hba.illume.celestehealth.com
Recommended browsers: Chrome or Firefox

Creating Charts Quick Start Guide

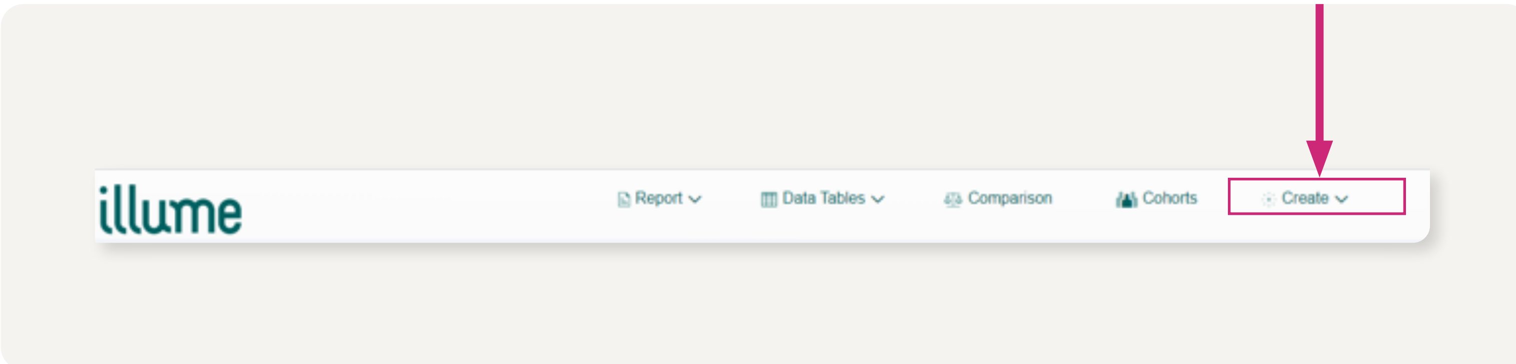
Creating Charts

See things your way: by creating charts, you're able to build your own custom visualizations utilizing the Illume data sets.

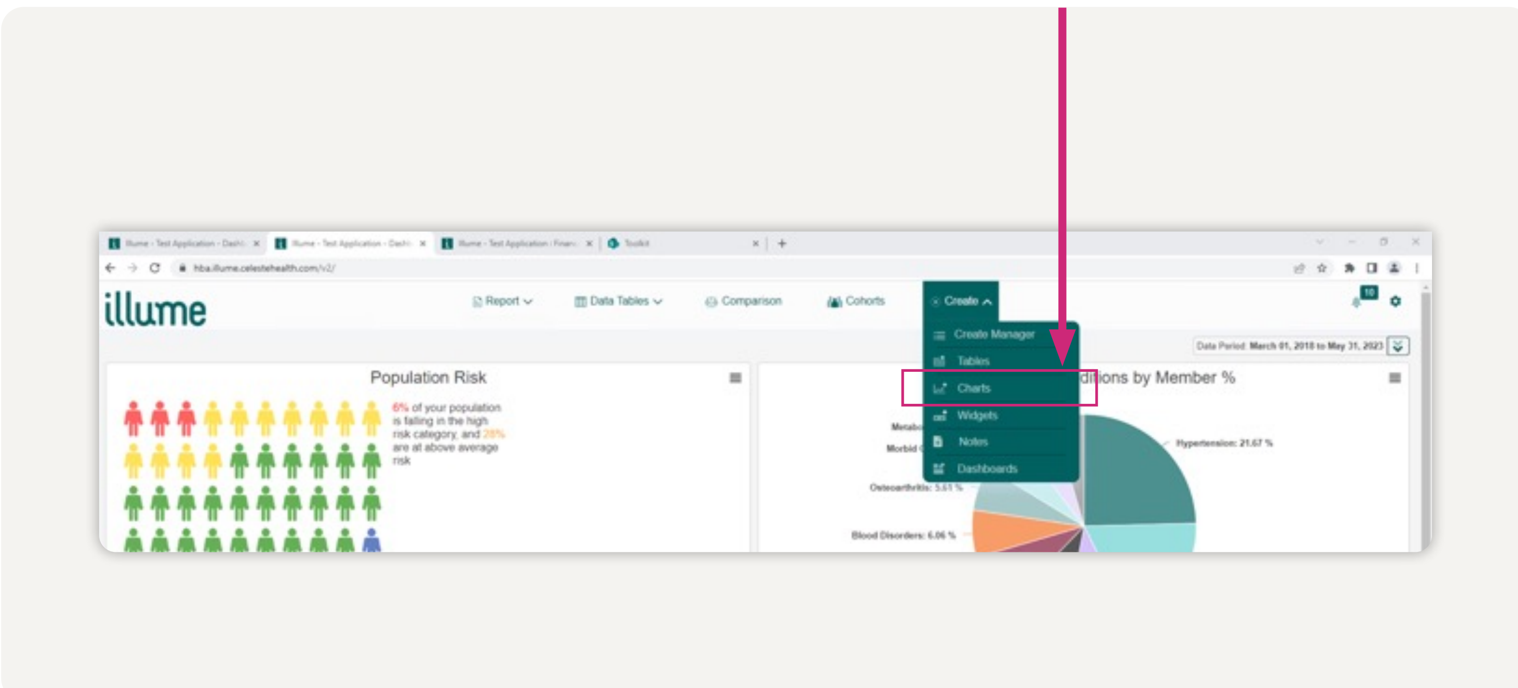
Let's go on a brief tour.

