TAI QUERY REPORTER USERS GUIDE

VERSION 1.0.0.1

TAI SOFTWARE

February 9, 2011

Introduction

- **TAI Query Tool provides users with ad hoc ability to generate customized reports and analytics to monitor and improve their daily operations.**
- **The tool's graphical capability enables users to visualize the results.**
- **Query tool's functionality resembles that of Microsoft SQL Query Analyzer where a user has the flexibility to manipulate data at the lowest level.**

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General

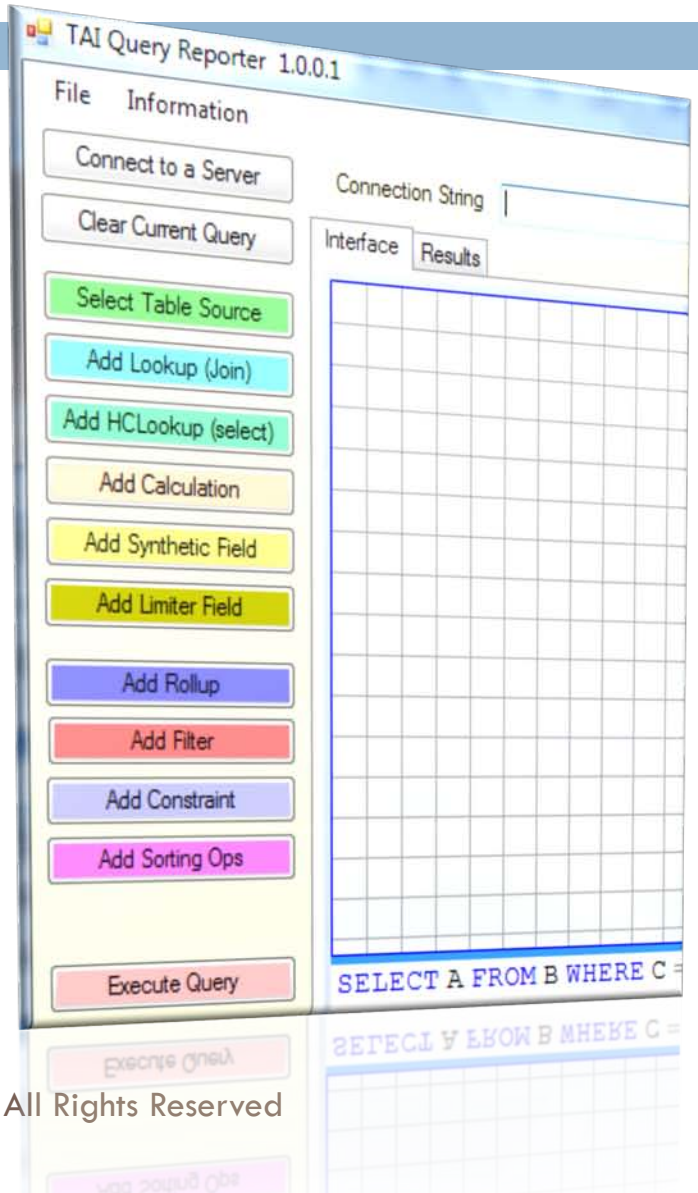
- **The Query tool enables users, familiar with data elements of a database and knowledge of where to find certain information, to explore the depth and wealth of data.**

- **Data dictionary document, if available, is a good reference material describing data elements in tables and databases.**

- **This version of the tool requires .NET 4 Framework to be installed on the machine on which the tool is executed/run from.**

Key Functionality

- **The following lists key functionality of the tool as depicted by the buttons to the right in a partial screen capture:**



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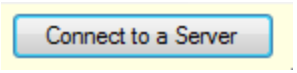
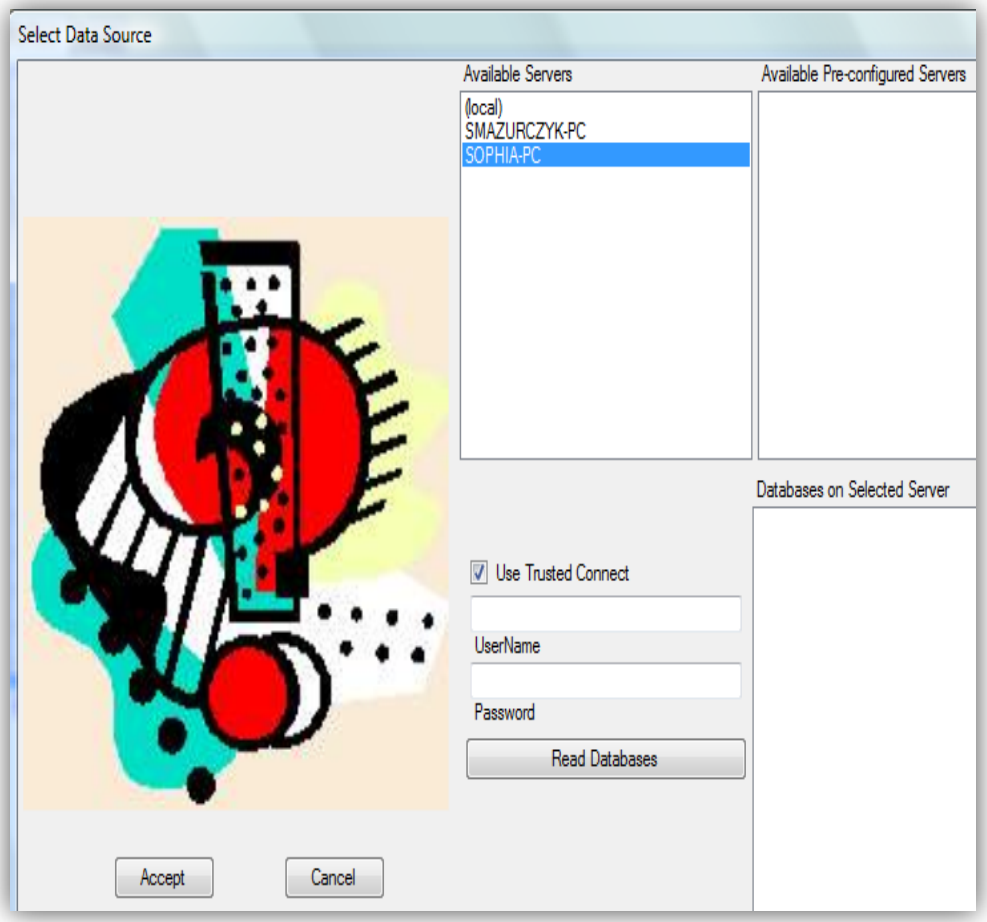
Connect to a Server

