# Discoverer Viewer for the Michigan BCCCP and WISEWOMAN



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# Introduction

Discoverer Viewer is a web based reporting software. For Michigan BCCCP and WISEWOMAN purposes, the software will be run through a Michigan Department of Community Health network server. Discoverer Viewer will be accessed through the Internet rather than installed as software on your personal computer. Discoverer allows real-time access to *a copy* of MBCIS data. Because Discoverer Viewer is a separate reporting tool for MBCIS data, one cannot add or edit MBCIS data through it.

With Discoverer Viewer, MBCIS users will have access to numerous reports programmed directly ("hard coded") into MBCIS. For convenience, a link to Discoverer Viewer is available on the main menu of the MBCIS thin client software application.

In Discoverer Viewer, individual reports are stored within folders called "workbooks." Most workbooks have variations of the same or related reports that are analogous to worksheets in Excel. To run a report, just open the workbook and choose the name of the worksheet (i.e. report) you want. Soon, report data shows on your screen in the form of a table. Some reports require you to first enter *parameter* values before the report data can be retrieved. For example, a report parameter might be the fiscal year of the data you want displayed.

With Discoverer Viewer you can analyze data online, print reports on paper, or export the data to another program for analysis and printing, such as Excel. Newer features in Discoverer Viewer allow you to modify the format of the report before printing. For instance, you can move columns around or hide them, change sort criteria, or apply conditional formatting to the values displayed in the report. You can also save your customized set of changes for future use.

### Why Discoverer Viewer?

The thin client version of MBCIS is the result of much planning, programming work, and application testing to provide you with the best system possible. Although it would be convenient for end users to have all data reports built directly into MBCIS, the main drawback of doing this is that the greater the number of hard-coded reports in the system, the slower the system will run for *all* end users. (The details involve the processing limitations of the server on which MBCIS resides, the Internet connection speed of end users, and the number of processes the program requires for a given task.) The process for making minor changes to hard-coded reports is also substantially longer. Thus, the Discover Viewer tool provides a way to access MBCIS data without affecting the functionality of MBCIS. It also provides for easier report customization.



### What are workbooks?

Workbooks are Discoverer files that contain worksheets displaying data retrieved from the database. If you are familiar with spreadsheet applications (e.g. Microsoft Excel) you can think of a workbook as a spreadsheet file. Discoverer workbooks are stored permanently on the server alongside MBCIS, but they can be added or changed by a data team programmer with the appropriate MBCIS access rights.

### What are worksheets?

Worksheets contain the data from MBCIS that you want to analyze, and they include some components to help you analyze the data. For example, a worksheet can contain parameters, totals, percentages, exceptions, and calculations. If you are familiar with spreadsheet applications (e.g. Microsoft Excel) think of a workbook as a spreadsheet document and worksheets as different sheets in that spreadsheet document.

	Table Layout Sort									
					Likely Case	Manageme	ent Eligible	e Clients		
						18-MAR	-09			
, [	.CA			Exam Y	ear Fiscal					
	INGHAM CO HI	D - LANSING	×	<sup>2</sup> FY2009	<b>V</b>					
	0.0.4.0									
(1997)	S Page 1 of C	<u>i</u> (> (>>)	<u>25 rows per page</u>							
	Exam Name	Service Date	Client Name	Birth Date	County	MBCIS ID	Client ID	Body Loc	Dx Status	Diagnosis
1	Followup CBE	01-OCT-2008		30-MAR-1943	IONIA	23450	NI62845	Right	Work up complete	Not applicable
2		01-OCT-2008		30-MAR-1943	IONIA	23450	NI62845	Left	Work up complete	Not breast cancer (oth
3		05-OCT-2008		13-0CT-1955	INGHAM	81 120	NI19034	Left	Work up complete	Not applicable
4		05-OCT-2008		13-OCT-1954	INGHAM	81 120	NI19034	Right	Work up complete	Not breast cancer (oth
5		05-OCT-2008		01-SEP-1954	JACKSON	64732	NI219244	Right	Work up complete	Not applicable

A Discoverer Viewer worksheet

### What is my username for Discoverer?

To use MBCIS and Discoverer Viewer, you will need one or two ids. The first id is called your "Single Sign On" or **SSO** id. This id is granted by the State of Michigan and is used to get you into the state server where MBCIS resides. Newer program staff will have the same SSO id and MBCIS id. Program staff which has been with the program longer likely has what is referred to as their "old MBCIS id" (from Version 2 and prior of MBCIS). If you have an "old MBCIS id," it will be the one associated with your Discoverer Viewer account.

