

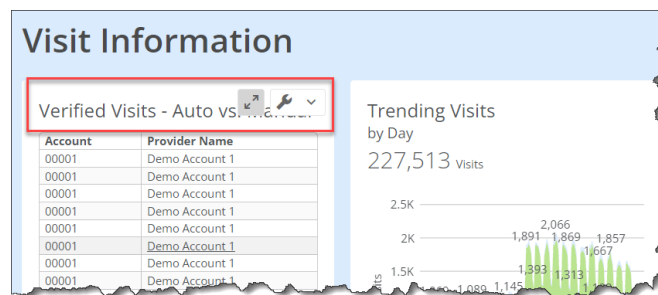


## DOMO Session 2 Guided Exercises

### Exercise 1

#### Making a copy of the existing card

1. From the dashboard, click on the **Visits Verified: Auto vs Manual** card and show the card details



2. In the card details, click on the *Share* icon and select **Save As**

Account	Provider Name	SantraxID	Visits	# Verified	% Verified	# Not Verif	% Not Verif	% Manual Verif	# Omitted
00001	Demo Account	122429	30	30	100%	0	0%	40%	0

3. Options for saving the card:
  - a. Change the **Card Title** to "EVV Compliance." This is where you change the name to be something more applicable for your business needs or specific KPI. This is a free form field and anything can be entered into this section. Leave the **Description** box blank.
  - b. From the drop down arrow, select **Overview** as the page where the card will be saved.

- c. Make sure **Take me to the new card when I'm done** is selected. This will direct you to the **Overview** dashboard to view your newly created card.
- d. Click on **Save**.

Save as

A Card title + SMART TEXT

EVV Compliance

Description + SMART TEXT

Add Card Description...

Preview HIDE

EVV Compliance

B Select the page where you would like the new card to reside:

Q Overview

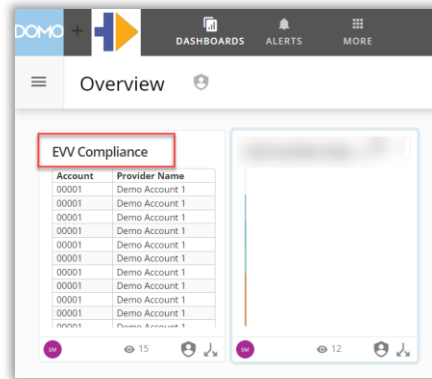
C  Take me to the new card when I'm done

D CANCEL SAVE

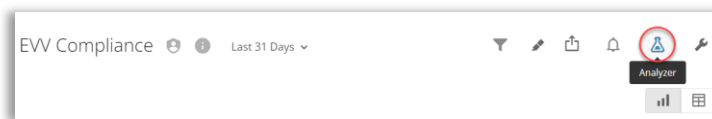
## Exercise 2

### Making changes to the card

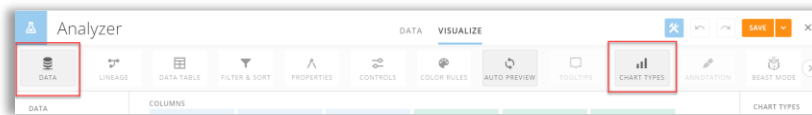
1. From your *Overview* page, click on the *EVV Compliance* card.



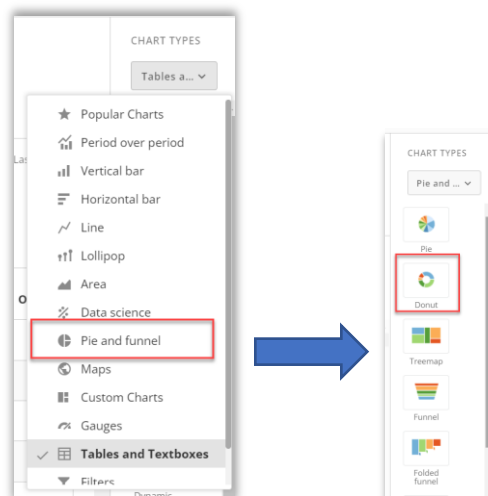
2. Click on the icon for the *Analyzer*. You also have the option to click on the card options (wrench) and select **Edit in Analyzer**.