- **The first step is to find a database server. Click on the** 

button.

- **The tool will automatically search and display a list of available database servers that are accessible to the tool.**

- **Users will need a SQL login to the server to which they'll be connecting.**



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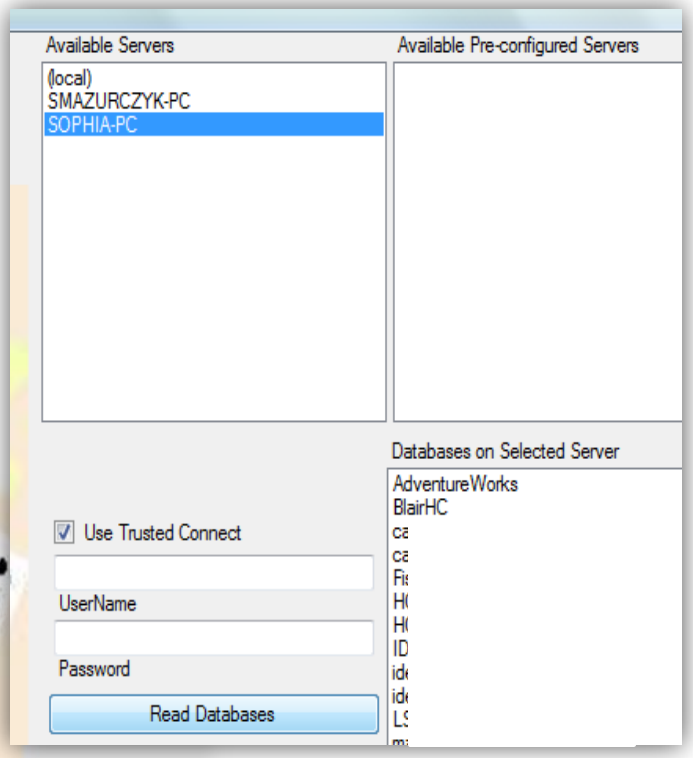
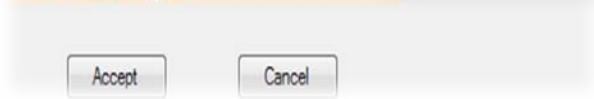
Select Server & dB

- Click on one of the servers that appear in the Available Servers box.
- Then click on the Read Databases button. A list of available databases will be displayed in the Databases on Selected Server box.
- Click on the database you would like to work with – i.e. BlairHC.

Then click on the Accept button





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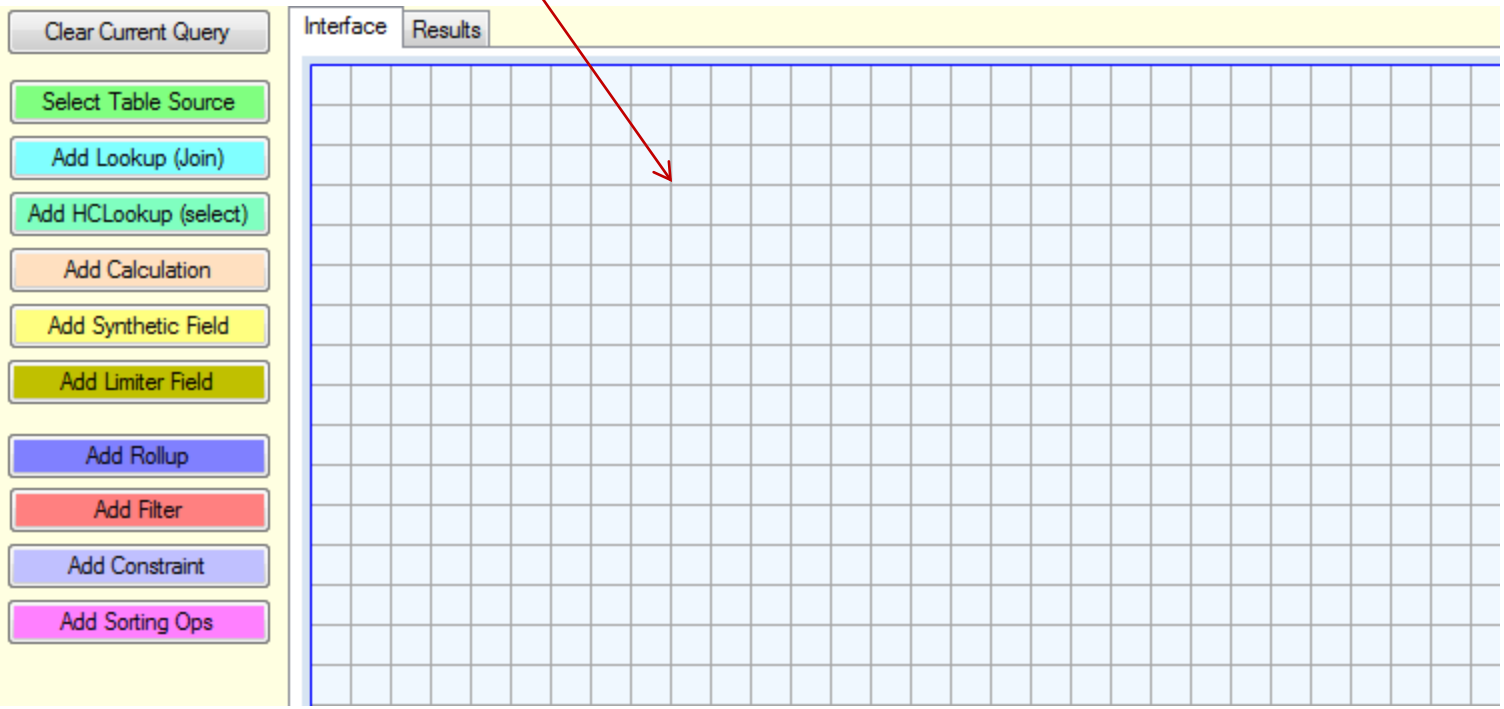
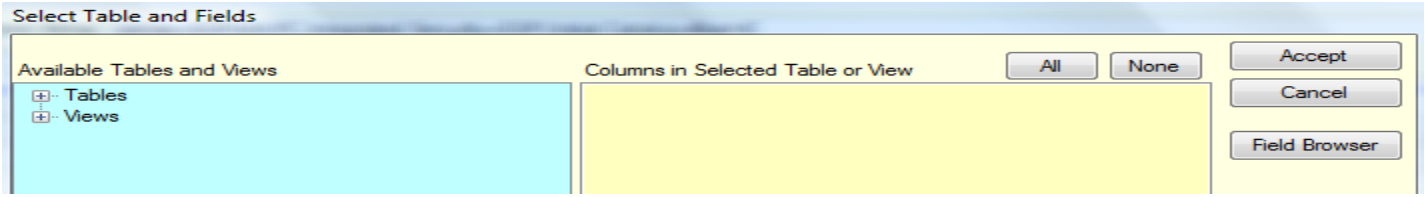
Clear Current Query

