

## CO-HCPF Inzata Analytics User Manual

Welcome to the User Manual for Inzata Analytics provided specifically for the Colorado Department of Health Care Policy & Financing (CO-HCPF). This manual is designed to serve as a comprehensive guide for all users, empowering you to navigate, understand, and effectively use the Inzata Analytics platform for data reporting and analysis.

Whether you are a seasoned data analyst or a novice user, this manual will provide the necessary steps and details to ensure you can access and utilize the platform efficiently. We've structured the guide to be user-friendly, providing clear, concise instructions, screenshots, and a glossary of terms for quick reference.

Here is what you will find in this manual:

**1. Accessing and Navigating the Reporting Tool:** This section will introduce you to the Inzata Analytics platform. It covers how to log in, navigate through different sections, and use essential features of the reporting tool.

**2. Data Submission Process:** This section delves into how you can upload and submit your data to the Inzata Analytics system. It provides step-by-step instructions, from data preparation to successful submission, ensuring your data is ready for analysis.

**3. Accessing and Downloading Reports:** This part of the manual is dedicated to teaching you how to access various reports within the Inzata Analytics platform and download them for offline use. Whether you need a quick snapshot or a detailed report, this section will guide you through the process.

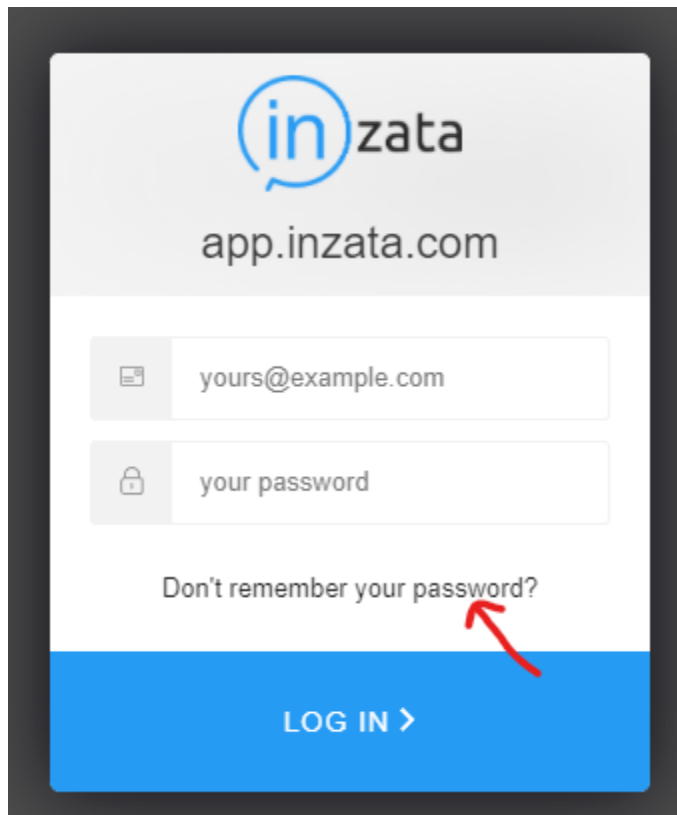
**4. Glossary of Terms:** To ensure that you fully understand the terminology used within the Inzata Analytics system and this manual, we've included a glossary. This comprehensive list explains all the technical terms, abbreviations, and jargon you might come across while using the platform.

Remember, the primary goal of this manual is to make your experience with the Inzata Analytics platform as seamless and productive as possible. So, take your time to read through each section, familiarize yourself with the system, and don't hesitate to refer back to this guide as often as you need.

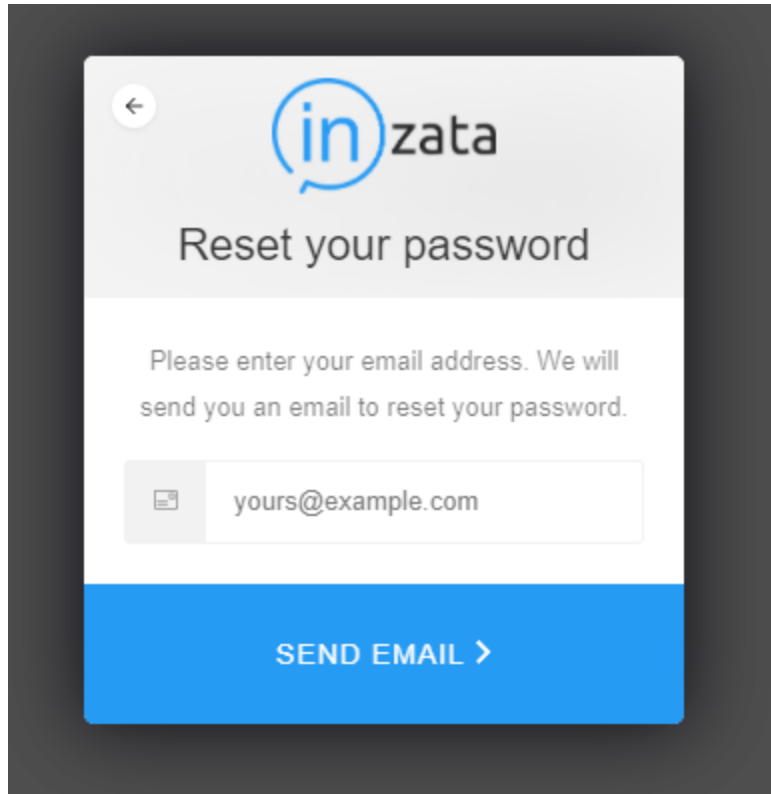
**Let's dive in and get started with Inzata Analytics.**