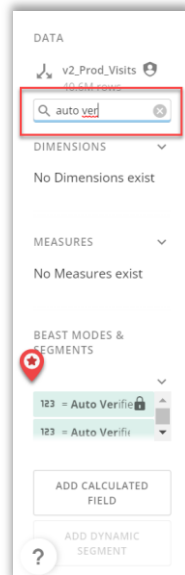
3. Turn off all the panels except for **DATA**, **AUTO PREVIEW** and **CHART TYPES**



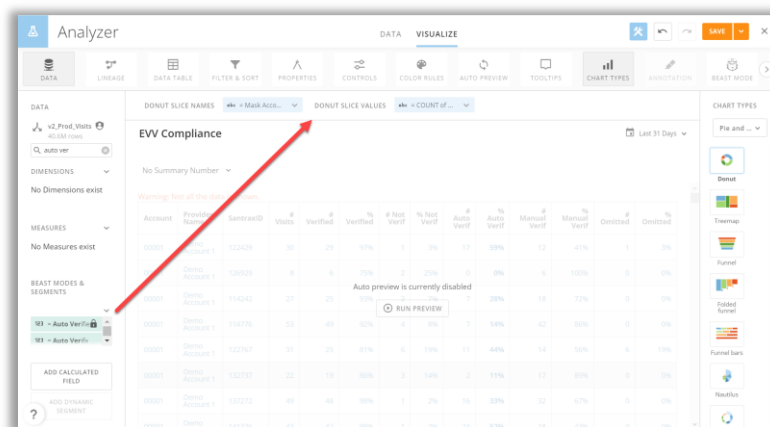
4. From the *Chart Type* panel, click on the drop-down menu and select **Pie and Funnel**. Then, select **Donut**.



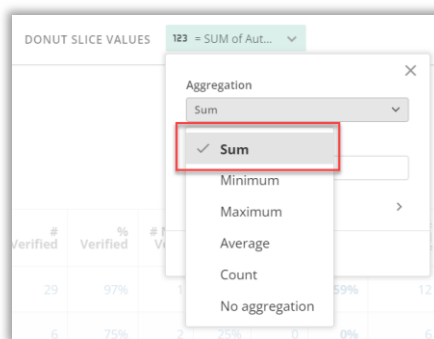
5. From the *Data* panel, locate the **Auto Verified** field. *Best practice: use the search field to quickly narrow down your options.*



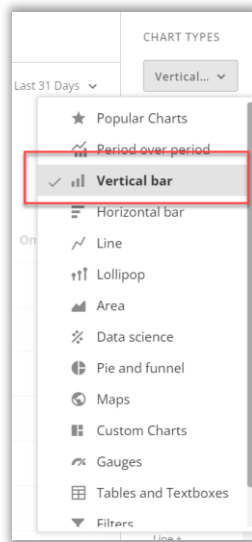
Then, drag and drop it to the **Donut Slice Values**.



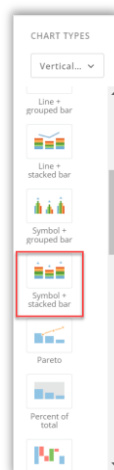
Click on the drop down arrow and change the **Aggregation** from **Count** to **Sum**. Once these changes are done, the card will show the number of visits that were automatically verified, per provider.



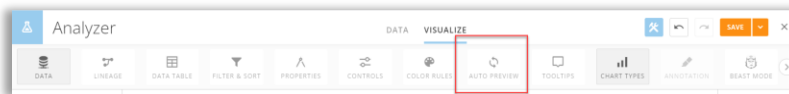
6. From the *Chart Type* panel, click on the drop-down menu and select **Vertical Bar**.



