Performance Analytics

Powered by Horizon Business Insight

Using Horizon Business Insight with TRENDSTAR

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Corporate address

McKesson Corporation
5995 Windward Parkway
Alpharetta, GA 30005
404-338-6000

Reader comments

Comments regarding this publication are welcome and should be sent to:

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

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Chapter 1: Introduction

The need to bring consolidated enterprise information directly to the desktops of healthcare managers and caregivers has never been greater. Many healthcare organizations are looking for the best way to deploy this information, while ensuring secure and convenient access for the correct people.

Using the latest Web technologies, McKesson's Horizon Business Insight™ product meets this need by providing easy and secure access to financial, clinical and operational decision support information through a Web browser.

A Brief Description

Horizon Business Insight is a customizable information management solution that provides a systematic way to distribute an organization's critical management measures to decision makers in a timely, consistent and cost-effective manner. Horizon Business Insight incorporates data from decision support, operational systems, HTML documents and other external sources and makes it readily available to managers through a single point of access — their Web browser. With all the information they need accessible in one place, managers can monitor and manage their operations more efficiently and work collaboratively toward achieving the organization's mission and business objectives.

As convenient as everyday voicemail and e-mail, yet far more powerful, Horizon Business Insight can transform the way people communicate and use information to guide management decisions. Decision support information, from TRENDSTAR and other systems, can become as accessible and easy-to-use as these common tools and equally indispensable for sharing knowledge and directing decisions. With Horizon Business Insight, managers will routinely get online to review their management information and critical issues, just as they currently check their voicemail or e-mail.

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Getting Started

TRENDSTAR information can be viewed in Horizon Business Insight as a Highlight or a Report. In either case, interaction with Horizon Business Insight involves the following major functional areas:

1   Generating Horizon Business Insight files in TRENDSTAR CCA, CPA, HSL, RUA or MCA Flexible Reports, and exporting them to the Horizon Business Insight server.

   • Text files generated in CCA or HSL with the .WTH extension will be used to define Highlights in Horizon Business Insight.

   • Expanded text files generated in CCA with the .TXT extension can be used as ASCII files to define Highlights in Horizon Business Insight.

   • Files created in CCA, CPA, HSL, RUA or MCA with the .ERS extension will be converted to files with the .WTR extension and sent to Horizon Business Insight Reports.

2   Importing these files using Horizon Business Insight Subset Editor in order to define Highlights.

3   Refreshing Reports for Web viewing.

4   Defining individual users and groups that will have access to the Web Highlights or Reports.

5   Using the Horizon Business Insight Viewer to review the reports.

This document is concerned only with the first of these steps.

Transfer Options

There are two built-in options for transferring files from the TRENDSTAR server to the Horizon Business Insight server:

- Network File System (NFS)

  In order to use NFS, the NFS server software must be installed on the HBI server. This software is purchased separately from a third party vendor. The NFS mount point is set up when your Horizon Business Insight server is installed. (If you have difficulty accessing the NFS mount point on the Horizon Business Insight server, contact Technical Support at 1-800-274-3292.)

- File Transfer Protocol (FTP)

  In order to use FTP, the FTP server service must be enabled under Internet Information Services (IIS) on the HBI server. This is an integral part of the Windows 2003 operating system and does not require additional software. Please refer to Appendix D for instructions on how to enable and configure the built-in FTP export option.

You may also manually transfer files to Horizon Business Insight using either the FTP client native to Windows or a third-party FTP client.

Chapter 2: Creating Text Files for Horizon Business Insight Highlights

Introduction

Flexible Reporting in CCA and HSL can be used to create and generate text files for Horizon Business Insight Highlights.

In CCA you can either create a text file specifically for Horizon Business Insight Highlights or you can create an expanded text file and bring it into Highlights as an ASCII file.

The steps involved in using Horizon Business Insight Highlights are noted below:

1   Create a report format in the **Flexible Reporting** option of either CCA or HSL.

2   Generate a report and output a .WTH file using the **Text file for Horizon Business Insight Highlights** option. In CCA, you can also create an expanded text file (.TXT) and bring it into Highlights as an ASCII file.

Please note the various limitations, restrictions, and conversions when creating the report format in **Flexible Reporting.**

You must contact McKesson's TRENDSTAR Hardware & Operations in order to have the **Text file for Horizon Business Insight Highlights** option made available to you in CCA and HSL. To do this, call 1-800-274-3292 and log a support call asking for access to Horizon Business Insight Highlights.

Clinical Cost Accounting: Text File for Horizon Business Highlights

Create a report format in CCA, and then generate an output file. Use the **Text file for Horizon Business Insight Highlights** format option to create a file with the .WTH extension that will be viewed in Horizon Business Insight as a highlight.

Limitations, Restrictions and Conversions

Most data can be used in creating formats and generating output files. There are, however, certain limitations and restrictions that you should be aware of. There are also certain date conversions that take place when the text file for Horizon Business Insight is created. These limitations, restrictions, and conversions include:

Incompatible Format Options

The following format options cannot be used with the **Text file for Horizon Business Insight Highlights** option:

- Rank by column
- Text file for exports
- Select special format characters

Data Row Inclusion

All data rows in the format will appear in the Horizon Business Insight file; you cannot select to include only certain rows after the format has been defined.

Single Year Data Recommendation

It is recommended that you limit the data in the report to one year. If your data base information includes more than one year of data, you should use qualifiers and/or an MBE table to limit the data to a single year. Otherwise, incorrect data can occur if your date sort is month, year or quarter and more than one year's data appears together in the same row sort.

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Date Conversions

All date information will be converted in the output text or .WTH file as shown in the table below.

Date item	Converted to
DATE	Full date from the patient record.
MONTH	Admission: The merged end date in the admission date range from all data bases is used as the basis for calculating a year back from that date. This calculated year is then used to concatenate months and first day of month. Ex: last date in merged admission date range is 2/15/99. Year is calculated as 2/1/98 through 2/28/99. Months are calendar months for this calculated year.
	Discharge: The same method is followed, using discharge date range rather than admission date range.
CALENDAR QUARTER	Method is the same as MONTH; the first day of each quarter is based on the prompted for fiscal start month.
NOTE: All dates will be shown in the MM/DD/YYYY format.	

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Generating an Output Text File for Horizon Business Insight Highlights

When you have created a format for sending data to Horizon Business Insight, you must choose the **Generate a report** option in the Flexible Report Writer in order to create the output text file. After answering the appropriate prompts for the format and qualifying the output as necessary, you are asked to choose a Format Option. Select **Text file for Horizon Business Insight Highlights**. Please note the incompatible format options listed above.

Text File for Horizon Business Insight Highlights Option

When you choose this format option, you create both a report, as selected in Print Options, and a .WTH text file formatted for use in Horizon Business Insight.

When you choose this option you will see the following prompts:

```
Horizon Business Insight Highlights file
```

Enter the name of the text file to be created. This file name must have a .WTH extension.

If you are using NFS:

The file name must be preceded by the logical that points to the NFS mount on the Horizon Business Insight server. The logical must be followed by a colon. Use **WEBDATA:** as the logical for TRENDSTAR files to be used as Horizon Business Insight Highlights.

