

Performance Analytics

Powered by Horizon Business Insight



Using Horizon Business Insight with
Horizon Performance Manager

Release 15.0
April 2010

Copyright notice

Copyright © 2010 McKesson Corporation and/or one of its subsidiaries. All Rights Reserved. Use of this documentation and related software is governed by a license agreement. This documentation and related software contain confidential, proprietary, and trade secret information of McKesson Corporation and/or one of its subsidiaries, and is protected under United States and international copyright and other intellectual property laws. Use, disclosure, reproduction, modification, distribution, or storage in a retrieval system in any form or by any means is prohibited without the prior express written permission of McKesson Corporation and/or one of its subsidiaries. This documentation and related software is subject to change without notice.

Publication date

April 2010
Produced in Ireland

Product

Horizon Business Insight Release 15.0

Corporate address

McKesson Corporation
5995 Windward Parkway
Alpharetta, GA 30005

Reader comments

Comments or suggestions regarding this publication are welcome and should be sent to the following address:

McKesson Corporation
Horizon Business Insight Documentation Team
380 Russell Street
Hadley, MA 01035

Trademarks

McKesson Performance Analytics, Horizon Business Insight, Horizon Performance Manager and McKesson logo are trademarks and registered trademarks of McKesson Corporation and/or one of its subsidiaries.

CPT copyright 2007 American Medical Association. All rights reserved. Fee schedules, relative value units, conversion factors and/or related components are not assigned by the AMA, are not part of CPT, and the AMA is not recommending their use. The AMA does not directly or indirectly practice medicine or dispense medical services. The AMA assumes no liability for data contained or not contained herein. CPT is a registered trademark of the American Medical Association.

All other product and company names may be trademarks or registered trademarks of their respective companies.

Table of Contents

Chapter 1: About Customer Types	1-1
Chapter 2: Overview	2-1
Choosing an export type for Horizon Business Insight highlights	2-2
Chapter 3: Using FTP to Export to Horizon Business Insight	3-1
Exporting a Horizon Performance Manager Worksheet File	3-2
Using FTP to move your exported file	3-7
Chapter 4: Using NFS to Export to Horizon Business Insight	4-1
Exporting a Horizon Performance Manager Worksheet with NFS	4-2
Chapter 5: File Formats	5-1
Format information for HPM .wth and .txt files for HBI Highlights	5-2
Highlight File Format	5-2
Example of Horizon Performance Manager Highlight File	5-7
Format information for HPM .wtr files for HBI Reports	5-9
Report File Format	5-9
Example of Horizon Performance Manager Report File	5-13

Chapter 1: About Customer Types

This document provides information about exporting data from Horizon Performance Manager to Horizon Business Insight. Depending on the Horizon Business Insight product purchased by your organization, certain sections of this document may not be applicable to you. This section describes the various customer types.

Enterprise HBI Customers

Enterprise HBI customers have access to all of the Horizon Business Insight websites and all options available with the software.

All sections of this manual are applicable to Enterprise HBI customers with Horizon Performance Manager.

Limited License HBI Customers

Limited License customers use Horizon Business Insight exclusively with another McKesson source system. Pre-defined data from your source system are brought into HBI and standard highlights have been designed and built so you can analyze and report on specific areas of your business.

The documentation in this manual is not applicable to limited license customers.

Note: In some cases, Limited License HBI customers are also referred to as HBI Standard Content customers.

Reports Only HBI Customers

Reports only customers use Horizon Business Insight to view data files only from Horizon Performance Manager, TRENDSTAR or Outcomes Advisor. Reports only customers have access only to HBI Reports and Resources; these customers do not have access to HBI highlights or highlight-related functionality such as subsets and scorecards:

References in this manual to Horizon Business Insight highlights are not applicable to Reports only customers.

Chapter 2: Overview

The **Export** option in Horizon Performance Manager allows users to generate a worksheet and then export it to Horizon Business Insight™. You can export your worksheet to Horizon Business Insight for use as a highlight or as a report. Files used as highlights require a specific file format. Accordingly, worksheets exported from Horizon Performance Manager to Horizon Business Insight Reports cannot subsequently be used to create highlights.

Once you have created your worksheet in Horizon Performance Manager, you can export the file to the Horizon Business Insight server using either an FTP utility software or the NFS mount point on the Horizon Performance Manager server along with the NFS Server software installed on the Horizon Business Insight server.

This manual provides information and instructions on the following:

Topic	See page
Chapter 3: Using FTP to Export to Horizon Business Insight	3-1
Chapter 4: Using NFS to Export to Horizon Business Insight	4-1
Chapter 5: File Formats	5-1

Once you have decided which transfer methodology you will use, refer to the applicable chapter in this guide.

Choosing an export type for Horizon Business Insight highlights

Horizon Performance Manager provides two options to export a worksheet file for use as a Horizon Business Insight highlight. Both export options can be used with either FTP or NFS.

- Horizon Business Insight Highlight generates a .wth file
- Text File to Horizon Business Insight generates a .txt file

Depending on the structure of your worksheet and your data needs in the Horizon Business Insight highlights built from the worksheet source file, it may be preferable to choose the export type, **Text File to Horizon Business Insight** rather than **Horizon Business Insight Highlight**.

If you choose to export as **Horizon Business Insight Highlight** the following restrictions apply to highlights you create in Horizon Business Insight from the worksheet source file.

- You highlights cannot have more than 8 dimensions because:
 - Horizon Performance Manager has a limit of 8 drill levels in a worksheet
- AND
- you cannot define a column from a .wth file as a dimension in a Horizon Business Insight highlight
- You cannot delete or modify the dimensions in a Horizon Business Insight highlight.
- You cannot define a column from your worksheet file as a dimension in a Horizon Business Insight highlight.
- Precalculated subtotals included in your worksheet file and then included in highlight measures can be invalidated by a number of actions in Horizon Business Insight. When Horizon Business Insight recalculates these subtotals, the recalculated values may not agree with the precalculated values in the source file.
- In the Subset Editor, you cannot change the subset definition or the name and location of the source file on the server.

