Commissioning Programme
Tools for Rapid Analysis of Care Services (TRACS)

User Guide

Draft Version 0.1

Date 04th April 2008

Background

Document Purpose and Use

The aim of this document is to provide a comprehensive guide to the background and structure of TRACS, minimum system requirements, how the it uses is gathered, how to gather the data and how to refresh that data within the core TRACS application. In addition to this, the document hopes to provide a thorough user guide to the functionality available within and provide explanation of various ways to examine your data to identify scales of opportunity within your current pricing model.

Numerous appendices are included at the end of the document detailing more in depth information regarding structure, table and field lists and a summary of key words and frequently asked questions.

You will also find on the back cover of the document a list of useful contacts for this and other workstreams available from CSED.

The number of screen shots has been condensed to show the outcome where appropriate; each screen shot will have comment boxes applied to them. Wording in green represents a comment. Wording in light yellow represents an action. See below for example.

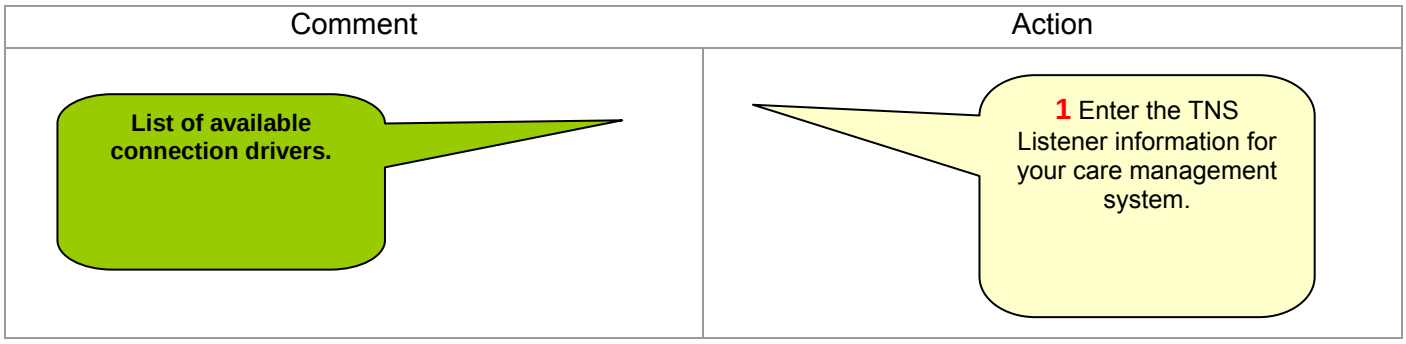


Fig.1

Most of the screen shots used are from a Windows XP environment and may vary slightly from your own environment if you are using Windows 2000 / Vista. This applies to all components of TRACS.

CSED & Better Buying

The Care Services Efficiency Delivery programme (CSED) was formed in 2004 to help councils achieve their Gershon efficiency targets across adult social care. 18 Months was spent working with 32 councils gathering detailed data (Deloitte & Touche) which resulted in a big report with many recommendations.

In 2005 the programme was restructured. A new programme director was installed (Richard Allman) with a new focus on Pragmatic on the ground support; A new (reduced) budget helped focus and tightly define CSED's workstreams.

CSEDs mission is to deliver evidence based, pragmatic and practical efficiency improvement solutions within a whole systems context, using proven in-depth case study materials of successful implementation. To facilitate efficiency improvements, process and system change across multiple councils via the introduction of common standards and leveraged approaches.

Working with 5 pilot councils CSED developed an approach to the ACM Process and kicked off regional ACM micro/macro model in late 2006. We are now engaged with all ADASS regions on a broader programme of works.

Ultimately, we will be valued on what we actually deliver, not on what we promise to deliver.

Workstreams we are currently running;

- Referral, Assessment and Care Management
- Electronic Monitoring of Home Care
- Homecare Re-ablement
- Demand Forecasting and Capacity Planning (POPPI)
- Transforming Community Equipment and Wheelchair Services
- Buying Process improvement & Opportunistic Buying ('Better Buying')

Initiatives developed;

- Blue Badge
- Client Contributions
- Financial Assessment
- Enquiry Management
- Management Operating System
- Mobile Working
- Access Management
- Better Brokerage
- Streamlining Paperwork
- Others in development …
  - Change Culture Assessment
  - eEnabled Assessment Booking
  - eEnabled Package Placement

What TRACS is, What it Does, and How it does it

Tools for Rapid Analysis for Care Services is an open source software product which interfaces with Care Management Systems for analysing, simulating and presenting social care and related data.

In short, TRACS;

- Models changes to pricing
- Models changes to quantity
- Models changes to cost
- Models changes to services
- Lets you see the data in graphical form

All via a graphical point and click interface within totally interactive timescales (seconds not days). TRACS is intended to be used initially in meetings with commissioning strategy managers to identify possible areas/scale of opportunity in pricing models. Functionality is now included to enable some verification and data trail. Although TRACS is a strategic tool and not an operational tool we have endeavoured to ensure that calculated costs are as accurate as possible based on your data.

TRACS comes in three parts;

Application – TRACS.mdb
This is the main Access database file, within this file is graphical user interface that is intended for use by the end user. This part of the application performs the main set of calculations that enable TRACS to do what TRACS does best.

Import – Authority Import.mdb
The import database contains sets of logic that when connected to your Care Management Systems database via ODBC extract relevant information and migrates the data to the TRACS Common Data Set (CDS).

Warehouse – Authority Data.mdb
The TRACS warehouse is where the main TRACS application stores the processed information in a format which enables the speed of calculation necessary. TRACS has a separate data store to enable the flexibility for the application to be used on multiple systems. MSAccess 2003 has a file size limit of 2GB, most care management system extracts are well within this limit however if data was required from more than one system that figure could be breached. By storing each system in a separate file accessed through the common front end this potential pitfall is avoided.

The system allows you quick access to simulated cost data which is easy to remodel using the in built functionality. Using your own care management system data, open care package costs are calculated for each week of required service then multiplied appropriately to see scale of opportunity based on annualised cost. TRACS allows whole package population modification in addition to unlimited subset selection. Multiple options for pricing tables including price breaks by supplier and quantity. Price table substitution and more allow for a truly powerful flexible approach.

The Demonstration Data

What is it, where is it from?

The Tools for Rapid Analysis of Care Services application CD contains in addition to the core application, templates and other useful documents a set of Demonstration data that enables the demonstration of the full range of capability of the system.

With a specific authorities permission we have taken a copy of their care management system data that is required to populate and operate TRACS. As the data is a representative set of local authority data this makes it ideal to use as a test bed. To ensure anonymity all personally identifiable information has been nulled. All suppliers have been renamed to ensure commercial confidentiality and prices have been randomly “tweaked”. In addition to this we have transposed those clients from their original location to Cardiff so that the capability of the inbuilt Mapping/G.I.S. system can be utilised.

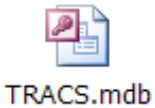
How to get it going

When you first get the CD there are a Few steps you will need to follow in order to get the system up and running using the Demo data.

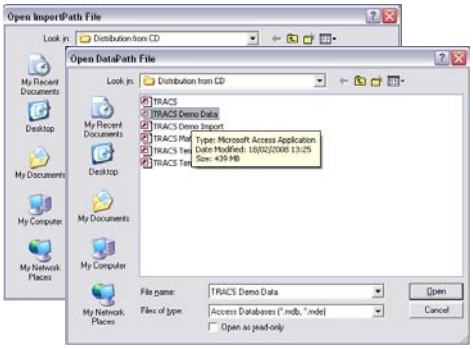
Firstly, create a new empty folder on your PC’s hard drive “C:/TRACS” (where c: is your local hard disk).

The information that you need is stored within a self extracting ZIP* file on the CD. Open the CD to view the contents by double clicking "My Computer" on your desktop or going to "Windows Explorer" and choosing "My Computer". Find the device which now contains the TRACS CD and either double left click, or right click and "Explore"/"Browse" the contents.

Find the “TRACS Distribution.exe” file and extract the contents to the folder you created earlier.
When the files have been unzipped switch to the folder, locate the TRACS application file and double left click to open.



