

Introduction

What is a Statistic?

In Multiview, a statistic is a type of general ledger account that allows you to store non-financial, numeric data in the system. The information can be derived from a source system, financial ratios, or any other numeric value you'd want to store.

They are limited to being a number with 2 decimal places, the same as financial values stored in a journal entry. If trying to add a percentage value, it is recommended to multiply that value by 100. Because they are not financial, journal entries for statistic accounts do not have to be balanced entries.

Statistics can be created in many ways!

- Automatically via the Stats Group Maintenance screen
- Manually via Journal Entry Creation tools or interfaces
- Calculated and created via VPA JE upload reports

Why Use Statistics Accounts?

Statistic accounts allow you to store any numbers in the system and not have it tied to your financial data. This means that it can serve many purposes for different types of users in the system. Since it doesn't tie to your balance sheet or income statement, these numbers only become relevant for users that need them. For other users, they are effectively invisible.

Here are some of the many uses for Statistic accounts:

- Ancillary data related to financial data (check-ins, check-outs, number of procedures)
- Review scores
- Financial Ratios
 - These can particularly be useful for storing historic values and not relying on a calculation. This can assist if you have later adjustments from audits
- Used for storing some values used in the Budget & Forecast module
- And more!

Statistics Setups

Creating Statistics Accounts

Statistics accounts are created in the same location as any other general ledger account in Multiview. To do this, we will first navigate to the **System Maintenance** section, and then the **General Ledger Setup** menu. From here, we will open the **Accounts** screen.

Once on the Accounts screen, you'll be able to see any statistic type accounts by referring to the Account Type column. Each Statistic account will have an Account Type of "Statistic" instead of the financial options of asset, liability, revenue, expense, or capital.

Fixed Left		Account			
Chart Id	Account No ▲	Account	Account Type	DR/CR	Posting Level
REC	REC	REC	=	=	=
01	9900	Facility Square Feet	Statistic	Both Debit/Cre...	Allowed
01	9950	Visits	Statistic	Debit	Allowed
01	9950X	Visits Multiplier	Statistic	Debit	Allowed
01	9951	Patient Days	Statistic	Debit	Allowed
01	9951X	Patient Days Multiplier	Statistic	Debit	Allowed

With the exception of selecting a different account type, other options allowed with financial accounts are also allowed when creating a statistic account. In particular, account control classes can still be set to these accounts to determine which business units can be used with that statistic account.

Important note: when creating a journal entry with a statistic account in any format, you will need to be sure to select a business unit along with that account. For many, this can seem counter-intuitive for simply adding a numeric value as it might not be relevant to any department. Many users will choose to add these types of statistic accounts to either an admin or balance sheet business unit. There are no rights or wrongs here, but consistency will assist with using these accounts in any VPA reports going forward.

Stats Group Maintenance

The Stats Group Maintenance screen allows users to create a query from a ViewSource 360 source. Typically, this will come in the form of either a revenue system (Cerner, or Epic), or a payroll 360 table.

To access this screen, we will navigate to the Multiview section and then the **General Ledger** menu. From here, we can select the **Stats Group Maintenance** screen. Once in this screen, users have the option of viewing different stats groups that have been created to this point. Each stats group is a collection of one or more queries that are added to a statistic to generate a value. Each group will generate together and create a single journal entry. In our test database, we can see a single stats

- **Unit Id Column Name** – this is the column in the Query Source that describes the unit that will be associated with the statistic account. Depending on the query we create below, the eventual output could be a single value, or a value in multiple units.
- **Amount Aggregate** – this gives us multiple ways to calculate our final stat. Normal aggregate values exist here such as sum, average, count, min, and max.
 - Unique to the Stats Group Maintenance screen is the Count Distinct option. Count Distinct allows us to get a count of the number of unique values that exist in a column. This will not count duplicates where the Count option alone would.
- **Round By** – the number of decimal places to round the final value to.

We will populate these columns as follows for this stat account:

- **Query Source** = CERNER_REVENUE_DATA_F1
- **Amount Column Name** = FIN
- **Multiply By** = 1.000000
- **Unit Id Column Name** = DEPTID
- **Amount Aggregate** = Count Distinct

At this point, we have created the parameters about where the final value will go and how it will be calculated. We have not determined how to query the data we're looking for. To do that, we will click on the **Edit Query** button on the screen. This will bring up a query screen that has all the same fields that would be available in the Cerner Revenue Data Inquiry Screen. For the purposes of this example, we will create search criteria as follows:

- **Activity Date** = from CMB to CME
- **Cerner Sub Ledger** = Revenue
- **Med Service Code** = Lab Visit

Important Note: for date fields, it is generally highly recommended to use Relative Dates. For those current dates, the current month will be related to the date the user uses to generate the Stats Group. This does not depend on the actual current date as this field does in other parts of the system.

Once complete, we can see the details for our query on the right-hand docking panel. We can also edit the definition at any time as needed.

Statistics Generation

Since we have completed adding a statistic account, we can now generate our new statistic query. To do this, we'll click on the **Generate Stats** button at the top of the screen. This will open a new window and we will enter an As of Date of 20180131 (January 31st, 2018). Then we can hit the **Submit** button and the system will begin to process our query and create our journal entry.

