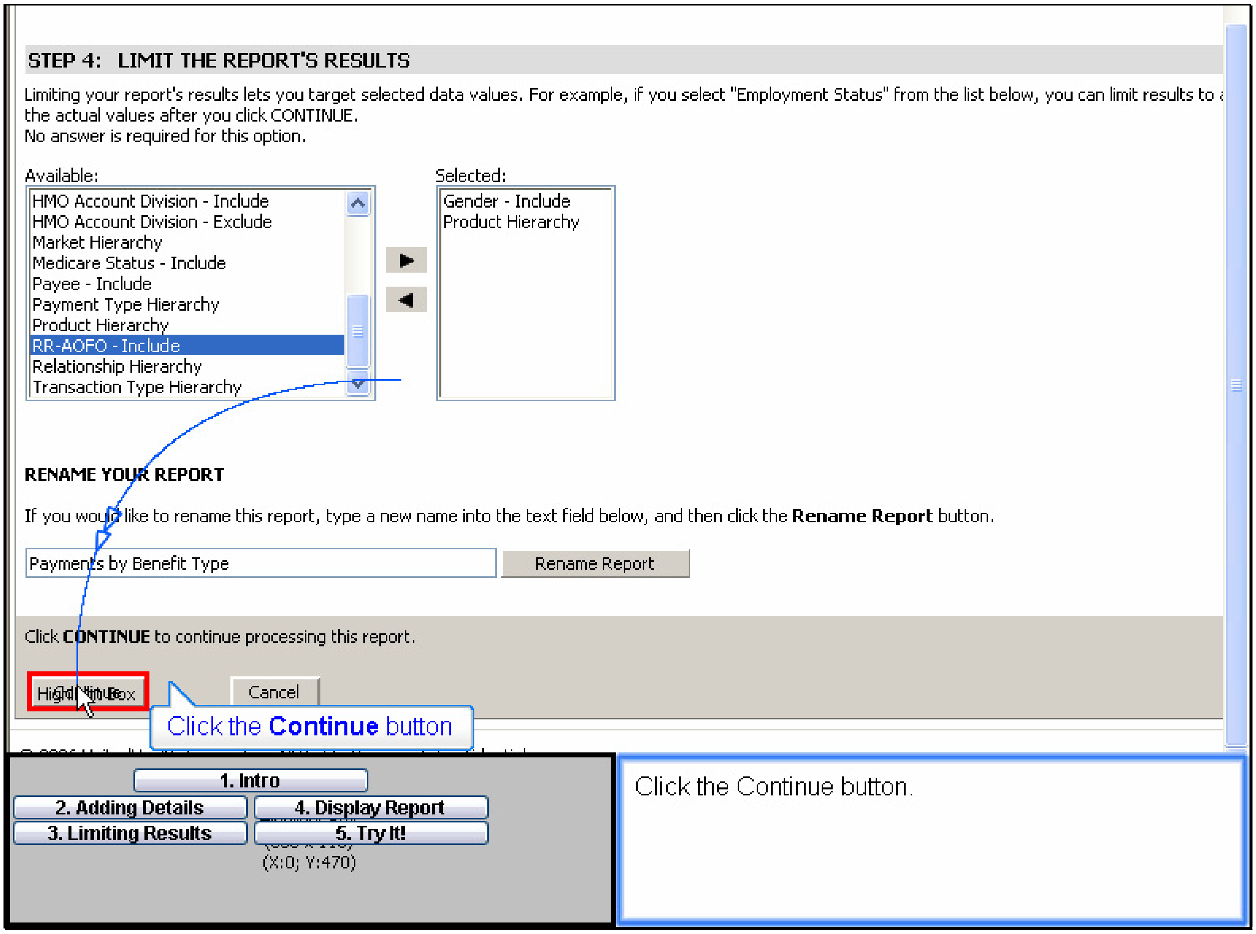
Click the right arrow button to move that variable to the Selected field.



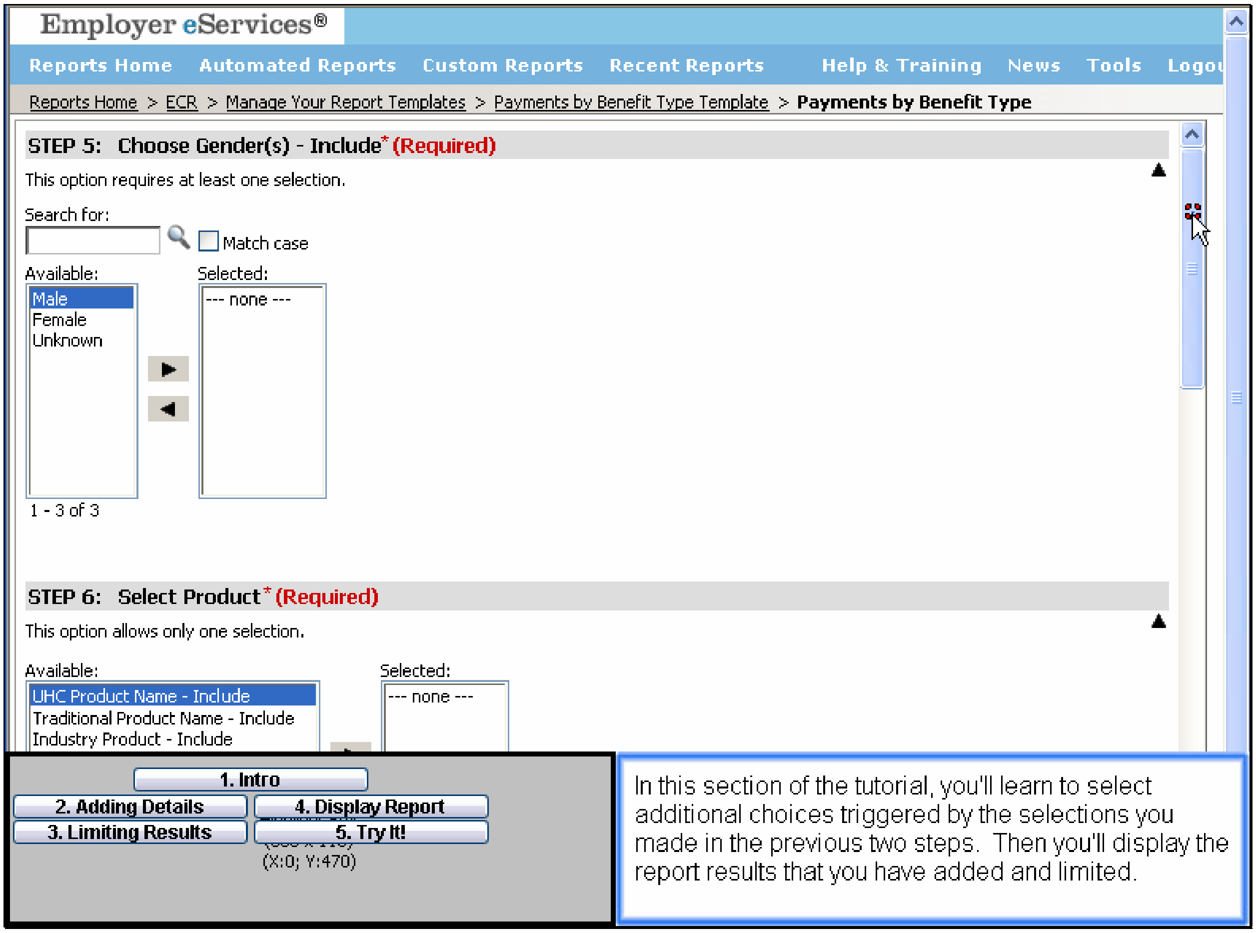
Scroll down and highlight the other appropriate variable. In this example, we'll select Product Hierarchy.