Navigating to charts

Step 1 - Hover over “Create” at the top right of the page.



Step 2 - A dropdown menu will appear. Select “Charts” from the menu.



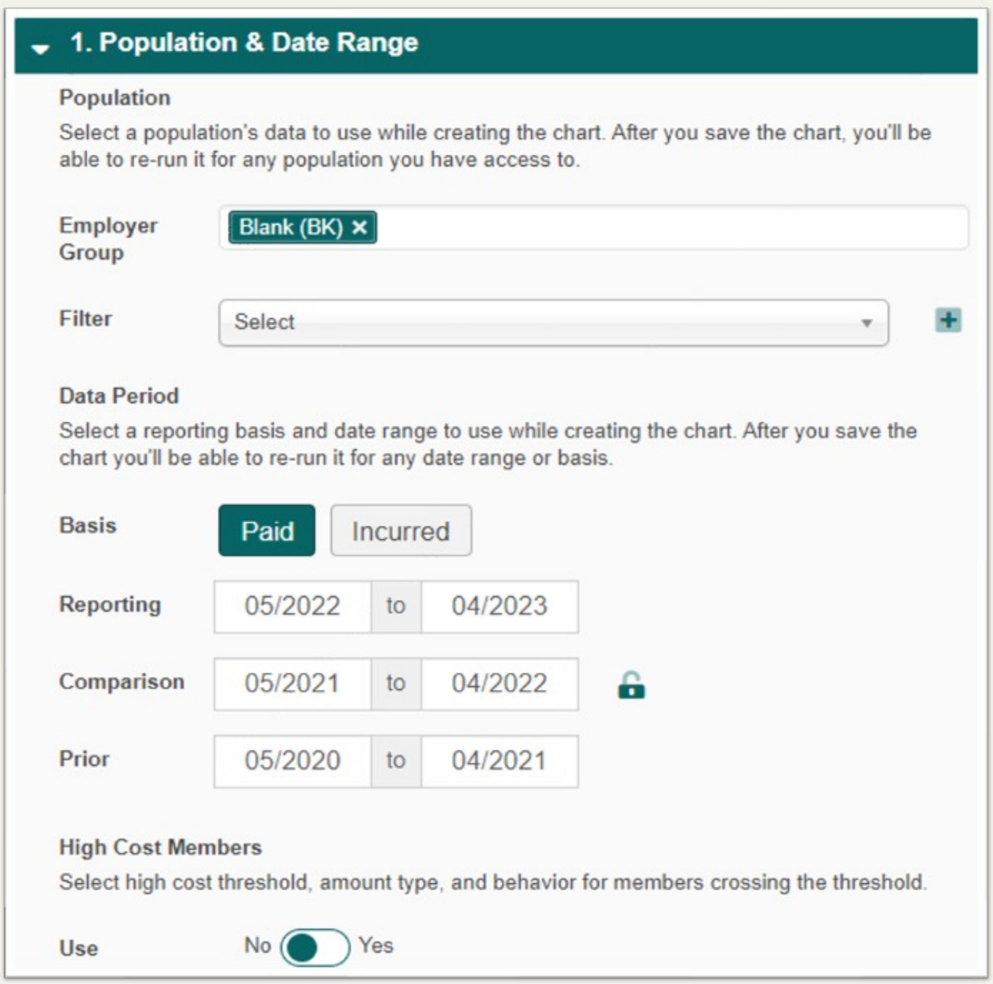
Create Charts Overview

1. Population & Date Range

Population – Allows you to select a population during the Create process to see an actual population example while creating the visual. After the chart is saved, it can be re-run for any population the user has access to.