If you are using built-in FTP:

The file name must be preceded by **FTP:** which will trigger the following prompts:

```
FTP Account
```

Select the the HBI server to export to.

```
FTP Directories
```

Select the directory to export to.

```
File Type
```

Select Binary for the File Type.

```
Fiscal Start Month
```

Choose the start month of your fiscal year from the drop-down list.

The report and text file will be created when you have chosen a print option and provided a name for the report.

```
Flexible Report Writer ─────────────────────────────  DCML:CCAREPORT.RPC ─┐

                               ┌─ Horizon Business Insight Highlights file ─┐
    Format Options:     Suppress │      WEBDATA:DEPTCASES.WTH                │
                        Page by D └──────────────────────────────────────────
                        Rank by column
                        Text file for exports          ┌─ Fiscal Start Month ─┐
                       >Text file for Horizon Business  │   January            │
                        Create a Horizon BI/ds.Pathfind │   February           │
                        Select special format character │   March              │
                        Create a benchmark table     ==)│   April              │
                        Suppress selected output option │   May                │
                                                        │   June               │
                                                        │   July               │
                                                        │   August             │
                                                        │   September          │
                                                        │   October            │
                                                        │   November           │
                                                        │   December           │
                                                        └──────────────────────┘

            (CTRL Z) Stop       (PF2) Help       (PF4) Accept screen
```

Figure 2-1 Text file for Horizon Business Insight Highlights in CCA

Clinical Cost Accounting: Expanded Text File

Create a report format in CCA, and then generate an expanded text file. Use the **Text file for exports** format option and the **Expanded text file** suboption to create a file with a .TXT extension. This file can then be imported into Horizon Business Insight Highlights as an ASCII file.

Create a Report

You can use one of the two predefined formats specifically designed for use with the expanded text file export format option. These formats can be found in the EXPANDED.RPC report table on CMLCTL:. Like other predefined report tables, you can copy the formats to your own report table and modify them to suit your individual hospital needs.

The two predefined formats are listed in Appendix A. These expanded formats include:

> **Expanded patient data** is based on a single data base and includes four row sorts and 32 column definitions.

> **Expanded CPA patient data** is based on a single data base and includes four row sorts and 35 column definitions. The three additional columns are for CPA-specific data.

Generate an Expanded Text File

When you choose the **Text File for Exports** format option, you create a text file for use with HBI as well as a report. The text file is formatted for use with most spreadsheet programs, including Microsoft's Excel.

When you choose this option you will first be asked which type of text file you want to create. Choose from the following:

Text file simply turns the data in the report into a text file; it requires the file name extension of .PRN. Please note that .PRN files are not designed for HBI and will require modification before they can be used.

Expanded text file turns the data in the report into an expanded file which:

- provides two columns for each row sort value (code, code and title),
- adds a code and title field for each column in the report for which a title can be obtained, and
- adds sufficient spaces to the left of the code and title field so as to maintain numeric order in the file.

When you choose the expanded text file option, you will see the following prompt:

```
Name of text file
```

Enter the name of the expanded text file to be created. It must have the file name extension .TXT.

If you are using NFS:

The file name must be preceded by the logical that points to the NFS mount on the Horizon Business Insight server. The logical must be followed by a colon. Use **WEBDATA:** as the logical for TRENDSTAR files to be used as Horizon Business Insight Highlights.

If you are using built-in FTP:

The file name must be preceded by **FTP:** which will trigger the following prompts:

```
FTP Account
```

Select the the HBI server to export to.

```
FTP Directories
```

Select the directory to export to.

```
File Type
```

Select Binary for the File Type.

Figure 2-2 Expanded text file

Hospital Systems Library

Create a report format in HSL, and then generate an output file. Use the **Text file for Horizon Business Insight Highlights** format option to create a file with the .WTH extension that will be viewed in Horizon Business Insight as a highlight.

Limitations, Restrictions and Conversions

Most data can be used in creating formats and generating output files. There are, however, certain limitations and restrictions that you should be aware of. There are also certain date conversions that take place when the text file is created. These limitations, restrictions, and conversions include:

Single Fiscal Year or 13-Month Period

While multiple data sets can be used, it is recommended that the report format cover only a single fiscal year or 13-month period set.

Format Columns

Format columns cannot be used.

Incompatible Print Options

The following print options cannot be used with the **Text file for Horizon Business Insight Highlights** option:

- Print negative numbers in parentheses
- Print numbers in thousands
- Print numbers with commas
- Suppress report detail, subtotals, or total
- Rank rows based on a column
- Text file for export
- Specify characters to print instead of zeros.

Data Rows

All data rows in the format will appear in the Horizon Business Insight file; you cannot select to include only certain rows after the format has been defined.

If your format contains user-defined rows or detailed user-defined rows, you cannot create a text file for Horizon Business Insight Highlights from the report.

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Data Columns With T or * as Column Values

If data columns contain either T or * as column values, indicating a data length longer than the column width, you will see a message recommending you adjust the width of your columns. Horizon Business Insight will discard these values if you do not increase the column width.

Date Conversions

All dates information will be converted to calendar dates in the output text or .WTH file as follows:

Date item	Converted to
MONTH	First day of each month with the prompted fiscal year value.
PERIOD	The prompted value, P01 start date, periodicity, and periods with extra day are used to calculate the calendar date.
NOTE: All dates will be shown in the MM/DD/YYYY format.	

Generating an Output Text file for Horizon Business Insight Highlights

When you have created a format for sending data to Horizon Business Insight, you must choose the **Generate a report** option in the Flexible Report Writer in order to create the output .WTH text file. After answering the appropriate prompts for the format you are asked to choose a Print Option. Select **Text file for Horizon Business Insight Highlights**. Please note the incompatible format options listed above.

Text File for Horizon Business Insight Highlight Options

When you choose this print option, you create both a report, as selected in Print Options, and a .WTH text file formatted for use in Horizon Business Insight.

When you choose this option you will see the following prompts:

```
Horizon Business Insight Highlights File
```

Enter the name of the text file to be created. This file must have a .WTH file name extension.

If you are using NFS:

The file name must be preceded by the logical that points to the NFS mount on the Horizon Business Insight server. The logical must be followed by a colon. Use **WEBDATA:** as the logical for TRENDSTAR files to be used as Horizon Business Insight Highlights.

If you are using built-in FTP:

The file name must be preceded by **FTP:** which will trigger the following prompts:

```
FTP Account
```

Select the the HBI server to export to.

```
FTP Directories
```

Select the directory to export to.

```
File Type
```
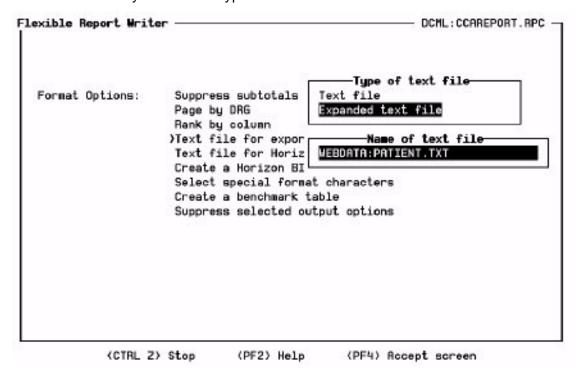
Select Binary for the File Type.

```
Fiscal Year
```

Enter the fiscal year for the report.