When you export as, **Text File to Horizon Business Insight** the restrictions above do not apply to the highlights you build in Horizon Business Insight from the source file.

Chapter 3: Using FTP to Export to Horizon Business Insight

This section provides information and instructions for customers who are using an FTP utility software to export Horizon Performance Manager files to the Horizon Business Insight server.

Using FTP as the transfer methodology to export Horizon Performance Manager worksheet files to Horizon Business Insight is a multi-step process. The process includes the following steps.

- Use the **Export** option in Horizon Performance Manager to save your worksheet file to a directory on the Horizon Performance Manager server.
- Use FTP to place the exported file in the required location on the Horizon Business Insight server.

Each of these steps is discussed in this chapter.

The Horizon Performance Manager format information for Horizon Business Insight highlight and report files can be found at the end of this manual.

Exporting a Horizon Performance Manager Worksheet File

Once you have defined, built and saved your worksheet in Horizon Performance Manager, you can export it to Horizon Business Insight for use as a highlight or a report.

Follow the steps below to export your Horizon Performance Manager worksheet file.

- 1 Open Horizon Performance Manager's Worksheet Manager and select the library, folder and specific worksheet you want to export to Horizon Business Insight.

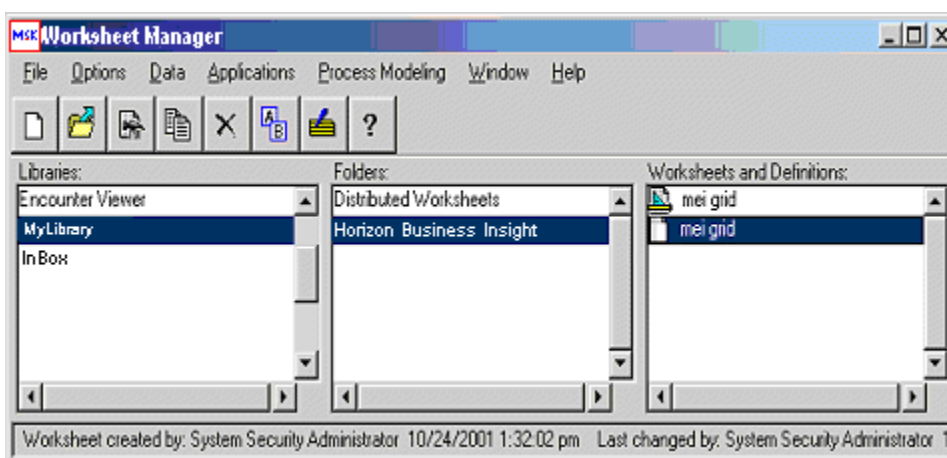


Figure 1: Horizon Performance Manager's Worksheet Manager window.

- 2 From the **File** menu in Worksheet Manager, select **Export**.

- The **Export** screen shown below will be displayed.

Figure 2 Horizon Performance Manager Export window.

- 3 From the **Type** dropdown box, select the type of file you want to export. Note that once you make your selection, options on the window that are not applicable to the file type you selected will be grayed out.
 - Select **Horizon Business Insight Highlight** if you intend to create highlights from the information and view them in Horizon Business Insight.
 - Select **Horizon Business Insight Reports** if you do not intend to create highlights from your worksheet.
 - Select **Text File to Horizon Business Insight** if you intend to you export your worksheet as text file.
- 4 In the **File name** box, type a name for your export file. When used in file names, uppercase letters are automatically converted to lowercase letters and characters and spaces are converted to the underscore character (_). Do not use periods in file names and do not enter an extension for your file. The required extension for your export file is automatically added during the export process.

-
- Horizon Business Insight Highlight files are saved with a *.wth* extension.
 - Horizon Business Insight Report files are saved with a *.wtr* extension.
 - Text Files are saved with a *.txt* or *.csv* extension, depending on delimiters used. See **Report Options** below.
-

Note: If the name you choose for your export file is the same as a file already saved to the server location, the original file is automatically overwritten by the current file. A warning message is not displayed.

- 5 If you selected **Horizon Business Insight Reports** as your file type, choose one of the following **Report Options** by clicking the associated radio button:
- Single report -- exports the entire worksheet to a single report.
 - Burst into individual reports -- exports separate reports for each row in the first drill level.
 - Single and individual reports -- results in the following:
 - a single report containing all the rows in the worksheet.
 - separate reports for each row in the first drill level.

Report Options are not available if you selected Horizon Business Insight Highlights as your file type.

- 6 If you selected **Horizon Business Insight Reports** as your file type, you can choose to include worksheet header information with the exported file. To do so, place a checkmark in the box to **Include first four header lines in title**. When you enable this option the first 80 characters in each of the first four header lines are automatically appended to the worksheet title and exported.
- 7 If you selected **Text File to Horizon Business Insight** as your file type, you can select the following **Format Options** by clicking the check boxes next to each option:
- Export at lowest drill level - When this checkbox is selected, each drill level included in the report will be displayed in the exported file in a separate column. Subtotals and totals will not be displayed. When this option is deselected, all drill levels in the worksheet will be displayed in the exported file in a single column including subtotals and totals. Export at lowest drill level cannot be used with the Export Current Drill option.
 - Include column labels - Select this option if you want the column labels in your worksheet file to be displayed in the exported file. When you choose to include column labels, they will be displayed at the top of each column in the exported file.
 - Include row labels - Select this option if you want the row/drill level labels in your worksheet file to be displayed in the exported file. When you choose to include row labels, they will be displayed in the first column of each row in the exported file.
 - Include header information - Select this option to include worksheet header rows in your exported file.