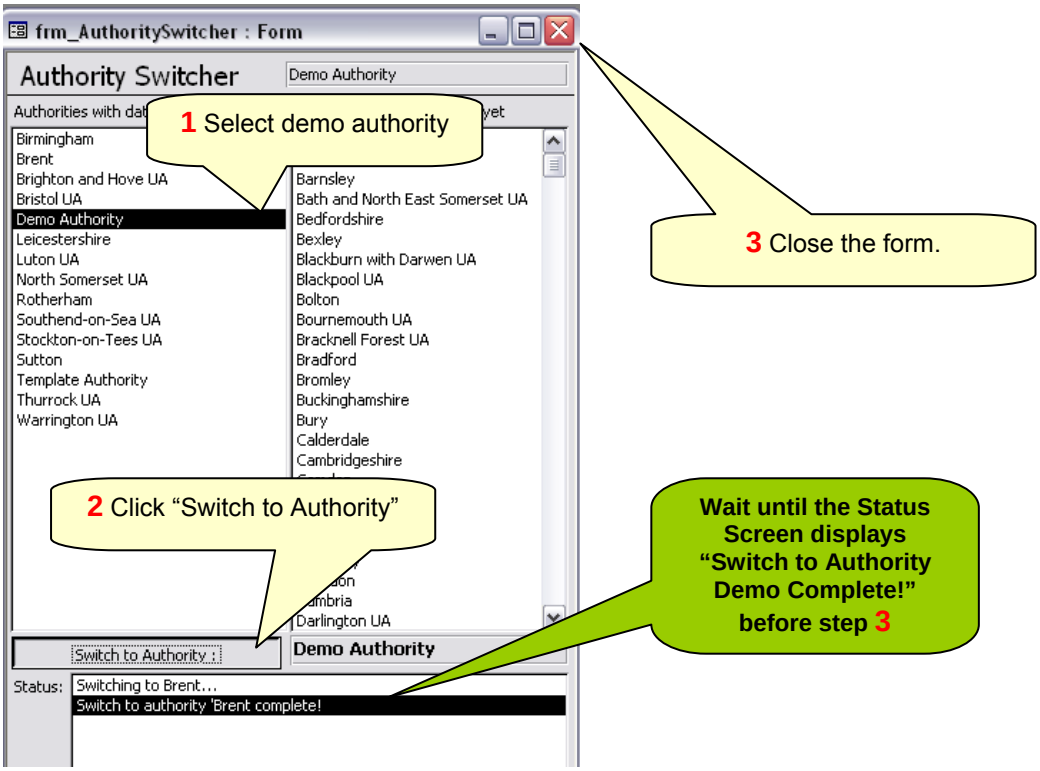
The FIRST time that you open an installation of TRACS you may encounter some dialog boxes that you would not usually expect to see.



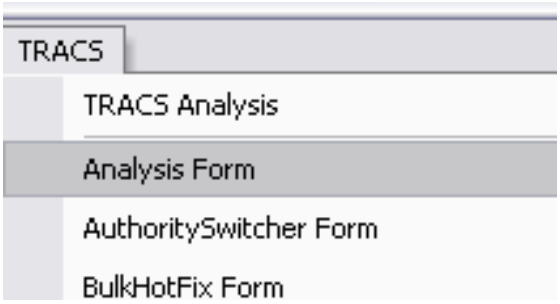
There are two dialog boxes that will open, sequentially asking for the location of the “Data” database and the “Import” Database.

Point these towards the “Sample Data” database and the “Sample Import” database.

If the Authority Switcher form opens;



The next time you open TRACS you will be taken straight to the Analysis screen, for now access the TRACS menu and select “Analysis Form”.

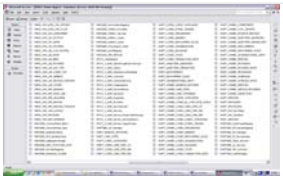
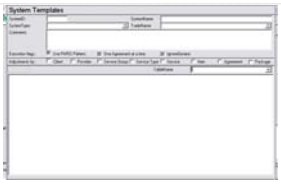
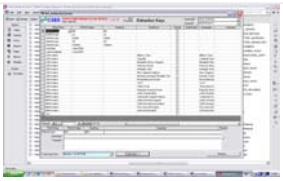


Initial Setup and Configuration

Outline Process

The below diagram outlines the process which must be undertaken to populate TRACS with data from your own system;

The process below assumes that you will be using a template logic as a starting point.

TRACS	TRACS Demo Import	**Comments**
		ODBC Connection set up to correct care management database.
		Tables are linked via ODBC to live system tables
		Add system details to the template list.
		Copy extraction logic from another template to your own system.
		Set and check extraction keys table, so that only required information is extracted from your system – ensures only necessary minimum network traffic.
		Extract Data using specified template. Data is copied from your live system to a set of intermediate tables in a pre determined format (as defined in the template selected)
		Open TRACS and from the Menu Choose the “Packages Form”.
		Click the “Import Lookups” button. Once completed a status message will confirm that this stage is completed.

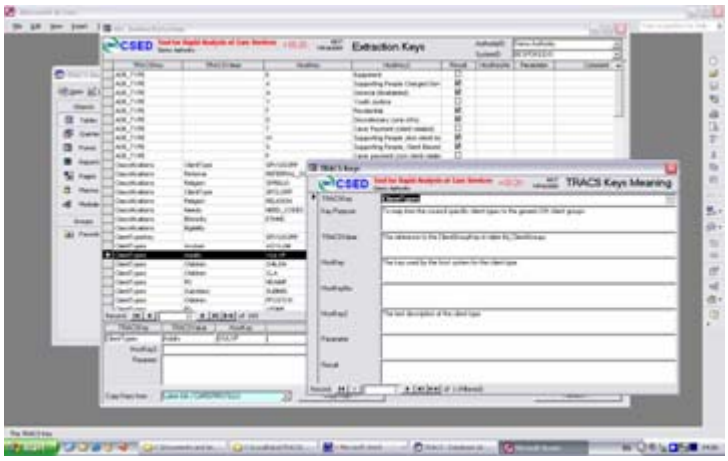
		Click the “Import Packages” button. When this process is half way through it will display a screen with the current mappings so you can check before you continue.
		OPTIONAL : Using the TRACS menu check to see levels of spend/qty units using the “Check Packages by Provider” and “Check Packages by Service” form.
		Press the two remaining buttons on the form – “Process Packages” and “Simulate over Time”
		Check calculations using the TRACS forms “Check Packages by Week”, month and year versions also.

If a template is not used, then additional work needs to be done to create a template within the import database for your authority. Support from a CSED consultant is available to complete this process. The process within the TRACS Application remains unchanged.

What data is required, from where?

If you need to write a bespoke extraction logic yourself, or you wish to modify an existing logic set then it is important that you know what data is required, where it needs to go, and from where you might find it.

As much as possible has been done to ensure that TRACS is self documenting. All relevant table descriptions have been given. Against each field there is a note to give a hint as to what the information may be, or where it might come from. In addition to this there is a tag on certain tables (at field level) to highlight if the information held is required or optional.



Within the extraction keys form, against each of the keys you can double click the record selector to open a key description window.

Wherever possible this information has been entered, although may not be 100% complete.

Please see appendix a for a list of keys used to date with explanation.

Preparation for Data Gathering

Before Data can be extracted from your system into TRACS there are a number of steps that you may have to complete. A connection to your system may need to be set up and permissions requested from your IT section.

You will need details of your database environment, server/service details etc in order to set up the connection.

IT Requirements: Security permissions

You will need a READ ONLY username and password for connection via an ODBC connection to your live system tables. For Swift/CareFirst there are appendices at the back of this document should your IT department wish to limit access to only those tables that are required by TRACS.

IT Requirements: Software / Drivers

Depending on your database system, Oracle/SQL Server etc, you may need to have additional ODBC Drivers Installed, or third party software which come packaged.
To use the GIS elements of TRACS you will need access to your windows FTP.exe file. TRACS builds a shell script which is passed to the executable in order to upload xml files with non sensitive data to our server, so that they can be displayed in our built in browser.

IT Requirements: Minimum System Requirements

To run TRACS© import you will need;

- 2 gigabyte free hard disk space
- 1 gigabyte RAM (512mb minimum)
- READ ONLY Network links to your care management database server.
- TRACS has been evidenced working in Windows 2000, XP and Vista Environments.
- Microsoft Access version 2003 (minimum) or the MS Access runtime installed as a minimum in order to run the core application. TRACS© will work with a full version of MS Access 2003.
- Client database software (depending on client database)
- Microsoft Internet Explorer 5.5 or later (for GIS software only).
- CD-ROM Drive.

