



# Sandata

Get more right from the start

## **Sandata Business Intelligence (BI)**

*Powered by DOMO*

## **Session 2: Intro to Analyzer**

# Objectives

**This virtual training session introduces you to Sandata BI card building functionality. Participants will be able to do the following:**

- Create a copy of an existing card and save the card in the Overview dashboard
- Access the Analyzer to modify the card
- Identify the different panels of the Analyzer and how they can be used to modify the view
- Update a card with different chart types, datasets, controls and filters
- Walk through the guided exercises
- Locate Resources, participate in the Q and A

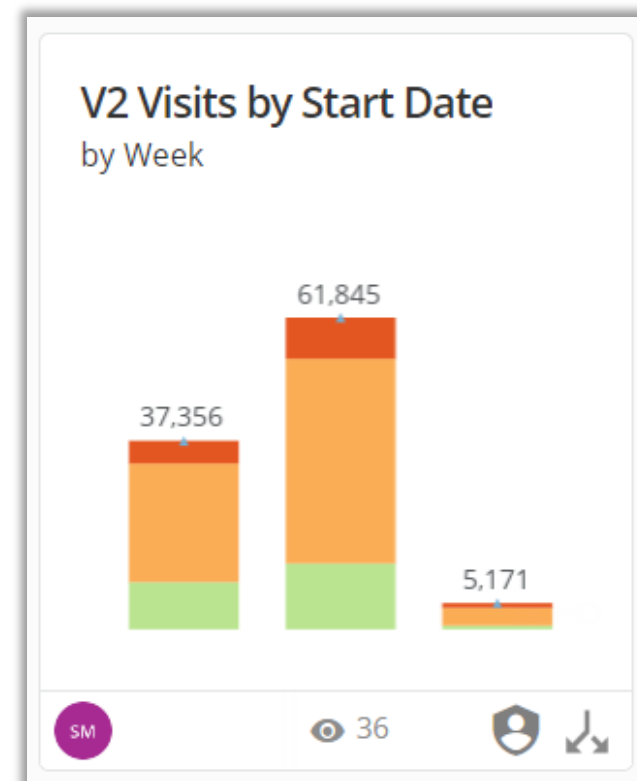


# BI Analyzer

- ▶ Sandata Business Intelligence (BI) Analyzer will allow you to build the chart or table for your specific needs
- ▶ You can also apply and edit filters, chart properties, sort options, modify the chart name and description, as well as view and manipulate the data table for the chart



**Users must not edit the existing cards in their dashboards.**

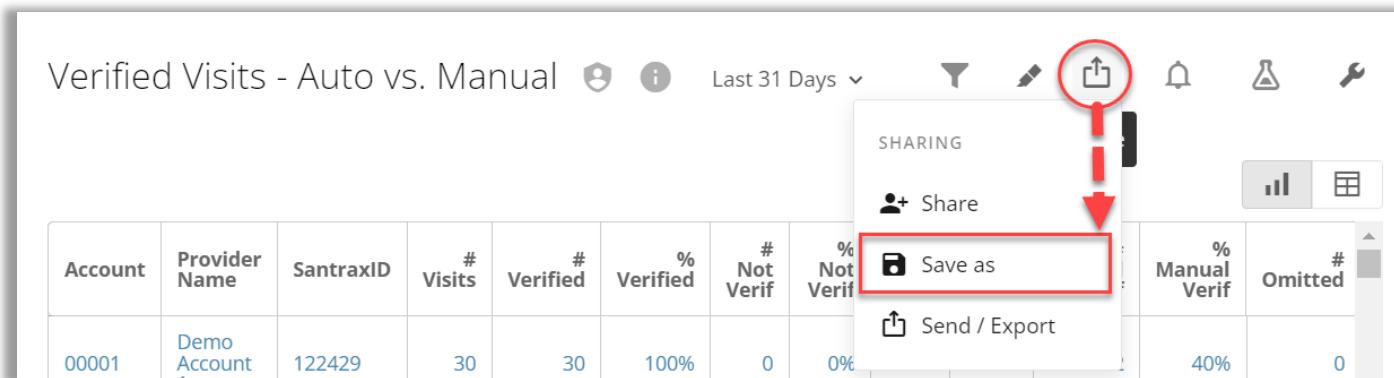


# Copying a Card

Creating a copy of a card will allow you modify an existing card to display different chart properties.