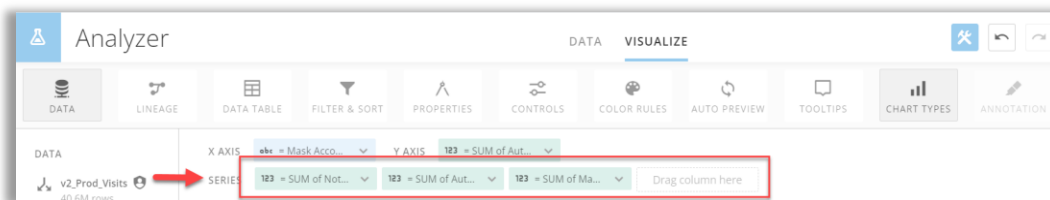
7. Select **Symbol + Stacked Bar**



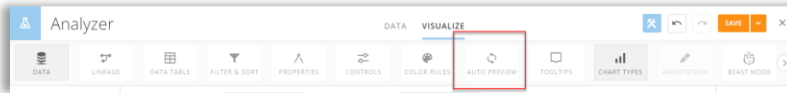
8. Disable Auto-Preview



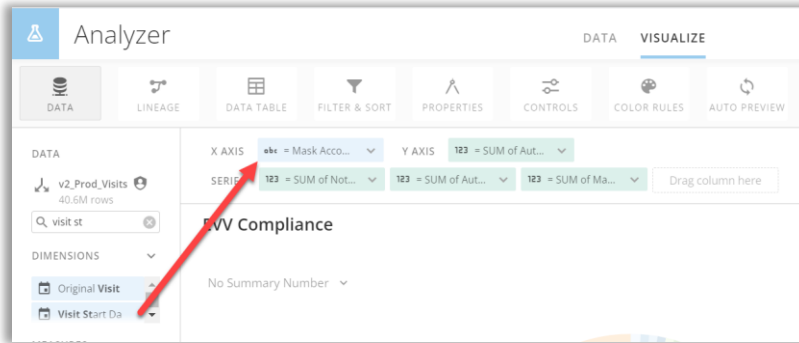
9. Eliminate all the fields in the Series bar, except: “SUM of Auto Verified” and “SUM of Not Verified” and “SUM of Manual Verified”. Hover over the field’s name to view the full name of the field and click the x to remove the field.



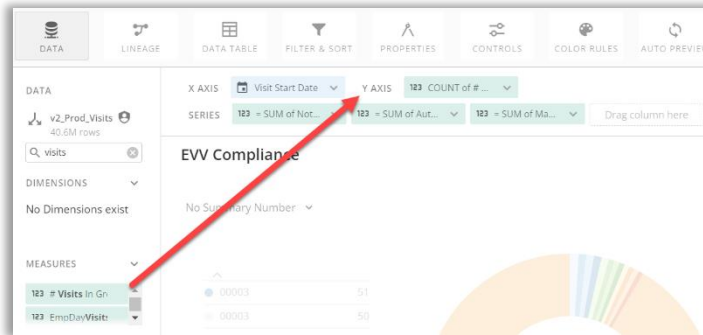
10. Enable Auto-Preview



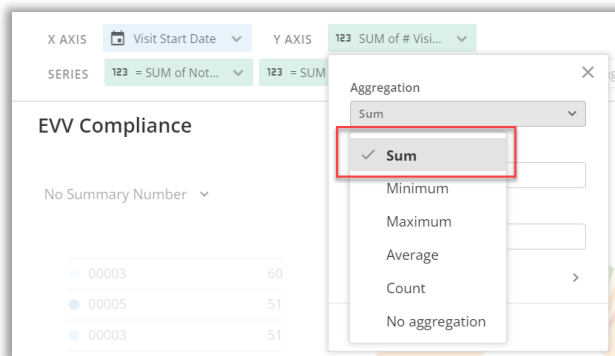
11. From the data panel, locate the **Visit Start Date** field. Then, drag and drop it to the X-Axis.



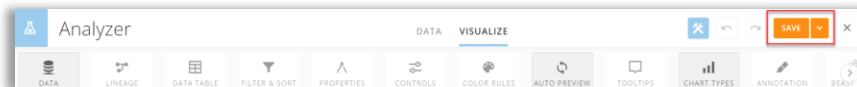
12. From the data panel, locate the **Visits** field. Then, drag and drop it to the Y-Axis.



Using the drop down arrow, change the **Aggregation** from **Count** to **Sum**



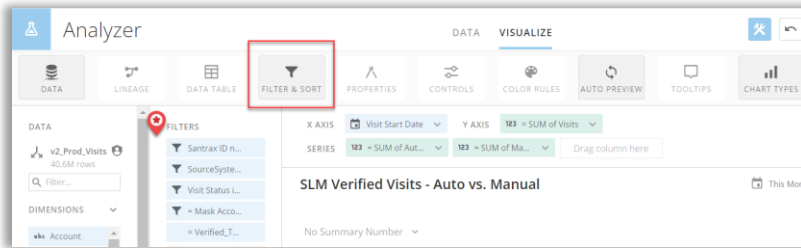
13. **Save** the card but do not exit *Analyzer*



