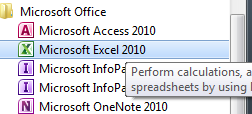
Connecting to & Using the TBI Cube with Microsoft Excel Pivot Tables

The following is a set of instructions which will walk you through the process of setting up a new data connection in Excel, connecting to the Analysis Server, connecting to the TBI\_Cube database, to the TBI Cube itself, and viewing its underlying data.

# Setting up an External Excel Data Connection

In order to view the Cube data in Excel you must setup a connection to the cube within Excel. The following 6 steps will assist a user in setting up a connection to one of the three Analysis Servers that host the TBI Cube Analysis Services database.

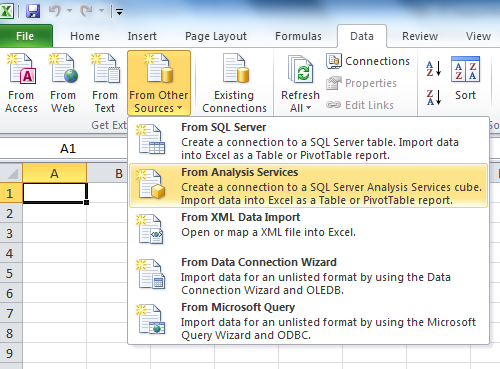
1. Open Microsoft Excel 2010
   1. Start – All Programs – Microsoft office – Microsoft Excel 2010



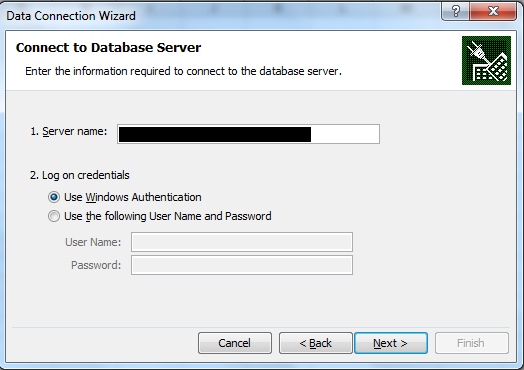
1. In Microsoft Excel, at the top of the screen, click on the “Data” tab.



1. Click “From Other Sources”, and select “From Analysis Services”

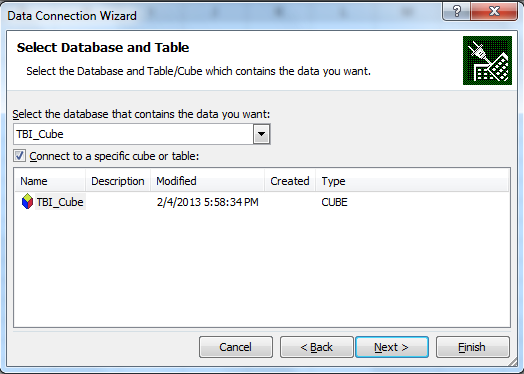


1. Specific the correct server name & authentication type, and click Next.
   1. Analysis Server Names:
      1. Development - DNS\DNS
      2. Pre-Production – DNS
      3. Production – DNS
   2. Select “Use Windows Authentication” –This uses your windows login credentials to attempt to connect to the data source, therefore, your user account must be part of the correct Active Directory group which has access to each server.



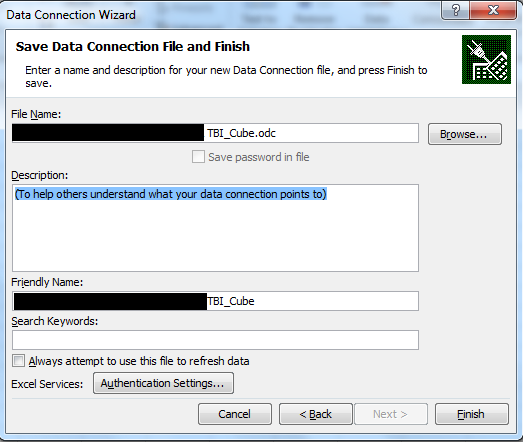
*\*\* If you run into an error here, your user may not have access to the Analysis Server; Please contact Mike Rolli (PII).*

1. Select the TBI\_CubeV6 database, and the TBI\_Cube, and click Next.



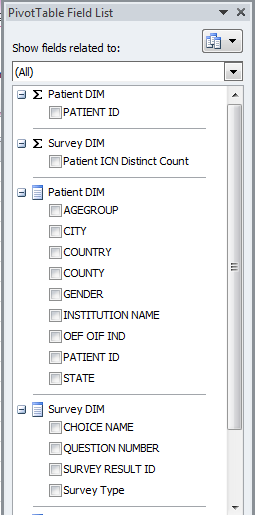
*\*\* If there are not any selectable objects, or the TBI\_Cube database is not an available choice, the cube may be in process, or you may not have appropriate permissions. Please contact Mike Rolli.*

1. At this point you can click Finish, or specify a different set of names for saving your new data connection file locally.

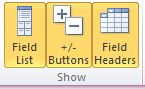


# Using the Newly Created Connection

1. After clicking finish, the Excel screen may take a few seconds to refresh, but should show you a pivot table design screen, along with the Pivot Table Field List (shown below). *\*\*These values will change as the design of the cube is refined and/or updated.*



* 1. If the Pivot table field list does not show automatically, you can click the Field list button to show or hide the field list.



1. You are now ready to start slicing & dicing the available data. At the bottom of the Field List, there are 4 boxes which assist in setting up your Pivot report.
   1. Report Filter - Allow you to filter any column.
   2. Column Labels – Defines your columns.
   3. Row Labels – Defines your rows of data.
   4. Values – Defines which values are being counted.

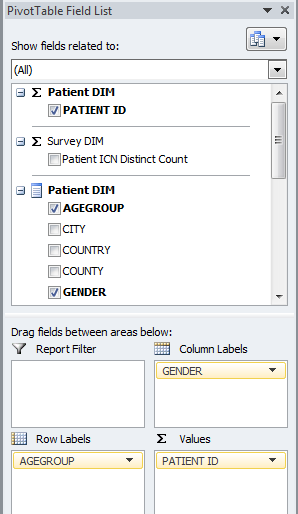
# Current TBI Cube

The current iteration of the TBI Cube that has been successfully deployed to the analysis server on DNS only contains Patient Demographic data, and Patient Survey data. The only currently available “values” are Patient ID & Patient ICN Distinct Count. The Patient ID counts unique values from Patients table, and the Patient ICN Distinct Count, counts the distinct patients who have responded to Survey questions.

Therefore when analyzing Patient Demographic data, currently the Patient ID must be selected, and when analyzing the Patient Survey Data, the Patient ICN Distinct Count value must be used.

# Example Report

1. An Example of How to create a report of Counts of Unique patients by Age Group & Gender.
   1. Setup your fields as listed below.



* 1. Gives you the following report.