The cards will be available in your Overview dashboard and can be considered a “sandbox” to create, edit and delete the cards you copy. The cards will be independent of the original card, and they can be shared with others in your organization.

In the card details, click the *share* icon and select **Save As**



The screenshot shows a dashboard card titled "Verified Visits - Auto vs. Manual" with a "Last 31 Days" filter. A sharing menu is open, highlighting the "Save as" option. The table below shows data for a demo account.

Account	Provider Name	SantraxID	Visits #	Verified #	Verified %	# Not Verif	% Not Verif	Manual Verif %	Omitted #
00001	Demo Account 1	122429	30	30	100%	0	0%	40%	0



# Saving As Card Options

**Card title** – change the name of the card. This is a free form field, and anything can be entered into this section.

**Description** – brief explanation of card functionality. This is a free form field, and will display under the card title (optional)

**Select the page where you would like the new card to reside** – this is where the copied card will be saved. It should default to **Overview**, and no other options are available

**Take me to the new card when I'm done** checkbox defaults a checked to automatically direct you to the *Overview* dashboard to view your newly created card.

**Save** – saves a copy of the card

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

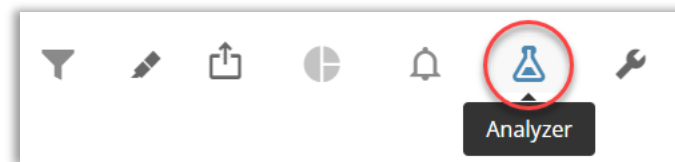
CANCEL SAVE D



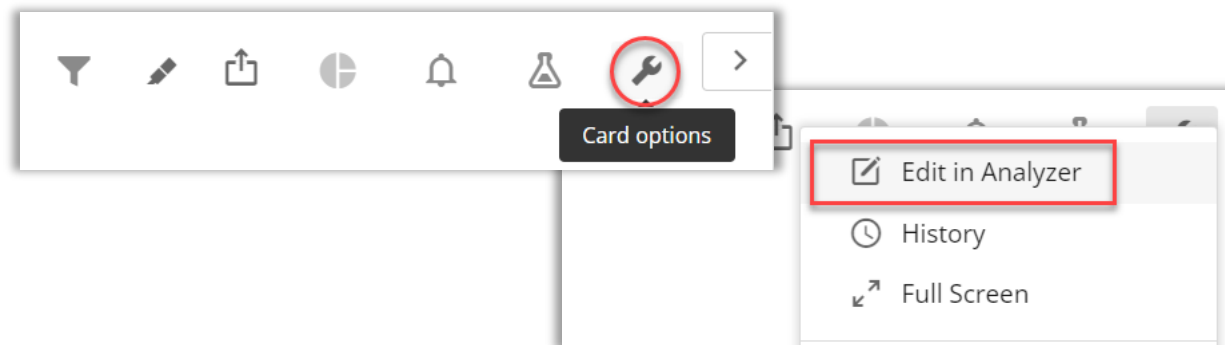
# Accessing Analyzer

From the card details, the Analyzer can be opened into two ways:

- Using the *Analyzer* icon



- Using the card options (wrench) and selecting **Edit in Analyzer**



# Analyzer Layout

Analyzer could appear overwhelming when looking at all the options and available functions. Let's break down the different components to utilizing the tool to design your ideal chart

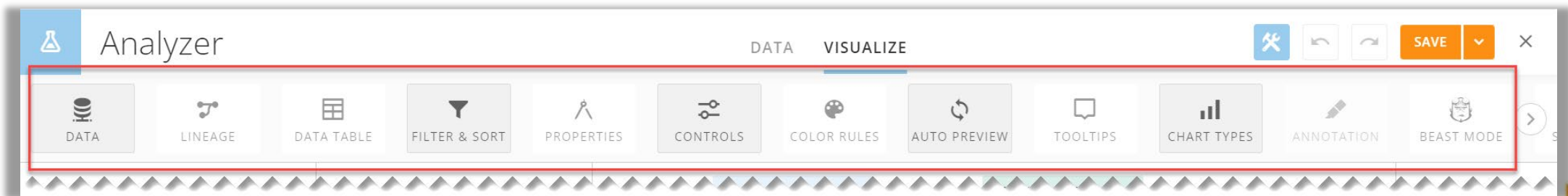
The screenshot displays the Analyzer tool interface with the following components:

- Header:** "Analyzer" title, "DATA" and "VISUALIZE" tabs, and a "SAVE" button.
- Navigation Bar:** Buttons for DATA, LINEAGE, DATA TABLE, FILTER & SORT, PROPERTIES, CONTROLS, COLOR RULES, AUTO PREVIEW, TOOLTIPS, CHART TYPES, ANNOTATION, and BEAST MODE.
- Left Panel (DATA):** Shows the data source "v2\_Prod\_Clients" (2.9M rows) and a list of dimensions (Account, Account Group) and measures (ClientKey, Latitude). It also includes "BEAST MODES & SEGMENTS" and options to "ADD CALCULATED FIELD" and "ADD DYNAMIC SEGMENT".
- Middle Panel (FILTERS):** Lists filters such as "Account Group in AZ", "Active Status in Y", "Payer in AZCCCS", and "Service Code in". It also includes a "SORTING" section and a "LIMIT ROWS" dropdown set to "All rows".
- Right Panel (CHART TYPES):** Shows the selected "Pie" chart type and other options like Donut, Table, Heat map, and Single value.
- Visualization:** A pie chart titled "Active Client List By S" for the period "Jan 1, 2021 - Feb 16, 2023". It shows 1,739 total active clients. The chart is broken down into categories: Skills Training (439), Attnd Care; Family (home) (533), Attendant Care (386), Attendant Care; Family (non-res) (305), Respite Care, 15 min (96), Attendant Care; Spouse (43), Home Health- RN (7), and Home Health- LPN (3).
- Bottom Right Panel (CONTROLS):** Includes "Provider Type" and "Service Code" sections with checkboxes for "Select All" and specific values like G0299, G0300, H2014, S5125, and S5150.

# Analyzer Toolbar

Provides access to buttons that let you show or hide various tools in the Analyzer interface. When a button is selected, it will appear in a darker grey color on the toolbar. Enable or disable toolbar options as appropriate to maximize the viewing panel.

**Best Practice:** use the **DATA, AUTO PREVIEW & CHART TYPE** to create the desired chart and then enable **FILTER & SORT, PROPERTIES** and **CONTROLS** to customize the chart view and functionality options

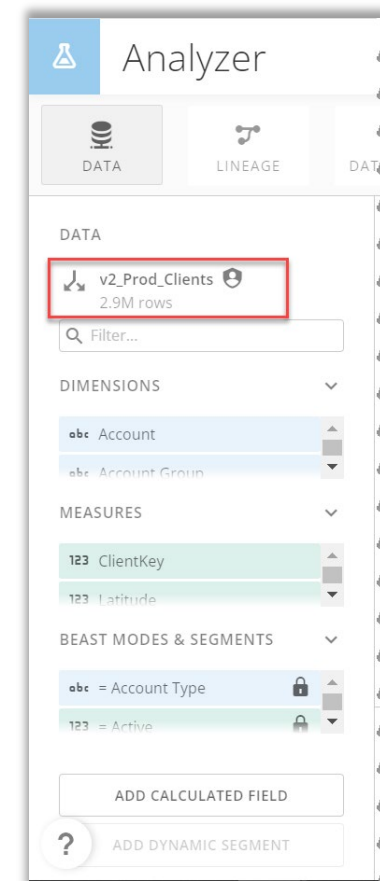


# Data panel

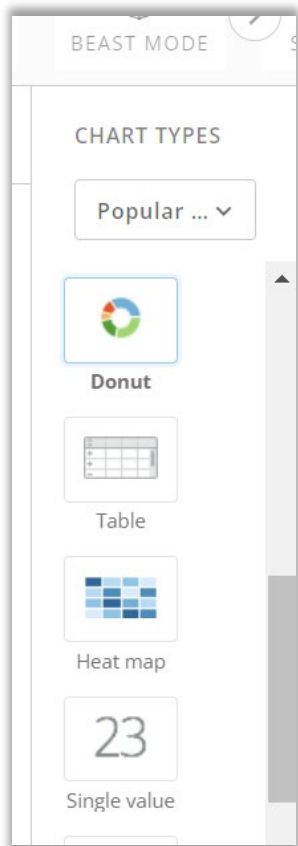
This displays the DataSet powering this chart. It shows the columns from this DataSet that you can apply to your chart.