MSAccess database solutions

File Locations

Ideally we would ask that a copy of the database is made available on a local drive (stored on a desktop pc rather than a network drive) so that the effect of any network traffic is minimal and the impact to people using the system is reduced.

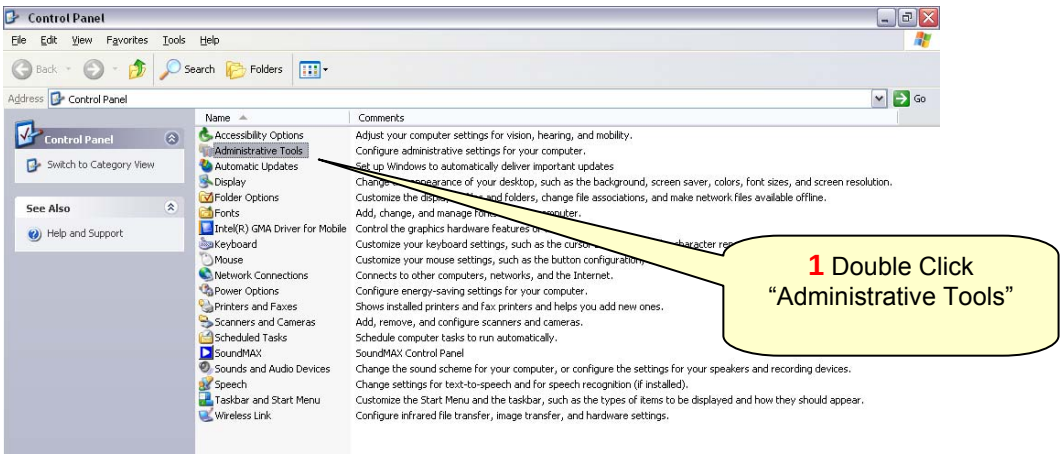
Security Permissions

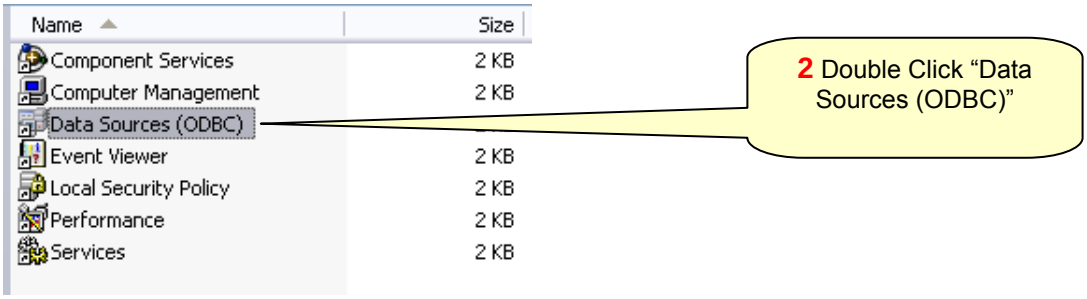
If Access workbook security is set up on your system we will need a current READ ONLY username and password as a minimum. In certain bespoke applications we may ask that we take a copy of the entire application so that we can use the front end screens as an aid to sourcing data locations within the database schema – in these cases a password that allows us to view/edit forms and queries would be advantageous.

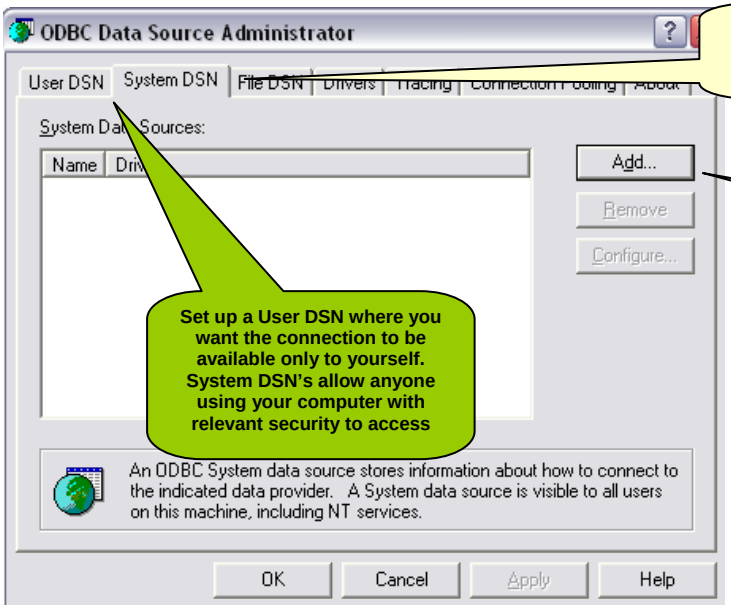
You may need to check to see if you have sufficient permissions to create system DSN's. If during the process outlined below you receive security based errors it suggests that you do not currently have required access and need to contact your I.T. section to either grant these permissions or create the ODBC connection on your behalf.

Creating the ODBC connection

Firstly you will need to open the computers "Control Panel" screen. To do this click the windows "START" button then "Control Panel".



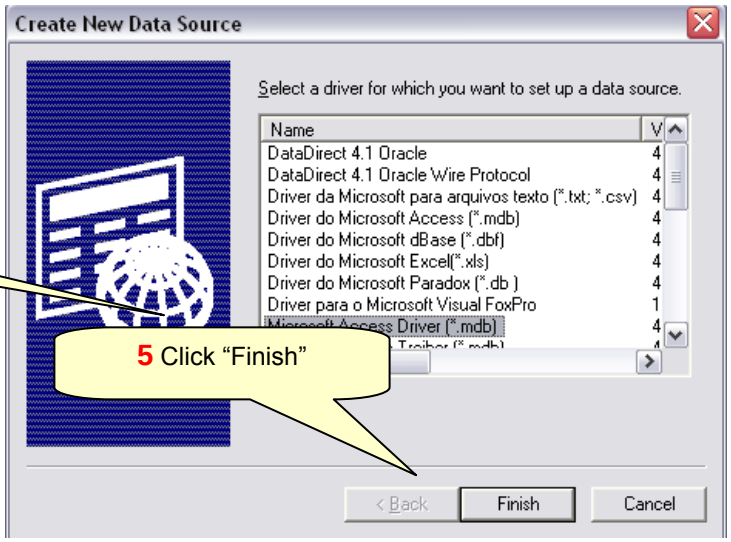




2 Switch to the "System DSN" tab

Set up a User DSN where you want the connection to be available only to yourself. System DSN's allow anyone using your computer with relevant security to access

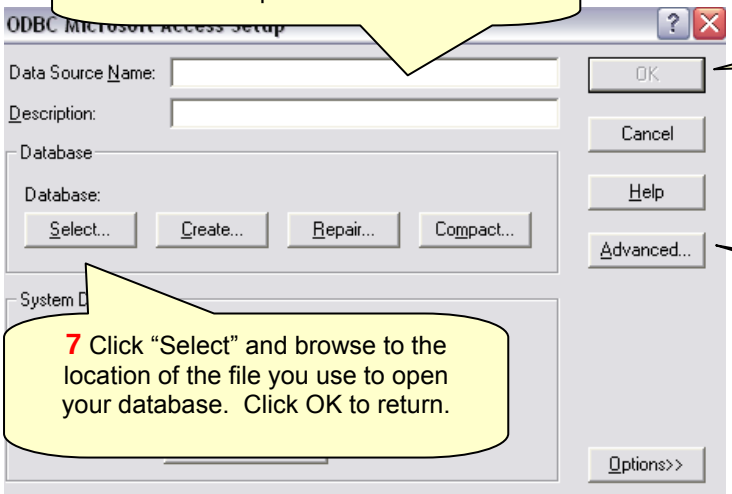
3 Click "Add"