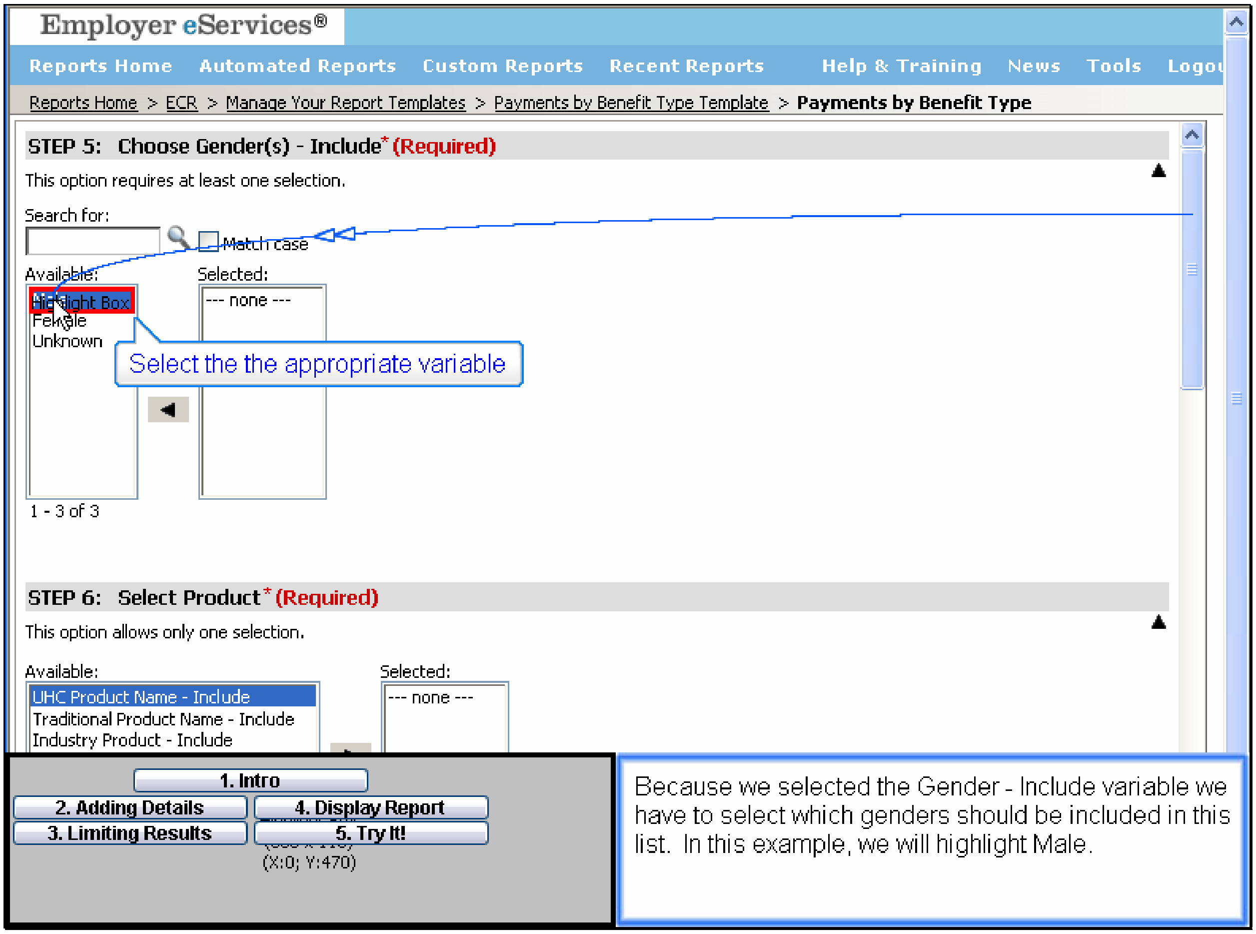
Click the right arrow button to move that variable to the Selected field.



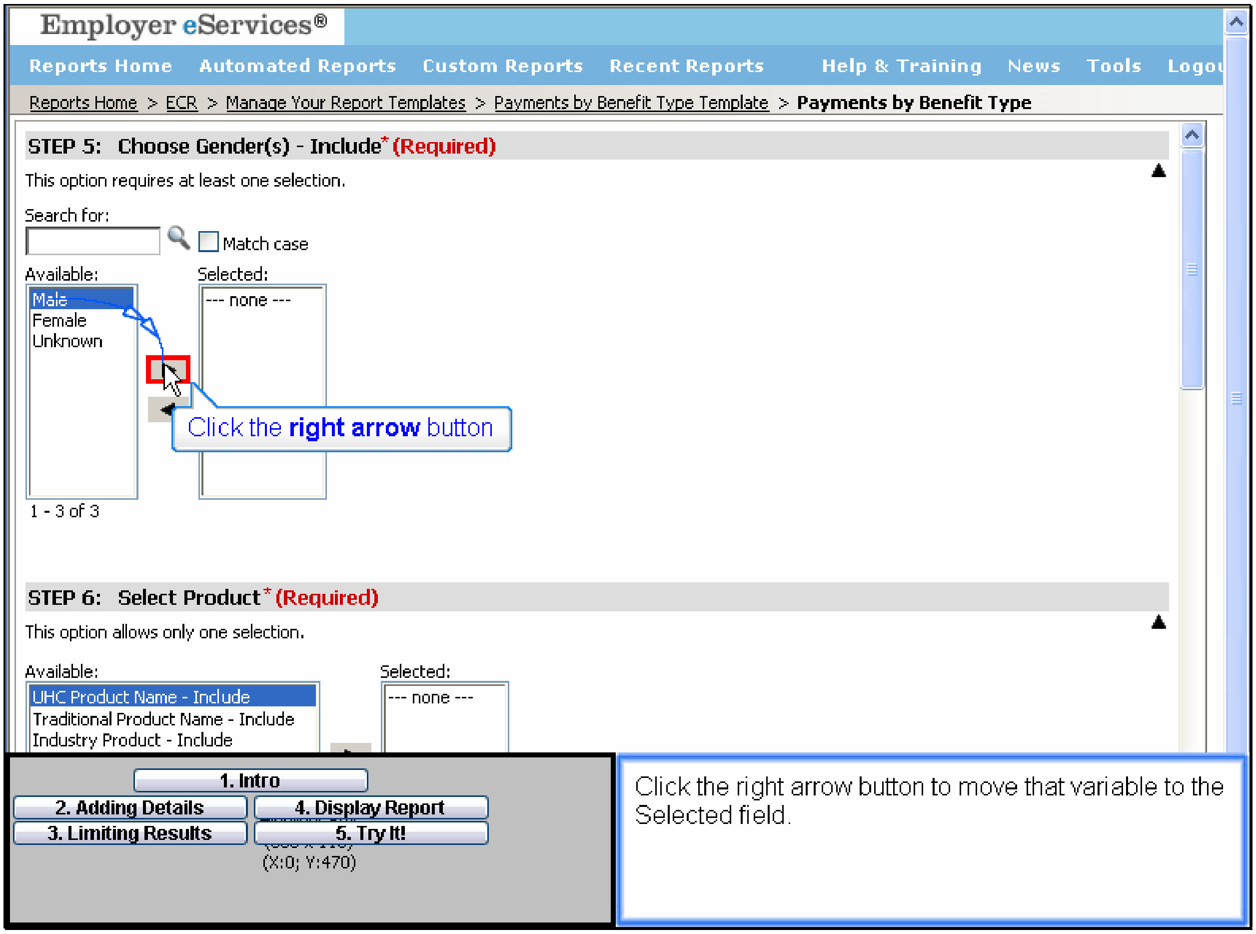
Click the Continue button.