- **Clicking on the Clear Current Query button will erase the work area in preparation for a new query.**

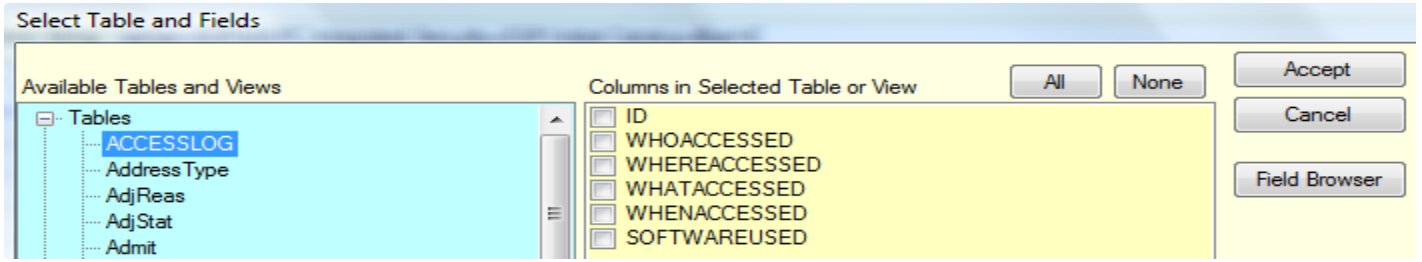


Select Table Source

- **Before you can start creating queries, you will need to select the tables, their fields/data elements, etc.**
- **To obtain a list of tables, expand them by clicking on the plus sign to the left of the Tables.**



- **Then click on the actual table – i.e. ACCESSLOG and the list of its fields will be displayed in the area to the right. Select the individual fields by clicking to the left of each and then press Accept button.**



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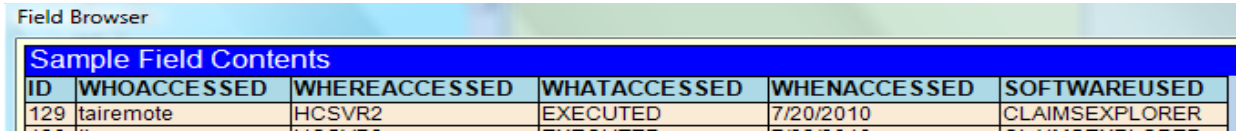
Query Display

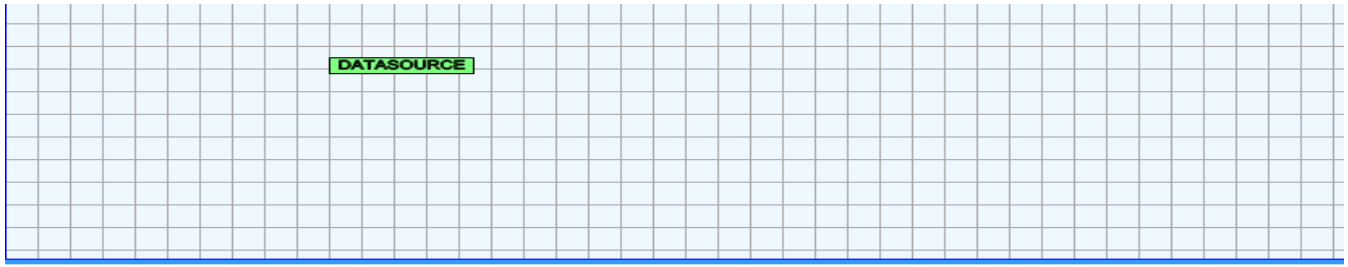
- **Clicking on the Field Browser button will display table data.**


Field Browser

Sample Field Contents

ID	WHOACCESSED	WHEREACCESSED	WHATACCESSED	WHENACCESSED	SOFTWAREUSED
129	tairemote	HCSVR2	EXECUTED	7/20/2010	CLAIMSEXPLORER