If your database is based on periods, you will see additional prompts.)

The report and text file will be created when you have chosen a print option.

```
Flexible Report Writer ─────────────────────────────── HSLREPORT.RPH ─┐
                                                   Report width is 121

  End print options

  Include a footnote
  Modify report header
  Suppress report detail, su ┌─ Horizon Business Insight Highlights table ─┐
  Rank rows based on a colum │        WEBDATA:COSTCENTERS.WTH              │
  Text file for export       └────────────────────────────────────────────┘
  Suppress zero filled lines
  Specify characters to print instead of zeros    ┌──────────────────────┐
  Print negative numbers in parentheses           │ Fiscal year : 2002   │
  Print numbers in thousands                       └──────────────────────┘
  Print numbers with commas
  Specify page length
  Page on first sort break
  Suppress all paging
  Divide columns on more than one page
  Justify column titles
  Specify row title location

  Text file for Horizon Business Insight Highlights

         (CTRL Z) Stop     (PF2) Help     (PF4) Accept screen
```

Figure 2-3 Text file for Horizon Business Insight Highlights in HSL

Chapter 3: Creating Files for Horizon Business Insight Reports

Introduction

Use Flexible Reporting in CCA, CPA, HSL, RUA or MCA to create and generate files for Horizon Business Insight Reports. The TRENDSTAR process begins with the creation of .ERS files which are fully compatible with Horizon Business Insight Reports. Refer to your TRENDSTAR Flexible Reporting documentation for additional information on creating .ERS files.

Regardless of whether your report is generated in CCA, CPA, HSL, RUA or MCA, the steps for passing TRENDSTAR reports to Horizon Business Insight Reports are the same.

There are three steps involved in using Horizon Business Insight Reports.

1   Create a report format in the Flexible Reporting option of CCA, CPA, HSL, RUA or MCA.

2   Generate a report and output an .ERS file using the **Create a Horizon BI/ds.Pathfinder Report** option.

3   Send the TRENDSTAR output file to Horizon Business Insight using the **Send a report to Horizon Business Insight** option.

Before you begin, you must contact Performance Management Technical Support to have the options necessary to pass files from TRENDSTAR to Horizon Business Insight Reports made available to you. To do so, call 1-800-274-3292 and log a support call asking for access to Horizon Business Insight Reports.

Generating an Output file for Horizon Business Insight Reports

When you have created a format for sending data to Horizon Business Insight Reports, you must choose the **Generate a report** option in the Flexible Report Writer in order to create the output file. After answering the appropriate prompts for the format you are asked to choose a format option (CCA) or a print option (HSL). Select **Create a Horizon BI/ ds.Pathfinder Report**.

Create a Horizon BI/ds.Pathfinder Report Option

When you choose this format/print option, you create both a report, as subsequently selected in the output Print Options, and an .ERS file. The .ERS file will later be converted to a .WTR file for use in Horizon Business Insight Reports via the **Send a report to Horizon Business Insight** option.

Note: Certain conditions apply when you select the particular HSL print options in conjunction with the **Create a Horizon BI/ ds.Pathfinder Report** option. For details, refer to your TRENDSTAR HSL Flexible Reports documentation.

When you choose this option you will see the following prompt:

```
Horizon BI/ds.Pathfinder Table
```

Enter the name of the Horizon Business Insight file to be created. This file must have an .ERS file name extension. .

```
Flexible Report Writer ──────────────────── DCML:CCAREPORT.RPC ─

    Format Options:     Suppress subtotals
                        Page by DRG
                        Rank by column
                        Text file for exports
                        Text file for Horizon Business Insight Highlights
                       >Create a Horizon BI/ds.Pathfinder report
                        Select special format characters
                        Create a benchmark table
                        Suppress selected output options


                                          ─Horizon BI/ds.Pathfinder table─
                                          │DEPTCASES03.ERS            █│


          (CTRL Z) Stop      (PF2) Help      (PF4) Accept screen
```

Figure 3-1 Create a Horizon BI/ds.Pathfinder option for Horizon Business InsightReports.

The report will be created when you have chosen an output print option and provided a name for the report (CCA).

Sending an Output .ERS File to Horizon Business Insight Reports

This option allows you to send the .ERS files you created in CCA, CPA, HSL, RUA or MCA to Horizon Business Insight Reports.

Send a Report to Horizon Business Insight Option

This option can be accessed from the Flexible Reporting menu in CCA, CPA, HSL, RUA or MCA. When you choose this option you will see the following prompts:

```
Name of file
```

Select the name of the .ERS file that you want to send to Horizon Business Insight Reports. To do so, you can enter *.ERS at the prompt for a list of all report .ERS report tables. You can limit your selection using alphanumeric characters with wild cards.

Press **<PF4>** to display a list of all the .ERS files in your selection. Choose the file you want to send to Horizon Business Insight from the list by positioning your cursor on the file and pressing **<PF4>** to **Accept Screen**.


```
Flexible Report Writer ─────────────────────────  DCML:CCAREPORT.RPC ─┐
                                                  ┌──────────────────┐
                                                  │ ALL              │
                                                  │ ARHHFMA2.ERS     │
                                                  │ ARHHFMA3.ERS     │
         Generate a report                        │ ARHY02.ERS       │
         List a report format                     │ ARHY03.ERS       │
         Print a report log file on the screen     │ DEPTCASES02.ERS  │
                                                  │ DEPTCASES03.ERS  │
         View a Horizon BI/ds.Pathfinder report   │ MODARHY02.ERS    │
         Send a report to ds.Pathfinder           │ MODARHY03.ERS    │
         Send a report to Horizon Business Insight└──────────────────┘

         Select a report table
         End flexible report writer




             (CTRL Z) Stop      (PF2) Help      (PF4) Accept screen
```

Figure 3-2 Send a report to Horizon Business Insight option with name selection prompt.

```
     Horizon BI directory
```

<u>If you are using NFS:</u>

The file name must be preceded by the logical that points to the NFS mount on the Horizon Business Insight server. The logical must be followed by a colon. Use **WEBRPT:** as the logical for TRENDSTAR files to be used as Horizon Business Insight Reports.

<u>If you are using built-in FTP:</u>

The file name must be preceded by **FTP:** which will trigger the following prompts:

```
     FTP Account
```

Select the the HBI server to export to.

```
     FTP Directories
```

Select the directory to export to.

```
     File Type
```

Select Binary for the File Type.

```
Flexible Report Writer ───────────────────────── DCML:CCAREPORT.RPC ─┐
                                      ┌─ Horizon BI directory ─┐
                                      │ WEBRPT:               │
                                      └───────────────────────┘


         Generate a report
         List a report format
         Print a report log file on the screen

         View a Horizon BI/ds.Pathfinder report
         Send a report to ds.Pathfinder
         Send a report to Horizon Business Insight

         Select a report table
         End flexible report writer




              <CTRL Z> Stop     <PF2> Help     <PF4> Accept screen
```

Figure 3-3 Send a report to Horizon Business Insight with prompt for logical.