4 Choose "Microsoft Access Driver"

5 Click "Finish"

6 Type "TRACS". You can optionally add a description in the field below



9 Click OK to complete the procedure.

7 Click "Select" and browse to the location of the file you use to open your database. Click OK to return.

8 IF you have a username and password requirement; click "Advanced" and enter this information.

Oracle Database Systems

Security Permissions

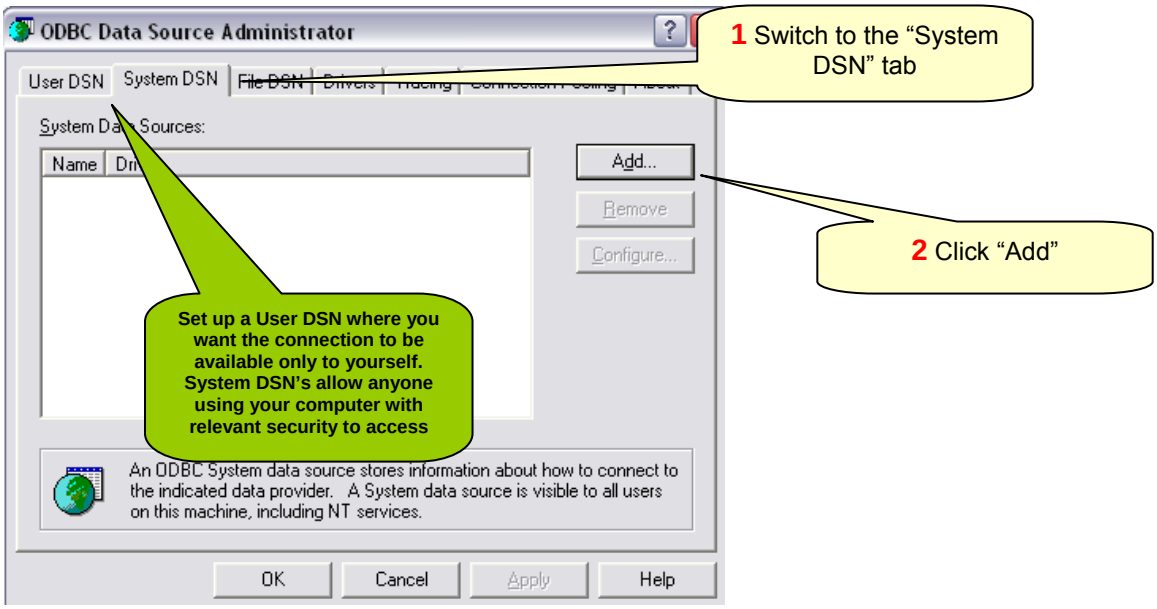
In order to set up the connection to your oracle database you will need system privileges sufficient enough add System DSN's and a current READ ONLY username and password that gives access to either all tables, tables pre determined by CSED or tables minus those that you know are not relevant such as child protection (if joint children/adult system) etc.

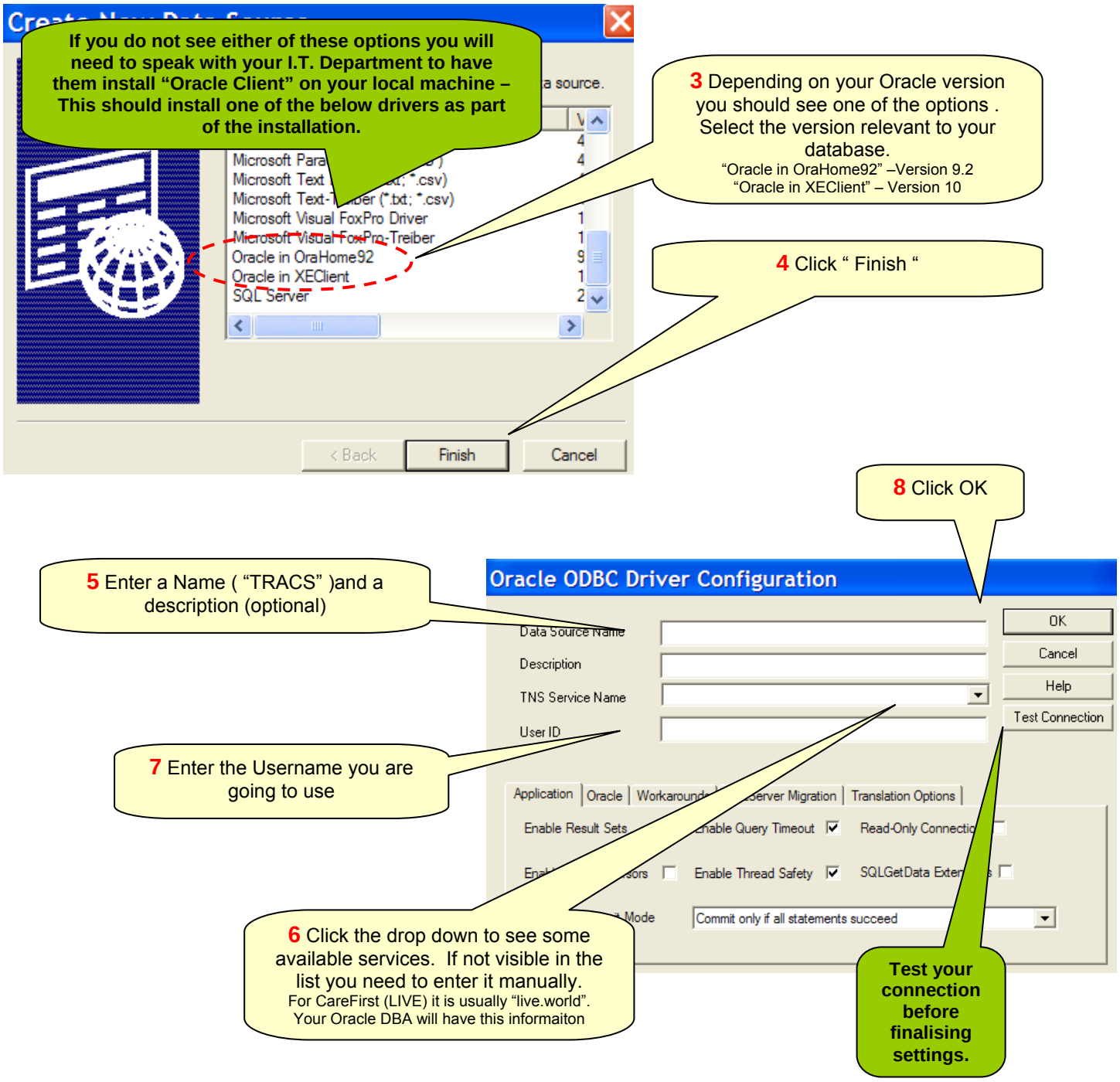
You may need to check to see if you have sufficient permissions to create system DSN's. If during the process outlined below you receive security based errors it suggests that you do not currently have required access and need to contact your I.T. section to either grant these permissions or create the ODBC connection on your behalf.

Creating the ODBC Connection

You must first open the DataSources (ODBC) folder which is part of the computer control panel (as described earlier).

This is usually accessed by clicking "START" -> "Control Panel" -> "Administrative Tools", then finally the "Data Sources (ODBC)" option.




If you do not see either of these options you will need to speak with your I.T. Department to have them install "Oracle Client" on your local machine – This should install one of the below drivers as part of the installation.
3 Depending on your Oracle version you should see one of the options . Select the version relevant to your database.
"Oracle in OraHome92" –Version 9.2
"Oracle in XEClient" – Version 10
4 Click " Finish "
Microsoft Visual FoxPro Driver
Oracle in OraHome92
Oracle in XEClient
SQL Server
< Back
Finish
Cancel
8 Click OK
5 Enter a Name ("TRACS")and a description (optional)
Oracle ODBC Driver Configuration
Data Source Name
Description
TNS Service Name
User ID
OK
Cancel
Help
Test Connection
Application
Oracle
Translation Options
Enable Result Sets
Enable Query Timeout
Read-Only Connection
Enable Thread Safety
Commit only if all statements succeed
7 Enter the Username you are going to use
6 Click the drop down to see some available services. If not visible in the list you need to enter it manually.
For CareFirst (LIVE) it is usually "live.world".
Your Oracle DBA will have this informaiton
Test your connection before finalising settings.

Microsoft SQL Server Systems

Security Permissions

In order to set up the connection to your oracle database you will need system privileges sufficient enough add System DSN's and a current READ ONLY username and password that gives access to either all tables, tables pre determined by CSED or tables minus those that you know are not relevant such as child protection (if joint children/adult system) etc.

You may need to check to see if you have sufficient permissions to create system DSN's. If during the process outlined below you receive security based errors it suggests that you do not currently have required access and need to contact your I.T. section to either grant these permissions or create the ODBC connection on your behalf.