After your account has been created by an Inzata staff member, complete the following steps to log in to the platform for the first time.

1. Go to [app.inzata.com](https://app.inzata.com).
2. Click “Don’t remember your password?”



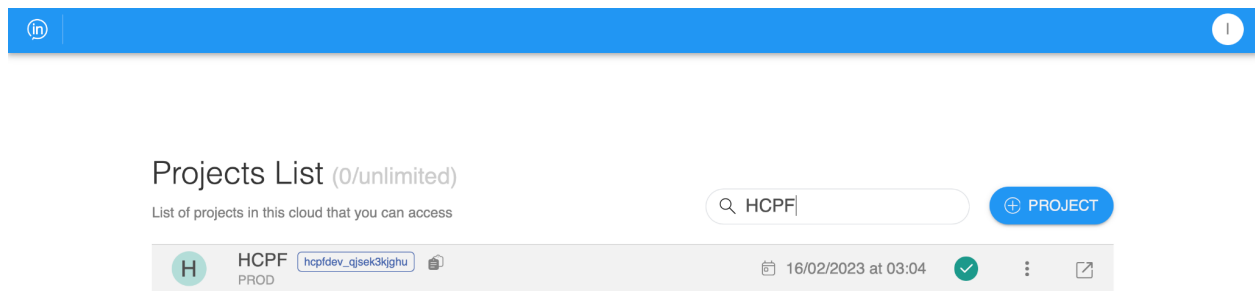
3. Enter your email address and click “Send Email”



**4. Go to your email and follow the steps to set up your password, then continue to log in at [app.inzata.com](https://app.inzata.com).**

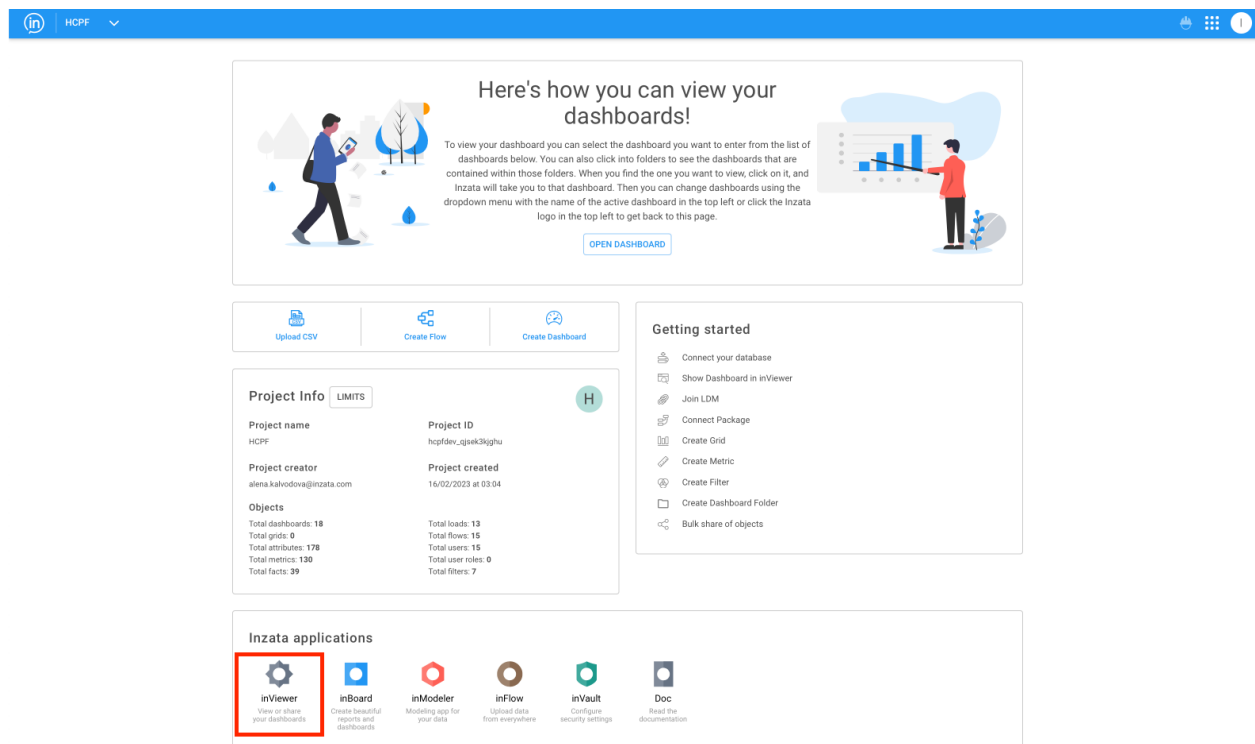
**Note: If there are any issues gaining access to the Inzata Platform, reach out to [help@inzata.com](mailto:help@inzata.com) for assistance from our customer support team.**