- **Dimensions** – columns that contain items with "string," "date," and "date-time" data types. This is color coded in blue within the Analyzer.
- **Measures** – columns that contain items with a "value" data type. Typically, this is a calculation and not an actual part of the data. This is color coded in green within the Analyzer.
- **Beast Mode** – columns that contain formulas and calculations like those found in Excel. These columns can be either text or values but will begin with an equal (=) sign

You apply columns to your chart by dragging and dropping them from this area into the column fields above the chart preview area.



# Chart Types Panel



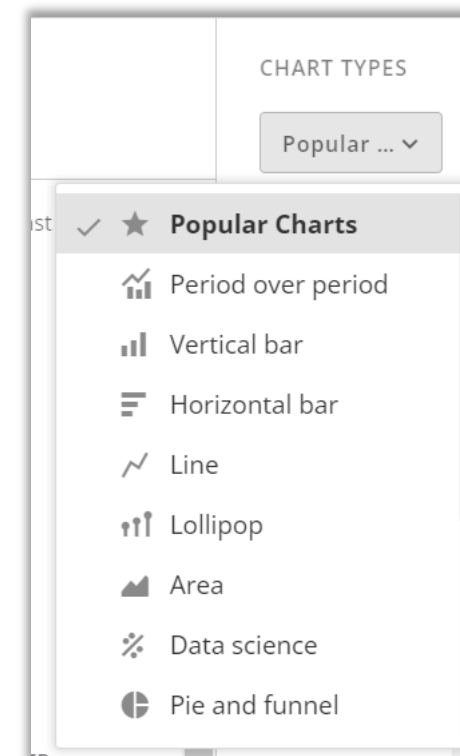
When determining the type of chart to use, it should be determined by the question or problem you are trying to solve. The original card depicted data in a chart or table format.

Use the Chart Types to select a different view of the data

- ▶ Click on the drop-down option to display the different chart types available and select the desired chart



Note: the system will make selections for the data options; however, these can be updated to your data points.