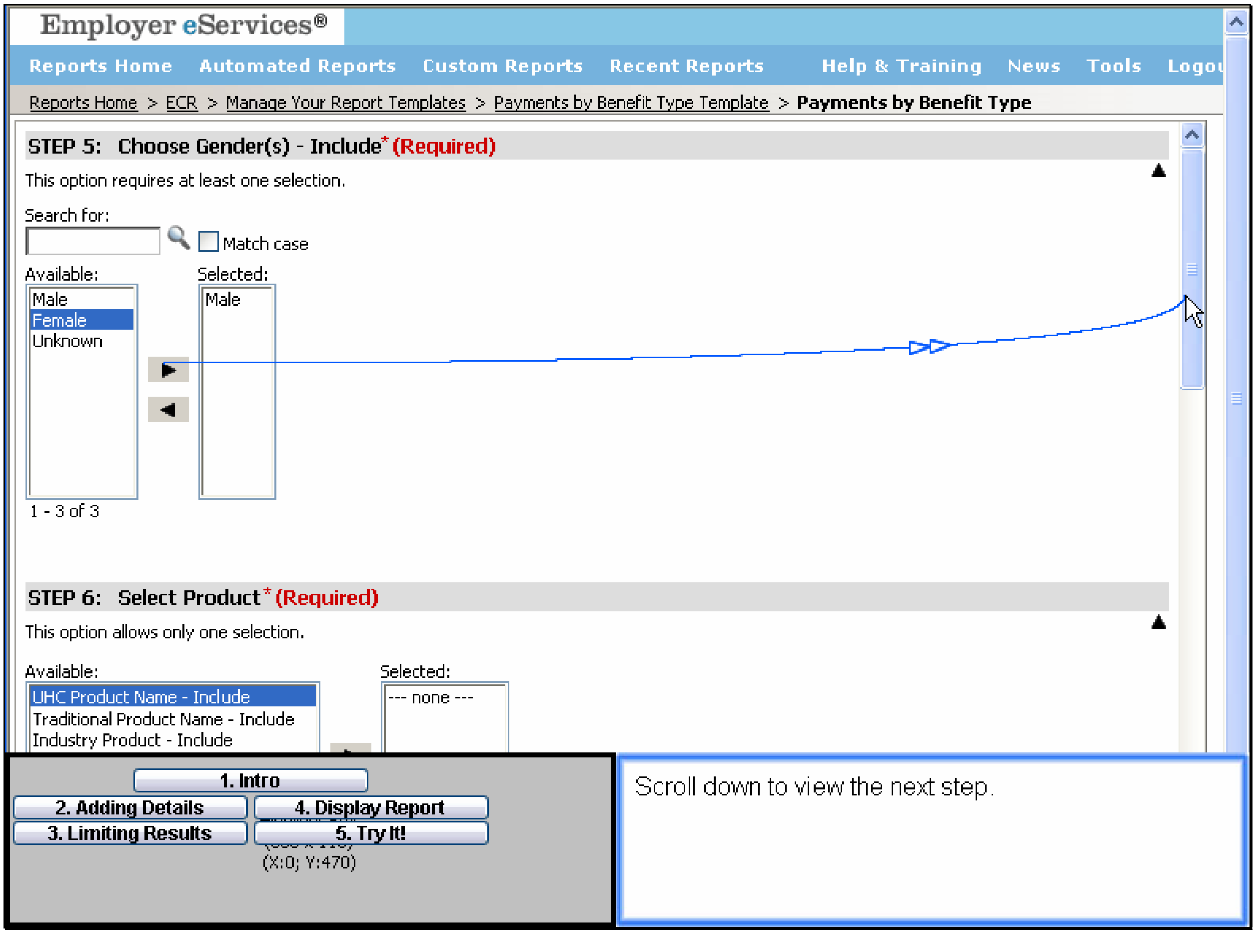
In this section of the tutorial, you'll learn to select additional choices triggered by the selections you made in the previous two steps. Then you'll display the report results that you have added and limited.



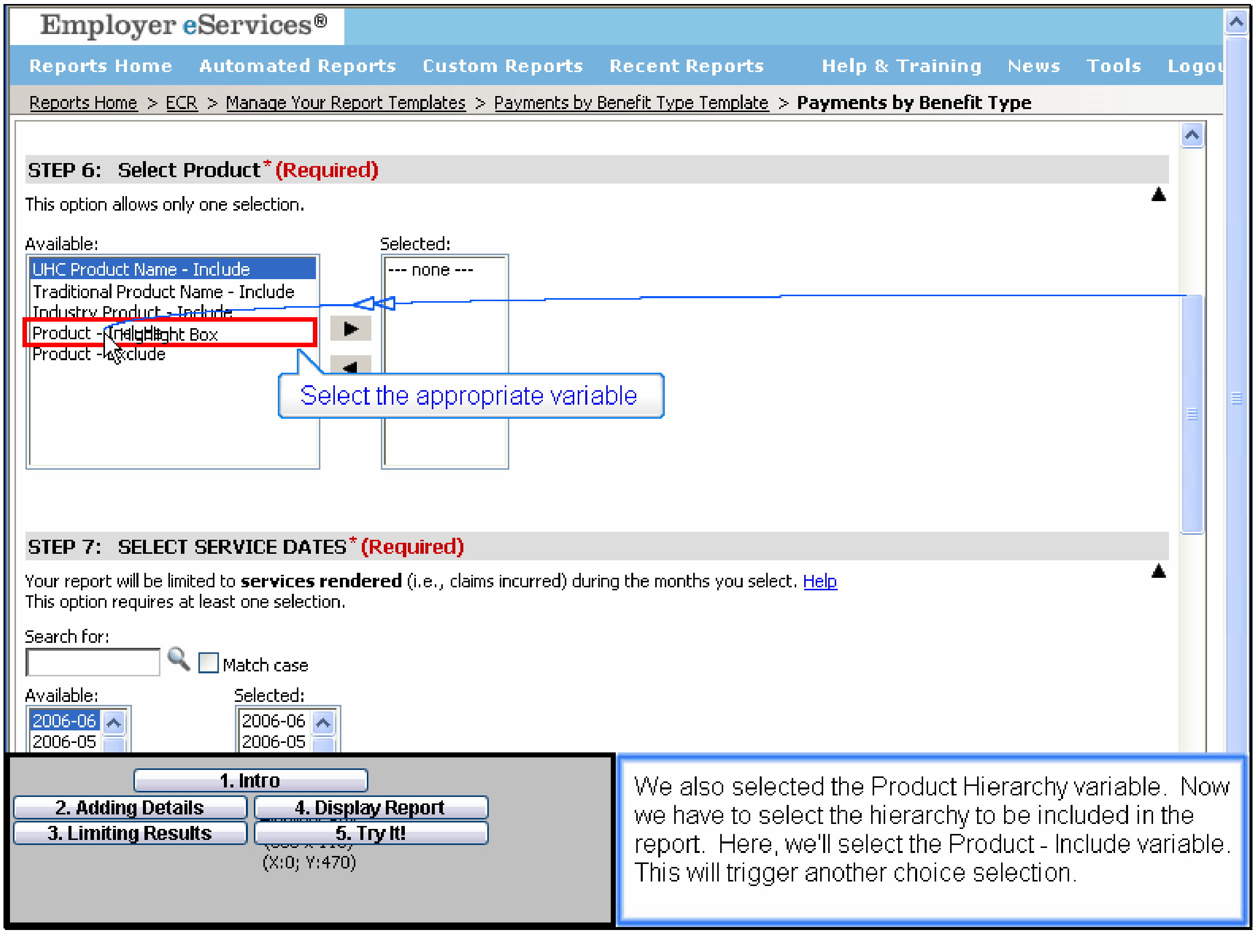
Because we selected the Gender - Include variable we have to select which genders should be included in this list. In this example, we will highlight Male.



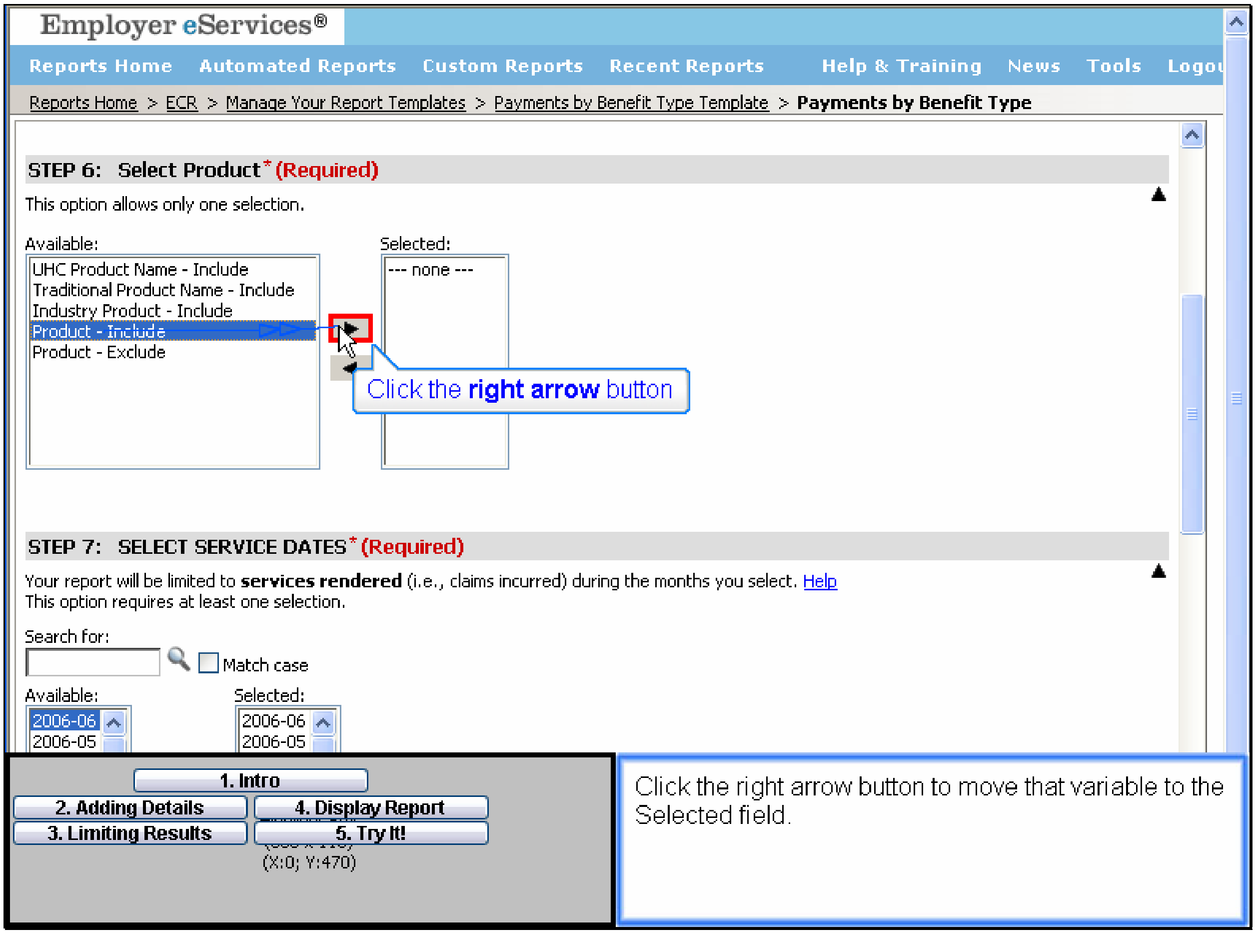
Click the right arrow button to move that variable to the Selected field.