Once you are logged in to Inzata, the first page you will see is the Projects List Page:



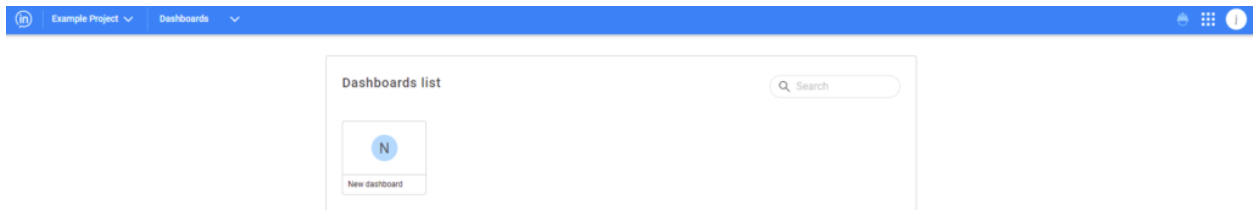
**Note: You will only see projects for which you have access to, in this case, HCPF PROD.**

You will then need to click on the HCPF project which will then take you to the Dashboard landing page:



Once on this page, scroll down and click on the gear icon labeled, “InViewer”. InViewer is our in platform dashboard viewing application.

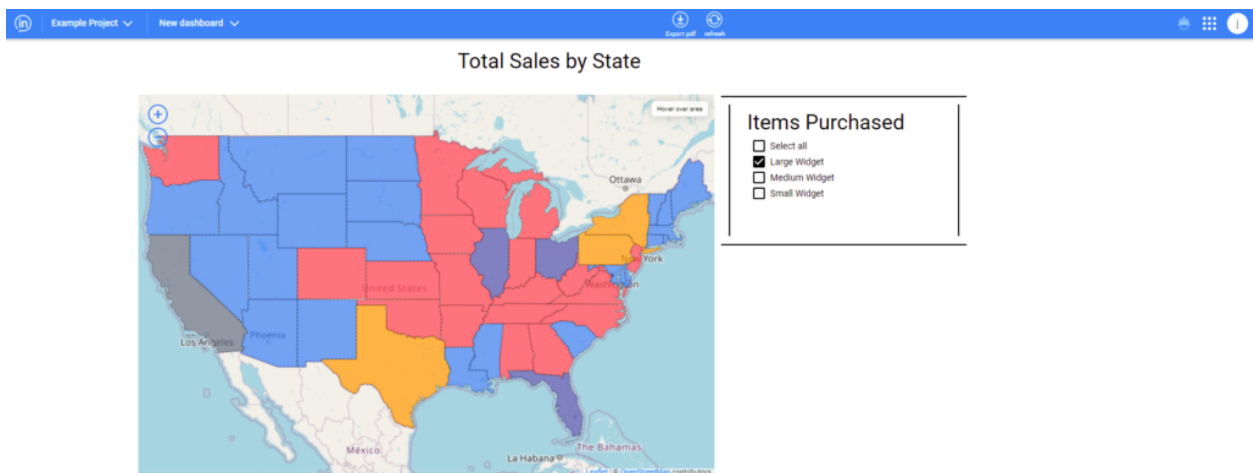
## Dashboard List / InViewer Landing Page



After opening the InViewer app from your Inzata homepage, the user will be brought to a page name listed in the top blue bar to the far left. By clicking on that name, the drop down menu opens, listing out the other projects that a user can access. To the right of the project name in the top blue bar is the word “Dashboard”. By clicking on that word, the drop down menu displaying the dashboard list will open. This is one of the ways to view the list of dashboards that the logged-in user can access within the project specified on the top left.

However, the main way to view the list of accessible dashboards within a project is the central panel with the heading “Dashboards list”. Within this panel, there will be separate boxes for each dashboard that the signed-in user can access. An alternate way of finding the dashboard in this panel is to use the search box in the top right of the “Dashboards list” panel.

## Dashboards



### Dashboard Example

The InViewer dashboards are for end-users who do not have access to InBoard, but do have access to view certain dashboards. The different widgets, grids, and other features of the dashboards and their functionalities and uses are discussed in the InBoard documentation.

Users can access dashboards in InViewer directly from three places:

- the dashboard drop down menu in the top left of the webpages, on the blue bar, within the InViewer module.
- the panel containing the list of dashboards that a user has access to on their Inzata user homepage.
- the panel containing the list of dashboards that a user has access to on the InViewer navigation or launch page.