### What If I do not have an MBCIS account?

If you do <u>not</u> have an MBCIS username, you will not be able to use Discoverer. To get an MBCIS username, you will have to complete the required MBCIS training and submit the User Agreement found in the front of the MBCIS user's manual.

# **Opening Discoverer Viewer**

MBCIS - N Cancer Con	t - MBCIS - Michigan Breas lichigan Breast : ntrol Informatio	st and Cervical Cancer and Cervical n System	Control - Windows Internet Explorer
Clinical			Clinical View
Client Information Enrollment Information Insurance Company Primary Care Providers View Providers View Enrollment sites View Facilities		View Client Info. View Enrollment In <u>View Providers</u> <u>View Enrollment si</u> <u>View Facilities</u>	i <u>fo.</u> tes
WISEWOMAN Client Information Enrollment Information	Repo Link to Discoverer V Clinical Reports Financial Reports	viewer	Other Go to New Agency Login User Information Exit Application

To open Discoverer Viewer, click on <u>Link to Discoverer Viewer</u> found in the Reports section of MBCIS (refer to graphic above).

### **Connecting to Discoverer Viewer**

1. When you first click on the Discoverer Viewer link in MBCIS, you will be taken to the **Connect to OracleBI Discoverer** screen:

Fill in the fields as indicated:

- 2. "Connect To" is an optional field. It should be left at its default.
- 3. User Name

Your **User Name** is the same as your SSO id unless you are a long-time user of MBCIS. In the latter case, your **User Name** is your MBCIS id.

4. Password

Your Discoverer **Password** is maintained separately in your MBCIS account. It does <u>not</u> change when you update the password associated with your SSO account. If you do not know your password, please call a member of the BCCCP data team. **Note: Changing the password associated with your SSO id does** <u>not</u> change the password associated with your MBCIS id.

ORACLE Discoverer Viewer Business Intelligence	
Connect to OracleBI Discoverer	
Welcome to OracleBI Discoverer.	
Connect Directly	
Enter your connection details below to connect direct	y to OracleBI Discoverer.
* Indicates required field.	This field is patiented to see 3
Connect To OracleBI Discoverer	blank or enter "eul_mbcis."
* User Name	
* Password	
* Database	
End User Layer eul_mbcis	
Locale Locale retrieved from browser 💌	
Go	

5. Database

The database name is "pbc2"

- 6. Leave the "End User Layer" field blank or enter "**eul\_mbcis**" as shown above.
- 7. Leave the "Locale" field at its default value.

8. Click Go to start Discoverer. You should see a list of worksheets that looks like this:

Bu Con	VRACLE Discoverer Viewer Preferences Ext Heb usiness Intelligence Preferences Ext Heb need > Vorksheet List							
	Searc	h						
	Type ir	a search string to find a specific workbook	or result set. Use the drop-down menu to choose be	tween Data	abase and Scheduled Workbooks.			
:	Search	All Workbooks	Gg					
	Resu	lt List						
	Refre	esh)						
	Expan	d All   Collapse All						
	Φ							
	Focus Name		Description		Last Modified			
		Discoverer Workbooks						
	¢	Abnormal Mammogram Results	(WS1) Abnormal Mamm with Diagnosis (WS2) Abnormal Mamm w/o Diagnosis (WS3) Diagnostic Mamm Results (WS4) Assessment Incomplete Dx (WS5) Breast Biopsy or Other Dx Breast Procedure	BCCCP	Wednesday, August 26, 2009 02:53:21 PM EDT			
	¢	🕨 🧐 Abnormal Pap Results	Locate abnormal Pap test results that require tracking. Use the report to help maintain timeliness. (WS1) Women with an abnormal Pap result but no dx. (WS2) Women with a colposcopy but no dx.	BCCCP	Tuesday, August 25, 2009 03:55:09 PM EDT			
	¢	Agency, Facility, Provider, and Billing Agency Lists	Names and associated MBCIS ids for your program. (WS1) Billing Agencies/Providers (WS2) Agencies (enrollment sites) (WS3) Facilities (WS4) Providers	BCCCP	Wednesday, August 26, 2009 02:58:43 PM EDT			

## A Required Setting in Discoverer Viewer Preferences

The <u>Preferences</u> link is available after you have logged onto Discoverer Viewer. It is available from the "List of Workbooks" screen in the upper right corner of the screen.