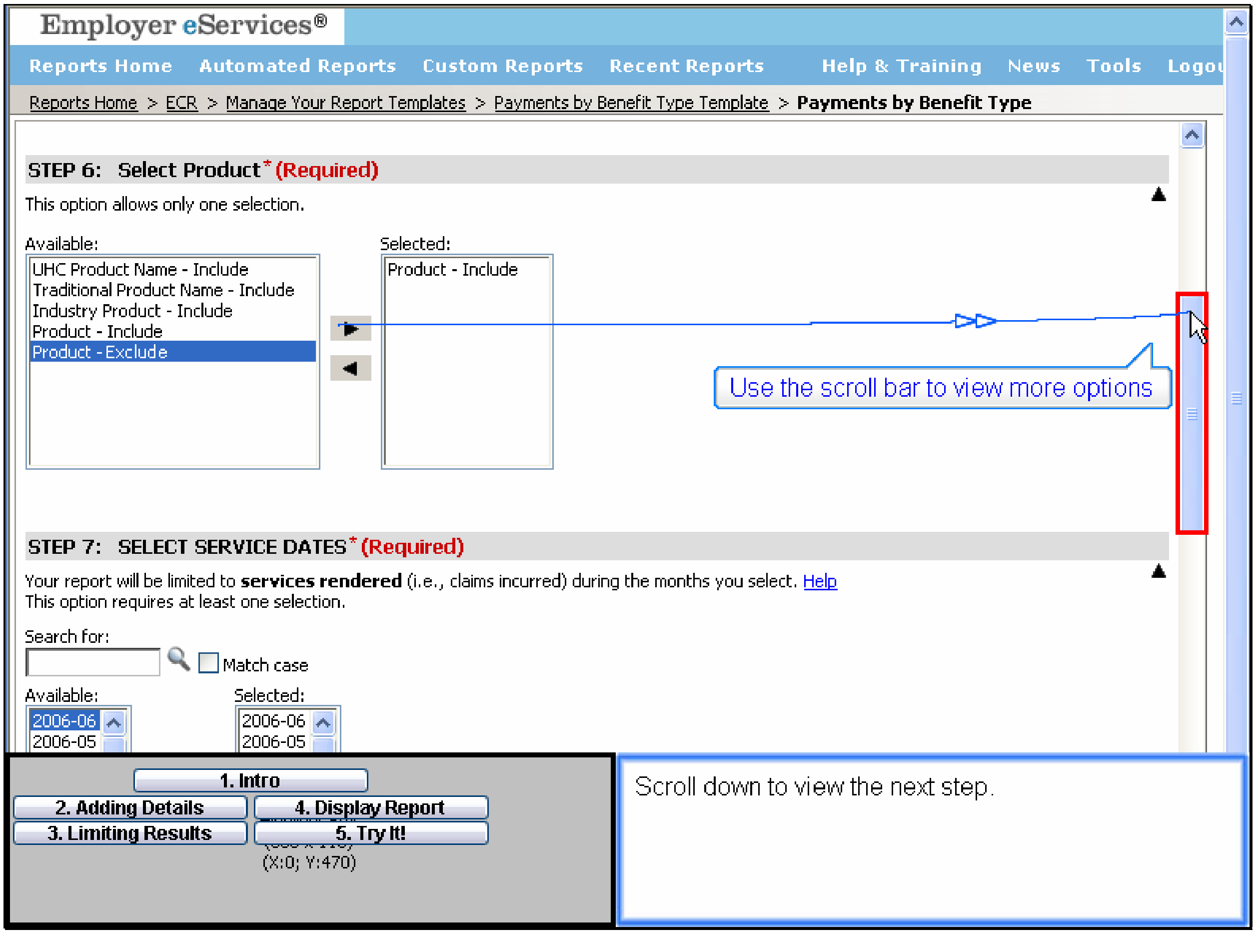
Scroll down to view the next step.



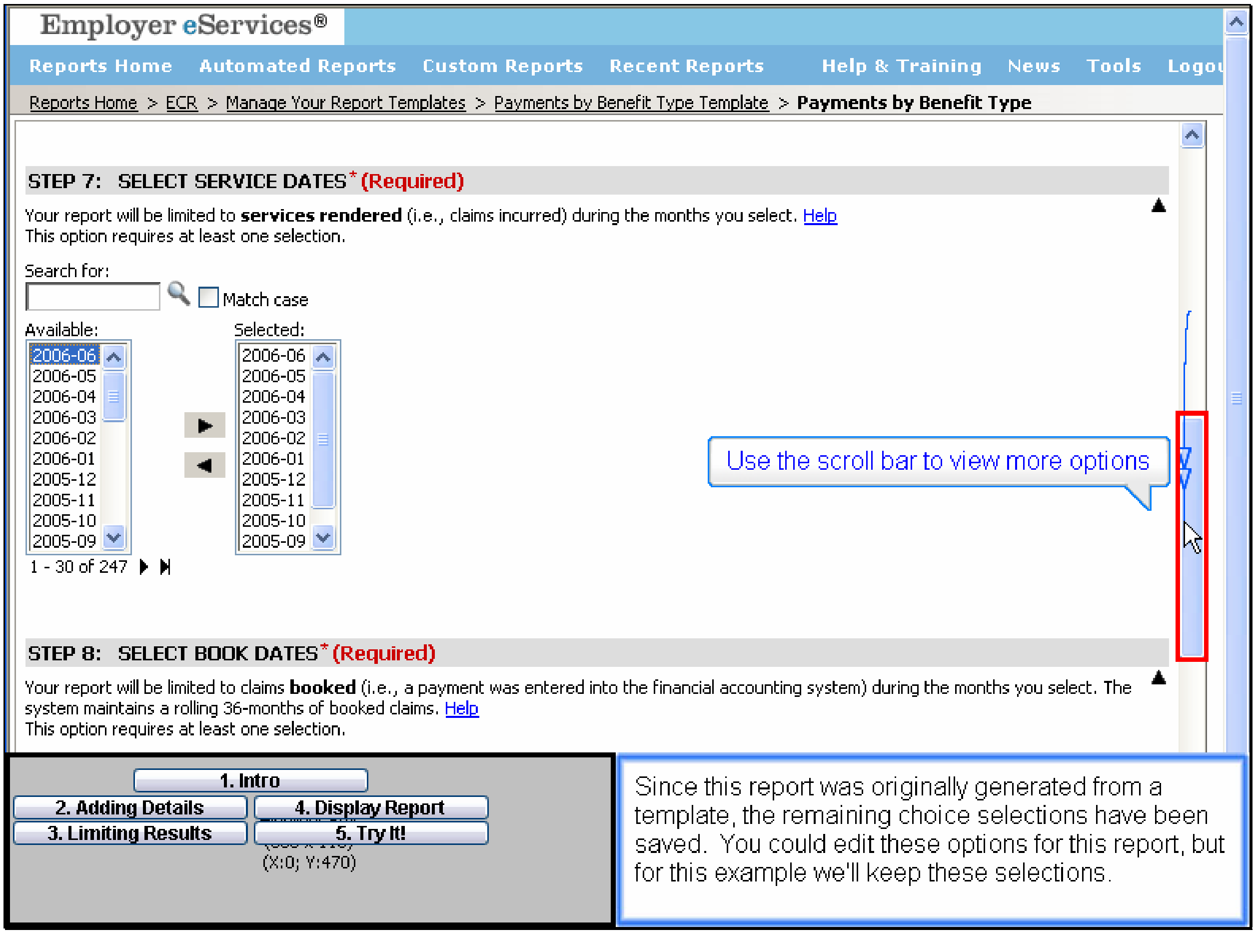
We also selected the Product Hierarchy variable. Now we have to select the hierarchy to be included in the report. Here, we'll select the Product - Include variable. This will trigger another choice selection.