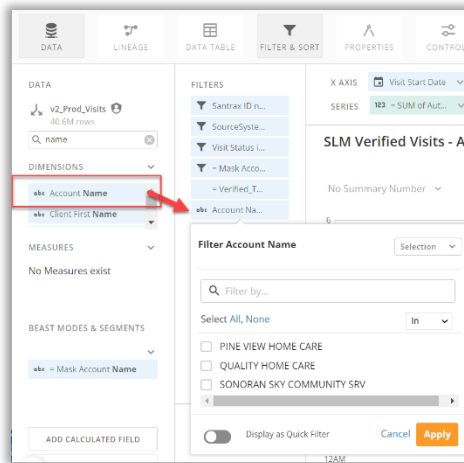
# Exercise 3

## Changing Filtering Options

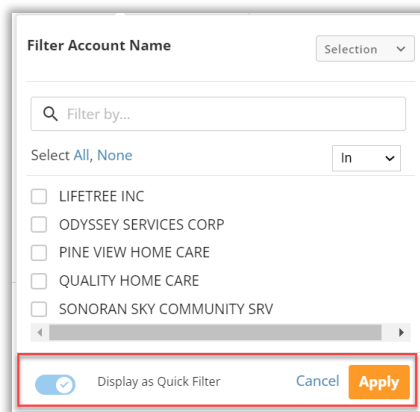
1. Turn on the **Filter & Sort** panel



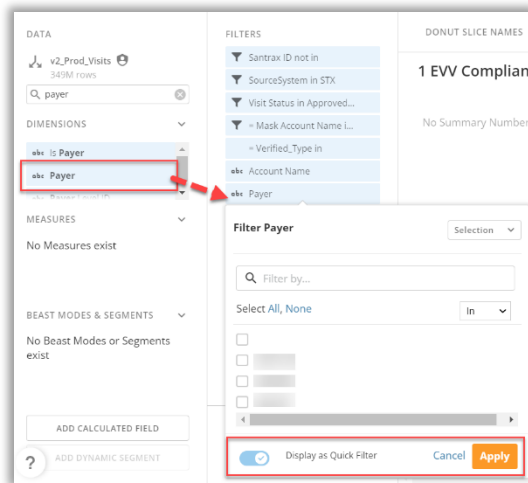
2. Locate **Account Name** from the *Data* panel. Then, drag-and-drop it to the *Filters* section.



3. Click on the option to **Display as a Quick Filter** to toggle on and display this as a quick filter. Click on **Apply**



4. Following the same procedure, add **Payer** as a *Quick Filter*

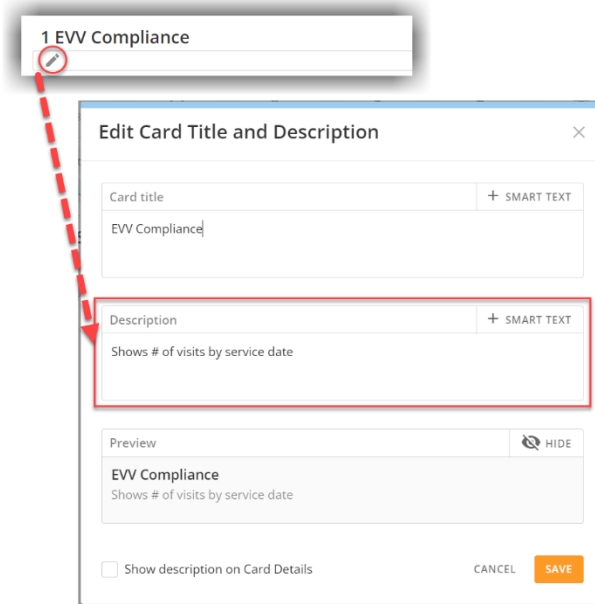


5. **SAVE** the card and exit *Analyzer*

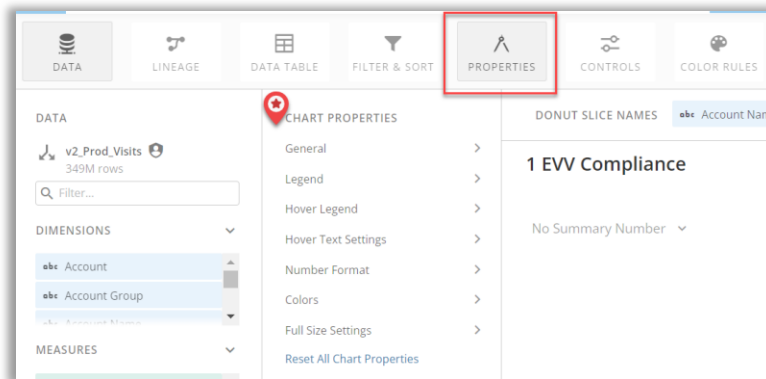
## Exercise 4

### Changing Additional Properties

1. Go back into Analyzer
2. In the description section, type a brief comment explaining what the card will show and its purpose