You will be prompted to **Delete** or **Save** the .ERS file. The default is **Delete**.

```
     Do you want to continue?   [Y/N]
```

Select **Y** for yes to convert your .ERS file to a .WTR file for use with Horizon Business Insight Reports.

Appendix A - Expanded Patient Data Report Formats

Expanded Patient Data

This format is based on a single data base and includes four row sorts and 32 column definitions.

```
Report title lines

    ------------------

    Expanded patient data


    REFERENCE TITLES

    ----------------

    Number of data bases:   1


    Data base reference titles:

            db

    Row sort definition                       Title length    Order

    ------------------                        -----------     -----


    Row sort 1: Attending physician specialty     Short         Ascending


    Row sort 2: Attending physician               Short         Ascending


    Row sort 3: Patient identification            Short         Ascending


    Row sort 4: Discharge date                    Short         Ascending


    Col

    No.   Titles          Column definition

    ---   ------          -----------------

      1   MDC             Column type:    Data

          NO.             Data item:      MDC

                          Data base:      db


      2   DRG             Column type:    Data

          NO.             Data item:      DRG

                          Data base:      db
```

```
 3   PAYOR            Column type:   Data

     NO.              Data item:     Payor

                      Data base:     db

 4   SEX              Column type:   Data

                      Data item:     Sex

                      Data base:     db


 5   AGE              Column type:   Data

                      Data item:     Age

                      Data base:     db

                      Numeric format: XXXXXX


 6   DISCHARGE        Column type:   Data

     DAY              Data item:     Discharge day of week

     OF WEEK          Data base:     db


 7   DISCHARGE        Column type:   Data

     MONTH            Data item:     Discharge month

                      Data base:     db


 8   DISCHARGE        Column type:   Data

     YEAR             Data item:     Discharge year

                      Data base:     db


 9   ADMIT            Column type:   Data

     DATE             Data item:     Admission date

                      Data base:     db


10   ADMISSION        Column type:   Data

     DAY              Data item:     Admission day of week

     OF WEEK          Data base:     db


11   ADMISSION        Column type:   Data

     MONTH            Data item:     Admission month

                      Data base:     db


12   ADMISSION        Column type:   Data

     YEAR             Data item:     Admission year

                      Data base:     db


13   ZIP/POSTAL       Column type:   Data
```

```
        CODE                Data item:      ZIP/Postal Code

                            Data base:      db


14   MEDICAL             Column type:    Data

     RECORD NO           Data item:      Medical record number

                         Data base:      db


15   ADMISSION           Column type:    Data

     TYPE                Data item:      Admission type

                         Data base:      db


16   DISCH               Column type:    Data

     STAT                Data item:      Discharge status

                         Data base:      db


17   RELIGION            Column type:    Data

                         Data item:      Religion

                         Data base:      db


18   ETHNIC ORIGIN       Column type:    Data

                         Data item:      Ethnic origin

                         Data base:      db


19   PRINCIPAL           Column type:    Data

     DIAGNOSIS           Data item:      ICD-9-CM principal diagnosis

                         Data base:      db


20   PRINCIPAL           Column type:    Data

     PROCEDURE           Data item:      ICD-9-CM principal procedure

                         Data base:      db


21   CASES               Column type:    Data

                         Data item:      Cases

                         Data base:      db

                         Numeric format: XXXXXX


22   LOS                 Column type:    Data

                         Data item:      Average LOS

                         Data base:      db

                         Numeric format: XXXX.XX


23   COMP                Column type:    Data
```

```
        LOS                 Data item:      Comparable LOS

                            Data base:      db

                            Numeric format: XXXX.XX


   24   CMI                 Column type:    Data

                            Data item:      Case mix index

                            Data base:      db

                            Numeric format: XXXX.XXXX


   25   CHARGE              Column type:    Data

        PER CASE            Data item:      Charge per case

                            Data base:      db

                            Numeric format: XXXXXXXXXX.XX


   26   UNITS               Column type:    Data

        PER CASE            Data item:      Units per case

                            Data base:      db

                            Numeric format: XXXXXXXXXX.XX


   27   FIXED               Column type:    Data

        COST                Data item:      Fixed cost

                            Data base:      db

                            Numeric format: XXXXXXXXXX.XX


   28   VARIABLE            Column type:    Data

        COST                Data item:      Variable cost

                            Data base:      db

                            Numeric format: XXXXXXXXXX.XX


   29   COST                Column type:    Data

        PER CASE            Data item:      Cost per case

                            Data base:      db

                            Numeric format: XXXXXXXXXX.XX


   30   NET INCOME          Column type:    Data

        PER CASE            Data item:      Net income per case

                            Data base:      db

                            Numeric format: XXXXXXXXXX.XX


   31   CASES w/ disch      Column type:    Data

        status = 20         Data item:      Cases

                            Data base:      db
```

```
                              Numeric format: XXXXXXXXXXXXXX

                              Qualifiers:    Discharge status

                                              20-20


        32   PATIENT          Column type:   Data
             TYPE             Data item: Patient type
    Data base:      db
```

Expanded CPA Patient Data

This format is based on a single data base and includes four row sorts and 35 column definitions. The three additional columns are for CPA-specific data.

```
Report title lines
    ------------------


    Expanded CPA patient data


    REFERENCE TITLES
    ----------------


    Number of data bases:   1


    Data base reference titles:
          db


    Row sort definition                       Title length    Order
    -------------------                       ------------    -----


    Row sort 1: Attending physician specialty    Short        Ascending


    Row sort 2: Attending physician              Short        Ascending


    Row sort 3: Patient identification           Short        Ascending


    Row sort 4: Discharge date                   Short        Ascending



    Col
    No.   Titles           Column definition
    ---   ------           ----------------


     1    MDC              Column type:   Data
          NO.              Data item:     MDC
                           Data base:     db


     2    DRG              Column type:   Data
          NO.              Data item:     DRG
                           Data base:     db


     3    PAYOR            Column type:   Data
          NO.              Data item:     Payor
```

```
                              Data base:      db
    4   SEX                   Column type:    Data
                              Data item:      Sex
                              Data base:      db


    5   AGE                   Column type:    Data
                              Data item:      Age
                              Data base:      db
                              Numeric format: XXXXXX


    6   DISCHARGE             Column type:    Data
        DAY                   Data item:      Discharge day of week
        OF WEEK               Data base:      db


    7   DISCHARGE             Column type:    Data
        MONTH                 Data item:      Discharge month
                              Data base:      db


    8   DISCHARGE             Column type:    Data
        YEAR                  Data item:      Discharge year
                              Data base:      db


    9   ADMIT                 Column type:    Data
        DATE                  Data item:      Admission date
                              Data base:      db


   10   ADMISSION             Column type:    Data
        DAY                   Data item:      Admission day of week
        OF WEEK               Data base:      db


   11   ADMISSION             Column type:    Data
        MONTH                 Data item:      Admission month
                              Data base:      db


   12   ADMISSION             Column type:    Data
        YEAR                  Data item:      Admission year
                              Data base:      db


   13   CONTRACT ID           Column type:    Data
                              Data item:      Contract ID
                              Data base:      db
```

```
14  ZIP/POSTAL        Column type:    Data
    CODE              Data item:      ZIP/Postal Code
                      Data base:      db


15  MEDICAL           Column type:    Data
    RECORD NO         Data item:      Medical record number
                      Data base:      db


16  ADMISSION         Column type:    Data
    TYPE              Data item:      Admission type
                      Data base:      db


17  DISCH             Column type:    Data
    STAT              Data item:      Discharge status
                      Data base:      db


18  RELIGION          Column type:    Data
                      Data item:      Religion
                      Data base:      db


19  ETHNIC ORIGIN     Column type:    Data
                      Data item:      Ethnic origin
                      Data base:      db


20  EMPLOYER          Column type:    Data
    NAME              Data item:      Employer name
              Data base:    db


21  PRINCIPAL         Column type:    Data
    DIAGNOSIS         Data item:      ICD-9-CM principal diagnosis
                      Data base:      db


22  PRINCIPAL         Column type:    Data
    PROCEDURE         Data item:      ICD-9-CM principal procedure
                      Data base:      db


23  CASES             Column type:    Data
                      Data item:      Cases
                      Data base:      db
                      Numeric format: XXXXXX
```