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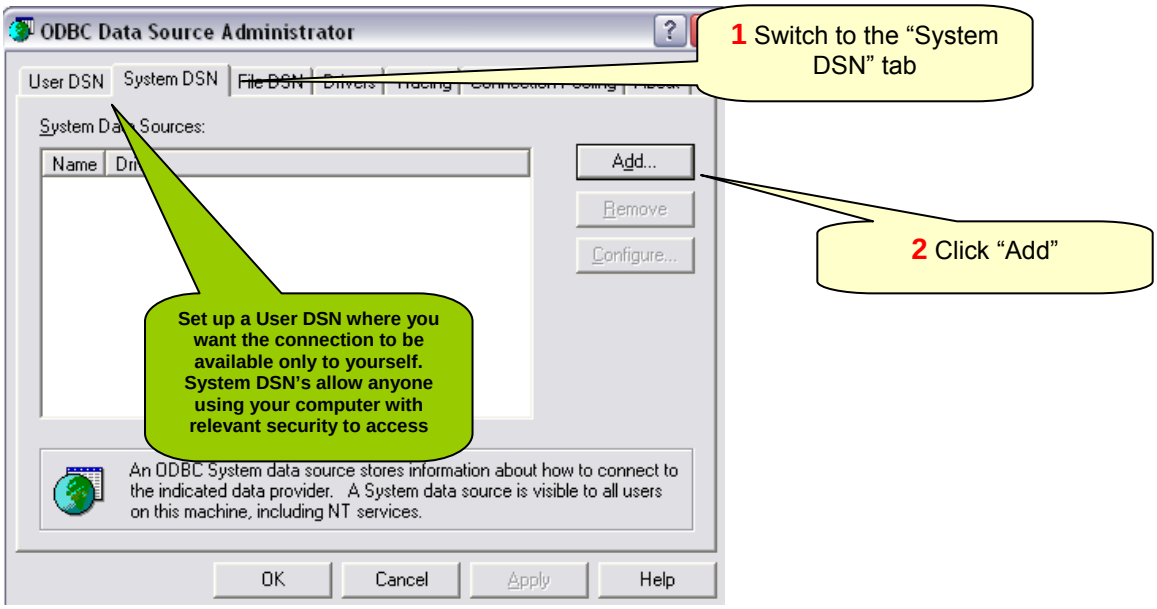
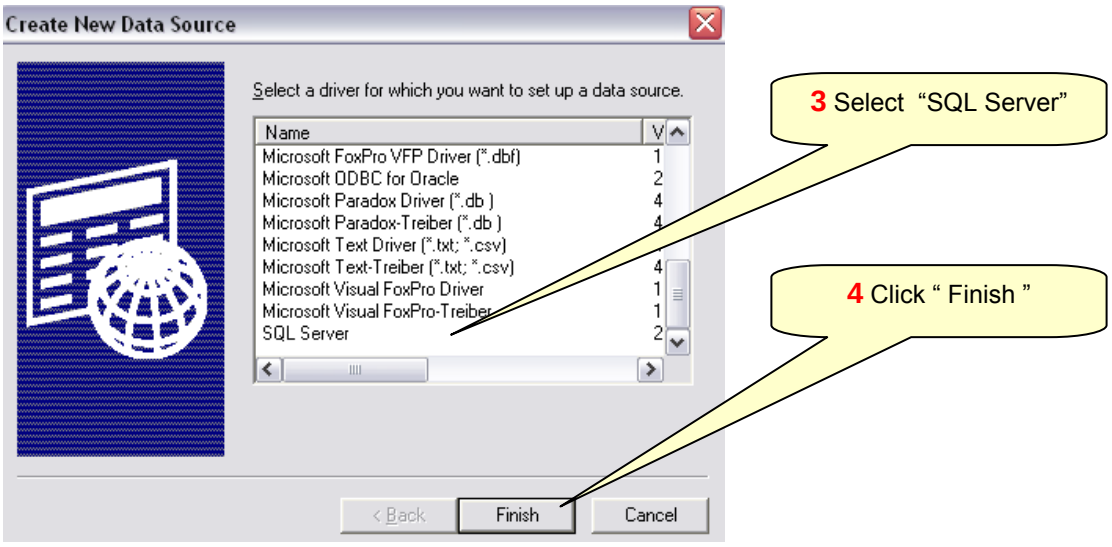
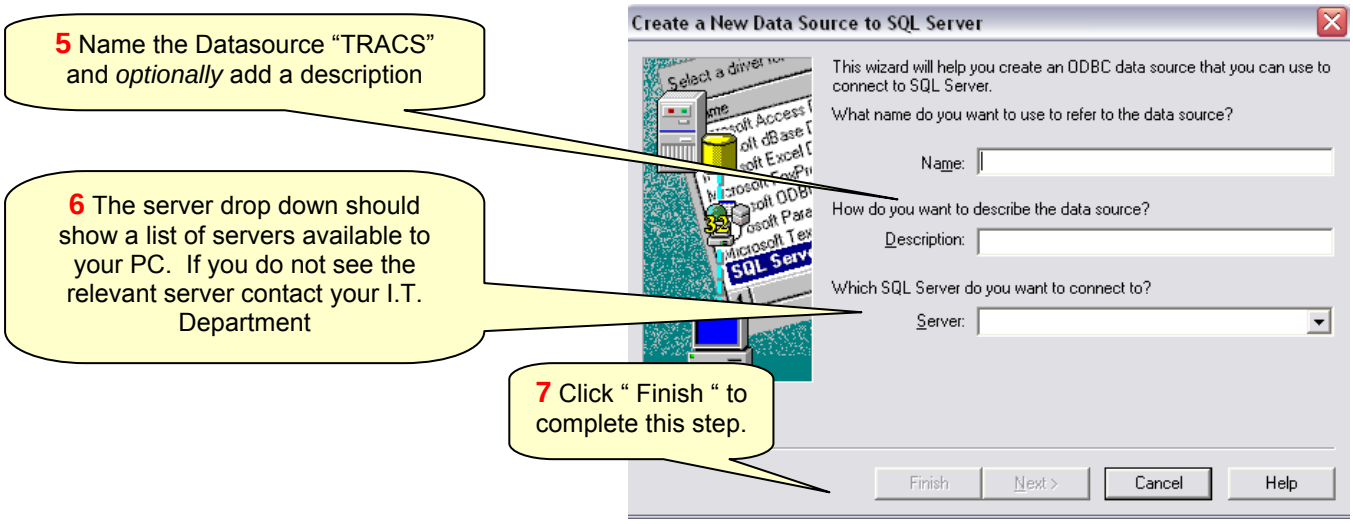
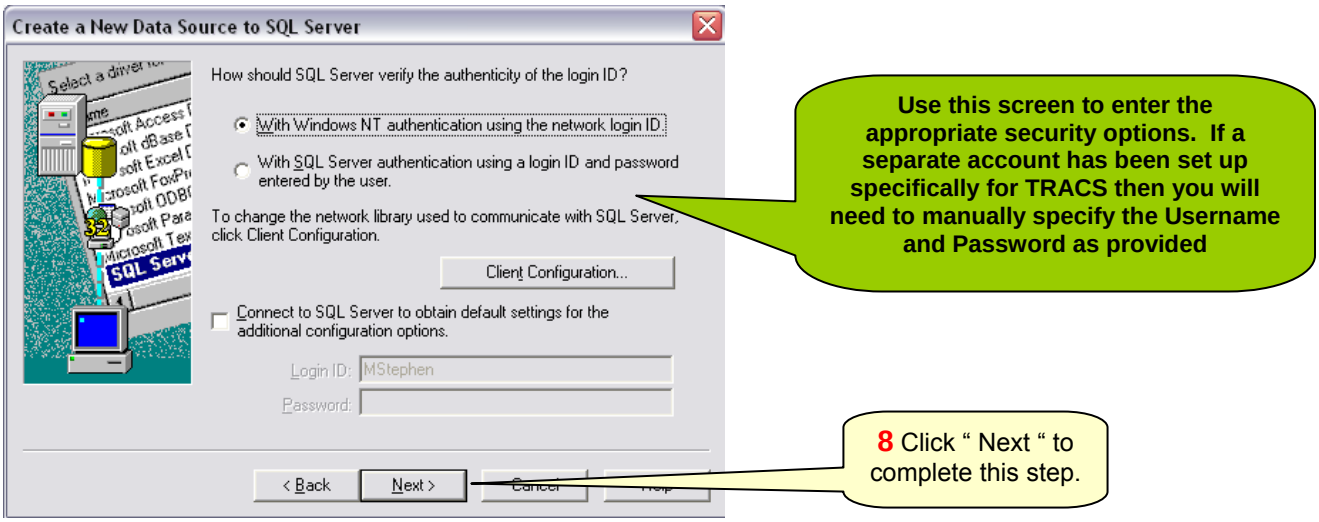
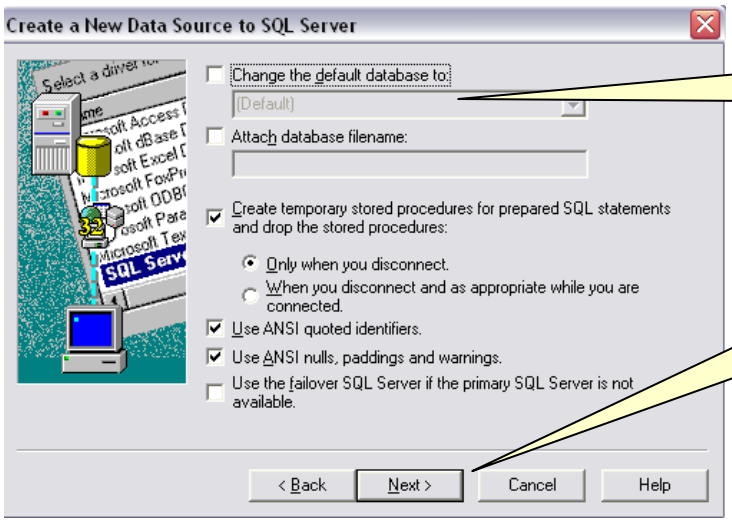