While looking at dashboards, the project name for the dashboard is listed in the top blue bar to the far left. By clicking on that name, the drop down menu opens, listing out the other projects that a user can access. To the right of the project name in the top blue bar is the name of the currently displayed dashboard. By clicking on that name, the drop down menu displaying the dashboard list will open. This is one of the ways to view the list of dashboards that the logged-in user can access within the project specified on the top left.

Two more notable aspects of the dashboard view from InViewer are the Export and Refresh buttons.

#### Export Button

The export button takes a snapshot of the dashboard with the filter settings as they are currently set in the prompt filters and then saves it to the viewing user's computer. Upon clicking the export button, the browser will start to save the pdf.

#### Refresh Button

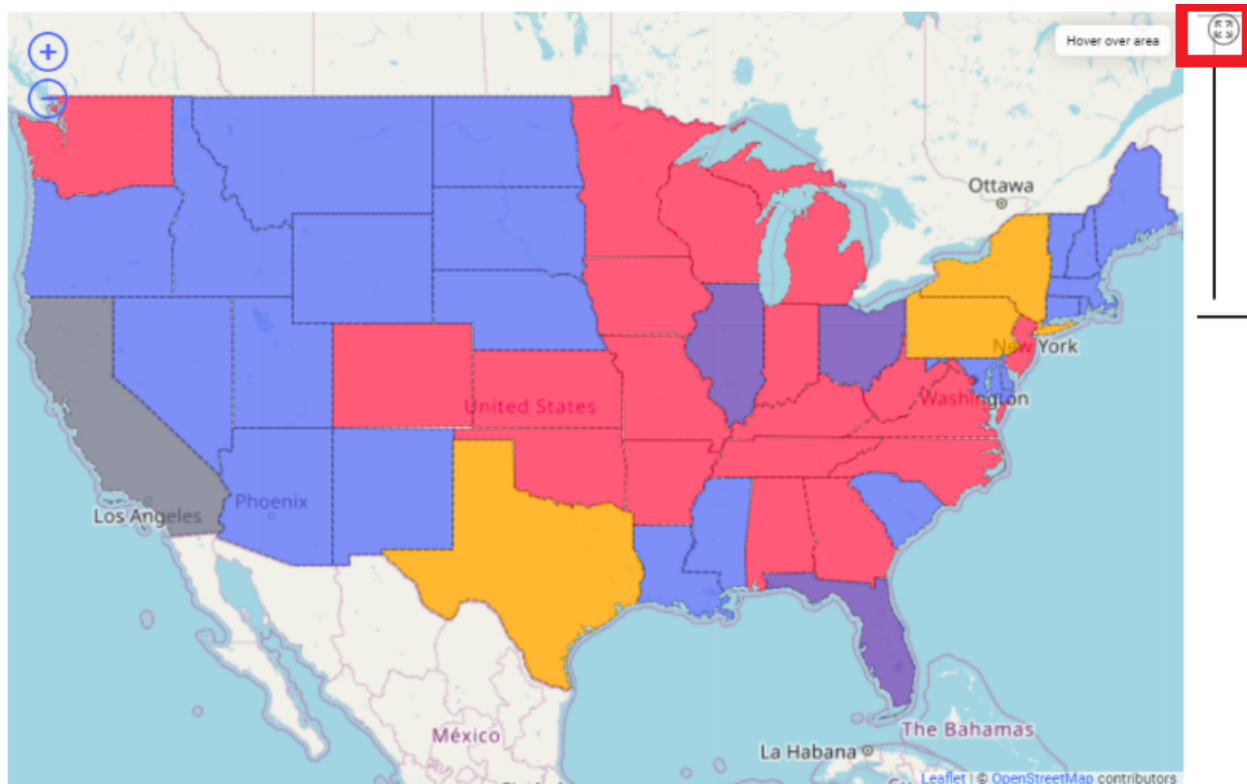
The refresh button's eponymous function is to refresh the dashboard that is currently being viewed. More specifically, it forces all the reports within the dashboard to reload all their information. This can serve to troubleshoot basic issues and to pull new information that may have been sent into Inzata from InFlow. For example, if there is an error in the network communications between the viewer's browser and the Inzata cloud, then a single report or multiple reports may fail to load data. If this were to occur, the user should use the refresh button.

#### Interacting with a Dashboard

When viewing a dashboard, there are multiple ways to change or interact with the different visualization and tables. Two minor ways to do so are by hovering your cursor over different parts of visualizations. This will create a small pop-up that will display the label information for the data being hovered over. Additionally, in the map report widgets, the InViewer users can click and drag to slide around the view of the map, and users can zoom in and out using the + and – buttons and the scroll bar on their mouse.

The two more powerful ways to interact with a dashboard are the Ad-Hoc Mode and Prompt Filters.

While the prompt filters are directly interacted with while viewing the dashboard itself, Ad-Hoc Mode requires the user to click on the small expanding circles in the upper right corner of a report, shown below in the red rectangle.