Appendix B -Formatting Information for Highlight Files

Following are guidelines for formatting TRENDSTAR files for use as highlights in Horizon Business Insight.

File Format for Highlight Files

```
"AMHERST REGIONAL HOSPITAL"Hospital Name

"HORIZON BUSINESS INSIGHT

EXPORT TEXT FILE V01.00"Horizon Business Insight File identifier

"26-APR-2001"Date created

"COLUMN"  20 11) COLUMN = header title

2) 20 = # of columns

3) 1 = is a hardcoded value

"PERIOD|MONTH|0401|0||0|0|0"1) PERIOD = date type of last drill level either

"DATE","PERIOD" or "NONE"

DATE is used for CCA

PERIOD is used for HSL

NONE is used if there is no

date/month in last drill level

2) MONTH = Period type of last drill level based on   firstfield

If DATE = period could equal DAILY, MONTH,YEAR, QUARTER

If PERIOD = period could equal MONTH, PERIOD

If NONE = period would be NONE

3) 0401 = Fiscal start month (04) with 01 attached

4)0 or 1 = does the data span more than 1 fiscal year?

 0=NO and 1=YES

5) HSL period start = If HSL report, what is the P01 start date (mm/dd/yyyy format)

6) HSL periodicity = 0 to 4; 0=n/a, 1=28 days, 2=28 days/leap year, 3=14 days, 4=7 days

7) HSL period extra days 1 = P01 to P13

8) HSL period extra days 2 = P01 to P13


" " "Group 2"|0 "Month/period"|01) Empty field ( " ") denotes a header is still coming

2) TRENDSTAR title of drill level

3) Patient level flag = 1 = below a patient level,

     0 = not below a patient level

4…) Same as 2 and 3
```

" " "UOS" "UOS" "Percent" "Revenue" "Revenue" "Percent" "Expense" "Expense"
"Percent" "PR Exp" "PR Exp" "Percent" "PR Hrs" "PR Hrs" "Percent" "Exp/UOS" "Exp/
UOS" "Rev/UOS" "Rev/UOS" First column title

" " "Actual" "Budget" "Variance" "Actual" "Budget" "Variance" "Actual" "Budget"
"Variance" "Actual" "Budget" "Variance" "Actual" "Budget" "Variance" "Actual"
"Budget" "Actual" "Budget" Second column title

" " "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" ""Third column title

" " "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" Not used (required)

" " "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" "" Not used (required)

"1~Total Ancillary "PREFIX | VALUE ~ TITLE

(| and ~ are used as delimiters)

Not every row has all three values, so in

this case you only have a VALUE and TITLE

Example of a Highlight File

```
"AMHERST REGIONAL HOSPITAL"
"HORIZON BUSINESS INSIGHT EXPORT TEXT FILE V01.00"
"24-OCT-2001"
"COLUMN"   5 1
"DATE|MONTH|0101|0||0|0|0"

" " "DRG"|0 "DEPARTMENT"|1 "ICD-9-CM PRINCIPAL DIAGNOSIS"|0 "DISCHARGE MONTH"|0
" " "CASES" "UNITS" "CHARGES" "DAYS"
" " "" "" "" ""
" " "" "" "" ""
"DRG|1~CRANIOTOMY AGE>17 EXCE "

"     03/01/1996 "1623708
"     08/01/1995 "113513523
"   1911~MALIG NEO FRONTAL LOBE "219750531
"     08/01/1995 "1727659
"   1914~MAL NEO OCCIPITAL LOBE "1727659
"     03/01/1996 "1519759
"     04/01/1996 "111445514
"     11/01/1995 "15197510
"     12/01/1995 "121829529
"   1983~SEC MAL NEO BRAIN/SPINE "4421670062
"     01/01/1996 "110400012
"   2250~BENIGN NEOPLASM BRAIN "110400012
"     11/01/1995 "19355510
"   2251~BENIGN NEO CRANIAL NERV "19355510
"     12/01/1995 "18316015
"   3209~BACTERIAL MENINGITIS NO "18316015
"     01/01/1996 "1415806
"   3313~COMMUNICAT HYDROCEPHALU "1415806
"     03/01/1996 "1831609
"     09/01/1995 "1552172557
"   3314~OBSTRUCTIV HYDROCEPHALU "2632488566
"     02/01/1996 "13118526
"   431~INTRACEREBRAL HEMORRHAG "13118526
"     03/01/1996 "19355512
"     04/01/1996 "1311855
"     05/01/1996 "17276513
"   4321~SUBDURAL HEMORRHAGE "319750530
```

```
"      06/01/1996 "120798019

"    43491~CRBL ART OCL NOS W INFR "120798019

"  660~ORTHO/NEURO PC "1820480820286

"      03/01/1996 "1311859

"    1983~SEC MAL NEO BRAIN/SPINE "1311859

"      06/01/1996 "18316019

"    43491~CRBL ART OCL NOS W INFR "18316019

"  664~CARDIO/PULMONARY PATIENT CENTER "211434528

"      03/01/1996 "1218808

"      08/01/1995 "12188023

"    1911~MALIG NEO FRONTAL LOBE "24376031

"      08/01/1995 "1218809


"REPORT TOTAL "25770810074190254432218698620
```

Appendix C - Formatting Information for Report Files

Following are formatting guidelines for TRENDSTAR files to be used as Horizon Business Insight Reports.

File Format for Report Files

The various TRENDSTAR report writers include options to export reports to Horizon Business Insight. The files generated by TRENDSTAR are .ERS files. These export options will automatically convert the .ERS files to ascii flat files. The TRENDSTAR report writers all generate the same file formats which always include header and detail records.

The following TRENDSTAR applications include options to export to Horizon Business Insight Reports:

- CCA/CPA Flexible Reports
- HSL Flexible Reports II
- MCA Flexible Reports
- RUA Utilization Analysis Reports

The header data provided by TRENDSTAR files will generally be used for report administration and management functions while the detail data will be displayed in the viewer to the end users who receive the reports.