- **The basic query was started when you accepted the fields. This is illustrated by the DATASOURCE image in the work area. Below the work space is the actual SQL query that is created for you.**
- **If you mouse over the image, you'll see the details such as the table and fields selected.**




```
SELECT
ACCESSLOG.ID,ACCESSLOG.WHOACCESSED,ACCESSLOG.WHEREACCESSED,ACCESSLOG.WHATACCESSED,
ACCESSLOG.WHENACCESSED,ACCESSLOG.SOFTWAREUSED
FROM ACCESSLOG
```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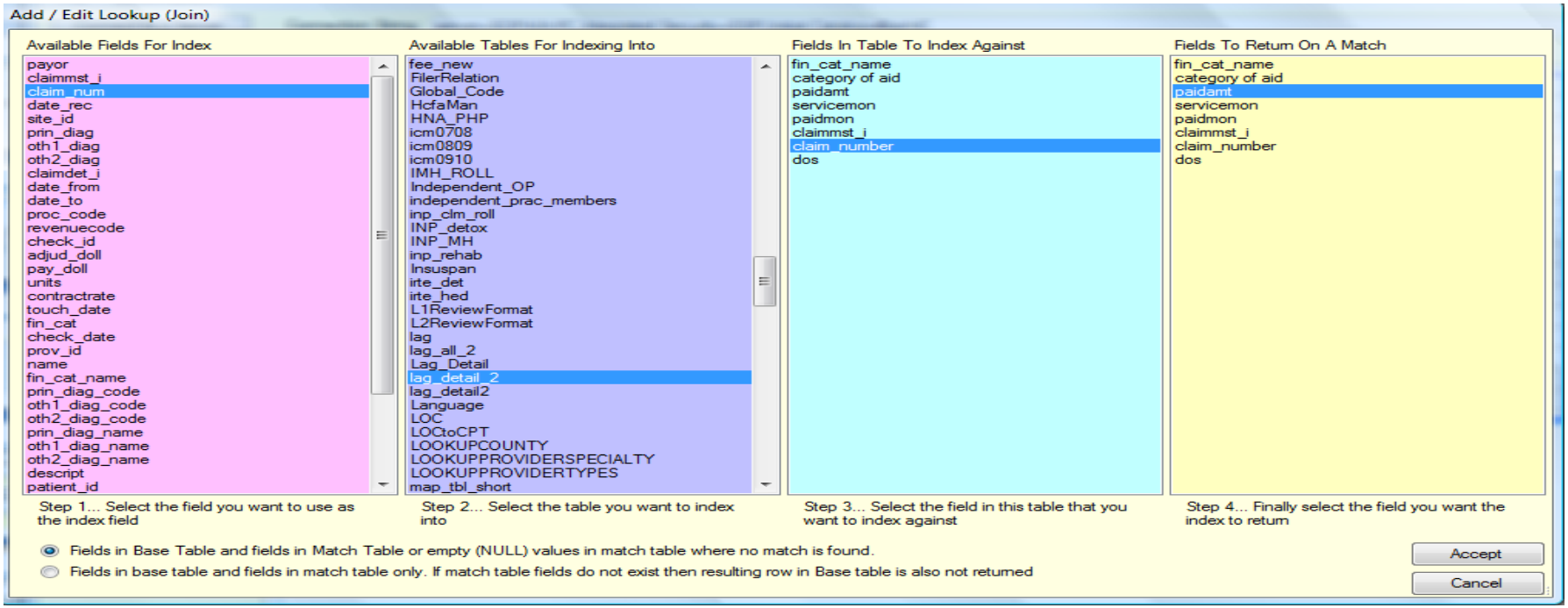
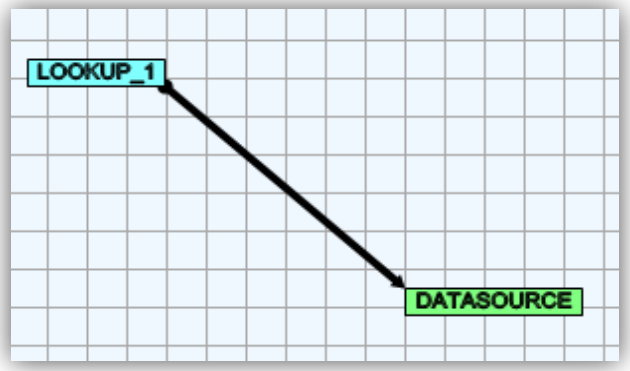
Add Lookup (Join)

- **This functionality allows you to collect data from two different tables where both tables have a field that is common. This field will link the two tables.**
- **For example, if you need to pull data that spans among multiple tables (i.e. partly in Claims_all and partly in Lag_detail2), a field that is common to both in this case is "claim_num" and "claim_number" in the Lag_detail2 table.**