ORACLE Discoverer Viewer Business Intelligence	Preferences	<u>Exit</u>	Help
Connect > Workbooks >			

1. Click on the <u>Preferences</u> link. A new screen with settings for Query Governor, Measure Unit, Axis Label, Summary Data, and Fan Trap Detection. A change to the Fan-Trap Detection feature is required before running reports.

ORACLE <sup>®</sup> Discoverer Viewer Business Intelligence		Exit Help
Measure Unit	nmary Data 💿 Fan Trap Detection	
Preferences		
Specify values for the following Preferences. To c	hange these options later, click the Preferences link.	Cancel Apply
Query Governor		
☑ Warn me if predicted time exceeds	[60] (Enter a value between 1 and 999999 in seconds)	
Prevent queries from running longer than	(Enter a value between 1 and 999999 in seconds)	
Limit retrieved query data to	(Enter a row limit value between 1 and 99999)	
Retrieve data incrementally in groups of	(Enter a row limit value between 1 and 10000)	
Cancel list-of-values retrieval after	(Enter a value between 1 and 99999 in seconds)	
Measure Unit		<u>     Return to Top     </u>
		Return to Top
Show Axis Label Always		lo <u>riciali to rop</u>
Summary Data		<u>Return to Top</u>
Select when to use summary data <ul> <li>Alway</li> <li>Only</li> <li>Only</li> <li>Prevention</li> </ul>	rs ynden available. Men summary data is not out of date (stale).	
𝗭 TIP Summary data can be set ap by your (	DracleBI Discoverer administrator to improve performance	
Fan Trap Detection		Return to Top
OracleBI Discoverer detects and prevents cert	ain queries that could return ambiguous results.This automatic detection can be disabled if you w	ish to see such data.
Enable fan-trap detection.		
		Cancel Apply
	Exit   Help	
Copyright (c)2000, 2005 Oracle Corporation. All rights rese <u>About OracleBI Discoverer Version 10.1.2.55.26</u> <u>Oracle Technology Network</u>	rved.	

 Fan trap detection will cause many reports to crash or not run at all. The box next to "Enable fan-trap detection" must be unchecked, as shown below.

Fan Trap Detection		Return to Top
OracleBI Discoverer detects and p	prevents certain queries the	at could return ambiguous results. This automatic detection can be disabled if you wish to see such data.
Enable fan-trap detection.	This box must	
	to run reports!	Cance! (Apply)

### **Errors When Returning to Discoverer Viewer**

1. Repeat the steps listed above to return to Discoverer Viewer at a later time.

Connecting should only take a few seconds at most. If you do not connect, you will likely see an error message for invalid username or invalid password. Retry logging in.



If you rule out number 1 and number 2, you may need to call for assistance. Call Mike at 517-335-9954.

# **The Worksheet List in Discoverer Viewer**

<u>Note</u>: In Discoverer Viewer, a **Workbook** is a collection of **Worksheets** in the same sense that you may have worksheets in a single Excel document (workbook). In most cases Oracle's use of the word "worksheet" is equivalent to the word "report."

#### Opening a workbook: How do I find the workbook I want?

You have two choices. You can scroll down the list of workbook names, or you can use the search utility at the top of the screen. To use the search utility, enter a key term from the title

of the workbook you want to find and click the Go button.

Worksheet List	
Search	
Type in a search string to	find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.
Search All Workbooks	GD

In the example graphic below, the word "case" was searched as a shortcut for "caseload." When pulling results, the search utility examines workbook names and descriptions only. This search does <u>not</u> include the names of individual worksheets.