- Include accounting characters - Characters such as dollar signs and percent signs are not recommended when exporting worksheets to Horizon Business Insight. Including these characters defines the associated data type as text rather than numeric.
 - Include all other prefixes and suffixes - You may use parentheses to indicate negative values. Other characters used as prefixes and suffixes should not be included in files exported to Horizon Business Insight.
- 8 If you selected **Text File to Horizon Business Insight** as your file type, you can select the following **Report Options** by choosing from drop down menus next to each option:
- Field separator - To change the delimiter in your worksheet, select one of the following. Note that the field separator you select will determine your text file type and extension. You can choose from Comma, Space, Tab, Pipe or None.
 - Record separator – In a worksheet export file each row comprises a record. Horizon Business Insight requires that records be separated by a carriage return <cr> followed by a line feed. Select Carriage Return <cr> when exporting a worksheet to Horizon Business Insight.
 - String delimiter - Use string delimiters, also referred to as text qualifiers, to enclose an entire field in a data row that includes a character such as the character used as your field delimiter. When you do so, Horizon Business Insight is alerted that the comma used within a text field is not a field delimiter. You can choose from Single quotes, Double quotes or None.
- 9 **Mask Identifiers** - This **Format Option** applies the de-identification settings you established when you defined your worksheet columns and rows in Horizon Performance Manager. If you do not select this option on the **Export** window, no data is de-identified in the exported worksheet.

To override the de-identification settings established in the worksheet definition, click **Select** and modify your settings on the Identifiers to Mask window. Any modifications you make here only affect the worksheet you are currently exporting; they do not affect the de-identification settings in your worksheet definition.

If the **Mask Identifiers** button is unavailable (appears dimmed), either the worksheet contains no data that can be masked, or no data is selected to be masked in the worksheet definition.

10 Click **OK** to export your file to the location shown below for your file type. References to [version] and [database] in the directories shown below refer to the current version of your HPM software and the name of the database on the HPM server respectively. Both may vary.

- Horizon Business Insight highlight files are saved at the following location:
.../apg/pdsdata/[version]/[database]/data/export/webtrend /highlights
- Horizon Business Insight report files are saved at the following location:
.../apg/pdsdata/[version]/[database]/data/webtrend/reports
- Text Files to Horizon Business Insight are saved at the following location:
.../apg/pdsdata/[version]/[database]/data/export/webtrend/highlights.

Move on to the next section to use FTP to move the file to the required location on the Horizon Business Insight server.

Using FTP to move your exported file

In this section you will use an FTP utility software to move the Horizon Performance Manager file from its current location to the required location, based on your file type, on the Horizon Business Insight server.

Important: The steps in this section must be performed by an individual who have administrative access to both the Horizon Performance Manager and the Horizon Business Insight servers.

- 1 Select **Windows Start/Programs** and open your FTP software application.
- 2 Connect to the Horizon Performance Manager or the Horizon Business Insight server and log in as required.
- 3 In FTP, navigate to the location of the exported highlight or report file at the applicable location noted below.

Highlight files are stored as *.wth* and *.txt* files at:

.../apg/pdsdata/[version]/[database]/data/export/webtrend/highlights

Reports are stored as *.wtr* files at:

.../apg/pdsdata/[version]/[database]/data/webtrend/reports

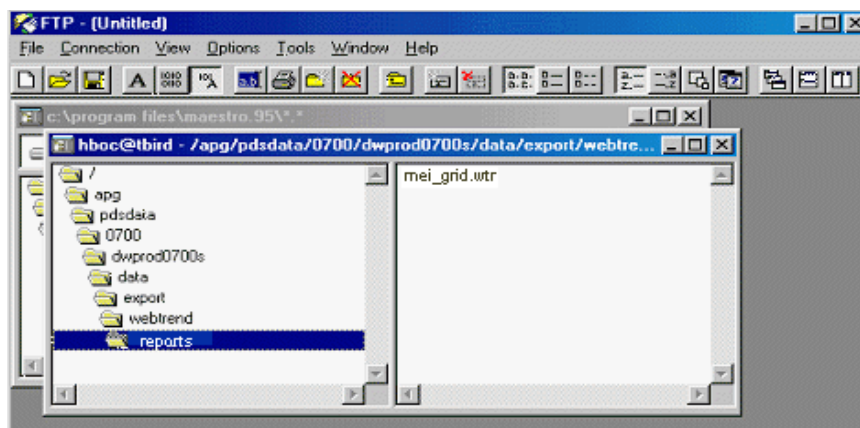


Figure 3 Example of location of report file where [0700] represents the Horizon Performance Manager version and [dwprod0700] represents the database.

4 Select the file you want to transfer to Horizon Business Insight.

Follow the FTP software prompts shown on your screen to transfer the file to the required location shown below on the Horizon Business Insight server.

Note: In order to properly transfer Horizon Performance Manager files to a Windows platform via FTP, you must select **BINARY** as the transfer type. Refer to your FTP product documentation for more information.

- Horizon Business Insight Highlights default directory is called **webtrend\wtfiles**
- Horizon Business Insight Reports default directory is called **webtrend\wtreports**
- Text Files to Horizon Business Insights default directory is called **webtrend\wtfiles**

You have completed the steps necessary to export and move your Horizon Performance Manager worksheet files to the Horizon Business Insight server.

Chapter 4: Using NFS to Export to Horizon Business Insight

This section provides information and instructions for customers who are using NFS to export Horizon Performance Manager worksheet files to the Horizon Business Insight server. In order to perform successfully perform the steps in this section, the following must be complete.

- The NFS mount point on the Horizon Performance Manager server has been established
- NFS Server software has been installed and properly configured on the Horizon Business Insight server

Once you have created your worksheet, you can use the Horizon Performance Manager **Export** option to automatically place your worksheet on the Horizon Business Insight server through the use of the NFS software.

Note that Horizon Performance Manager format information for Horizon Business Insight highlight and report files is provided at the end of this manual.

Exporting a Horizon Performance Manager Worksheet with NFS

Once you have defined, built and saved your worksheet in Horizon Performance Manager, you can export it to Horizon Business Insight for use as a highlight, report or text file.