Data Period – Select a reporting basis (paid or incurred) and date range to use while creating the chart. After the chart is saved, it can be re-run for any date range or basis.

High-Cost Members – Select members by cost. Choosing “No” will include all members. Selecting “Yes” will provide you the option to select a dollar threshold. By toggling to “Yes,” you will have the option to exclude high-cost members from the report, or only include high-cost members in the report.



2. Select Data

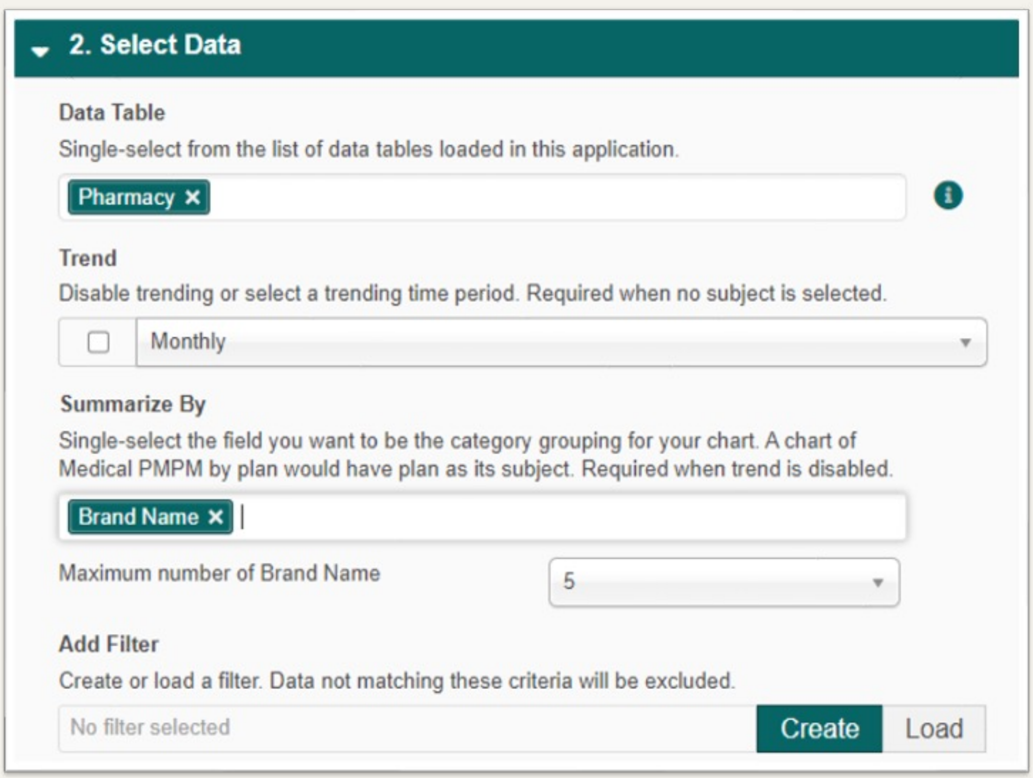
Data Type – Choose one of the available data sets.

Trend – Data can be trended on a Weekly, Monthly, Quarterly or Yearly basis. When trending is enabled, only one value field will be available at a time. Also, trending is required when no "Summarize By" value is selected.

Summarize By – A single-select field that will be the category grouping for the chart. A chart of Medical PMPM by plan would have "Plan" as the subject. This is required when trend is disabled.

Maximum Results – Select 5, 10, 20, or 50 as the maximum number of results that should be displayed on the chart.