Sea	arch	All Workbooks Case	Go		
Re	sult	t List			
F	R <u>e</u> fre:	sh			
Ex	pand	All Collapse All			
¢					
Fo	cus l	Name	Description	Owner	Las
		Discoverer Workbooks			
€	€	🕨 🥥 Caseload	UPDATED WISEWOMAN Caseload Lists and Caseload Tables. See worksheet names for priority fields.	ww	Frid
€	€	Caseload by Age Group, Listings and Tables	Additional crosstables added. This workbook contains a caseload listing and various tables. Select program and FY for each report. Data for this table are updated nightly.	BCCCP	Mon
€	€	Case Management	(WS1) Identify cases likely eligible for reimbursement for CM. (WS2) Track those with case management services. Please direct questions about individual cases to Ann Garvin (517-335-9087).	BCCCP	Frida
€	₽	🕨 🦃 Case Management	Lists those clients who have received case management services.	ww	Mon
€	₽	LCA Transfer Cases	Transfer cases = women screened at your LCA but now at a different LCA.	BCCCP	Weo

# When you click on the arrow icon ( $\overline{\mathbf{v}}$ ) next to a workbook name, all worksheets in that workbook are displayed.

Focus	Name	Description	Owner	Last Modified
	Discoverer Workbooks			
¢	Caseload	UPDATED WISEWOMAN Caseload Lists and Caseload Tables. See worksheet names for priority fields.	ww	Friday, Februar
¢	✓ Source Caseload by Age Group, Listings and Tables	Additional crosstables added. This workbook contains a caseload listing and various tables. Select program and FY for each report. Data for this table are updated nightly.	BCCCP	Monday, March
	Caseload List by Name			
	Caseload List by Enroll Site			
	Caseload List by Enroll Date	Clicking on the blue triang	gle nex	t to the
	Caseload Table	report and displays all wo	rkshee	et i
	with County	names. Most reports hav worksheets in them. The	e 2 to 5 Caselo	ad by
	with Enrollment Site	Age Group report is an e	xceptio	n.
	with Race			
	with Race and Enroll Site			
	with Hispanic			
	with Hispanic and Enroll Site			
	historical			
	historical statewide			

### **Opening a worksheet/Running a report**

To run a report, click on the name of the worksheet you want. Discoverer Viewer will immediately attempt to retrieve the data for your worksheet. While the report is running you will see a Query Progress screen. Sometimes you will be given an estimate of how long it will take Discoverer to pull the report data.

ORACLE Discoverer Viewer Business Intelligence	<u>Help</u>
Abnormal Mamm w Diagnosis	_
Query Progress	
Estimated Time Unknown Elapsed Time 00:00:08	
Cancel Refresh	
TIP You can change the refresh rate of this page. Please check with your OracleAS administrator or the OracleBI Discoverer documentation for more details	-
Help	
Copyright (c)2000, 2005 Oracle Corporation. All rights reserved. <u>About OracleBI Discoverer Version 10.1.2.55.26</u> <u>Oracle Technology Network</u>	

When you have a report open, a **Worksheets** list will be displayed on the left side of the screen. The worksheet you have open will be shown in black font and other available reports in the same workbook will be underlined in brown font.



To return to the listing of all available reports, above the report title is a connection tree. Click on the <u>Workbooks</u> link in the tree to return to the full report list.

### Saving changes to a worksheet

When you have made changes to a report (refer to Formatting section below), the report is saved to your Discoverer account with a new workbook name.

To save a report, select the <u>Save as</u> link from the <u>Actions</u> menu on the left side of the screen.



A default name will appear for the file you are saving.

Connect > Workbooks >	
Save Workbook As	
Choose a new name for this workbook * Indicates required field.	Cance!) (Apply)
* Workbook Name Agency, Facility, Provider, and Billing Agency Lists1	
Ø TIP The workbook will be saved in the root of the folder tree.	

<u>Note</u>: If you change a worksheet and then try to switch to a different worksheet without saving it, Discoverer will prompt you to save or discard the changes you have made.

ORACLE Discoverer Viewer Business Intelligence	<u>Exit</u> <u>Help</u>
<u>∧</u> Warning	
Do you want to save your changes before closing this worksheet?	
You have not saved the changes you made to this worksheet. This worksheet must be closed to continue. Click "Yes" to save changes and continue, "No" to con without saving changes, or "Cancel" to return to this worksheet. If you choose "Yes" and you do not own the workbook, you will be prompted to save it under a ne name.	ıtinue w
Cance! No	<u>Y</u> es

If you click "Yes," you will see the proposed default name as shown above and you can elect to save it or cancel.

How a saved report looks on the list of workbooks is shown in this graphic:

#### **Discoverer** Viewer



Note that alphabetical order for the workbook list is maintained and your report can be identified by looking for your user id under the **Owner** column in the workbook list.

Please note: If you want a custom report that you created deleted, you will need to call Mike at 517-335-9954 for assistance.