Create New Data Source
Select a driver for which you want to set up a data source.
Name
Microsoft FoxPro VFP Driver (*.dbf)
Microsoft ODBC for Oracle
Microsoft Paradox Driver (*.db)
Microsoft Paradox-Treiber (*.db)
Microsoft Text Driver (*.txt; *.csv)
Microsoft Text-Treiber (*.txt; *.csv)
Microsoft Visual FoxPro Driver
Microsoft Visual FoxPro-Treiber
SQL Server
< Back
Finish
Cancel
3 Select "SQL Server"
4 Click " Finish "

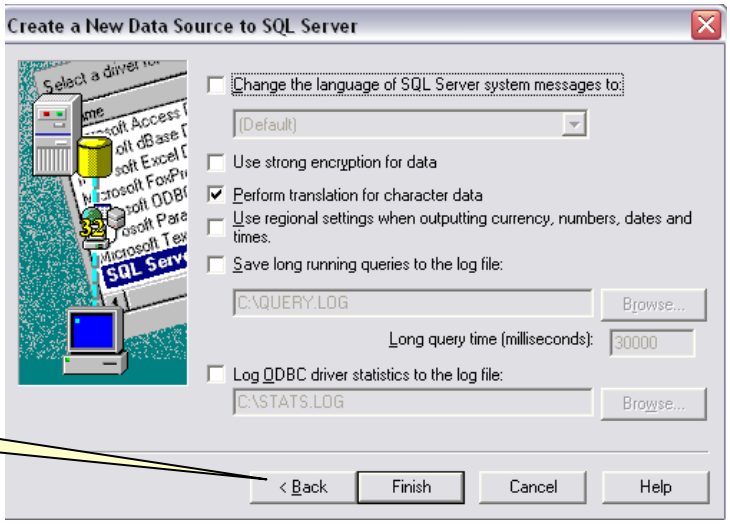

5 Name the Datasource "TRACS" and *optionally* add a description
6 The server drop down should show a list of servers available to your PC. If you do not see the relevant server contact your I.T. Department
7 Click " Finish " to complete this step.
Create a New Data Source to SQL Server
This wizard will help you create an ODBC data source that you can use to connect to SQL Server.
What name do you want to use to refer to the data source?
Name:
How do you want to describe the data source?
Description:
Which SQL Server do you want to connect to?
Server:
Finish
Next >
Cancel
Help


Create a New Data Source to SQL Server
How should SQL Server verify the authenticity of the login ID?
With Windows NT authentication using the network login ID.
With SQL Server authentication using a login ID and password entered by the user.
To change the network library used to communicate with SQL Server, click Client Configuration.
Client Configuration...
Connect to SQL Server to obtain default settings for the additional configuration options.
Login ID:
MStephen
Password:
< Back
Next >
Use this screen to enter the appropriate security options. If a separate account has been set up specifically for TRACS then you will need to manually specify the Username and Password as provided
8 Click " Next " to complete this step.

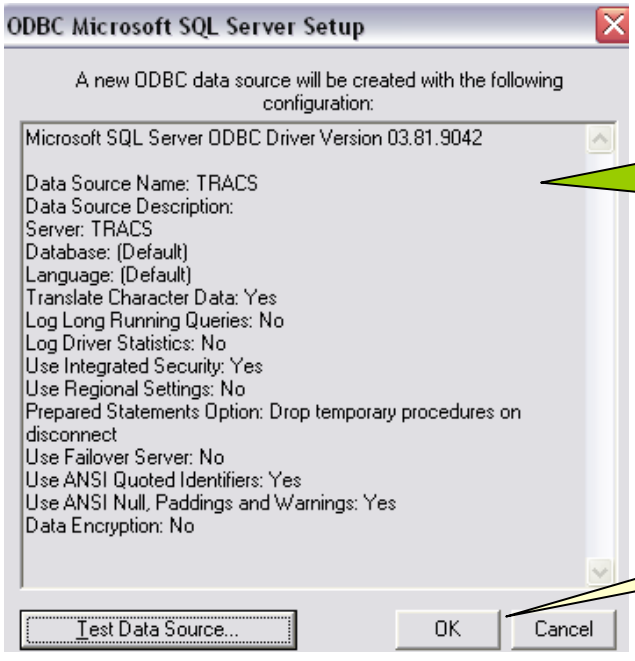


9 If you use a specific database check the box and use the drop down to select it.

10 Click " Next " to continue.



11 Click " Finish " to complete the procedure.



A summary of the options you have selected is shown. Click the " Test Data Source " button to ensure everything is working as it should.

12 Click " OK " to close the winow.

Populate TRACS with your own care management data

When you are sufficiently happy with the operation of TRACS and the component databases you will want to hook everything up to your own data. This next section of the guide aims to help this process along. TRACS comes with a series of logic templates for data extraction, it is envisaged that in most cases you will be able to use one of these generic logic sets, or at least modify an existing one.

In the event that you are using a bespoke system, or a system that we have templated, in a way very different to that of counterparts using said system then it is likely that a full new set of logic will need to be written, either by yourselves or with the support of CSED.