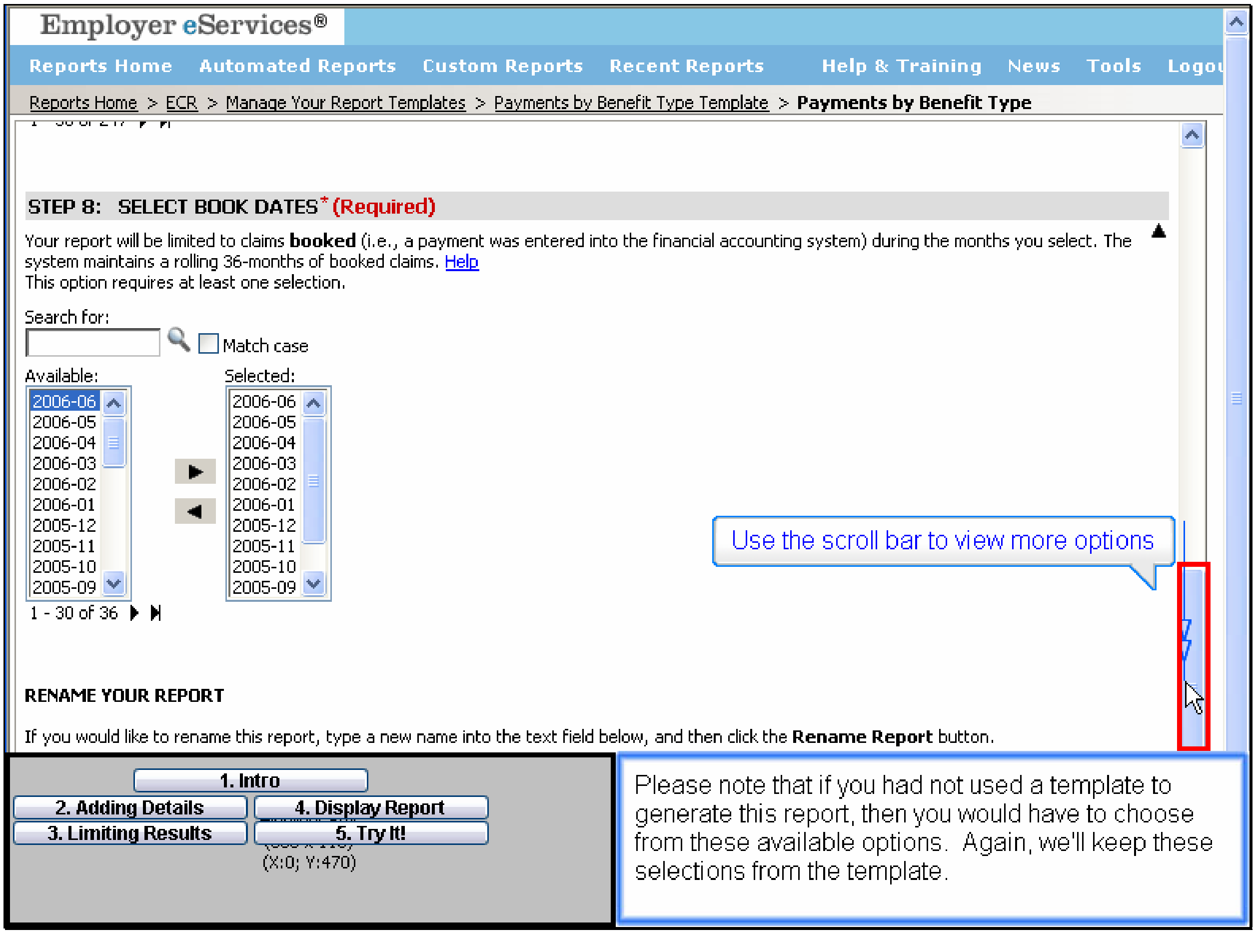
Click the right arrow button to move that variable to the Selected field.



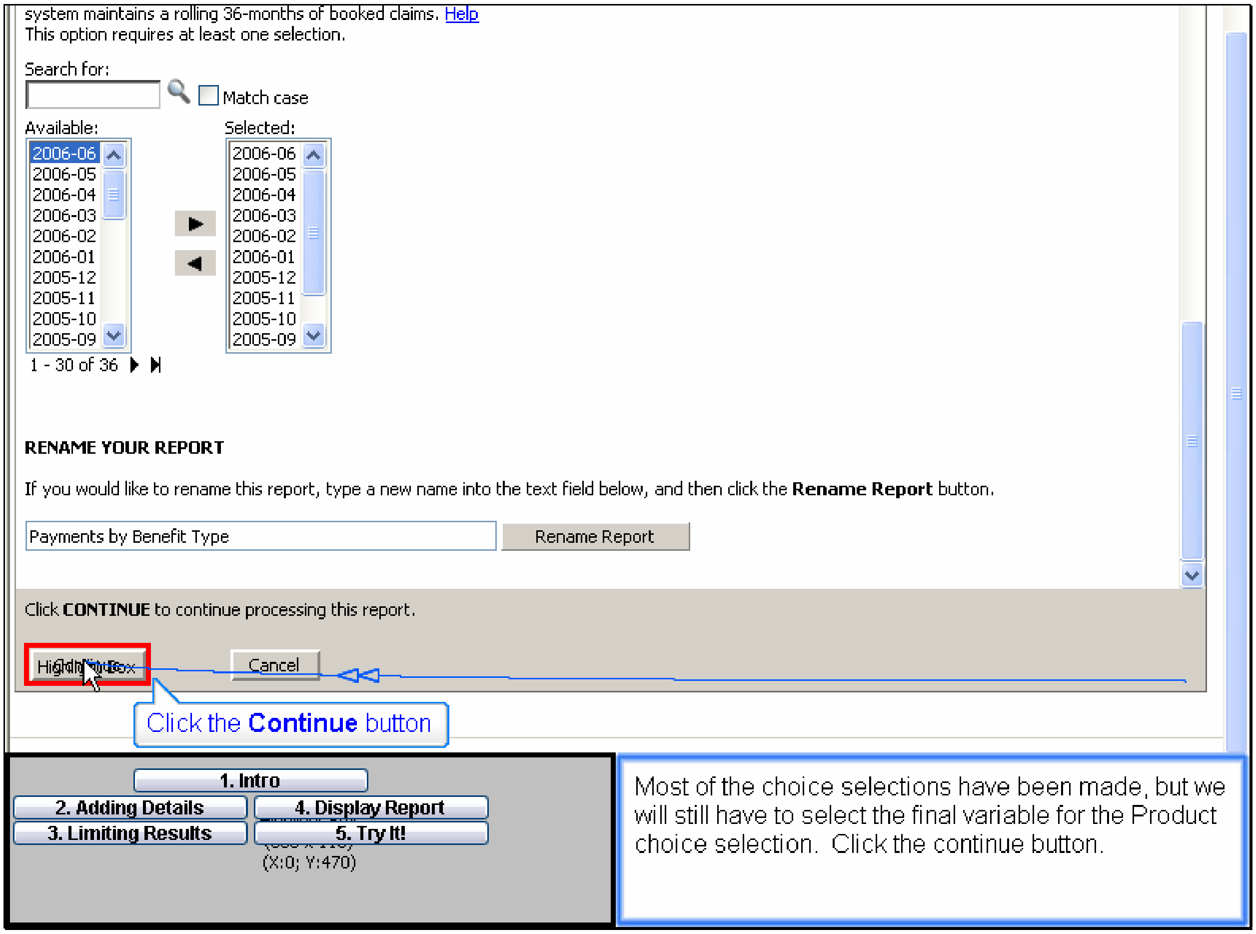
Scroll down to view the next step.