### Previewing and printing a worksheet

You preview a worksheet before printing to confirm that the settings in the Print Options page produce the output you expect. For example, you might want to check that margins, spacing, and set up options are correct before printing the worksheets. The preview worksheet will contain all data if there are 100 rows of data or less, otherwise it will preview only the first 100 cases.

To preview a worksheet:

1. Display or open the worksheet data that you want to print.

2. Click the <u>Printable Page</u> link to display your report. You can adjust the **Printable Page Options** as desired.

Printable Pag	e O	ptions
Set the options to	gen	erate a printable Portable Document Format (PDF) document of your worksheet.
Content	Pa	age Setup
General Op	tion	15
Page ite	ms	O Print current selection of page items
		C Print all combinations of page items
Show page ite	ms	On the first page
		C Never
Show t	itle	On the first page
		C Never
D	ata	O Print all rows and columns
		C Print only the rows and columns that are displayed in the crosstab or table.
Print Head	er	
Print Foote	er	
Table Optio	ns	
Print table		
Repeat 🗹	hea	der cells on every page
Content	Pa	age Setup

3. You can also check <u>Page Setup</u> and make adjustments there as well.

Content Dava Catur	
Content Page Setup	
Paper Setup	
Size Letter (8.5 x 11)	
Orientation  • Portrait  • Landscape	
Margins       Top     1       Inches     Inches       Left     0.75       Inches     Inches	The Column Sizes option is very useful for getting your report to look right on paper. Please note, however, that the column names and sizes are not matched up properly on the screen.
Scaling	
Set the scale of the printed worksheet.	
Scale 100% 🔽	
Column Sizes	
Set the width of the printed columns.	
Enrollment Site ID (MBCIS) Enrollment S	ite Name
Column size (Inches)	5.42
ITIP Maximum width of a single column:	7 (Inches)
If this box is not checked, text that is too large	to fit will be clipped if word wrap is not enabled through Plus.
4. When you are satisfied with your setting continue. Oddly, either choice will take yo	gs, click on <u>Preview sample</u> or <u>Printable PDF</u> to u to a PDF version of your report for you to inspec
and/or save. In general, you will want to u	ise Preview sample. Using the latter

choice, <u>Printable PDF</u>, is only recommended if you have already formatted and printed the report previously.

Tip!

If you get unwanted characters around the border of your report, they can be removed by unchecking the boxes for Print Header and Print Footer in the Content menu.

### **Exporting Discoverer worksheets**

You may export worksheet data from Discoverer Viewer so that you can examine the data or format the report for printing differently.

To export a Discoverer worksheet as a different file type:

- 1. Display or open the desired worksheet.
- 2. Click on the Export link from the Actions menu on the left side of the screen.



3. The "Export Options" page will be displayed. Choose export type from the drop down list,



(typically MS Excel) and click Export to display the "File Download" page:



4. To save your data, click save. The "Save As" dialog box will then open and you can rename the exported file before saving it. You can also control where the file gets saved.

Using <u>Upen</u> instead is <u>not</u> recommended. This will display the data in the application associated with the type of file you are saving. If you are exporting the file as an Excel document, the exported file will open up in Excel. However, if you close the whole window with the browser button your exported data will not be saved.

#### A Special note about exporting to Microsoft Excel--macro security level setting:

Excel will not allow you to open a Discoverer worksheet exported to an XLS file if the macro security level in Excel is set to "High." Excel displays an alert and prevents you from opening the worksheet.



To continue from this warning, select "Enable Macros". Discoverer Viewer reports use a type of macro that cannot be disabled.

To change your security setting in Microsoft Excel, follow this path:

<u>T</u>ools/ <u>O</u>ptions/ Security/ Macro Security

In the Macro Security interface, select a lower setting than the default.

# **Changing the Worksheet Display**

There are two general ways that a report can be changed so that it is better suited for printing or online use: 1) the worksheet can be changed by the creator of the report; 2) the worksheet display can be changed with settings available to you in Discoverer Viewer.

Many new settings and options have been added to Discoverer Viewer (from the prior version). This section will cover only those settings that can directly affect how your report will look when printed. You can explore other settings and tools on your own.

If you cannot adjust settings in Discoverer Viewer to get what you want to print, please call Mike at 517-335-9954 for assistance or email him at carrmi@michigan.gov.