TRENDSTAR files provide the following header information:

- File creation date and time
- Hospital name
- Data source (CCA, HSL, MCA)
- Up to five report title lines
- Number of sort levels (maximum of 5)
- Sort level names
- Number of columns (maximum of 50).
- Column definitions including up to five lines of titles, data types, width, decimal precision, is visible indicators, etc.

Additionally, TRENDSTAR may generate this header information:

- Up to three lines of footnotes
- Data in thousands indicator (HSL)
- Date range of data in the report (HSL)

- Split column number from HSL
- Up to 15 comment lines

The CCA/CPA report writer will also generate a flag page of data with the following information:

- Report title (same as header title 1)
- Hospital name (same as header)
- File creation date and time (same as header)
- Report tables including data base, MBE, cost table, physician table
- LOS calculation
- Discharge date range of the data bases used
- Discharge date range of the cases selected
- Row sort information (the same information as is passed in the header)
- Report qualifiers
- Log file information
- Format options
- Suppress subtotals
- Print rows with no [e.g., DRG] data
- Page by [e.g., DRG]
- Rank by column
- Selecting special format characters
- Creating a benchmark table
- Suppress selected output options
- Name of user who generated the report
- Number of cases selected for the report

TRENDSTAR Reports for Horizon Business Insight flat file interface uses the ds.Pathfinder ascii flat file specifications summarized in the next paragraph, and detailed in the pages that follow.

Generally, the flat 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 (e.g., source system, number of drill levels, date created, etc.). Blank lines in either Header or Data sections are ignored.

Header Definition for Report Files

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

The following file definition types are available for use:

File Definition Section	Description
FILETYPE=	WTR, this must be the first line in the file.
VERSION=	1.0 and above
CREATIONDATE=	MM/DD/YYYY hh:mm:ss tt
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=	Notes can contain up to 100 lines of text. Second note.
DATACOLS=	The number of data columns excluding the row label. Must appear before all COLHEADERnnn= and COLTYPEnnn
COLHEADERnnn=	
SORTLEVELS=	Number of drill levels followed by each sort label; tab-delimited; range is zero to five levels. Maximum length is 64 charac
COLTYPEnnn=	The column number is the "nnn". There are six tab-delimited fields: data type, decimal precision or maximim 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 Report Files

In the data section of Report files, each line contains the current drill level, a skip flag, the current row label and data for each column defined in the header section. Each of these fields is delimited by a tab. Other assumptions related to this flat file format are:

- Empty fields should not be padded with spaces.

- One data record per line, maximum 3000 characters per line.

- Lines must end with an <EOL> compatible with the native environment.

- All data is presorted by SORT LEVEL in ascending order.

- Drill down limited to nine levels.

- Level 0 (zero) is reserved for the REPORT TOTAL record, if any, and drill level headers. Drill level headers, if any, should have a skip flag turned off and drill level = 0. The REPORT TOTAL record, if any, is defined as the last line in the file having more data than a row label and skipflag = 0 and drill level = 0.

- Numeric data should be scrubbed so that prefix, suffix chars, $,% and other non-numeric characters are removed from the data fields of numeric columns.

- Skip flag: the skip flag identifies rows that contain no data except 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: In drill level 0, a row label is required for the REPORT TOTAL record, if any, but this label 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, and line feeds are 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:Text field.

  - BOOLEAN: a field set to "FALSE" or "TRUE".

  - BYTE: a signed integer from -128 to 127.

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Example of a Report File

```
FILETYPE= WTR

VERSION= 1.5

CREATIONDATE= 30-JUL-2001 9:00 AM

HOSPITALNAME= Amherst Regional Hospital

DATASOURCE= ERS - CCA

REPORTITLE=2001 DRG's by Patient

Row Sorts:DRG,Patient ID;Columns: Cases,Name,PDx,PPx,LOS,ADt,DDt

Qualifiers: Discharge date in 2010, Pat Type = In98dischg.rpc - 99drgpatid.ers baj
08/30/99


SORTLEVELS=2SMS_DRGPatient Account

DATACOLS=9

COLHEADER001=CASES

COLHEADER002=PATIENTNAME

COLHEADER003=ADMIT DATE

COLHEADER004=DISCHARGEDATE

COLHEADER005=LOS

COLHEADER006=PRINCIPALDIAGNOSISCODE

COLHEADER007=PRINCIPALDIAGNOSISDESCRIPTION

COLHEADER008=PRINCIPALPROCEDURECODE

COLHEADER009=PRINCIPALPROCEDURE DESCRIPTION

COLTYPE001=LONG82

COLTYPE002=TEXT17 2

COLTYPE003=TEXT112

COLTYPE004=TEXT112

COLTYPE005=FLOAT8 2

COLTYPE006=TEXT102

COLTYPE007=TEXT252

COLTYPE008=LONG10 2

COLTYPE009=TEXT252

END DEF


20300903851SMITH ,VERONICA07/16/2001 07/20/2001

4.0000.00

20300904011JONES,GEORGE A07/16/2001 07/20/2001

4.0000.00


20785664031GREEN,KARLA07/12/2001 07/26/200114.0000.00

20788858521TILLOTS,JOHN05/21/2001         06/29/200139.0000.00

00REPORT TOTAL7,779   7.45
```

Appendix D -Setting Up FTP Export

The following sections outline the one-time setup requirements for both the Horizon Business Insight server and the TRENDSTAR server to configure the built-in FTP export to either Horizon Business Insight Highlights or Reports.

These steps include the following:

1   Creating an FTP Virtual Directory on HBI

2   Configuring the Machine & Directory setup on TRENDSTAR

3   Configuring the user FTP Account on TRENDSTAR

Creating an FTP Virtual Directory on the Horizon Business Insight Server

The following section outlines one-time setup steps needed on the Horizon Business Insight server. These steps should be completed by your Horizon Business Insight Windows system administrator:

1   Review HBI folder structure and security.

2   Enable FTP Server service.

3   Create FTP Virtual Directory.

HBI Folder Structure and Security

Before you create an FTP Virtual Directory, you should review your folder structure and security permissions.

The default installation for Horizon Business Insight involves creating a wtfiles folder for subset input files and a wtreports directory for report files underneath *x*:\HBI. Subfolders can be created under both wtfiles and wtreports to allow for data separation by facility, entity or group.

Note: Your server may have been configured in the reverse with a folder for each entity or group in each of which resides a wtfiles folder and a wtreports folder.

No matter how your server is configured, you need to verify that the Windows security permissions are set appropriately to allow users authenticating via FTP write access to the correct folders. Users will be authenticating with the same domain username that they use to access the HBI websites and should be granted Modify permissions to the folders they need to export to.

An easy way to manage security permissions to these folders is to create local groups on the HBI server and place users with like export access in the same group. Then these groups can be given Modify permission to folders as needed.