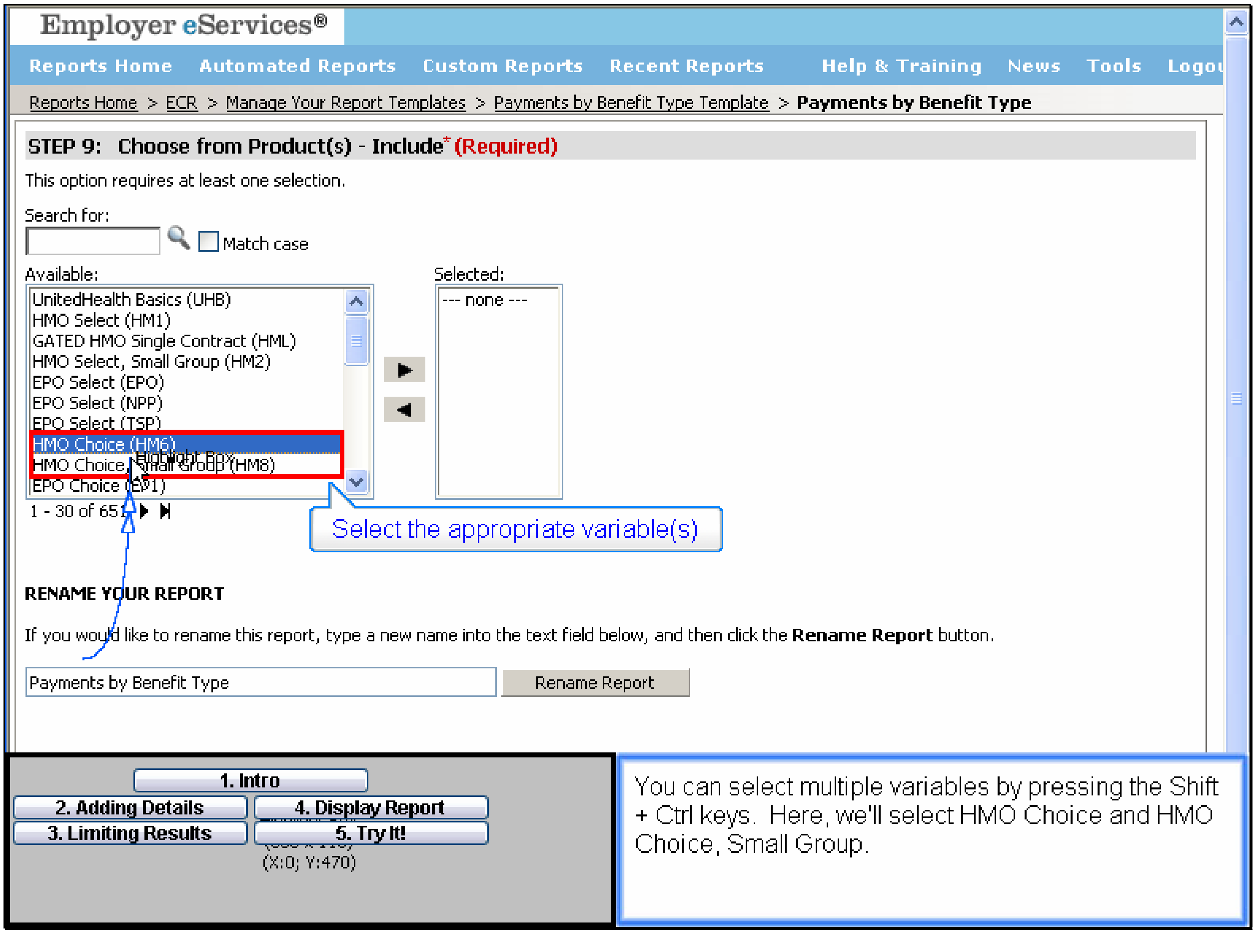
Since this report was originally generated from a template, the remaining choice selections have been saved. You could edit these options for this report, but for this example we'll keep these selections.



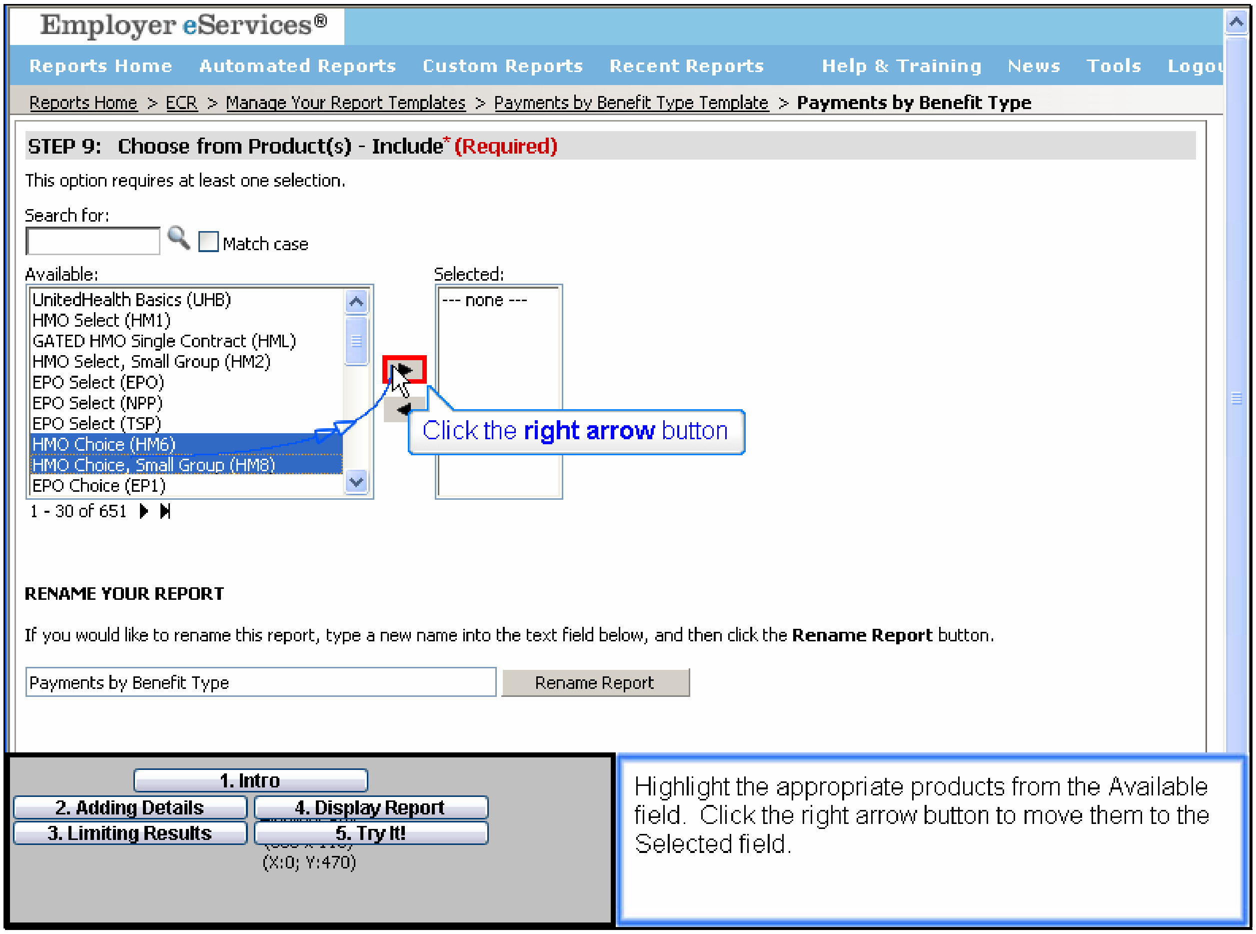
Please note that if you had not used a template to generate this report, then you would have to choose from these available options. Again, we'll keep these selections from the template.