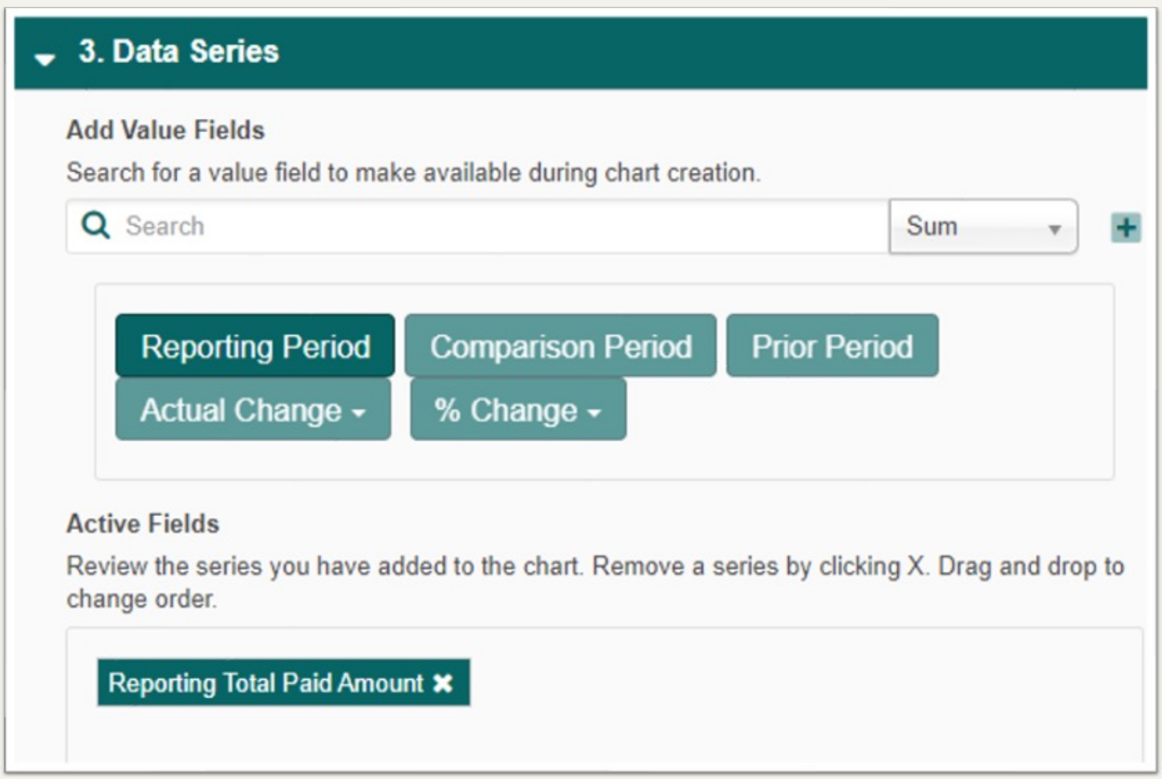
Add Filter – Create or load a previously created filter. Data that doesn't match the filter criteria will be excluded.



3. Data Series

Add Value Fields – Search for a value field to add to the chart and then select a function (Sum, Average, Min, Max, PMPM or Per 1,000) for the selected field. Click the plus to add the value field and function to the "Active Fields" list. The same field can be added to a chart multiple times using different functions.

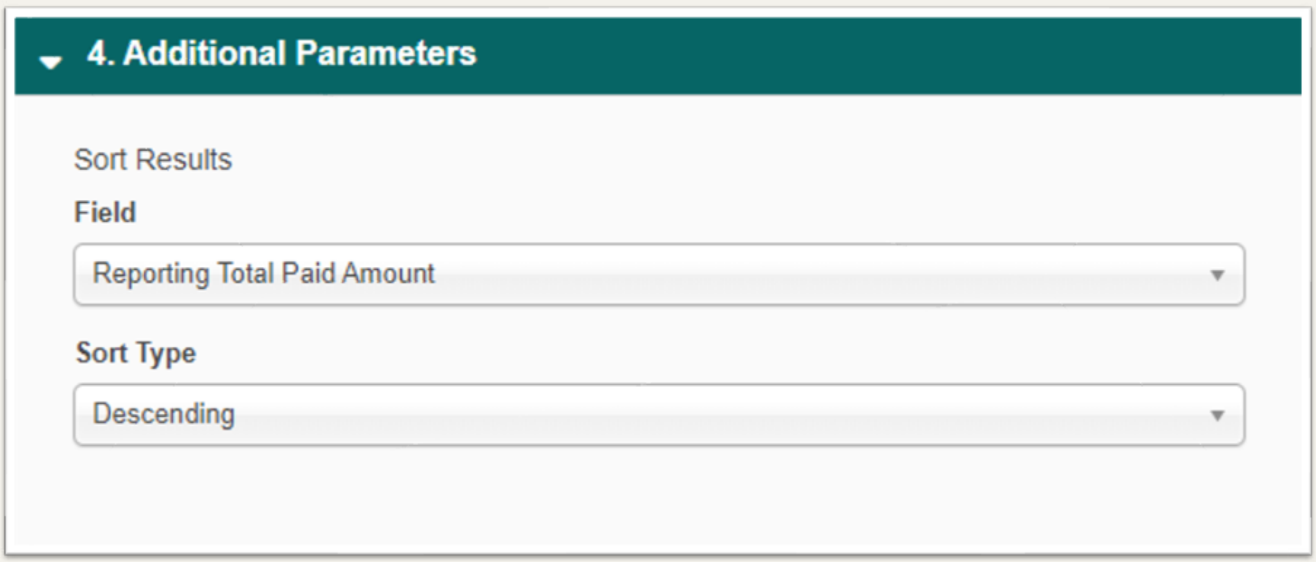
Active Fields – Incorporates a list of the "Value Field" series that have been added to the chart. Remove a series by clicking the "X". Drag and drop the "Active Fields" to change the order in which they appear on the chart.