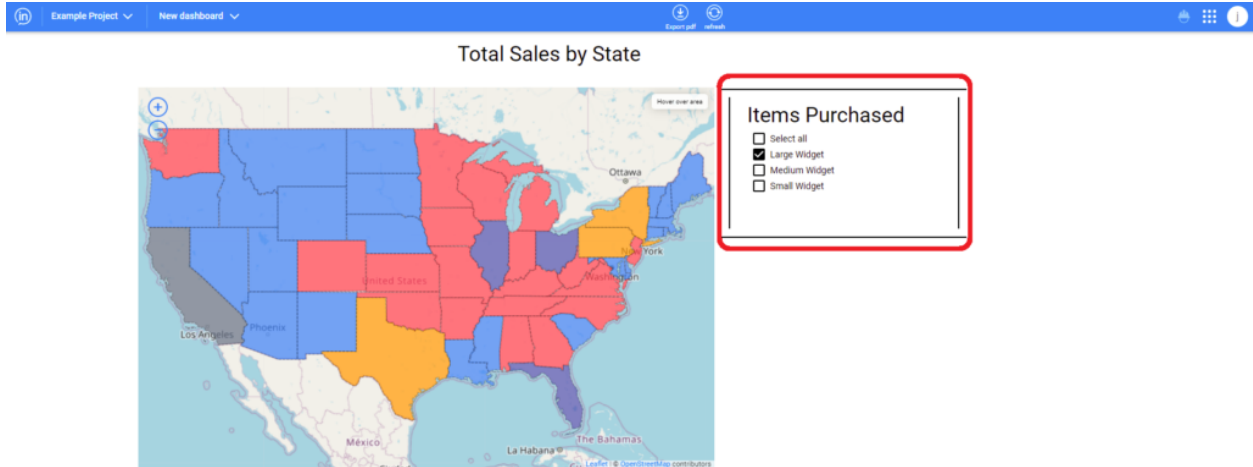


### Prompt Filter

Prompt filters are a way for InViewer users to dynamically filter the data feeding the visualizations in reports displayed in dashboards. There are six different variations of the prompt filters:

- Text
- Slider
- Dropdown
- Checkbox
- Radio
- Date Picker

Below is an example of a Checkbox format prompt filter. It is the only filter that allows for multiple selections. The radio and dropdown options function similarly.

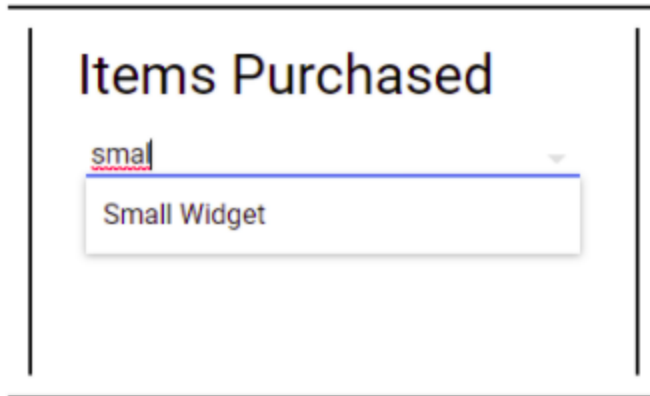


The slider is displayed below, and its functions by clicking an dragging the dot along the line to make different selections. In this example it is used with categorical data, but it is most commonly used for determining date ranges by having one slider designate the start date and the other the end date.

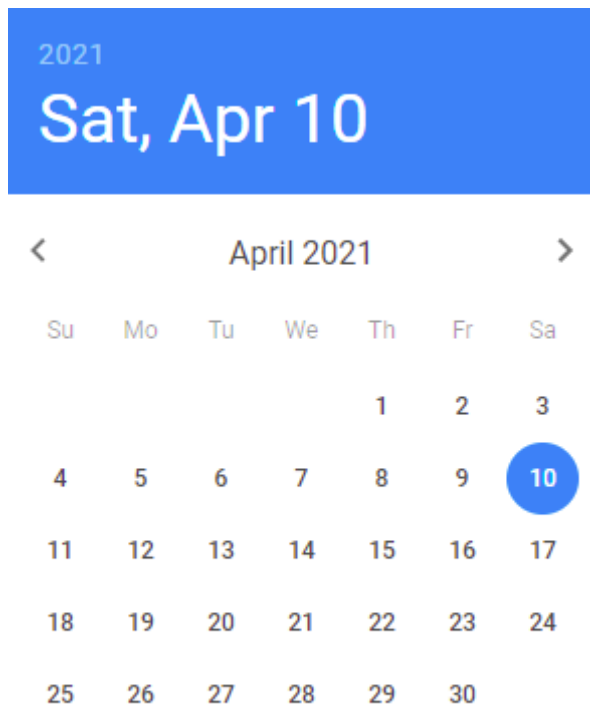


The text variation of the prompt filter allows the user to type in the feature that they would like to filter to. An example is below. It also can auto-complete partial text strings and can generate a list that lets the user select an option.