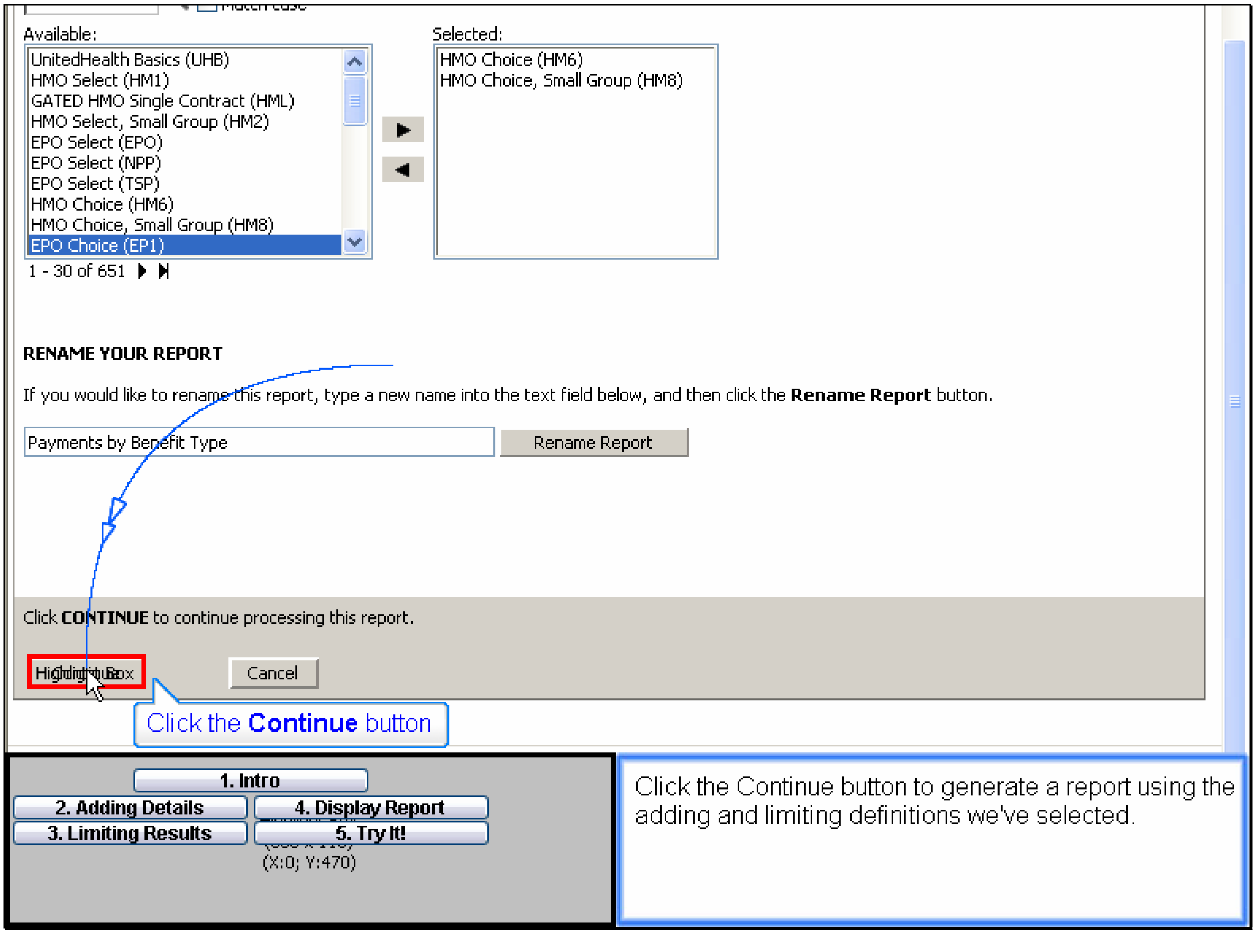
Most of the choice selections have been made, but we will still have to select the final variable for the Product choice selection. Click the continue button.



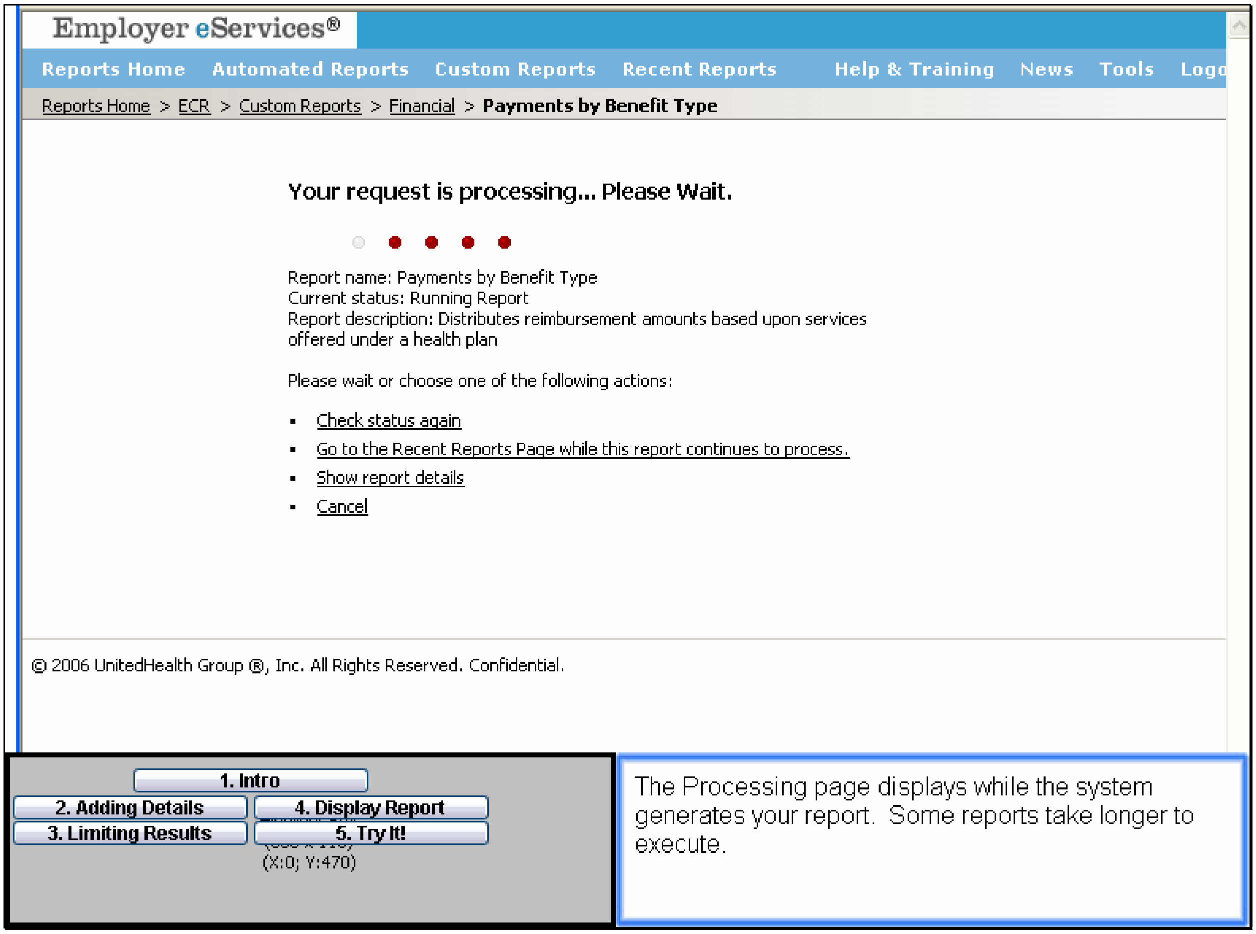
You can select multiple variables by pressing the Shift + Ctrl keys. Here, we'll select HMO Choice and HMO Choice, Small Group.