A new output window will open and will process each stat, one at a time. This window will continue to populate values for each statistic it calculates. Depending on the number of stats in the group, this can take anywhere from a few seconds to several minutes to process. The window can be left open and users can navigate to other parts of the system while it continues to process in the background.

We can now view our newly created journal entries. Since there is no intercompany transactions necessary for these transactions (remember, statistic entries are not required to be balanced), a separate journal entry will be created for each company that contains transactions from our query.

Navigating to the **General Ledger** menu and the **Journal Entry Inquiry** screen, we can view our newly created entries. In the query window, we can simply set the Date Created to today's date. We will then see our 2 created entries. Once was created for company 01, and one for company 10. Selecting an entry, and clicking on the **Edit Entry** option at the top of the screen will allow us to view the full details of this entry and post it, if desired.

To note, we can see that the Accounting Date is set to the As of Date selected when we created our stats run. The Comments section value matches the Stats Group description, and the transaction Remarks field matches the description from the Stats Id description.

Statistic Entries

This screen is in the **General Ledger** menu and then the **Statistic Entries** screen. Here, users are given a query option that will allow users to search for previously created statistic generation runs. For our purposes, we will simply query everything.

We can now see each Stats Group and Stats Id that has been generated, as well as the As of Date for each creation. On the right-hand docking panel, we can view the stats that were generated by this run on the Statistics tab, and also review the settings for that run on the Setup tab. If desired, this screen can also be used to create a new Generate Stats run by selecting the menu at the top of the screen.

Listing								Statistics							
								Statistics Setup Details							
1 of 29								View SQL							
								Stats Data 1 of 4							
Stats Group	Stats Group	Stats Id	Stats Entry	Final Entry	Date Created	Period Id	As Of Date	Company Id	Business Unit Id	Account No	Amount	Business Unit	Chart Id	Account	Accounting Date
IMUG	IMUG Statistics	IMUG1	First Stat	<input checked="" type="checkbox"/>	10 13 23	19M07	01 31 18	01	5470	94600	55.00	FPC - Downtown	1	Lab Proc...	01 31 18
G1	Group 1	LT12	Births - Cesarean	<input checked="" type="checkbox"/>	08 19 22	23M06	12 31 22	10	1900	94600	200.00	Urology Clinic	1	Lab Proc...	01 31 18
G1	Group 1	LT8	IP Surgery Patient Count	<input checked="" type="checkbox"/>	08 19 22	23M06	12 31 22	01	5473	94600	32.00	FPC - West End	1	Lab Proc...	01 31 18
G1	Group 1	LT1	IP Speech Therapy Visits	<input checked="" type="checkbox"/>	08 19 22	23M06	12 31 22	01	5476	94600	42.00	FPC - East End	1	Lab Proc...	01 31 18

Other Generation Options

There may be times when the desired statistic cannot be found in a ViewSource 360 table. There are other ways statistics can be added to the system. The simplest way is by creating a journal entry (either manually or by template) to post.

Users that have custom interfaces in Multiview can have these create statistic entries as well.

ViewPoint Analytics

Creating a Report with Statistics

Now that we have generated some statistics, we can create a simple report. To start, we will navigate to the **ViewPoint BI** menu and select the **My Reports** screen. Here, we can click the **Report Design** menu and select **New Report...**

We will create an Analytics report, as a New Report From Scratch, and give it a Report Name of "IMUG Stats". Finally, we'll select the GL Cube Id and click Next, then Finish. This will now generate a new blank report for us.

Note: this session is not meant to replace a basic VPA course. For users that are unfamiliar with the basics of VPA it is highly recommended to attend a VPA Intro course. This section is only meant to show specifics related to statistics and not an overall course into VPA setups. As such, instructions will be somewhat abbreviated.

Once the new report is open, we can start making the needed adjustments to allow stats to show up on our report. Statistics in a report are governed by the Measures section of the report properties. So, we will open the yellow icons for the Measures. Once open, we will select the measure called Statistical Amount and drag that into the Filters section above the report grid. This will replace the financial measure that is normally present by default for this report.

Next, we will go to the Design tab and add a few additional rows and columns. We will then move to the Organizational Unit section and find the MVAP structure and drag that into the rows of the report. We will right-click on the summary row and click the Expand option. Here we will fully expand the unit ownership structure.

Now, we can open the Relative Periods option and drag the Current month option onto the top of column 2. After that, we will open up Account and then the Consolidated Accounts Ownership. Here, by navigating to Orphans, we can find account 94600, Lab Procedures towards the bottom of the list. We will also drag this to the top of column 2 on top of the Current month.

Finally, to limit the total transactions, we see when calculating this report, we'll go to the Suppress menu at the top of the screen and select Rows. Now that all this is done, we can change the Closing period in the upper right corner to Jan 31, 2018, and hit the calculate button.

Once the calculation is completed, we'll see our calculated report showing values in the units that we generated our statistics for previously.

Note: while in this example we added the Statistical Amount measure to the main report filter, it can also be done on a case-by-case basis in a row, column, or even cell intersection as needed.

It should also be noted that depending on how your stat is built, a year-to-date column may not give you the value you're expecting. VPA will simply add the value of stats for each month that is being calculated when aggregating more than a single month. For more sophisticated reporting needs, cell intersections may be needed. Separate stats for both month-to-date and year-to-date may also be needed.