Enable the FTP Server Service in IIS

1 Place the Windows 2003 Server CD in the drive on the HBI application server.

2 Select **Start/Settings/Control Panel/Add or Remove Programs.**

3 Click on **Add/Remove Windows Components.**

4 Highlight **Application Server.** (Do not uncheck this option.)

5 Click **Details…**

6 Highlight **Internet Information Services (IIS).** (Do not uncheck this option.)

7 Click **Details…**

8 Check **File Transfer Protocol (FTP) Service** and click **OK.**

9 Follow the prompts to install and then exit Control Panel.

Create a Virtual Directory

It is only necessary to create one virtual directory for both exports for Highlights and Reports. The easiest option is to point the virtual directory to the x:\HBI folder. No matter what folder you use, any subfolder will be accessible (pending security permissions) from this one virtual directory.

1   Select **Start/Programs/Administrative Tools/Internet Information Services (IIS) Manager**.

2   Expand the local server name.

3   Expand the **FTP Sites** folder.

4   Right-click on **Default FTP Site**.

5   Select **New/Virtual Directory…**

6   Click **Next**.

7   Type the alias for the directory. (One word to be used by the TRENDSTAR Manager to set up the connection on the TRENDSTAR server.)

8   Click **Next**.

9   Click **Browse…**

10 Browse to the folder to be made into an FTP virtual directory.

11 Highlight the folder and click **OK**.

12 Click **Next.**

13 Check the **Write** box and click **Next**.

14 Click **Finish**.

Configuring the Machine and Directories Setup on TRENDSTAR

The following setup needs to be completed on the TRENDSTAR system. After the setup is complete, modifications are needed only if new directories are added, the HBI server host name or IP changes, or security changes are made to the folders on HBI.

There are two sections that need to be completed for the TRENDSTAR setup; the first is performed by MANAGER and the second by each user who will be utilizing this functionality.

Manager Setup

The MANAGER must set up information for TRENDSTAR on how to access the HBI machine(s) and available directories. You can set up a maximum of 16 different machines to receive an export.

FTP Machine Setup

1   Sign into the TRENDSTAR system as MANAGER.

2   Select **Security/Security Maintenance/FTP Machine Setup/Add/Machine**.

3   Type either the hostname or IP address for the HBI Server and press **Enter**.

> **Note:** To use a hostname, either TRENDSTAR needs to be configured to access your DNS server or a host entry needs to be added to the TRENDSTAR host table. Please call Technical Support at 1-800-274-3292 if you need TRENDSTAR configured to use the hostname for the HBI server.

4   Press **Enter** to default to port 21.

5   Type an alias for this machine.
This alias is what TRENDSTAR users will select when choosing the machine to export files to. This field is a text field that has a maximum of 64 characters and must be unique for each machine setup.

6   Press **PF4** to accept.

7   Answer the prompt "Do you want to continue adding machines [Y/N]?" as needed.
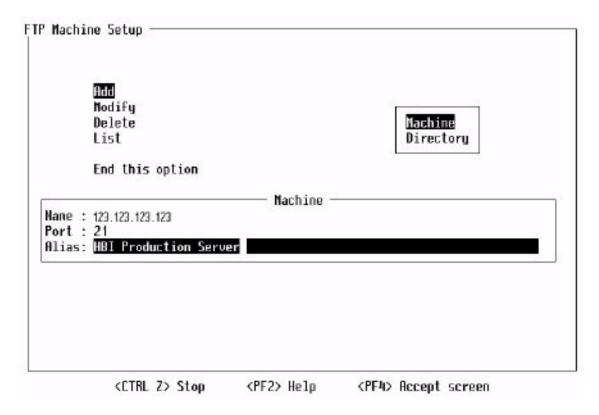
```
FTP Machine Setup ──────────────────────────────────────────────────────────┐
│                                                                             │
│         ┌───┐                                                               │
│         │Add│                                                               │
│         │Modify                                      ┌──────────┐           │
│         │Delete                                      │Machine   │           │
│         │List                                        │Directory │           │
│                                                      └──────────┘           │
│         End this option                                                     │
│                                                                             │
│  ┌─────────────────────────── Machine ──────────────────────────────┐      │
│  │ Name : 123.123.123.123                                            │      │
│  │ Port : 21                                                         │      │
│  │ Alias: │HBI Production Server│████████████████████████████████    │      │
│  └───────────────────────────────────────────────────────────────────┘     │
│                                                                             │
│                                                                             │
│                                                                             │
│                                                                             │
│                                                                             │
└─────────────────────────────────────────────────────────────────────────────┘
        <CTRL Z> Stop        <PF2> Help        <PF4> Accept screen
```

Figure D-1 FTP Machine Setup screen

FTP Directory Setup

1   Sign into the TRENDSTAR system as MANAGER.

2   Select **Security/Security Maintenance/FTP Machine Setup/Add/Directory**.

3   Select the machine name (not alias) to add directories for and press **Enter**.

4   Type the FTP virtual directory path and press **Enter**.

This is the one-word alias that was given to the FTP virtual directory when it was setup on the HBI server. If there is a subdirectory under this alias, enter the path to it here (e.g., Wtfiles\entity1 or entity4\wtreports).

5   Type an alias for this directory. This alias is what users will see when they pick a directory to export to.

6   Press **PF4** to accept.

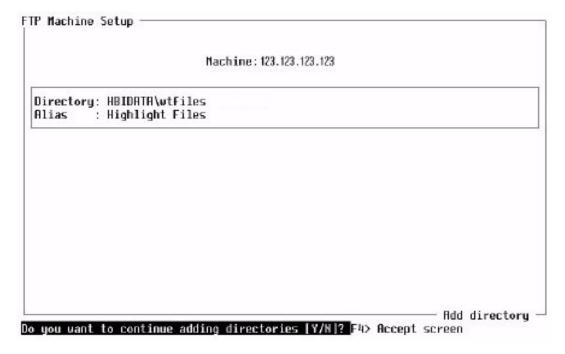**7**   Answer the prompt "Do you want to continue adding directories [Y/N]?" as needed.

```
FTP Machine Setup ─────────────────────────────────────────────────────────

                              Machine: 123.123.123.123

    ┌──────────────────────────────────────────────────────────────────────┐
    │ Directory: HBIDATA\wtfiles                                            │
    │ Alias    : Highlight Files                                            │
    └──────────────────────────────────────────────────────────────────────┘




                                                            ── Add directory ──
  Do you want to continue adding directories [Y/N]? F4> Accept screen
```

Figure D-2 FTP Machine Setup / Add directory screen

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User Setup

Each TRENDSTAR user that will be exporting to HBI must configure their FTP account setup information. There can only be one FTP Account Setup per machine for any given TRENDSTAR account.

1 Sign into the TRENDSTAR system as the user account.

2 Select from any product menu **Maintenance/FTP account setup/Create.**

3 Select the HBI server from the list of available machine aliases. This list contains only machines that have been setup by the MANAGER account.

4 Type the Windows account name that this person uses to access the directories on HBI. This can be a domain account or an account local to the HBI server. If it is a domain account, enter the domain name, then a "\", and then the username. Press **Enter**.

5 Type the Windows account password and press **Enter**. Remember this is case-sensitive. The characters of the password will not display as you type. If you make a mistake, press CTRL-U to start again.

6 If the information you entered was a valid login to that machine, then a list of available directory aliases set up by MANAGER will appear.