Lookup detail

- **This will result in a Lookup_1 image in your work space**



- **It will also add to the query on the bottom, below the workspace.**

```
SELECT
claims_all.claim_num,claims_all.date_from,claims_all.date_to,claims_all.proc_code,
claims_all.pay_doll,claims_all.units,claims_all.fin_cat,claims_all.check_date,
claims_all.fin_cat_name,claims_all.prin_diag_code,
LT0.PaidAmt AS 'claim_num_PaidAmt',
LT0.Units AS 'claim_num_Units'
FROM claims_all
LEFT OUTER JOIN lag_detail2 AS LT0 ON claims_all.claim_num=LT0.claim_number
```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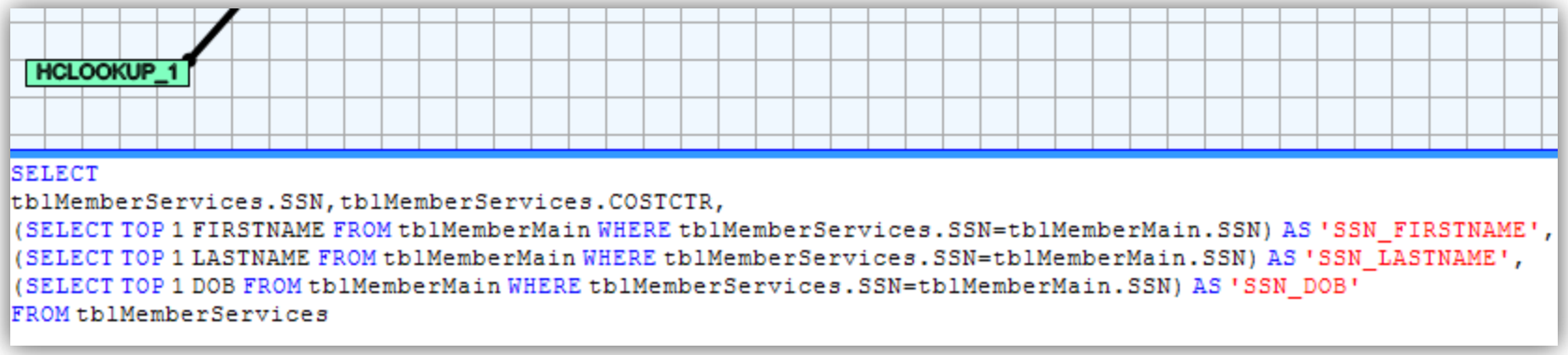
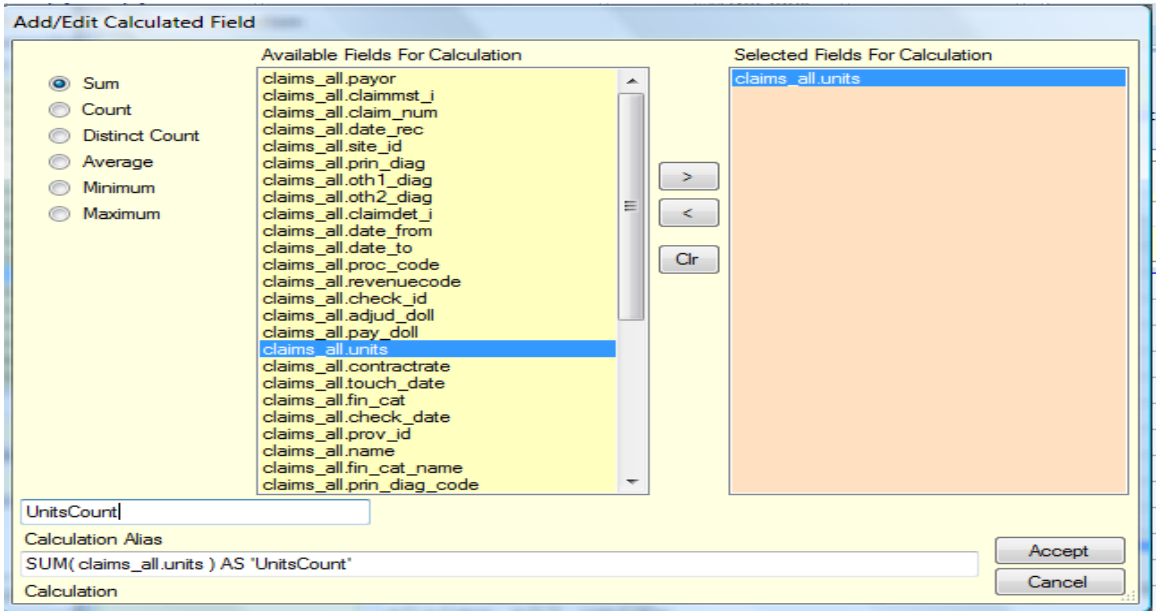
Add HCLookup (Select)

- This function is similar to the other Lookup with the exception that is does a " Select TOP 1" subquery rather than a Join. The purpose is to ensure that data element from only one record is used for joining. This may be useful in an environment with duplicate records – such as duplicate members



Add Calculation

- This function allows users to run a total on a specific data field.
- If you notice, the actual query is displayed in the Calculation text box.
- You can name the resulting displayed field to something more meaningful in the Calculation Alias text box.
- Clicking Accept button will add this function into the query in your work space and it appears as SUM



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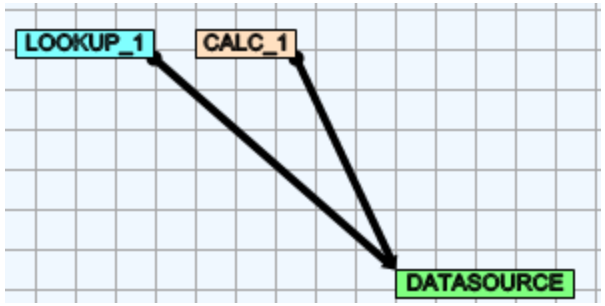
Calculation – SQL SUM

- Image Calc is displayed in the work area.