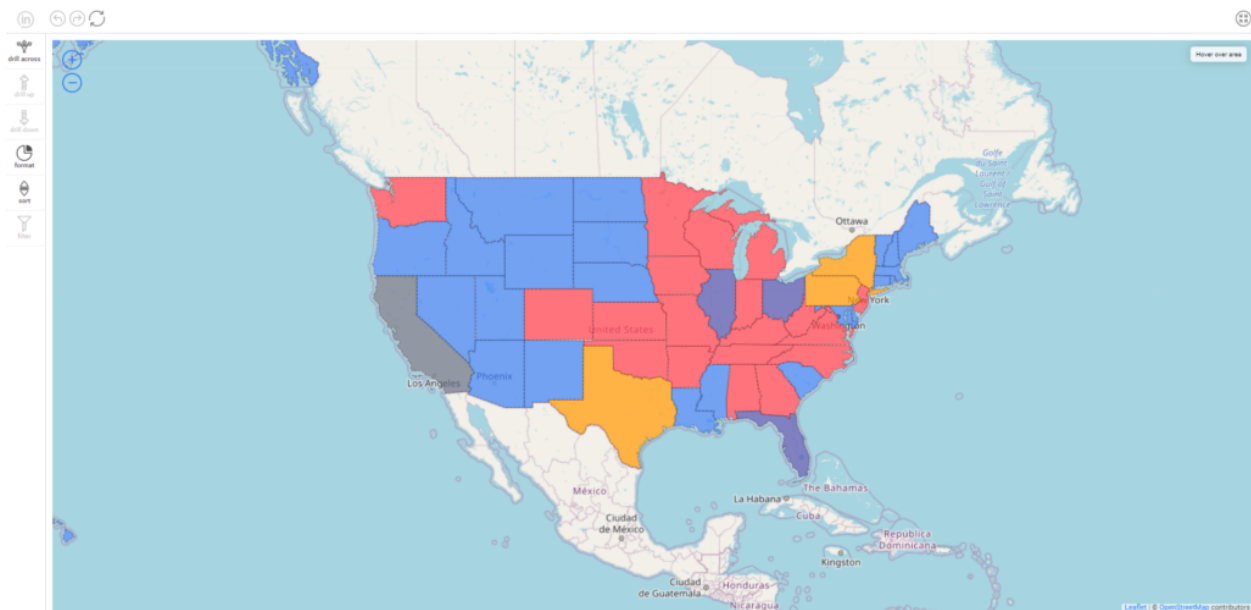


Lastly, the date picker prompt filter lets the user pick out a date to select on a calendar view. See below for an example of one of these calendars.



## Ad-Hoc Mode

Upon entering the Ad-Hoc Mode, the report that it was opened for will be expanded to a full screen view, similar to the view below in the case of a choropleth map.