Follow the steps below to export your Horizon Performance Manager worksheet file.

- 1 Open Horizon Performance Manager's Worksheet Manager and select the library, folder and specific worksheet that you want to export to Horizon Business Insight.

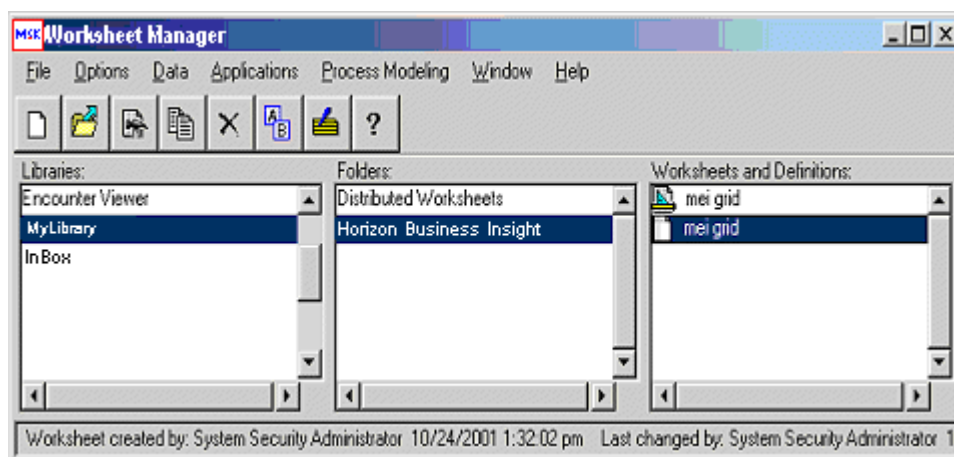


Figure 4: Horizon Performance Manager's Worksheet Manager window.

- 2 From the **File** menu in Worksheet Manager, select **Export**.

- The **Export** screen shown below is displayed.

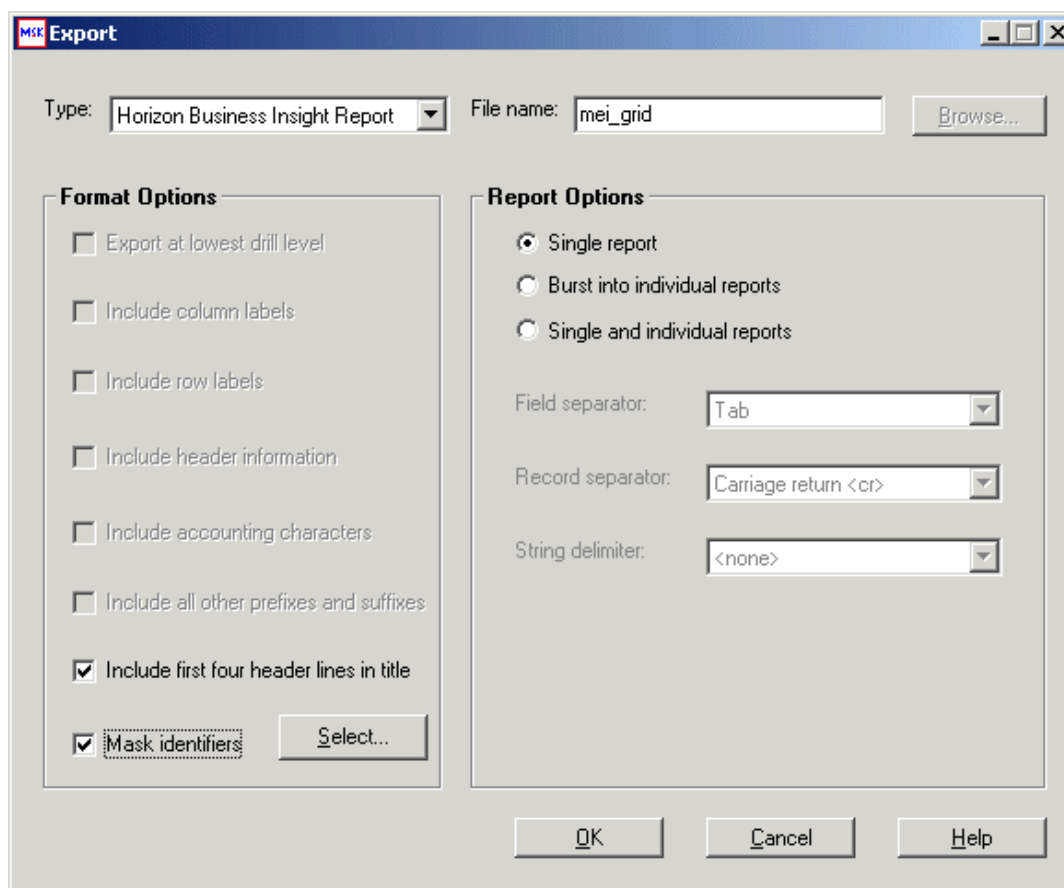


Figure 5 Horizon Performance Manager Export window.

- 3 From the **Type** dropdown box, select the type of file you want to export. Note that once you make your selection, options on the window that are not applicable to the file type you selected will be grayed out.
 - Select **Horizon Business Insight Highlight** if you intend to create highlights from the information and view them in Horizon Business Insight.
 - Select **Horizon Business Insight Reports** if you do not intend to create highlights from your worksheet.
 - Select **Text File to Horizon Business Insight** if you intend to you export your worksheet as text file.

-
- 4 In the **File name** box, type a name for your export files. When used in file names, uppercase letters are automatically converted to lowercase letters and characters and spaces are converted to the underscore character (_). Do not use periods in file names and do not enter an extension for your file. The required extension for your export file is automatically added during the export process.
- Horizon Business Insight highlight files are saved with a *.wth* extension.
 - Horizon Business Insight report files are saved with a *.wtr* extension.
 - Text files are saved with a *.txt* extension.
-

Note: If the name you choose for your export file is the same as a file already saved to the server location, the original file is automatically overwritten by the current file. A warning message is not displayed.