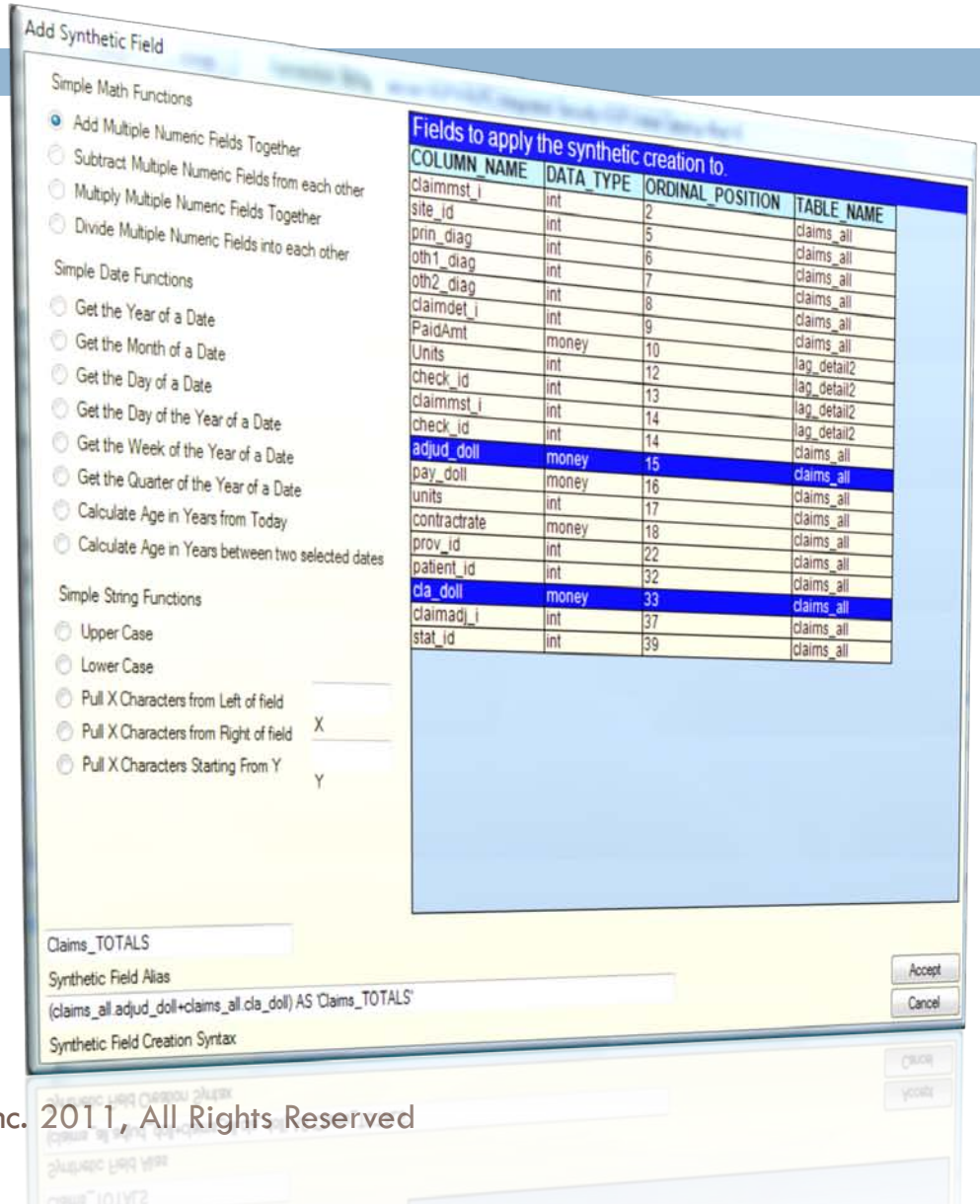


- Sum line is added into the query.

```
SUM( claims_all.units ) AS 'UnitsCount'
```

Add Synthetic Field

- This function serves the purpose of doing additional calculations or manipulation of data fields. For example if you want to add two existing fields to create a new field on the report.



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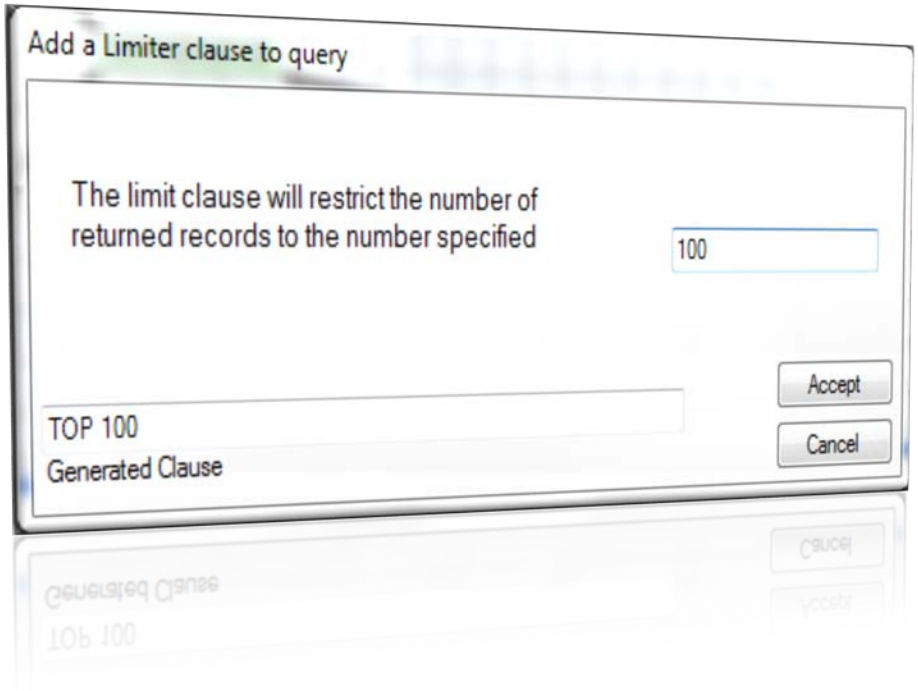
Add Delimiter Field

- This function gives you the control over how many records will be returned from the query. For example, this may be useful if you're interested in the top 100 members only. This will translate to "SELECT TOP 100" in the query.



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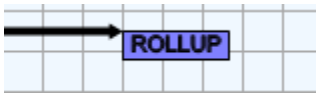
Add Rollup

- Rollup function lets you group or organize your records that will be displayed by selected fields you chose to be in the results set. Rollup is performed on rows of informational record set with same values.