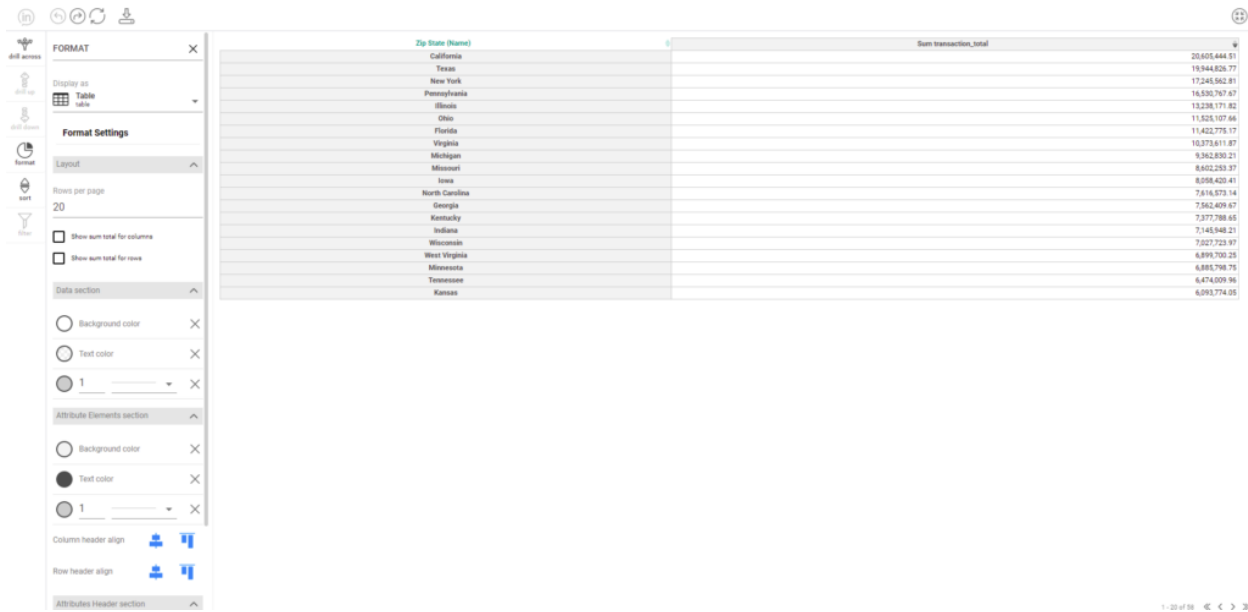


From this view, there are several notable features and functions. The user can still click and drag to slide their view of the map around, as well as use the scroll bar on their mouse and the + and – symbols in the top left to zoom in and out. To exit the Ad-Hoc Mode, the user can click on the circle with the arrows pointing inwards in the top right corner. Doing so will switch the user's display to the dashboard that they were looking at before entering Ad-Hoc Mode.

To the far left of the exit button along the top is the refresh button. The refresh button can be used to pull new information from the Inzata cloud in the event that there was an update to the underlying data in a visualization while it was being viewed.

The button two buttons over to the left is the undo button. It is the curved arrow pointing to the left. If a user drills down, up, across, or filters the data within the report examined in Ad-Hoc Mode, then the undo button can be used to undo the last step drilling or filtering step. The drilling and filtering features are discussed below in this document. Similarly, the button to the right of the undo button and to the left of the refresh button is the redo button. It is the curved arrow pointing to the right. Using this button, the user can redo any drilling or filtering step that was undone via the undo button.

Not shown in the Chloropleth map Ad-Hoc mode on the top bar is the export button as that functionality is unique to table views within Ad-Hoc Mode. An example of that button detailed below:



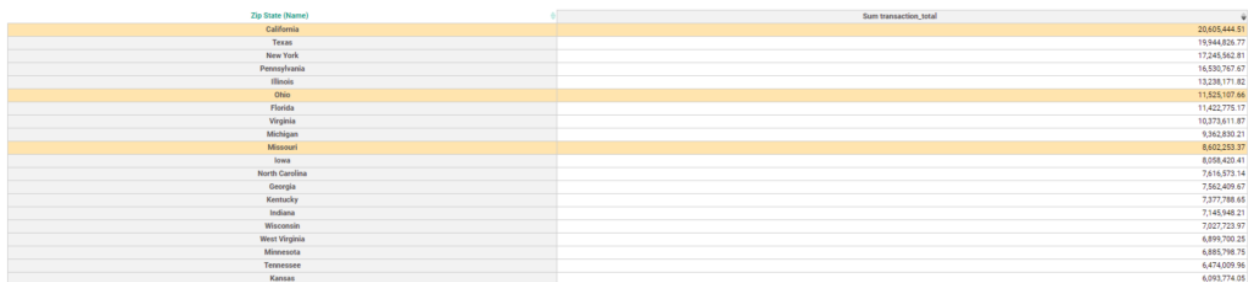
Zip State (Name)	Sum transaction_total
California	20,605,444.51
Texas	19,944,826.77
New York	17,245,562.81
Pennsylvania	16,530,767.67
Illinois	13,238,171.82
Ohio	11,525,107.66
Florida	11,422,775.17
Virginia	10,373,611.87
Michigan	9,362,830.21
Missouri	8,602,253.37
Iowa	8,058,420.41
North Carolina	7,616,573.14
Georgia	7,562,409.67
Kentucky	7,377,788.65
Indiana	7,145,948.21
Wisconsin	7,027,723.97
West Virginia	6,899,700.25
Minnesota	6,885,796.75
Tennessee	6,474,009.96
Kansas	6,093,774.05

### Formatting view in Ad-Hoc Mode

Shown above is a copy of the same report from the chloropleth map display, except it has been re-formatted into a table. To do this, the user must first click on the format button on the far left toolbar, and click on the format that is currently in use in the format panel that pops up. This will generate a dropdown list that contains most of the formats.

In the table format, the export button becomes visible. Clicking on it opens a small menu that has buttons for the two export options: .xls and .csv file options.

### Filtering in Ad-Hoc Mode



Zip State (Name)	Sum transaction_total
California	20,605,444.51
Texas	19,944,826.77
New York	17,245,562.81
Pennsylvania	16,530,767.67
Illinois	13,238,171.82
Ohio	11,525,107.66
Florida	11,422,775.17
Virginia	10,373,611.87
Michigan	9,362,830.21
Missouri	8,602,253.37
Iowa	8,058,420.41
North Carolina	7,616,573.14
Georgia	7,562,409.67
Kentucky	7,377,788.65
Indiana	7,145,948.21
Wisconsin	7,027,723.97
West Virginia	6,899,700.25
Minnesota	6,885,796.75
Tennessee	6,474,009.96
Kansas	6,093,774.05

Filtering is used to narrow a selection that is displayed within a table by eliminating the attributes that are not selected. The attributes are selected by clicking on them, and it is worth noting that metrics cannot be selected. Once the attributes of interest are selected, the user can click the “Filter” button on the far left toolbar to eliminate the unselected options.