### Changing the sort criteria

To sort values in a worksheet use the Sort tool:

- 1. Display or open the worksheet that you want to analyze.
- 2. Click the <u>Sort</u> link and then click the <u>More...</u> link to display the Sort Table.

▼Tools Layout Format Stoplight Sort Rows and	d Columns
Sort MBCIS   Order Asc	ending 🔽 Go More

3. Your report should already be sorted by the desired field. If it is not, check for another worksheet in the workbook that is.

4. You can use the sort table to suppress fields that you do <u>not</u> want to print by checking the **Hide Column** button for each field you do not want to see on your report.

ORACLE Discoverer Viewer Business Intelligence						
Connect > W Multiple Sc	orkbooks > <u>Client Enrol</u>	Ime	nt Information	- By F	<u>Y</u> >	
Specify a colu	mn, sort order, sort type	and	d whether the	colur	nn is visible	in your table.
	Column Header		Sort Order		Sort Type	Hide Column
First Sort	Last	-	Ascending	-	Normal 💽	
Second Sort	First	-	Ascending	-	Normal 💌	
Third Sort	MI	-	Ascending	-	Normal 💌	<b>*</b>
	Cycle ID	-	Ascending	-	Normal 💌	
		-	Ascending	-	Normal 💌	

Note: Making changes to the sort criteria will cause the report to reload and may take a few seconds.

### Changing the layout of a worksheet

To move columns around in a worksheet use the Layout tool:

- 1. Display or open the worksheet that you want to analyze.
- 2. Click the Layout link and then click the More... link to display the Table Layout interface.

<b>▼</b> Table		~
▼Tools Layout <u>Form</u> a	it <u>Stoplight</u> Sort Rows and Columns	
Move 💌 Name	Left of Clinical View	Go More

3. The **Table Layout** screen displays all of the page items and columns in the report. This screen gives you two ways to move columns. You can use the "Move" function near the top

of the screen with the drop down buttons  $\blacksquare$  to indicate which field you want to move, and where you want to move it to. The buttons next to each field name  $\textcircled{F} \textcircled{\bullet}$  allow you to move the field up into the page items, or move it to the left or right, respectively. You can also move page items down into the main report body.

ORACLE Discoverer Viewer Business Intelligence			Preferences Exit Help
Connect > Workbooks > Caseload by Age Group, Lis	tings and Tables - Caseload Li	st by Name >	
Table Layout			
Specify where you want items to appear in your table	by using the Layout tool, or b	y clicking arrows in the sample layout.	Cance! Apply
Layout Move VMBCIS Veft of	Last 💽 🖸		
☑ Show Page Items	Move field up	left or right	
Page Items LCA ↓ → FY ↓ ← → Program ↓ ←	to Page Items	$\bigcup$	
Columns MBCIS ∓ → First ∓ ↑ → Last ∓ ← → A	ge Group 😨 🛨 🖬 1st Servi	ce in Cycle Ŧ 🛨 Enroll Site Ŧ 🛨 C	ounty Ŧ 🛨 Creation Date Ŧ 🗲 🔿

4. The **Table Layout** screen also contains a swap function which allows you to swap the position of "Column A" with that of "Column B." Use the drop down buttons **T** to select "Swap" and to choose the fields you wish to swap on the report.

Busines	<b>'L∈</b> ' Discoverer Viewer <b>■</b> s Intelligence		
Connect	> Workbooks > Caseload by Age G	roup, Listings and Tables - Case	eload List by Name
Table L	ayout		
Specify w	here you want items to appear in yo	ur table by using the Layout to	ol, or by clicking a
Layout	Swap 💌 First 💌	With MBCIS	Go
Show	Page Items	With MBCIS Vith Last	<u>}</u>
Page Items		With Age Group With 1st Service in Cycle	
Columns		With Enroll Site With County	
Columna	MBCIS (1) First (1) (1) Last (1)	With Creation Date	Service in Cycle
		With LCA	
		With FY With Program	
Copyright (c)2000, 2005 Oracle Corporation. All rights reserved.			
Oracle Tech	nology Network		

Note: Making changes to the report layout will cause the report to reload and may take a few seconds.

### **Change selection parameters**

When you display a worksheet that contains page items you will want to check the page items to see if their values are selectable. You often will need to change the values for the page items when the report first opens. For example, you might want to display data for a different month than October.