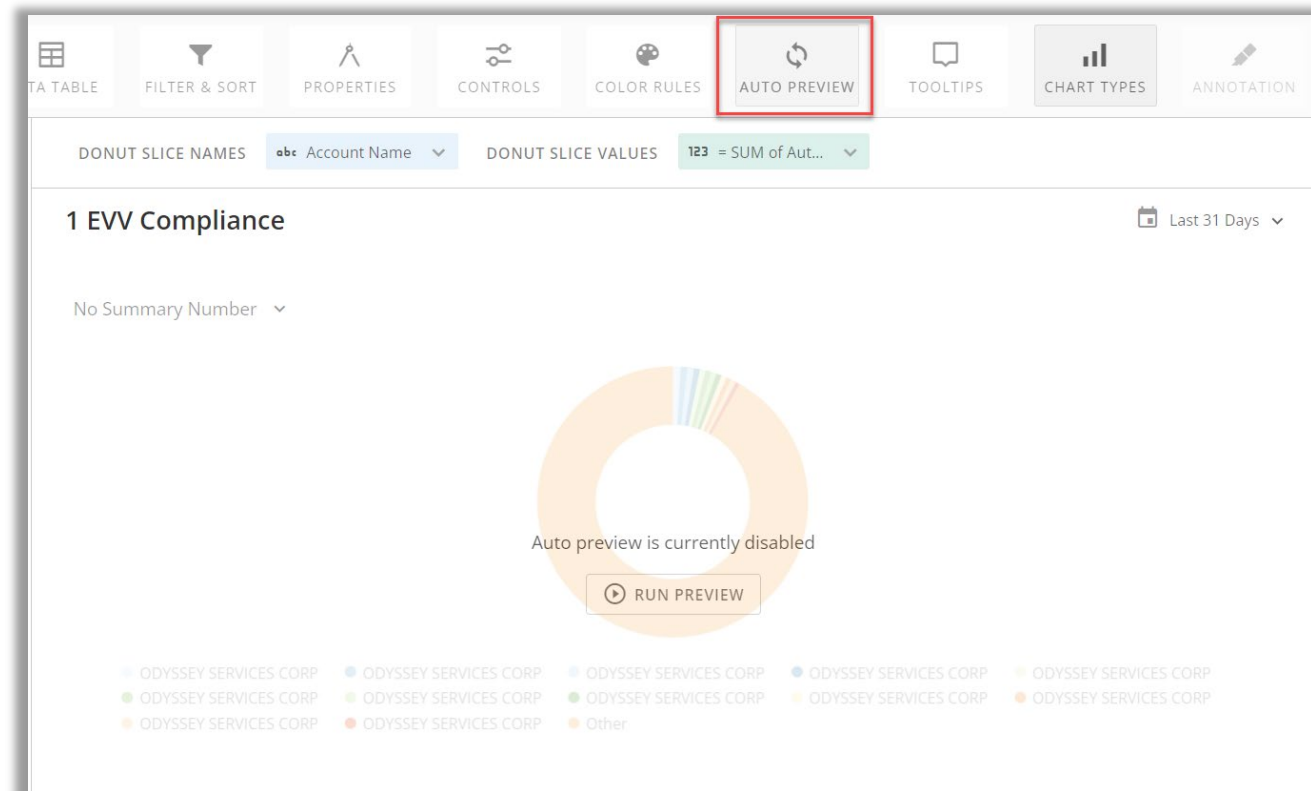
# Auto Preview Panel

The AUTO PREVIEW panel can be toggled off/on for automatic updating of the chart preview when changes are made

Disabling the preview could provide a faster editing experience, especially for very large cards.