4. Additional Parameters

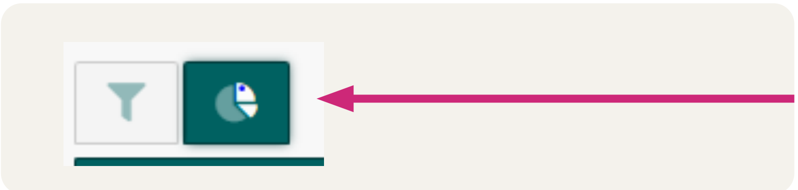
Field – This menu shows you the field you selected in Step 2 to summarize by (in this example, we selected “Brand Name”). This menu also shows you the “Active Fields” you chose in Step 3 (in this example, we selected “Reporting Total Paid Amount”).

Sort Type – You can choose to sort by ascending or descending.

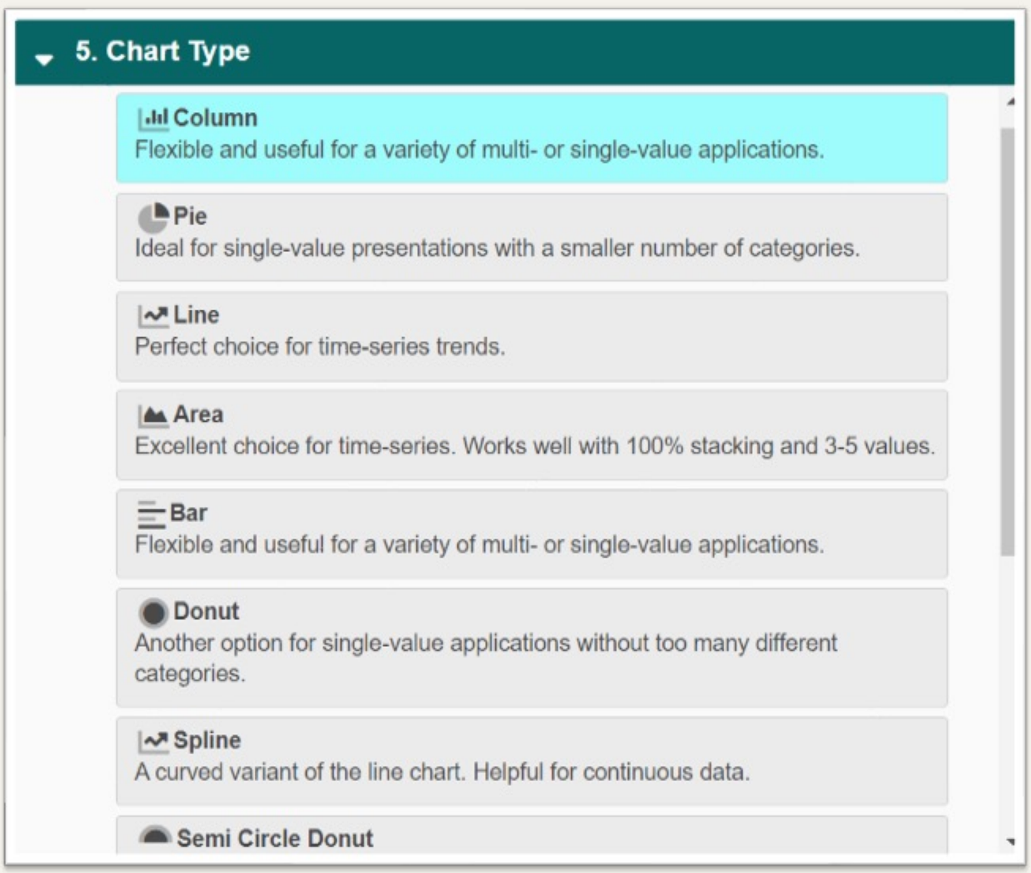


5. Chart Type

Select the chart icon above “Section 1. Population & Date Range.”