FY	2	Reminder Month
2008 💌	3	OCT 🗸

To apply a different parameter value to a worksheet:

- 1. Click on the drop down arrow and select the value you would like.
- 2. Wait for the report data to reload. Change additional page item values as necessary.

# **Customizing Discoverer Viewer**

There are two ways to tailor Discoverer Viewer actions and displays to better suit your needs. The first is through the <u>Preferences</u> link, which gives you some control over how reports are run and results are displayed. The second way is through Worksheet Options, which allows you to control the display of null data cells.

### **Discoverer Viewer preferences**

The <u>Preferences</u> link is available after you have logged onto Discoverer Viewer. It is available from the "List of Workbooks" screen in the upper right corner of the screen.



1. Click on the <u>Preferences</u> link. A new screen with settings for Query Governor, Measure Unit, Axis Label, Summary Data, and Fan Trap Detection.

2. Other than the required **Fan-Trap Detection** setting described in the section **"A Required Setting in Discoverer Viewer Preferences"** above, the only section you may be interested in is the query governor.

3. Optional: You can adjust the numbers associated with query time and query quantity to suit your needs. Changes made in this interface can be undone later.



### **Worksheet Options**

The Worksheet options link under the Actions menu takes you to the Worksheet options page.

Actions	
Rerun query	
Save as	
Revert to saved	
Printable page	
Export	
Send as email	
Worksheet options	3

The most useful setting in this interface is the box that shows how null values are displayed in your reports. The default setting is the word "NULL." If you do not like to see the word "NULL" throughout your reports, you can delete this to see blanks, or replace it with a period.

Worksheet options	
Select the items to display in the wor	ksheet.
Display Options	
☑ Title	Title
⊙ Table	
Remove the word "NULL" to see empty cells for missing data instead	
Sheet Options	
Show null values as	(Maximum 30 characters)
Show values that cannot be aggre	gated as (Maximum 30 characters)

#### BCCCP Discoverer Viewer Workbooks by Category

Last Updated 4/1/2010

#### CASELOAD

-Caseload by Age Group, Listings and Tables

#### **CLAIMS/FISCAL**

-Claim Information (Paid Amounts) by Provider Service Category
-Claims by Provider—THE REPORT TORY USES
-Claims Search (by Client Name or MBCIS ID)
-Matching Funds CDC FY2009
-Paid and Rejected Claims
-Paid and Rejected Claims by Provider
-Pended Claims: Authorization Required
-Select Pended Claims by Hold Code
-Select Rejected Claims by Hold Code

#### **CLINICAL ISSUES**

-Abnormal Mammogram Results -Abnormal Pap Results -ASCUS Results -Assessment Incomplete Results -Cancer Counts -Case Management -CDC Pap Policy FY2010—Eligibility-Ineligibility Report

#### **ENROLLMENT**

-Client Enrollment Information -Client Most Recent Enrollment -Family Planning Services by Client

#### **GENERAL DATA QUALITY**

-Agency, Facility, Provider, and Billing Agency Lists
-Clients Near 65
-Clinical Data Quality Assurance (Service Date Issues in MBCIS)
-LCA Transfer Cases
-Never/Rarely Screened for Pap Test
-Out of Range Dates
-Program and Age Mismatch

#### REMINDERS

-Reminder Labels (Anniversary Date)
-Reminder Labels (Reminders Tab)
-Reminder Master List (Anniversary Date w Phone)
-Reminder Master List (Anniversary Date)
-Reminder Master List (Reminders Tab)
-Reminder Master List, Select Enrollment Site (Anniversary Date)

#### **WISEWOMAN Discoverer Viewer Reports by Category**

#### Last Updated 4/1/2010

#### CASELOAD

-Caseload -Client Enrollment Information

#### **CLAIMS/FISCAL**

-Authorized Services with No Associated Claims
-Final Claims Data
-Matching Funds
-Paid and Rejected Claims
-Select Pended Claims by Hold Code
-Select Rejected Claims by Hold Code
-Services Not Authorized to Pay (OK to Pay Report)

#### **INTERVENTION**

-Follow-Up Contacts -Lifestyle Counseling Contacts

#### **PROGRAM MANAGEMENT**

-Facilities -Reminders -WISEWOMAN MDE Error Fixes

#### SCREENING

-BP Indicator -Case Management -Diabetes Screening -Project Fresh Eligibility -Results by Service Type

-Screening Alerts