- 5 If you selected **Horizon Business Insight Reports** as your file type, choose one of the following **Report Options** by clicking the associated radio button:
- Single report -- exports the entire worksheet to a single report.
 - Burst into individual reports -- exports separate reports for each row in the first drill level.
 - Single and individual reports -- results in the following:
 - a single report containing all the rows in the worksheet.
 - separate reports for each row in the first drill level.

Report Options are not available if you selected Horizon Business Insight Highlights as your file type.

- 6 If you selected **Horizon Business Insight Reports** as your file type, you can choose to include worksheet header information with the exported file. To do so, place a checkmark in the box to **Include first four header lines in title**. When you enable this option the first 80 characters in each of the first four header lines are automatically appended to the worksheet title and exported.
- 7 If you selected **Text File to Horizon Business Insight** as your file type, you can select the following **Format Options** by clicking the check boxes next to each option:
- Export at lowest drill level - When this checkbox is selected, each drill level included in the report will be displayed in the exported file in a separate column. Subtotals and totals will not be displayed. When this option is deselected, all drill levels in the worksheet will be displayed in the exported file in a single column including subtotals and totals. Export at lowest drill level cannot be used with the Export Current Drill option.
 - Include column labels - Select this option if you want the column labels in your worksheet file to be displayed in the exported file. When you choose to include column labels, they will be displayed at the top of each column in the exported file.

-
- Include column labels - Select this option if you want the column labels in your worksheet file to be displayed in the exported file. When you choose to include column labels, they will be displayed at the top of each column in the exported file.
 - Include row labels - Select this option if you want the row/drill level labels in your worksheet file to be displayed in the exported file. When you choose to include row labels, they will be displayed in the first column of each row in the exported file.
 - Include header information - Select this option to include worksheet header rows in your exported file.
 - Include accounting characters - Characters such as dollar signs and percent signs are not recommended when exporting worksheets to Horizon Business Insight. Including these characters defines the associated data type as text rather than numeric.
 - Include all other prefixes and suffixes - You may use parentheses to indicate negative values. Other characters used as prefixes and suffixes should not be included in files exported to Horizon Business Insight.
- 8 If you selected **Text File to Horizon Business Insight** as your file type, you can select the following **Report Options** by choosing from dropdown menus next to each option:
- Field separator - To change the delimiter in your worksheet, select one of the following. Note that the field separator you select will determine your text file type and extension. You can choose from Comma, Space, Tab, Pipe or None.
 - Record separator – In a worksheet export file each row comprises a record. Horizon Business Insight requires that records be separated by a carriage return <cr> followed by a line feed. Select Carriage Return <cr> when exporting a worksheet to Horizon Business Insight.
 - String delimiter - Use string delimiters, also referred to as text qualifiers, to enclose an entire field in a data row that includes a character such as the character used as your field delimiter. When you do so, Horizon Business Insight is alerted that the comma used within a text field is not a field delimiter. You can choose from Single quotes, Double quotes or None.

- 9 **Mask Identifiers** - This **Format Option** applies the de-identification settings you established when you defined your worksheet columns and rows in Horizon Performance Manager. If you do not select this option on the **Export** window, no data is de-identified in the exported worksheet.

To override the de-identification settings established in the worksheet definition, click **Select** and modify your settings on the Identifiers to Mask window. Any modifications you make here only affect the worksheet you are currently exporting; they do not affect the de-identification settings in your worksheet definition.

If the **Mask Identifiers** button is unavailable (appears dimmed), either the worksheet contains no data that can be masked, or no data is selected to be masked in the worksheet definition.

- 10 Click **OK** to export your file.

Because the NFS export requires the use of a mount point, the default path and directory where your exported file can be viewed depends on

- (a) whether you are navigating to the file on the HPM or the HBI server and
- (b) the type of file you chose when you exported the worksheet from HPM.

The table below provides the path and location based on these alternatives.

If you exported this file type...	the file can be found on the HPM server at:	the file can be found on the HBI server at:
<i>Horizon Business Insight Highlight</i> (.wth file) or <i>Text Files for Horizon Business Insight</i> (.txt file)	.../apg/pdsdata/[version]/[database]/data/export/webtrend/highlights	webtrend\wtfiles
<i>Horizon Business Insight Report</i> (.wtr file)	.../apg/pdsdata/[version]/[database]/data/webtrend/reports	webtrend\wtreports

Note: References to [version] and [database] in the directories shown in the table above refer to the current version of your HPM software and the name of the database on your HPM server respectively. Both may vary.

You have completed the steps necessary to export your Horizon Performance Manager worksheet files to the Horizon Business Insight server.

Chapter 5: File Formats

This chapter describes the file formats necessary for Horizon Performance Manager worksheets to be used as highlights and reports in Horizon Business Insight.

Sample highlight and report formats are also provided in this chapter.

Topic	See Page
Format information for HPM .wth and .txt files for HBI Highlights	5-2
Format information for HPM .wtr files for HBI Reports	5-9

Format information for HPM .wth and .txt files for HBI Highlights

Following are the guidelines for formatting a Horizon Performance Manager file that you intend to use as a highlight in Horizon Business Insight.