- A Rollup image will be added to graphical portion of the work area



- SQL "GROUP BY" listing selected fields will be added to the query

```
GROUP BY
claims_all.claim_num,claims_all.date_from,claims_all.date_to,
```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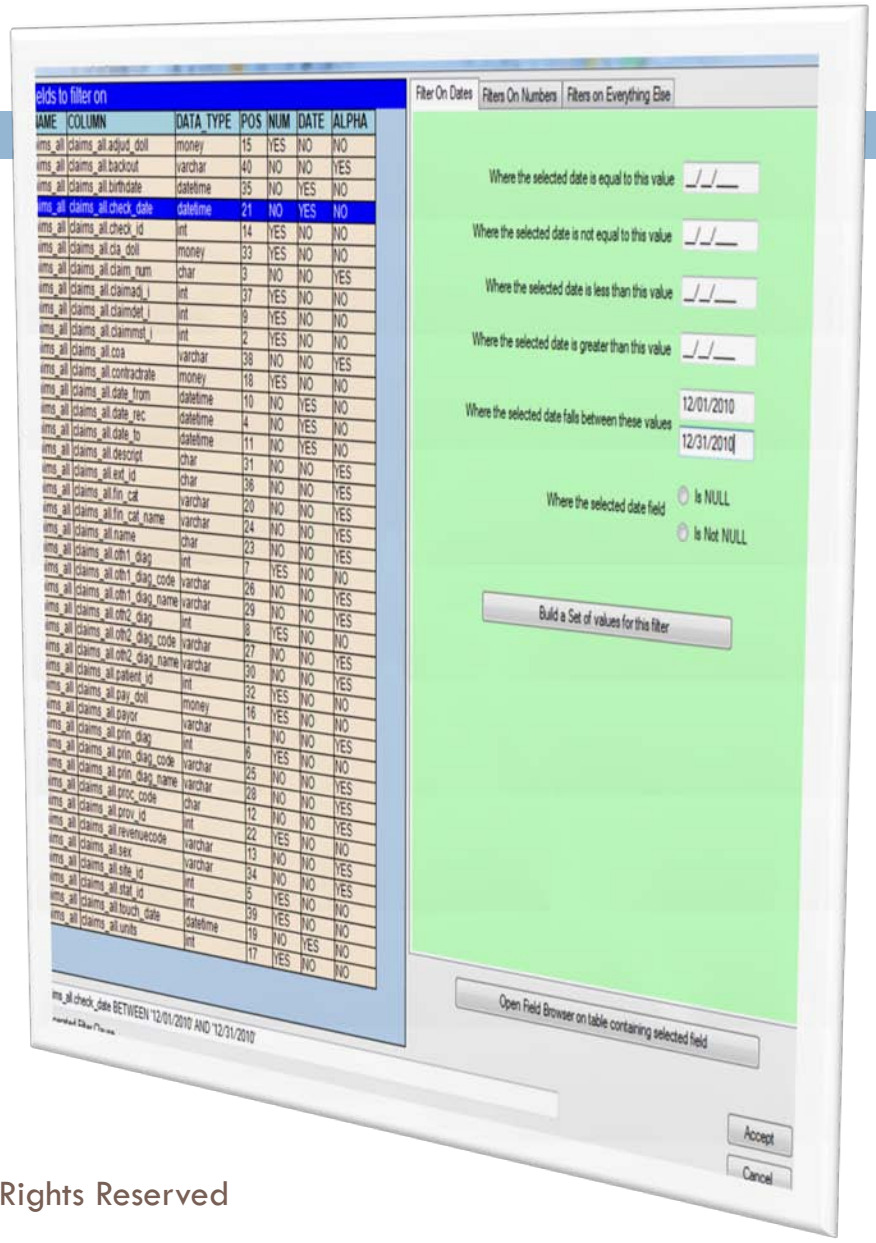
Add Filter

- Filtering allows you to narrow down your results set. For example, you may only be interested in claims that were paid in the month of December 2010.
- You can also filter on number fields or fields containing certain values.
- Filters translate to SQL "WHERE" clause.



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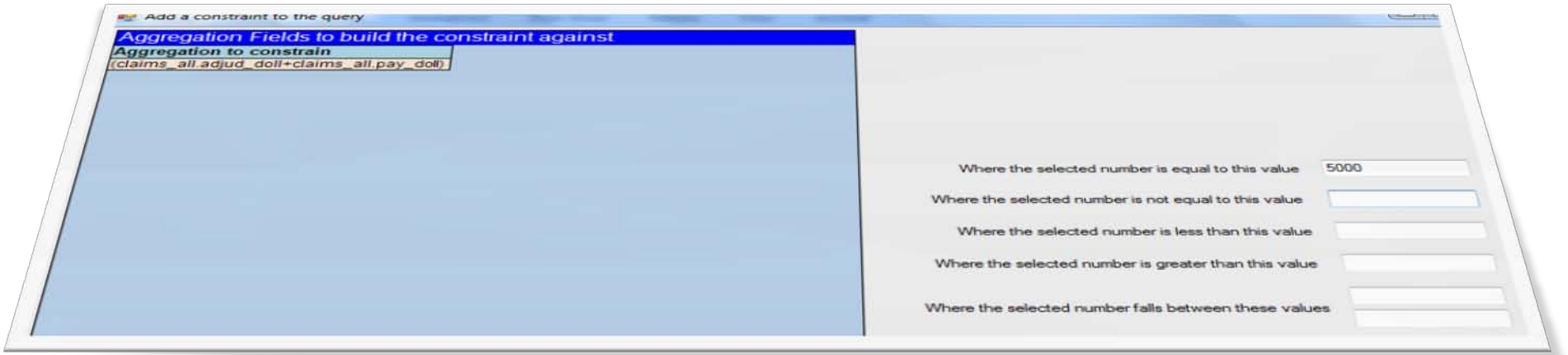
Add Constraint