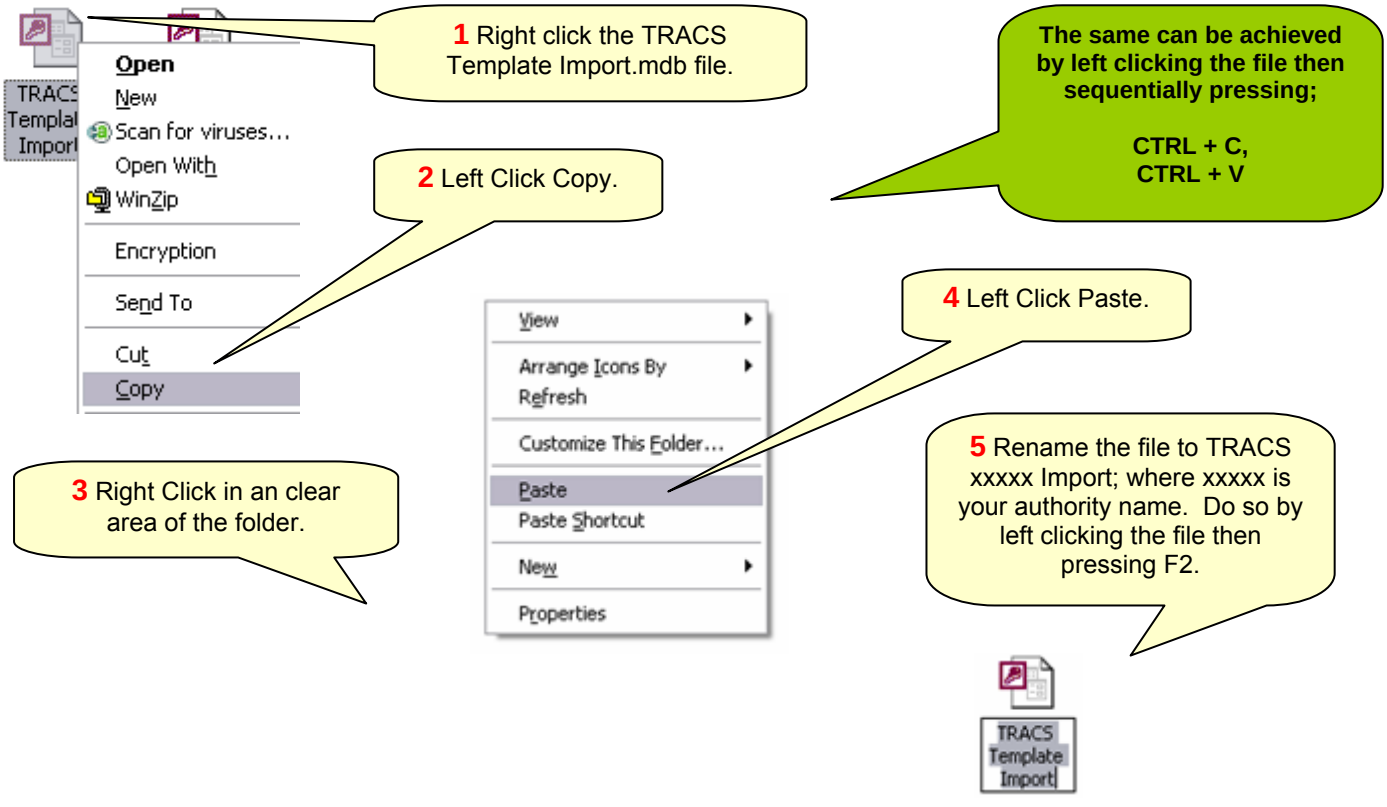
Template Import Database

The starting point should always be the template import database. As mentioned earlier this contains a copy of the logic sets that have been written by CSED to date. We have created numerous template logic sets for systems such as Swift and CareFirst as a lot of authorities use these. More recently we have created what we feel is a more generic logic set for these two that most authorities will be able to use will no, or very little, adaptation.

Make a copy

The first step of the process is to make a copy of the existing Template import database. If you have MSAccess version higher than 2003 you will be able to use the "Backup Database" feature within the "Tools" menu saving the backup copy as "TRACS XXXXX Import" where XXXXX is the name of your authority. In most cases it is easier to do a simple file copy (as below).

Firstly, locate and open the folder that you originally extracted the TRACS CD to *(C:\TRACS)*.



Adding a system to the Import Database Inventory

Start by opening the new Import database for your authority, which you have just created.

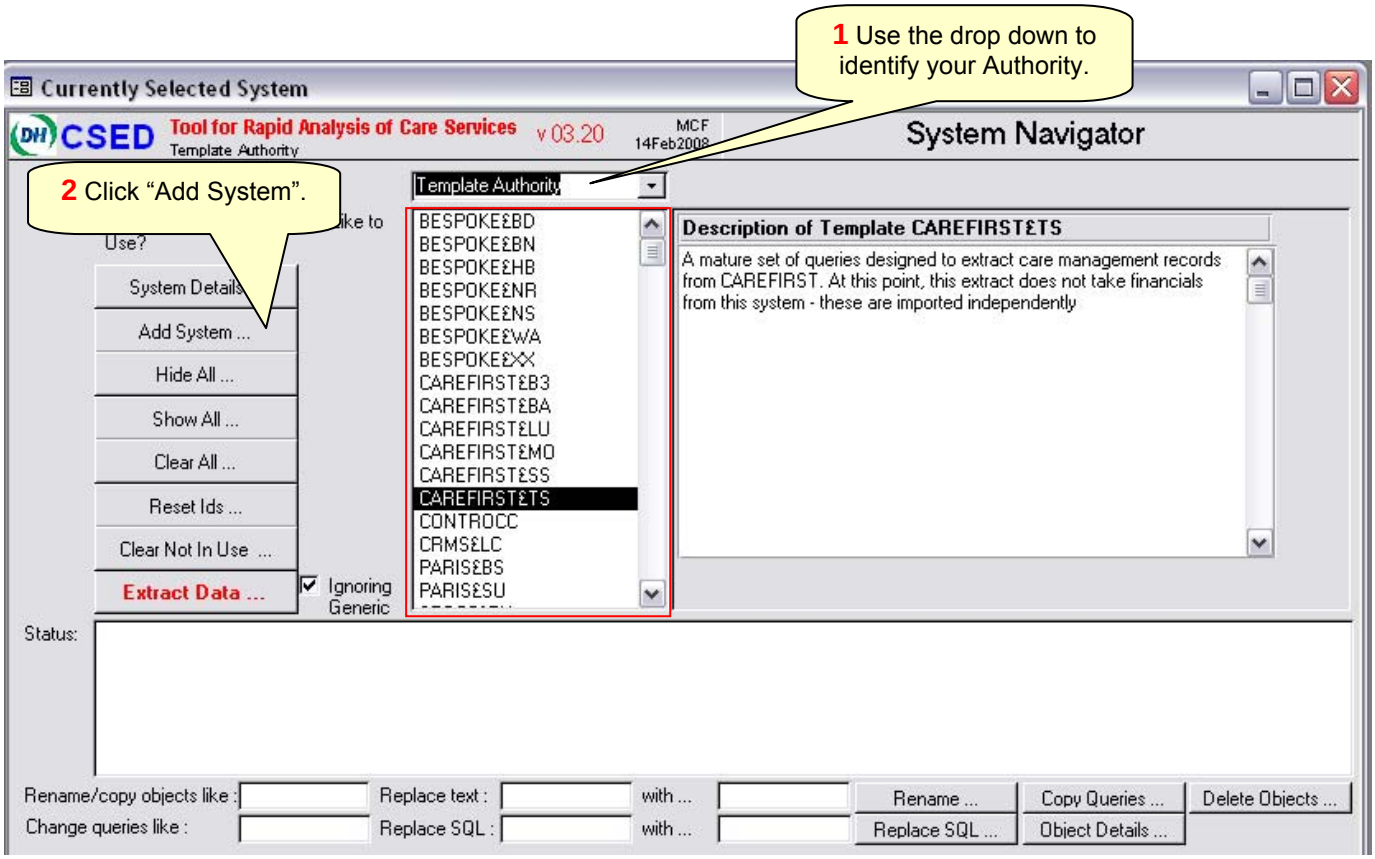
If your system does not appear in the **list** (Authority specific) then we will need to add a new one. To identify your system please scroll the entire list and look using the following syntax;