Highlight File Format

Your Horizon Performance Manager highlight file should be formatted as follows:

- The file is an ASCII flat file that is tab-delimited. All fields must end with a tab except the last field of a line, which end in <EOL>.
- One data record per line and all records must end with <EOL>.
- All data is presorted by drill level in ascending order.
- Numeric data, in INT and FLOAT columns, will not contain any formatting characters (e.g. prefix/suffix characters, \$, %, \ and commas).
- The following column data types are supported for data fields in the record:
 - TEXT represents character-based data. Tabs, carriage returns and line feeds are not allowed. Place the maximum field length in characters in the width field by the COLTYPE records.
 - INT represents signed integer values that are stored as long integers (4- bytes, -2,147,967,648 to 2,147,967,648).
 - FLOAT represents signed real (decimal) numbers that are stored as 8-byte floating point number (1.7e +/- 308, 15 digits).
 - DATE represents date with time field (MM/DD/YYYY hh:mm:ss tt); date alone (MM/DD/YYYY) or; time alone (hh:mm:ss tt), where tt is AM or PM.
 - FLAG is a field set to Yes or No.
- Drill level data types define the possible data types of the drill level aggregation field as follows:
 - TEXT is character-based data. Tabs, carriage returns and line feeds are not allowed.
 - INT represents signed integer values that are stored as long integers (4-bytes, -2,147,967,648 to 2,147,967,647).
 - FLOAT represents signed real (decimal) numbers that are stored as 8-byte floating-point number (1.7e +/- 308, 15 digits).
 - WBDATE is the Horizon Business Insight date field. Supported format is MM/DD/YYYY.
 - FLAG is a field set to Yes or No.

- CODE is a text-based field that should be numerically ordered. These are HPM CODE fields.
- Row labels consist of two tab-separated fields. The first row label field is the aggregation "key" (i.e., the code, if there is one). The second row label field is the display value. Generally, the display part of the row label contains the aggregation part of the label. In other words, if the row label is code and name in the worksheet, the first field will contain the code and the second field will contain the code and name. If the row level is of WB-Date type, then the first field will contain a date in the form MM/DD/YY and the second field will contain the label that is visible in the row label of the worksheet.
- There is only one row label field pair per record. It is the label that corresponds to the current drill level.

File Header Definition for Horizon Performance Manager Highlight Files

File definition information is found in the header of the data file:

- The file definition type names are displayed in specific uppercase words that are followed by an equal sign.
- All characters following the equal sign up to the end of the line will be considered file definition data.
- Some header lines may contain tab-delimited fields.
- The END DEF statement separates all the file definition information from the file data.
- Column titles should not contain or be followed by carriage returns.
- Numeric data should not be formatted.
- Only codes should be placed in the code field.
- FISCALYEARSTART must be formatted as MMDD.
- DATACOLS must be defined before any "COLTYPEnnn" and COLHEADERnnn" lines.
- The number of COLTYPE and COLHEADER lines must equal the number found on the DATACOLS line.
- The range of column numbers, nnn in COLTYPEnnn and COLHEADERnnn, will be contiguous and in order.
- DRILLLEVELS must be defined before any DRILLTYPEnnn and DRILLHEADERnnn lines.
- The number of DRILLTYPE and DRILLHEADER lines must equal the number found on the DRILLLEVELS line.
- The range of drill levels, nnn in DRILLTYPEnnn and DRILLHEADERnnn, will be contiguous and in order.
- No DRILLTYPE or DRILLHEADER will be defined for level zero, the level used for REPORT TOTAL and drill level headers.

The following file definition types are available for use:	
FILETYPE=	WBT, this must be the first line in the file.
VERSION=	1.0
CREATION DATE=	MM/DD/YYYY hh:mm:ss tt, in DATE data type format, time is optional.
HOSPITAL NAME=	Enterprise name.
DATASOURCE=	HPM
REPORTITLE=	The name of the worksheet.
PERIODICITY=	The maximum periodicity of the columns for periodic drill levels.

The following file definition types are available for use:	
FISCALYEARSTART =	The fiscal start date (MMDD) of the first dataset referenced in the worksheet.
DRILLLEVELS=	The number of drill levels. The range of values is one to nine levels. Must appear before all DRILLHEADERnnn= and DRILLTYPEnnn= lines.
DRILLHEADERnnn=	"nnn" represents a drill level number in the range of 1...DRILLLEVELS. DRILLHEADER is a single line description of the drill level.
DRILLTYPEnnn=	<p>"nnn" is a drill-level number in the range of columns from 1...DRILLLEVELS. DRILLTYPE consists of two tab-delimited fields: data type and width. These fields must occur in the order and position listed.</p> <ul style="list-style-type: none"> - data type: The data type of the aggregation field of the row label - width: The maximum width of the display field of the row label. - precision: The data precision, if the data type is FLOAT; otherwise, the precision is zero.
DATA_COLS=	The number of data columns excluding row label. Must appear before all COLHEADERnnn= and COLTYPEnnn= lines.
COLHEADERnnn=	"nnn" is a column number in the range of columns from 1...DATA_COLS. Multi-line column headers should be tab-delimited. There is a maximum of five lines per column.
COLTYPEnnn=	<p>"nnn" is a column number in the range of columns from 1...DATA_COLS. COLTYPE consists of two tab-delimited fields: data type and width. These fields must occur in the order and position listed.</p> <ul style="list-style-type: none"> - data type: The data type of the aggregation field of the column label. - width: The maximum number of characters in text field or the number of digits to display if the field is numeric. - precision: The data precision if the type is FLOAT; otherwise, the precision is zero. - is subtotalable: 0 if the field is non-numeric; 1 if the field is numeric.
END DEF	Delimits the end of the file header section.

Data Record for Horizon Performance Manager Highlight Files

Each data record will contain the following fields (in the order described below) separated by a tab:

- Drill level indicator
 - Drill level aggregation value
 - Drill level display label
 - Data for column 1...data for column nnn (data values separated by a tab).
- The drill level indicator on each data row will be in the range of 0...9. Drill level zero (0) indicates the REPORT TOTAL record. The REPORT TOTAL record is defined as the last line in the file and with drill level equal to 0.
 - A NULL data value (<TAB><TAB>) will be represented as a zero-length data field.
 - Leading and trailing spaces will be trimmed from all data fields.
 - ITEM NOT FOUND rows will have an empty (NULL) drill level aggregation field.
 - The REPORT TOTAL row and the drill level header rows, the rows with level indicator equal to 0, will have an empty (NULL) drill level aggregation field.
 - The PERIODICITY will be one of the values listed below. The value used will be the maximum periodicity of any one column if there is a periodic drill level. If there is no periodic drill level, then the periodicity will be daily (3).
 - 0 (monthly)
 - 1 (quarterly)
 - 2 (half yearly)
 - 3 (daily)
 - 4 (yearly)
 - 5 (weekly)
 - 6 (bi-weekly)
 - 7 (quad-weekly)