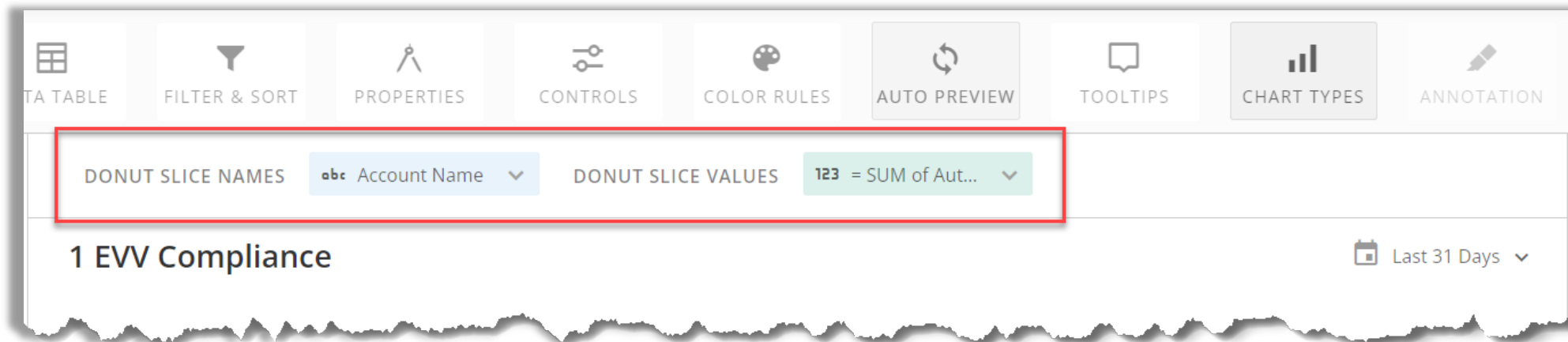


Note: click on **RUN PREVIEW** to display changes made



# Column Fields

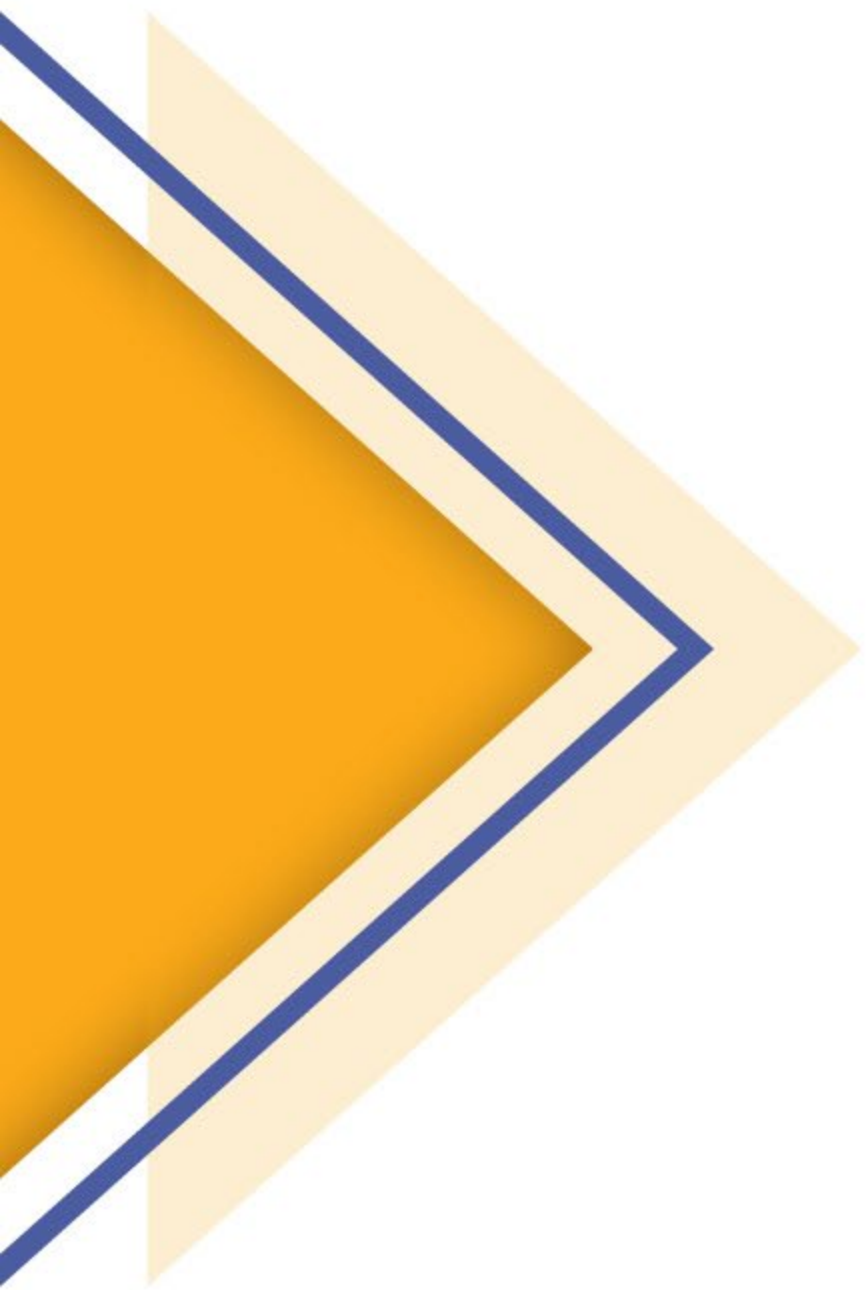
A dataset will have different columns available to modify your chart. To apply columns, you drag them from the available columns on the left side of the Analyzer (located in the DATA panel) into the appropriate fields in this area. These fields differ between chart types.



# Additional Toolbar Panels

- ▶ **FILTER & SORT**– enable this panel to adjust the filters for the chart as well as the sorting for the data. Use this panel with the **CONTROLS** panel to modify the filter options available to be displayed as a “Quick Filter”
- ▶ **CHART PROPERTIES** – the chart properties can be adjusted to include the location of the legend options, numbers vs currency, decimal places and other formatting options available
- ▶ **CONTROLS** – use this panel to modify the filter and sort options to modify the data on the chart in real time. Note: these options are enabled under the **FILTER & SORT** panel as a “Quick Filter”
- ▶ **DATA TABLE** – this panel shows all the data powering this chart.