7 The MANAGER may create up to 200 directories per machine. To limit the number of directories displayed for your account, select as many directories as needed and press **PF4**.

Note: You are allowed to select directories that you may not have access to write into. Please be sure to check with your system administrator to see which directories you should select.
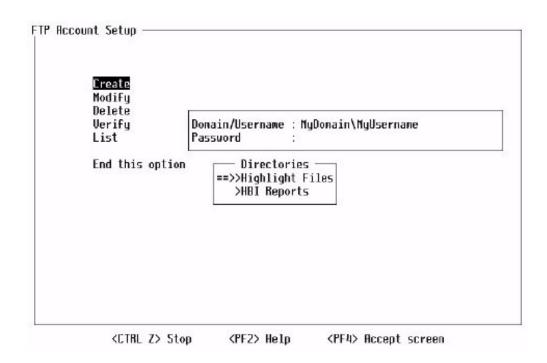
8 Type **Y** to add these directories.

```
FTP Account Setup ────────────────────────────────────────────

        Create
        Modify
        Delete
        Verify        ┌─────────────────────────────────────────┐
        List          │ Domain/Username : MyDomain\MyUsername   │
                      │ Password        :                       │
                      └─────────────────────────────────────────┘
        End this option    ┌── Directories ──┐
                           │ ==>>Highlight Files│
                           │    >HBI Reports   │
                           └──────────────────┘




        <CTRL Z> Stop      <PF2> Help      <PF4> Accept screen
```

Figure D-3 FTP Account Setup screen

Managing the TRENDSTAR FTP MANAGER Setup

The TRENDSTAR setup is for the most part static. Modifications to the MANAGER setup may be made to add a new machine, remove a machine, add directories, or create new directories.

Modify a Machine

You may modify the port number and/or the machine alias. The machine host name or IP cannot be modified. To change the host name or IP address, delete the machine setup and recreate it.

1   Sign into the TRENDSTAR system as MANAGER.

2   Select **Security/Security Maintenance/FTP Machine Setup/Modify/ Machine**.

3   Select the machine to modify and press **Enter**.

4   Modify the port number and/or the machine alias as needed and press **PF4**.

5   At this time, an FTP connection is made in the background to confirm that the host name or IP address exists and that the port given is an FTP port. If the machine information cannot be verified, you may still save the setup.

6   When prompted with **Do you want to modify this machine [Y/N]?,** type **Y**.

Modify a Directory

You may modify the path and alias of a directory setup.

1   Sign into the TRENDSTAR system as MANAGER.

2   Select **Security/Security Maintenance/FTP Machine Setup/Modify/ Directory**.

3   Select the machine and press **Enter**.

4   Select the directory and press **Enter**.

5   Modify the path and/or the alias as needed and press **PF4**.

6   When prompted with **Do you want to accept changes to this directory [Y/ N]?,** type **Y**.

Delete a Machine

You may delete a machine from the setup; however, the machine will still be listed as an option for the individual users unless they delete it from their setup. When a machine that is no longer in the MANAGER setup is selected during an export, the process will fail. Please refer to the information below on how a user can verify their setup against the MANAGER setup. Please note that if a user removes a machine from their setup, any export batches utilizing the FTP export option will need to be modified.

1   Sign into the TRENDSTAR system as MANAGER.

2   Select **Security/Security Maintenance/FTP Machine Setup/Delete/ Machine**.

3   Select the machine and press **Enter**.

4   When prompted with **Are you sure you want to delete this machine [Y/N]?**, type **Y**.

Delete a Directory

You may delete a directory from the setup; however, the directory will still be listed as an option for the individual users unless they delete it from their setup. When a directory that is no longer in the MANAGER setup is selected during an export, the process will fail. Please refer to the information below on how a user can verify their setup against the MANAGER setup. Please note that if a user removes a directory from their setup, any export batches utilizing the FTP export option will need to be modified.

1   Sign into the TRENDSTAR system as MANAGER.

2   Select **Security/Security Maintenance/FTP Machine Setup/Delete/ Directory.**

3   Select the machine and press **Enter**.

4   Select the directory and press **Enter**.

5   When prompted with **Are you sure you want to delete this directory [Y/N]?**, type **Y**.

Managing the TRENDSTAR FTP User Setup

The TRENDSTAR setup is for the most part static. Modifications to the user setup can be made to add new accounts -- one per machine setup, add new directories, or update the FTP password.

Modify an FTP Account Password

Since the username and password information used for the FTP process is the same as the Windows information used to authenticate with HBI, the password for this account will change according to the local security policies at your facility. This means that the password will need to be updated in TRENDSTAR when your password is changed in Windows.

1   Sign into the TRENDSTAR system as the user.

2   Select from any product menu **Maintenance/FTP account setup/Modify**.

3   Select the machine and press **Enter**.

4   Press **Enter** to select Password.

5   Type the new password and press **Enter.**

6   Retype the password to confirm and press **PF4**.

Modify User Directories

The MANAGER may create up to 200 directories per machine. To modify the directories displayed for your account, follow the instructions below. Please note that if the directory list is modified, any export batches utilizing the FTP export option will need to be modified.

1   Sign into the TRENDSTAR system as the user.

2   Select from any product menu **Maintenance/FTP account setup/Modify**.

3   Select the machine and press **Enter**.

4   Select **Directories** and press **Enter**.

5   Select or deselect as many directories as needed and press **PF4**.

Note: You cannot select directories that you may not have access to write into. Please be sure to check with your system administrator to see which directories you should select

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Verify the User Setup

The MANAGER can delete or modify machines and directories independantly of the user setup. Use the Verify option to check that your user account setup does not have any machines or directories that no longer exist in the MANAGER setup. Please note that this option does not actually authenticate against the HBI server during this verification and will, therefore, not verify that the account username and password are a valid login or that the username has access to the directories selected.

1   Sign into the TRENDSTAR system as the user.

2   Select from any product menu **Maintenance/FTP account setup/Verify**.

3   Type a name for the log file and press **Enter**.

4   Review the log file if any invalid account information is noted and correct as needed.

Delete a User FTP Account

If the MANAGER removes a machine setup, the user may delete the FTP account setup for that machine. Deleting an account for a machine will affect any export batches utilizing the FTP export option.

1   Sign into the TRENDSTAR system as the user.

2   Select from any product menu **Maintenance/FTP account setup/Delete/ Accounts**.

3   Select the machine to delete the account setup for and press **Enter**.

4   When prompted with **Are you sure you want to delete this account [Y/N]?,** type **Y**.

Delete Directories from a User FTP Account

If the MANAGER removes a directory for a machine setup, the user may delete this from the FTP account setup for that machine. Directories can also be removed by modifying the account directories and deselecting the directories to remove. Please note that if the directory list is modified, any export batches utilizing the FTP export option will need to be modified.

1   Sign into the TRENDSTAR system as the user.

2   Select from any product menu **Maintenance/FTP account setup/Delete/ Directories**.

3   Select the machine to delete the directories from and press **Enter**.

4   Select the directories to remove from the setup. Only directories that are currently listed as part of your account setup will be displayed.

5   Press **PF4** to continue.

6   When prompted with **Are you sure you want to delete these directories [Y/ N]?,** type **Y**.