Example of Horizon Performance Manager Highlight File

```

FILETYPE=WB
VERSION=1.0
CREATIONDATE=12/14/2000 04:11 PM
HOSPITALNAME=CONSOLIDATED MEDICAL CENTER
DATASOURCE=PDS
REPORTTITLE=pds1
PERIODICITY=3
FISCALYEARSTART=0601
DRILLLEVELS=8
DRILLHEADER001=DRG Code & Name
DRILLHEADER002=MDC Code & Name
DRILLHEADER003=Department Code & Name
DRILLHEADER004=Discharge Status Code & Name
DRILLHEADER005=Payor Code & Name
DRILLHEADER006=Patient MEI Code
DRILLHEADER007=Patient Age
DRILLHEADER008=Patient Type Code & Name
DRILLTYPE001=TEXT 32 0
DRILLTYPE002=TEXT 32 0
DRILLTYPE003=TEXT 32 0
DRILLTYPE004=TEXT 32 0
DRILLTYPE005=TEXT 32 0
DRILLTYPE006=CODE 32 0
DRILLTYPE007=TEXT 32 0
DRILLTYPE008=TEXT 32 0
DATACOLS
COLHEADER001=APC Expected Total Payment
COLHEADER002=APC Code
COLHEADER003=APG Code
COLHEADER004=Charges
COLHEADER005=Prin Proc Code
COLHEADER006=Prin Proc Name
COLHEADER007=Patient Type Code
COLHEADER008=Patient Type Name
COLHEADER009=Prin Proc Code
COLHEADER010=Prin Proc Name
COLHEADER011=Total Cost
COLHEADER012=Fixed Cost
COLHEADER013=Variable Cost
COLHEADER014=Patient Date of Birth
COLHEADER015=Payor Plan Code
COLHEADER016=Payor Plan Name
COLHEADER017=Payor Detailed Act Pmt Amount
COLTYPE001=FLOAT 10 2 1
COLTYPE002=TEXT 32 2 0
COLTYPE003=TEXT 32 2 0
COLTYPE004=FLOAT 10 2 1
COLTYPE005=TEXT 32 2 0
COLTYPE006=TEXT 32 2 0
COLTYPE007=TEXT 32 2 0
COLTYPE008=TEXT 32 2 0
COLTYPE009=TEXT 32 2 0
COLTYPE010=TEXT 32 2 0
COLTYPE011=FLOAT 10 2 1

```

```

COLTYPE012=FLOAT    10    2    1
COLTYPE013=FLOAT    10    2    1
COLTYPE014=DATE     10    2    0
COLTYPE015=TEXT     32    2    0
COLTYPE016=TEXT     32    2    0
COLTYPE017=FLOAT    10    2    1
END DEF
8  ER      ER Emergency Room 3.60  ER      Emergency Room
   1.03    0.31    0.73          12/22/1980 000      UNKNOWN *****
7  16      16      3.60          ER      Emergency Room
   1.03    0.31    0.73          12/22/1980 000      UNKNOWN*****
6  42997510 42997510 3.60          ER
   Emergency Room 1.03 0.31 0.73 12/22/1980 000      UNKNOWN*****
8  ER ER Emergency Room 3.60  ER      Emergency Room
   1.03      0.31          0.73 6/5/1978      000      UNKNOWN*****

```

Format information for HPM .wtr files for HBI Reports

Following are the guideline for formatting a Horizon Performance Manager file to be used as a Horizon Business Insight Report.

Report File Format

You can export a worksheet from Horizon Performance Manager for use as a Horizon Business Insight Report. Horizon Performance Manager generates a default extension of .WBT for these files. Your report file should be formatted as follows

- Generally, the file is text-based, tab-delimited, and contains both a data section and the header information.
- The header section contains the information needed to format the report, each column, and information about the report itself including source system, number of drill levels, date created, etc.
- Blank lines in either Header or Data sections are ignored.
- The files are tab-delimited flat files with header record and data records.
- The data records are also tab-delimited and contain one record for each row in the worksheet.
- Subtotal rows are included and row sort titles are repeated for each row of data.
- The drill level is indicated as an integer value such that 0 is the report total, 1 is drill level 1 subtotal and so on.
- Horizon Performance Manager files provide the following header information:
 - File creation date and time
 - Hospital name
 - Data source (HPM, HSL, CCA, MSL etc.)
 - Up to five report title lines
 - Number of sort levels
 - Sort level names
 - Number of columns
 - Column definitions including up to five lines of titles, data types, width, decimal precision and the visibility indicator.
 - File layout supports a notes field. However, HPM does not populate it even if notes are defined on the exported worksheet
 - Filetype
 - File version

Header Definition for Horizon Performance Manager Report Files

Following are header definition guidelines for Horizon Performance Manager files to be used as Horizon Business Insight Reports:

- Each file definition section starts with a specific uppercase word and ends with the equal sign.
- All characters following the equal sign and up to <EOL> will be considered file definition data.
- END DEF statement separates all the file definition information for the file data.

The following file definition types are available for use:	
FILETYPE=	VPF, this must be the first line in the file.
VERSION=	1.0
CREATIONDATE=	MM/DD/YYYY hh:mm:ss tt, where tt represents AM or PM. Seconds are optional.
HOSPITALNAME=	Maximum length of 64 characters.
DATASOURCE=	Source product
REPORTTITLE=	Up to five tab-delimited lines.
NOTE=	Notes can contain up to 100 lines of text. First note.
NOTE=	Second note.
DATA COLS=	The number of data columns excluding the row label. Must appear before all COLHEADERnnn= and COLTYPEEnnn= lines. Maximum of 256 data columns from Pathways Decision Support.
COLHEADERnnn=	Column headers have a maximum of 80 characters.
SORTLEVELS=	Number of drill levels followed by each sort label, tab-delimited, range is one to eight levels. Maximum length is 64 characters per label.
COLTYPEEnnn=	The column number is the "nnn". There are six tab-delimited fields: data type, decimal precision or maximum text length, prefix, suffix, negative number format, thousands separator. Only first three are required.
END DEF	Delimits the end of the file header section.