Choose the desired chart type to present the data. Your visualization options include Column, Pie, Line, Area, Bar, Donut and Spline charts. Please note that Pie and Donut charts are disabled for certain data configurations, including trend charts, as well as charts with two or more active fields.



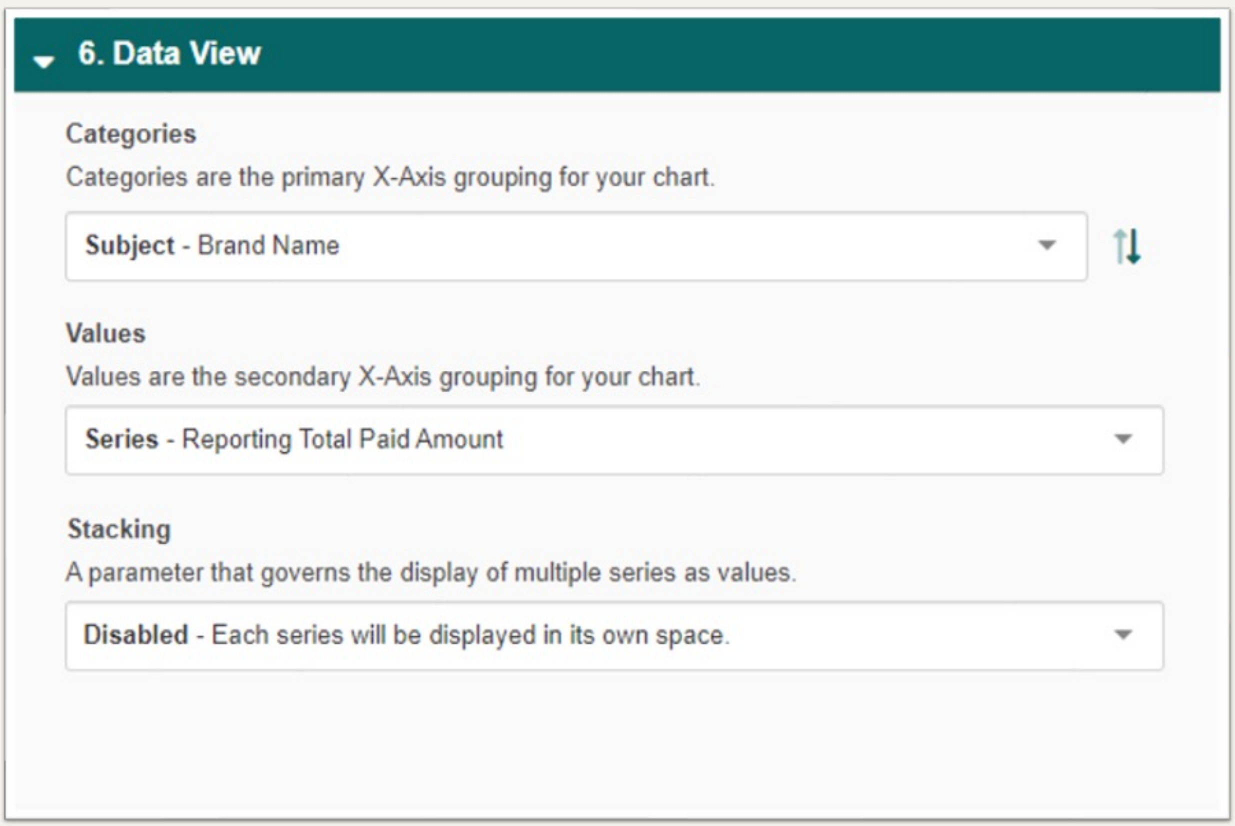
6. Data View

Categories – This is the primary X-axis grouping for the chart. Click the arrows to the right of the "Categories" box to switch the primary and secondary X-axis.

Values – This is the secondary X-axis grouping for your chart.