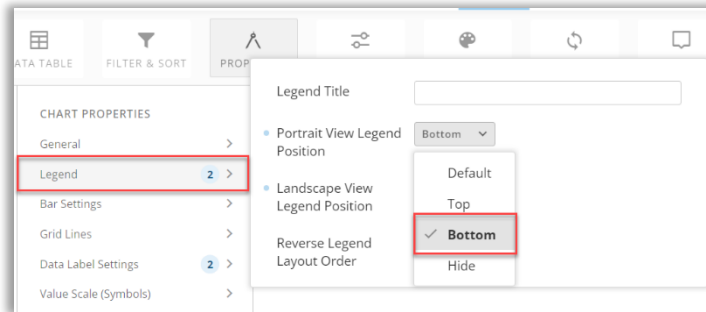


3. Turn on the **PROPERTIES** panel

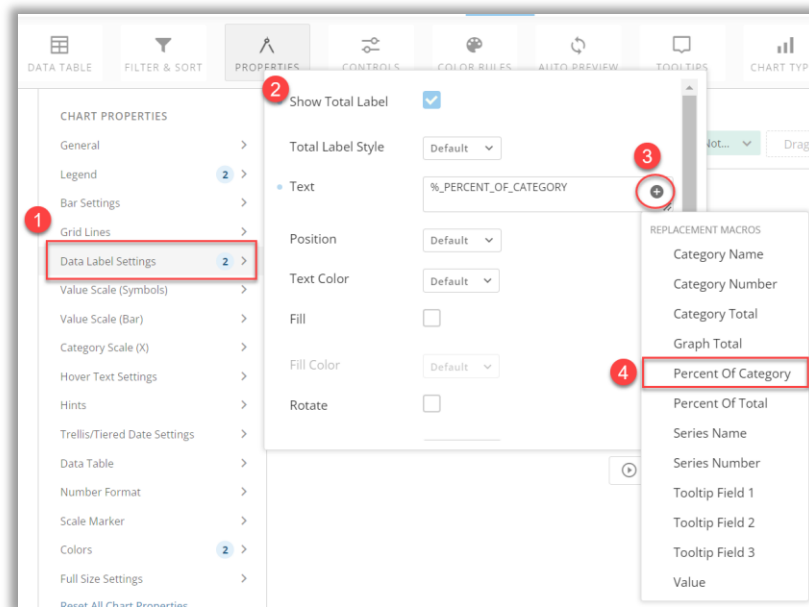


4. Are there any properties set up? How were you able to tell?

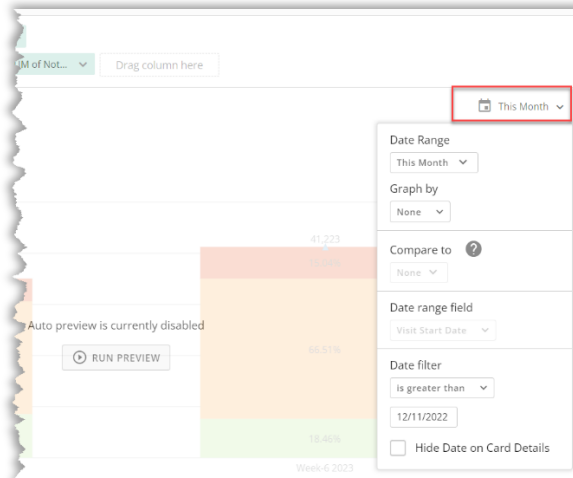
5. Under the **CHART PROPERTIES** panel, use the options in the **Legend** property to change the location (position) of the legend to the **Bottom**.



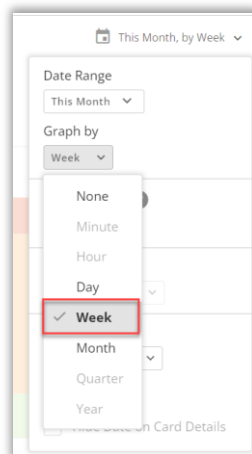
6. From the **Data Label Settings**, select **Show Total Label**. Then, click on the plus sign in the **Text** box to view the list of macros available. Select the **Percent of Category** macro that will show the percentage of each series based on the category, which is the number of visits.



7. Change the **Date Range** of the card to only show data for the **This Month**



8. From the **Graph by** drop-down, select **Week**.



9. **Save** the card