Data Section for Horizon Performance Manager Report Files

Following are guidelines for formatting the Data Section of Horizon Performance Manager files to be used as Horizon Business Insight Reports:

- Each line contains the current drill level, a skip-flag indicator, the current row label and data for each column defined in the header section.
- Each of these fields is delimited by a tab.
- Empty fields should not be padded with spaces.
- One data record per line with a maximum of 300 characters per line.
- Lines must end with <EOL> and be compatible with the native environment.
- All data is presorted by SORTLEVEL in ascending order.
- Drill down is limited to eight levels.
- Level 0 is reserved for REPORT TOTAL record, if any, and drill level headers. Drill level headers, if any, should have a skip flag turned off and drill level equal to 0. The REPORT TOTAL record, if any, is defined as the last line in the file having more data than a row label and skip flag = 0 and drill level = 0.
- Numeric data should be scrubbed so that prefix and suffix characters, \$, % and other non-numeric characters are removed from the data fields of numeric columns.
- The skip flag identifies rows that contain no data except a row label.
- There is only one row label field per record. It is the label corresponding to the current drill level. For example, to drill from Department to Physician to Patient, the row label will hold the Patient Name if the data is for the third level. Exception: For drill level 0, a row label is required for the report total record, if any, but is optional for all other level 0 records.
- Blank lines or unrecognizable header lines are ignored.
- The following data types are supported for data fields in the record.
 - TEXT: Character-based data. Tabs, carriage returns, line feeds not allowed. Place the maximum field length in characters in the precision field of the COLTYPE records. Characters per field is limited to 255.
 - SHORT: Signed integer (whole number) values are stored as short integers (2-bytes, -32768 to 32767).
 - LONG: Signed integer (whole number) values are stored as long integers (4-bytes, -2,147,967,648 to 2,147,647).
 - FLOAT: Signed real numbers are stored as a 4-byte floating point number (3.4e +/- 38, 7 digits).
 - DOUBLE: Signed real numbers are stored as an 8-byte floating point number (1.7e +/- 308, 15 digits).

-
- CURRENCY: A DOUBLE implying financial formatting.
 - DATE: MM/DD/YYYY hh:mm:ss tt, where tt represents AM or PM. Seconds are optional.
 - BOOLEAN: A field set to FALSE or TRUE.
 - BYTE: A signed integer from -128 to 127.

Example of Horizon Performance Manager Report File

```

FILETYPE=VPF
VERSION=1.0
CREATIONDATE=10/24/2001 12:08 PM
HOSPITALNAME=Test Hospital
DATASOURCE=PDS
REPORTTITLE=webhighlight1
SORTLEVELS=3Individual Encounters - NameDRG Code & NamePatient Type Code&
Name
DATACOLS=8
COLHEADER001=DepartmentCode
COLHEADER002=DepartmentName
COLHEADER003=Check-inDate&Time
COLHEADER004=PayorName
COLHEADER005=Charges
COLHEADER006=Encounters
COLHEADER007=Days
COLHEADER008=AverageLOS
COLTYPE001=TEXT      32      2      (      ,      R      T
COLTYPE002=TEXT      32      2      (      ,      R      T
COLTYPE003=DATE       10      2      (      ,      R      T
COLTYPE004=TEXT      32      2      (      ,      R      T
COLTYPE005=DOUBLE     10      2      (      ,      R      T
COLTYPE006=LONG       10      0      (      ,      R      T
COLTYPE007=LONG       10      0      (      ,      R      T
COLTYPE008=LONG       10      0      (      ,      R      T
END DEF

3      0      ER Emergency Room      7/13/1999 12:00:00 am      Blue Cross - Jane
51.25  1      0      0
2      0      ITEM NOT FOUND      7/13/1999 12:00:00 amBlue Cross - Jane
51.25  1      0      0
1      0      SMITH,GEORGE 10/13/1999 12:00:00 am      10/13/1999 12:00:00 am
Blue Cross - Jane51.2510      0
3      0      MD Physician Office      10/7/1999 12:00:00 am      Blue Cross -
Jane      1      0      0
2      0      ITEM NOT FOUND      10/7/1999 12:00:00 am      Blue Cross -
Jane      1      0      0
1      0      JONES,GOODTON 10/7/1999 12:00:00 am      10/7/1999 12:00:00 am
Blue Cross - Jane 1 0      0
3      0      MD Physician Office521OUTPATIENT PEDIATRICS10/7/1999
12:00:00 amBlue Cross - Jane330.00100
2      0      ITEM NOT FOUND 521OUTPATIENT PEDIATRICS10/7/1999 12:00:00 am
Blue Cross - Jane330.0010      0
1      0      MILLER, JULIA 10/7/1999 12:00:00 am521OUTPATIENT PEDIATRICS
7/7/1999 12:00:00 amBlue Cross - Jane330.00100
3      0      INP Inpatient      10/16/1999 12:00:00 am      Blue Cross -
Jane      263,789.901      4      4
2      0      148 MAJOR SMALL & LARGE BOWEL PROCEDURES W CC      10/16/1999
12:00:00 amBlue Cross - Jane263,789.90144
1      0      JACKSTON,JOAN 10/16/1999 12:00:00 am      10/16/1999 12:00:00 am
Blue Cross - Jane263,789.90144
3      0      SDS Same Day Surgery      10/15/1999 12:00:00 am      4,616.40      111
0      0
Report Total      7,431,352.36      29      72      2

```