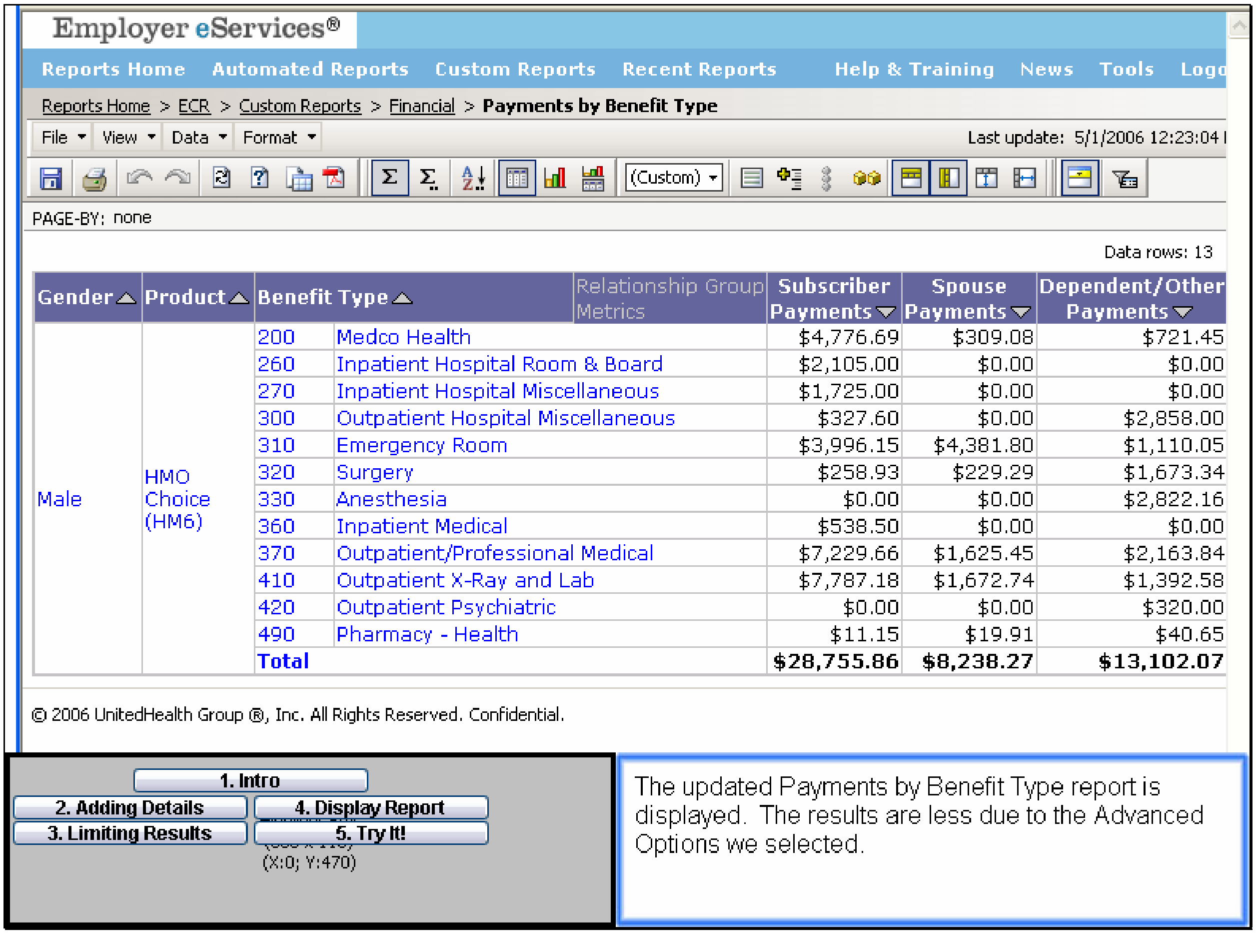
Highlight the appropriate products from the Available field. Click the right arrow button to move them to the Selected field.



Click the Continue button to generate a report using the adding and limiting definitions we've selected.

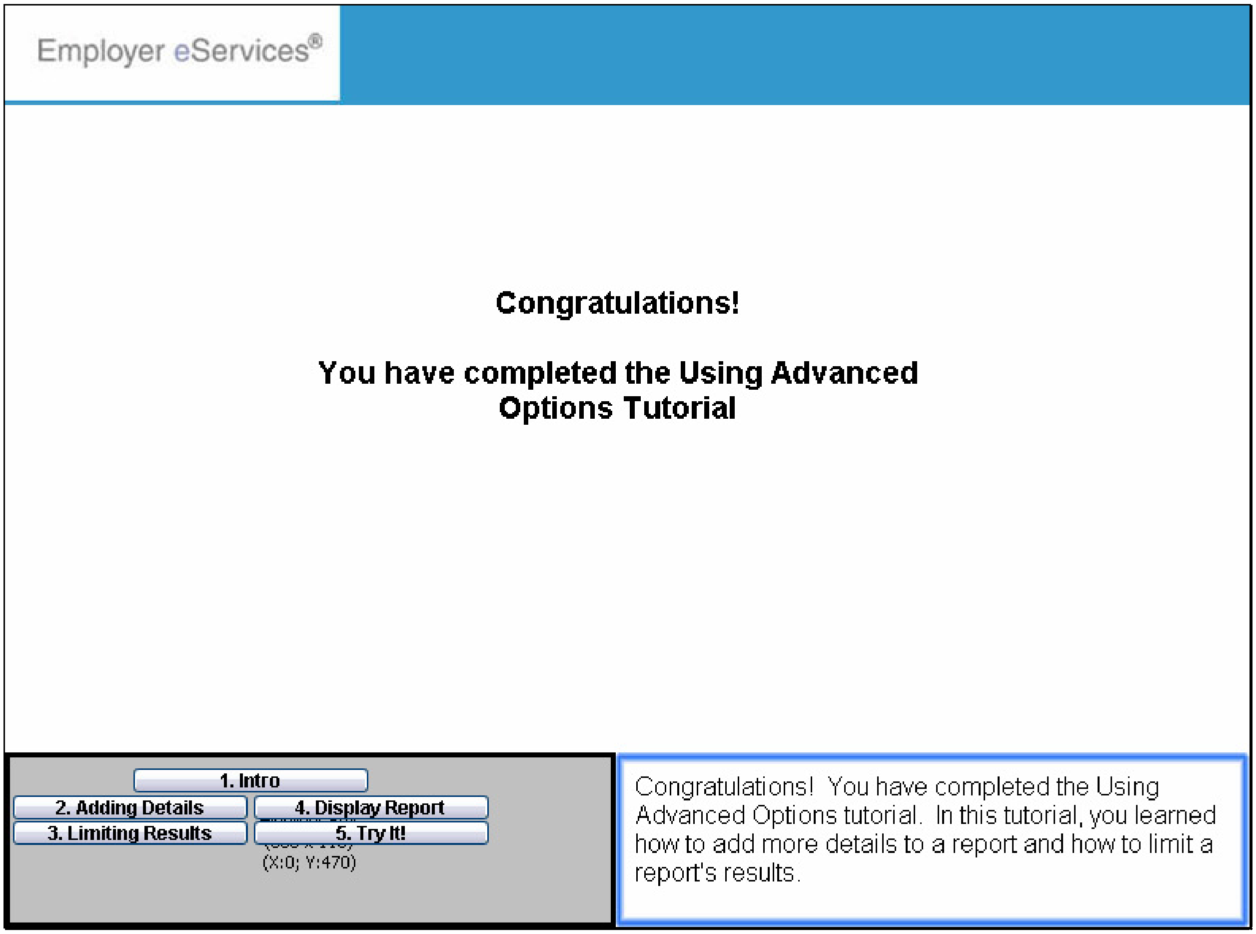


The Processing page displays while the system generates your report. Some reports take longer to execute.



Gender	Product	Benefit Type	Relationship Group Metrics	Subscriber Payments	Spouse Payments	Dependent/Other Payments
Male	HMO Choice (HM6)	200	Medco Health	$4,776.69	$309.08	$721.45
		260	Inpatient Hospital Room & Board	$2,105.00	$0.00	$0.00
		270	Inpatient Hospital Miscellaneous	$1,725.00	$0.00	$0.00
		300	Outpatient Hospital Miscellaneous	$327.60	$0.00	$2,858.00
		310	Emergency Room	$3,996.15	$4,381.80	$1,110.05
		320	Surgery	$258.93	$229.29	$1,673.34
		330	Anesthesia	$0.00	$0.00	$2,822.16
		360	Inpatient Medical	$538.50	$0.00	$0.00
		370	Outpatient/Professional Medical	$7,229.66	$1,625.45	$2,163.84
		410	Outpatient X-Ray and Lab	$7,787.18	$1,672.74	$1,392.58
		420	Outpatient Psychiatric	$0.00	$0.00	$320.00
		490	Pharmacy - Health	$11.15	$19.91	$40.65
		Total		**$28,755.86**	**$8,238.27**	**$13,102.07**

The updated Payments by Benefit Type report is displayed. The results are less due to the Advanced Options we selected.



Congratulations! You have completed the Using Advanced Options tutorial. In this tutorial, you learned how to add more details to a report and how to limit a report's results.