- This function works on the field(s) you've created with the Add Synthetic Field button.
- It lets you sets limits or constraints on the values of the created field.
- For example, if you're interested in claims whose payment is $5000



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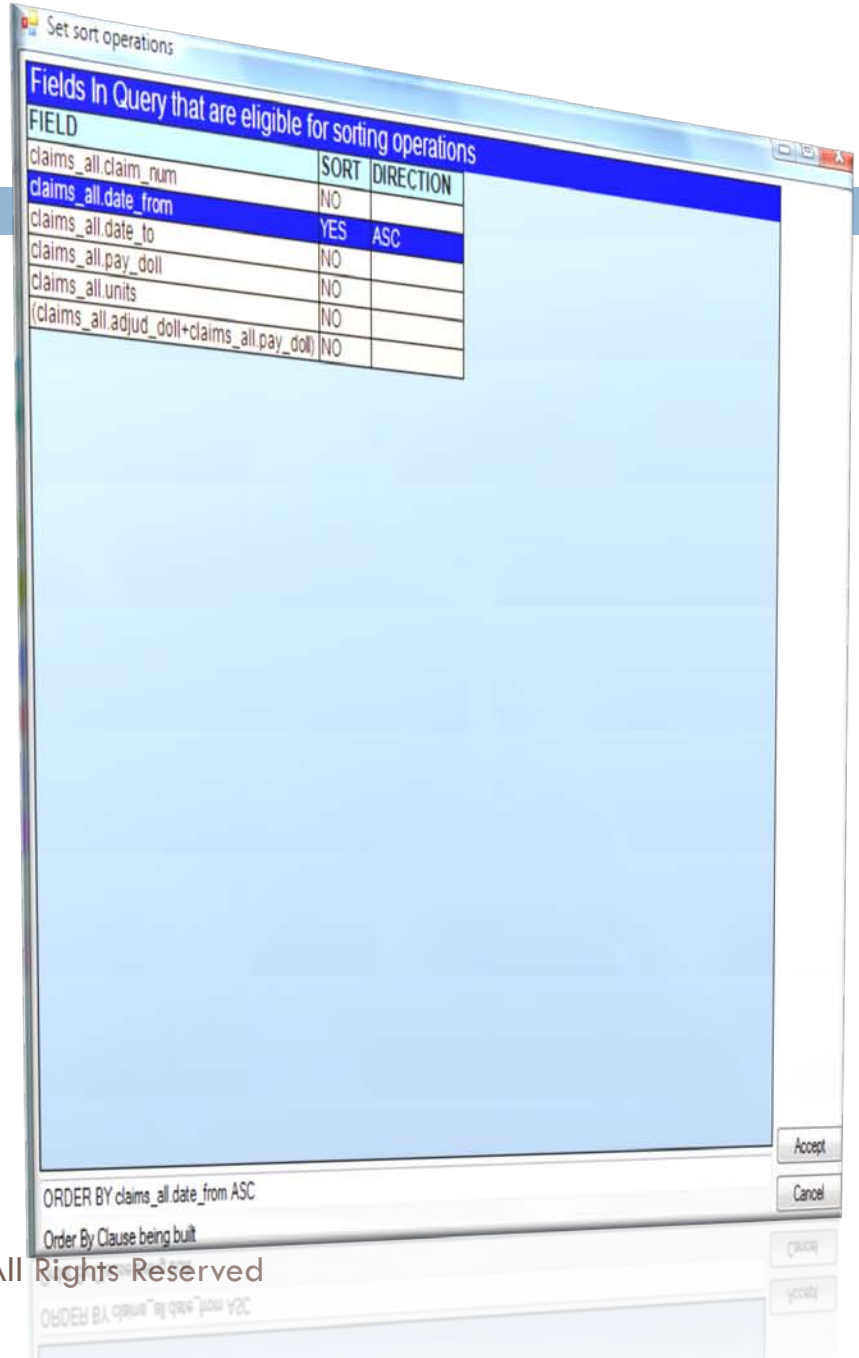
Add Sorting Ops

- Sorting helps you to force your results set to be arranged or ordered by certain fields and also in either ascending or descending.
- For example, you may want to display the results by member's last name in the ascending order or claims by service date.
- This function translates to SQL "ORDER BY".



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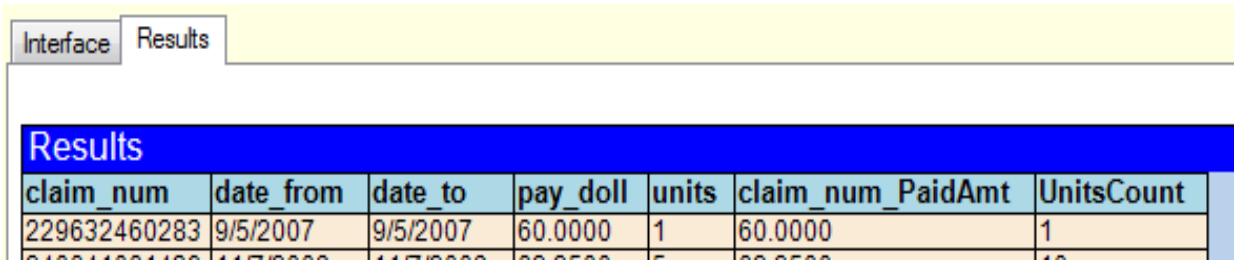
Execute Query

- This button is self explanatory – clicking it will run the query that was created.

- The outcome/results will be displayed in the area under the Results tab.



Saving queries

- Once you have created a query that works (gives you what you need), you can save it and run it as required with possibly changing some filters such as check dates, etc.

- To Save a query, click on File then select a folder that may be designated for queries.

- You can then File/Open at some later date and just Execute the saved query to produce the desired report.