## Drilling in Ad-Hoc Mode

There are three ways to drill into data displayed in a table format within Ad-Hoc Mode: across, up, and down. Each type of drilling is named for the way in which the user is drilling through the logical data model hierarchy that the viewed data is within.

- **Drill across**

Drilling across allows a user to include any new attribute that is related to the attributes in the report widget that is being viewed. It drills “across” in the sense that it is not limited to the attributes adjacent to it within the data model, instead it can skip them and drill into other attributes without having to take multiple steps through attributes in the data.

- **Drill up**

Drilling up is a function that works similarly to the “drill across”, except that it is limited to letting the user drill to the adjacent higher level attributes.

- **Drill down**

Drilling down is also a function that works similarly to the “drill across”, except that it is limited to letting the user drill to the adjacent lower level attributes, as opposed to higher levels when drilling up.

## Inzata Data Submission Process:

1. Navigate to <https://upload-co-hcpf.inzata.com/>
2. Log in with the username and password provided to you via email:



### Send Files

Welcome, you can use this easy portal to upload files.

Please ask your administrator for login details.

Username

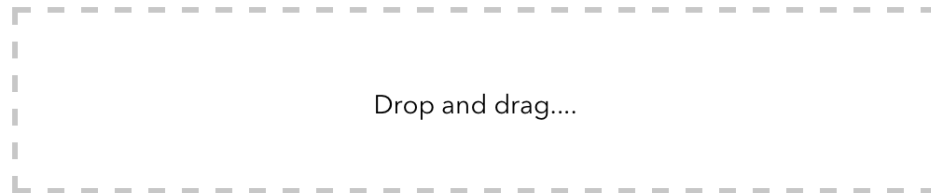
Password

LOGIN

3. Once you are logged in, you will be presented with the file upload page

## Send Files

Welcome, you can use this easy portal to upload files.



no file selected

4. Click “choose file” to open a new window that will allow you to choose the relevant file for upload or, simply click and drag the file from your desktop in to the dotted line box.

5. Once the file has been selected, click on the “Upload All” blue button noted below in red:

## Send Files

Welcome, you can use this easy portal to upload files.

 Screenshot 2023-06-05 at 12.40.43 PM.p... Pending



Choose File  Screenshot...2.40.43 PM

UPLOAD ALL

CANCEL UPLOAD

6. You should see this message if the upload was successful:

## Send Files

Welcome, you can use this easy portal to upload files.

Great, your files were uploaded

UPLOAD MORE

## **Glossary Of Terms:**

1. Inzata Analytics:
  - A platform used for data reporting and analysis, providing users with the ability to access and navigate data, submit their own data, and download reports for offline use.
2. Inzata Dashboard:
  - The landing page in the Inzata platform that provides access to different sections and features of the system.
3. InViewer:
  - An in-platform dashboard viewing application on the Inzata platform.
4. Dashboard List / InViewer Landing Page:
  - A page where a user can see the list of dashboards that they have access to within the project specified.
5. Projects List Page:
  - The first page seen after logging into Inzata, where users can access different projects.
6. Widgets:
  - Components of the dashboards displaying different pieces of information in varying formats like charts, tables, graphs, etc.
7. Grids:
  - Structured layout systems used to arrange content on the dashboard.
8. Ad-Hoc Mode:
  - A feature that allows users to interact more thoroughly with the reports, including drilling and filtering data.
9. Prompt Filters:
  - A tool that allows users to dynamically filter the data feeding the visualizations in reports displayed in dashboards. There are six variations of prompt filters: text, slider, dropdown, checkbox, radio, date picker.
10. Export Button:
  - A feature in InViewer that allows the user to take a snapshot of the dashboard and save it to their computer.
11. Refresh Button:
  - A feature that refreshes the current view of the dashboard, reloading all the information.
12. Choropleth Map:
  - A type of thematic map where areas are shaded or patterned in relation to a data variable. This provides an easy way to visualize how a measurement varies across a geographic area.
13. Data Submission Process:
  - The steps for uploading and submitting data to the Inzata Analytics system for analysis.
14. HCPF PROD:
  - An access-limited project within the Inzata system. It is specifically mentioned for the Colorado Department of Health Care Policy & Financing users.

15. Drill Down/Up/Across:

- Techniques used in the Ad-Hoc Mode to explore detailed views of the data (down), move from a detailed view to summary (up), or navigate to data that falls at the same level in the data hierarchy (across).

16. Formatting View:

- A feature in the Ad-Hoc Mode which allows users to change the display of data, for instance, switching a map to a table format.

17. InFlow:

- A data source which sends information into the Inzata platform.

18. InBoard:

- A component of Inzata, which is primarily for users with access to more than just viewing dashboards. The functionalities are discussed in InBoard documentation.

19. File Upload Page:

- The page accessed during the data submission process for selecting and uploading data files.