Stacking – This is a parameter that governs the display of multiple series as values.

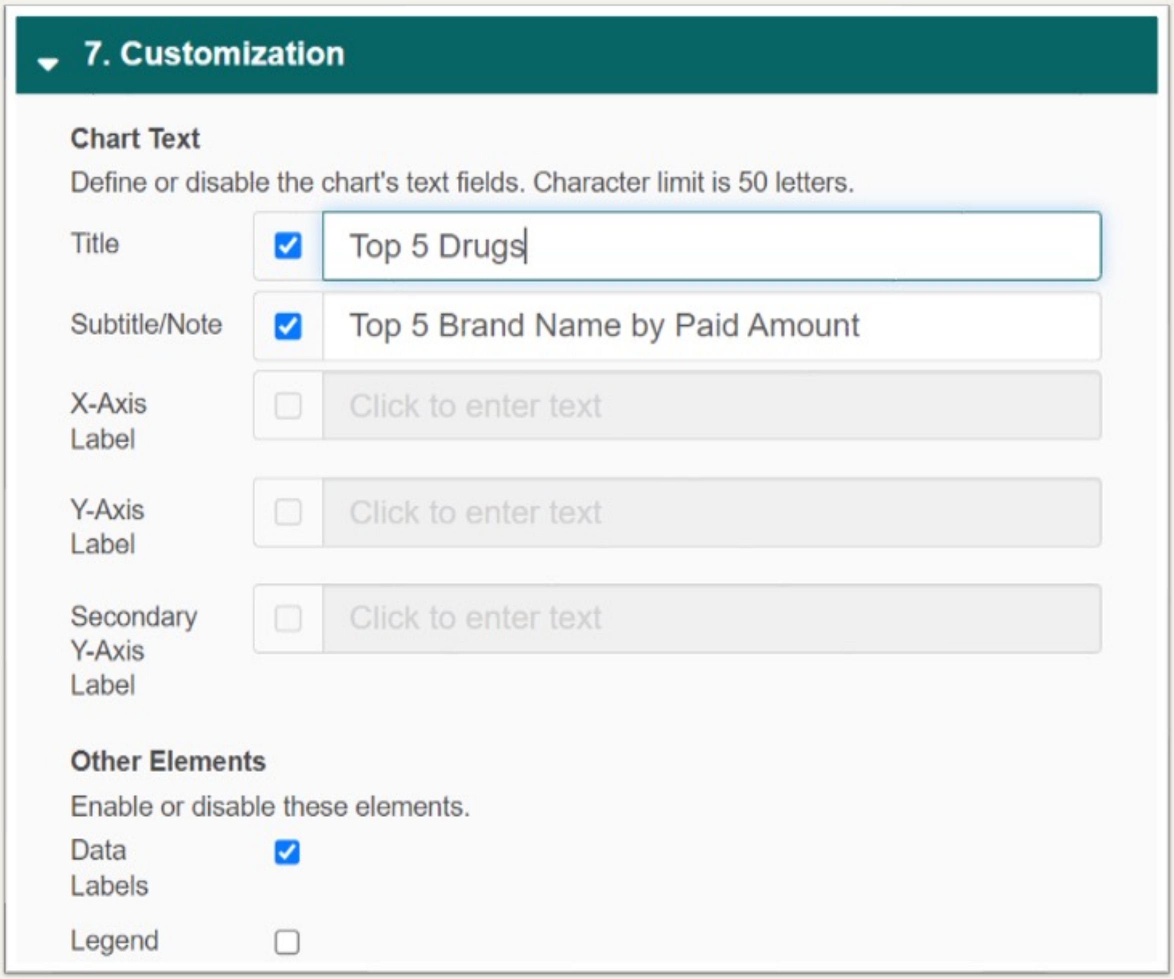
- **Disabled** will display each category in its own space
- **Enabled** will display each category in the same space
- **100%** will display each category in the same place as a percentage of the total