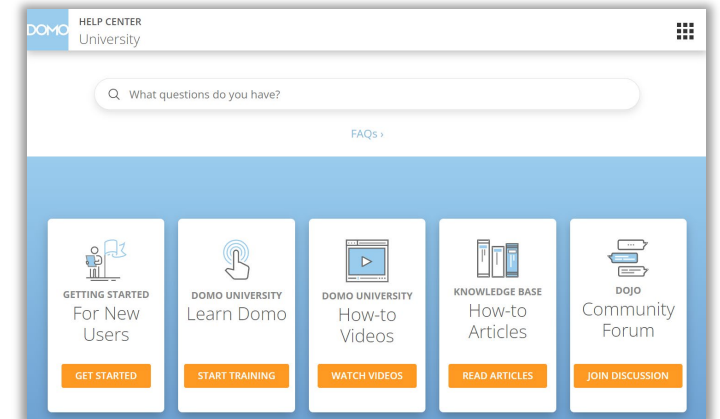
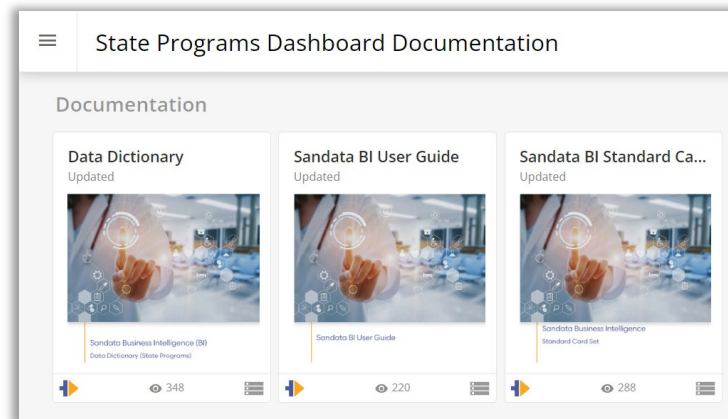
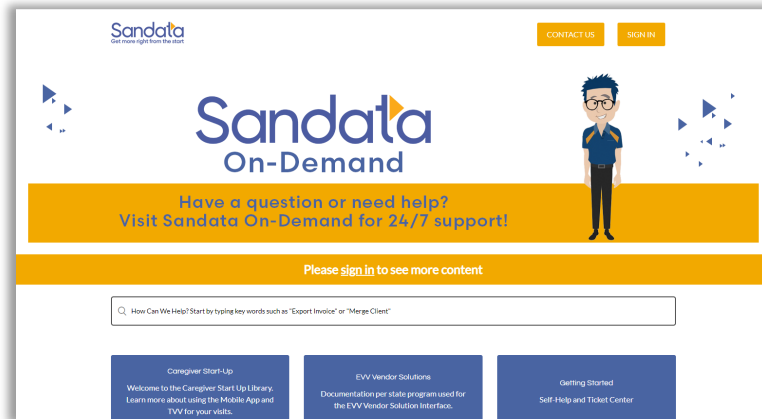


# Guided Exercises

# Resources

There are several resources available that can be found online and easily assessable.

- Sandata On-Demand – reference materials, videos and the BI Quick Reference Guide
- State Programs Dashboard Documentation – located within Sandata BI dashboards are the following guides: **Data Dictionary**, **Sandata BI User Guide** and **Sandata BI Standard Card Description**
- DOMO Learn – access to DOMO Help Center



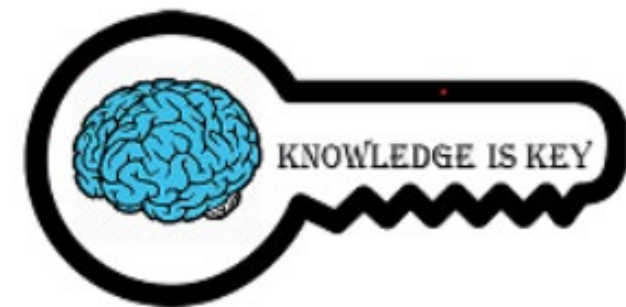
# State Programs Dashboard Documentation

Data Dictionary



# What You Have Learned

- Create a copy of an existing card and save the card in the Overview dashboard
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- Walk through the guided exercises
- Location of resources



# Questions