7. Customization

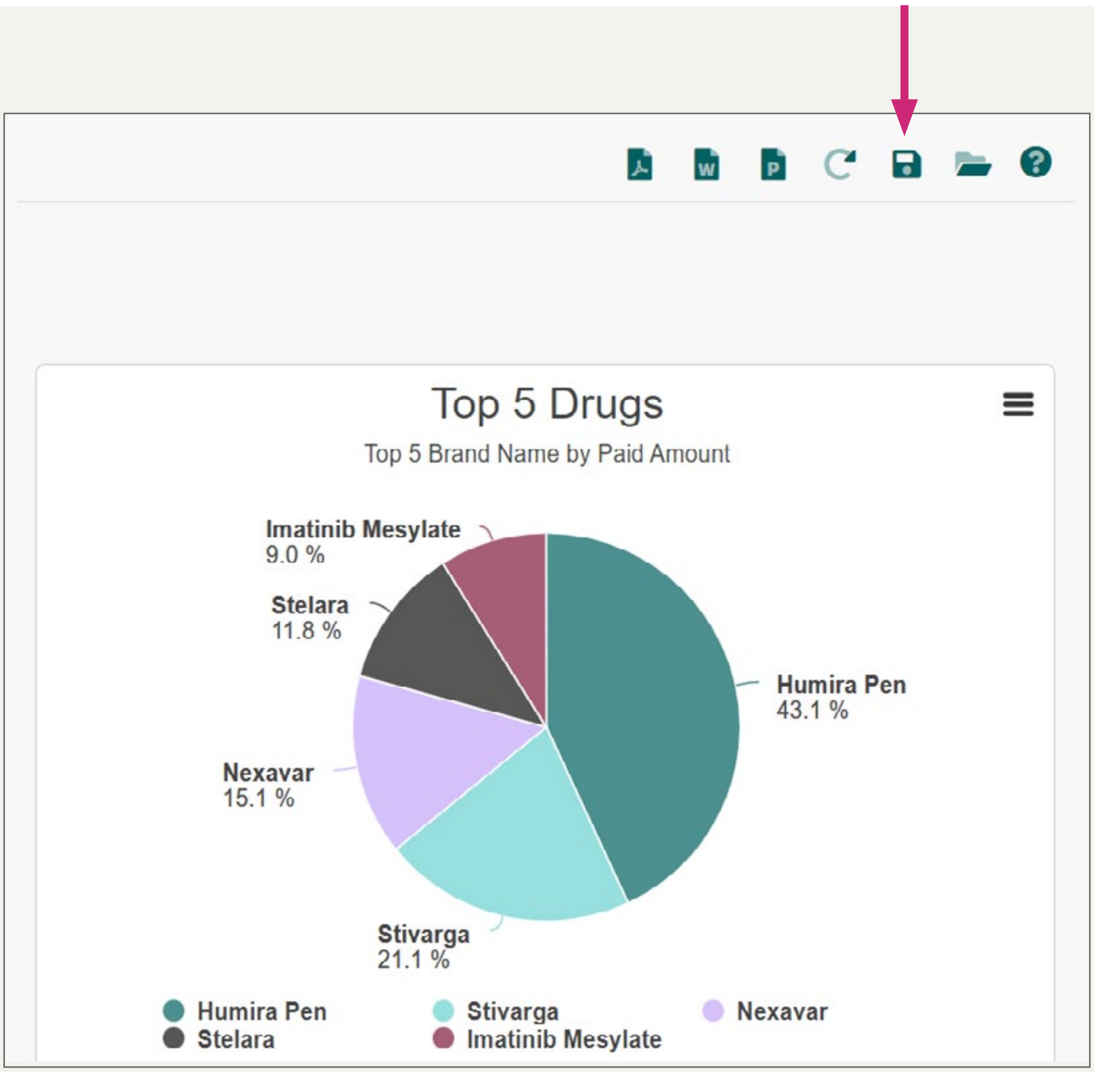
Chart Text – Define or disable the chart's text fields with a 50-character limit.

Other Elements – Enable each Element by placing a checkmark in the box next to it and disable by simply removing the checkmark.



8. Save

Click the “Save” button to save the chart for future use. Saved charts are stored in “Create Manager” and can be accessed by clicking on the “Charts” tab.



User Roles

Report Library Administrator – Controls the functionality for Create Manager. They can view all charts regardless of sharing status, make themselves the “owner” of any chart, publish any chart, and manipulate charts through sharing, un-sharing, and cloning.

Non-Administrators – Can only access charts that they own or that have been shared with them. They cannot edit charts that have been shared with them.

Create Charts in Report Library

Once a chart has been published to the Report Library, it will appear among all the other reports in this library. The default setting for published charts is unshared. Administrators must change the share setting for the report to be visible by all end-users. Once shared, charts can be bundled, scheduled and made available in Executive Analytics by all end-users.