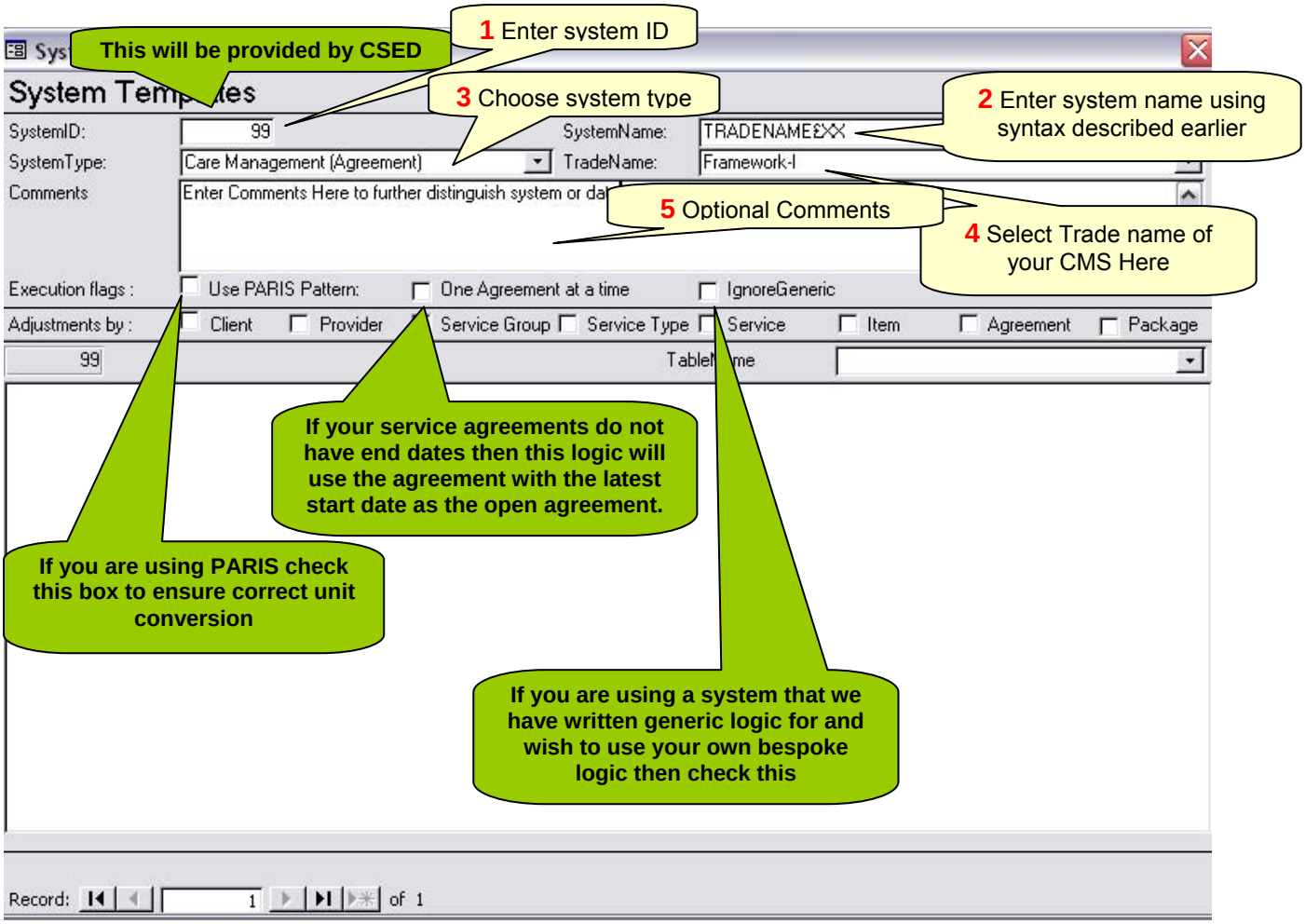
	CMS NAME	£	AUTH IDENTIFIER
i.e	CAREFIRST	£	TS

CMS Name – This refers to the trade name of your care management system; Swift, CareFirst, Paris, Framework-I for example. If you are using a bespoke or an in house system then please use BESPOKE as the trade name.

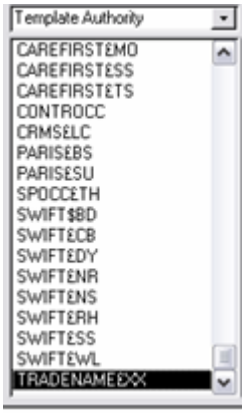
£ - This is a simple character break so that some of the logic routines know what is generic logic and which is bespoke – this is required in all cases.

Auth Identifier – The authority identifier is usually the first two letters of the authorities' postcode.





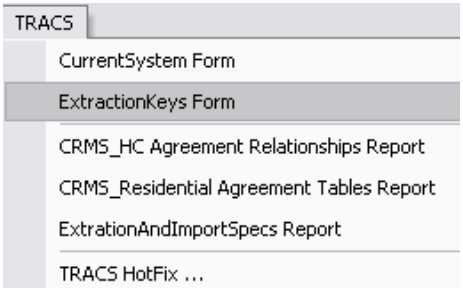
When you have entered the required information, close the form to update the list.



When you click your newly added system the TRACS import database will automatically hide all database objects that do not relate to your current installation – to make looking through the remaining objects a lot less difficult.

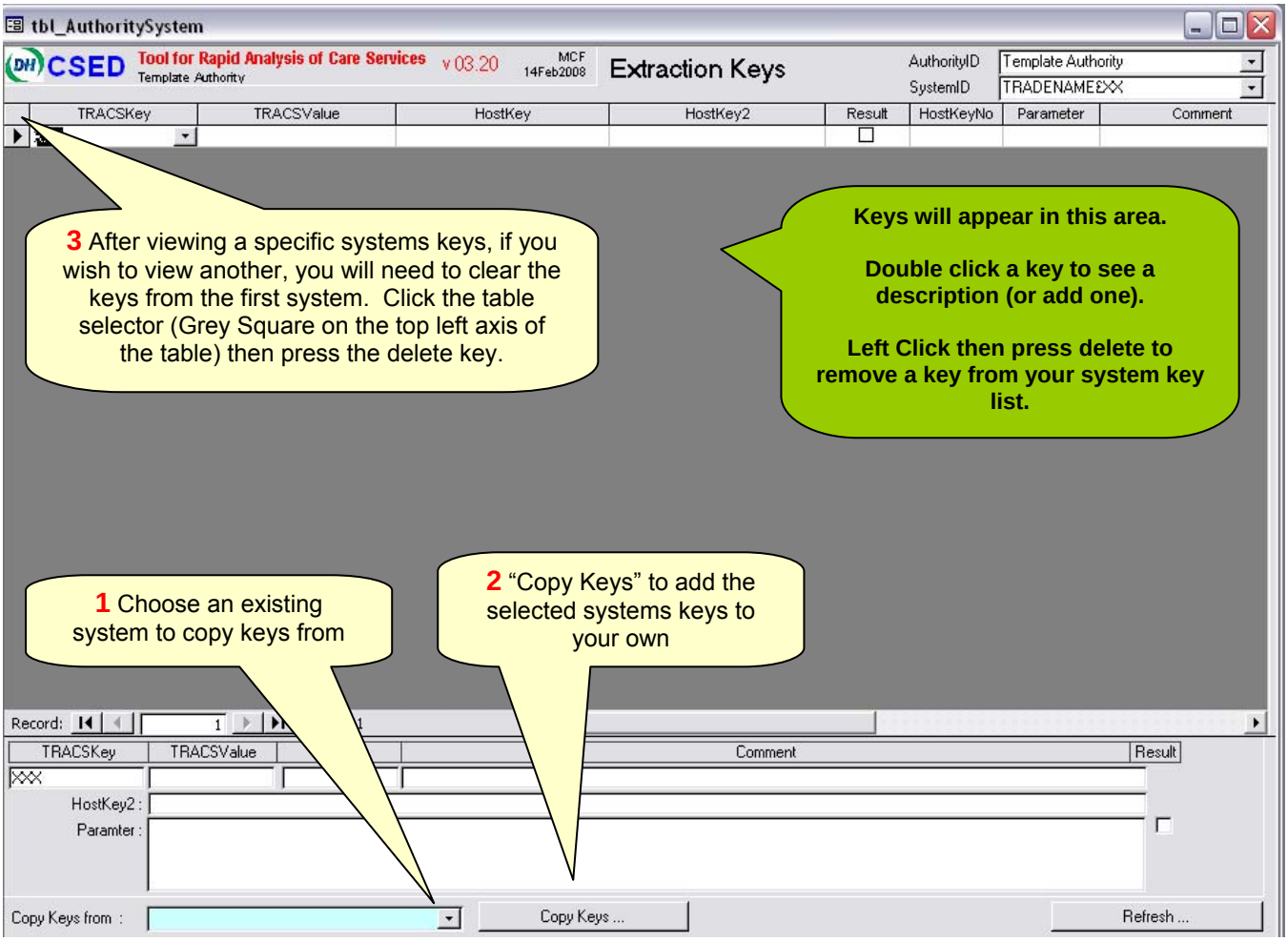
The status window will inform you when this is complete.

Using Generic System Logic



If you are using a system that there has already been a set of extraction logic written for, we strongly suggest that you use this as a base for your own.

To look through details of systems similar to your own you can use the ExtractionKeys form. Which is accessible from the TRACS menu.



Not all the keys that are copied from another system may be required for your own, or there may be additional keys necessary dependant on your system. For CareFirst/Swift the generic system model(s) should hold a full set of keys to be used.

In general you should only have to add/edit/delete keys for service types and items, service groups and key field identifiers. If you are using a bespoke model, or writing your own the use of keys is suggested for ease of use. You can take inspiration from other system keys but with the flexible nature of the system the way you use this will be down to yourself.

Once you have selected an existing model, make a note of the system you have copied keys from so that queries and table linkages can be copied.

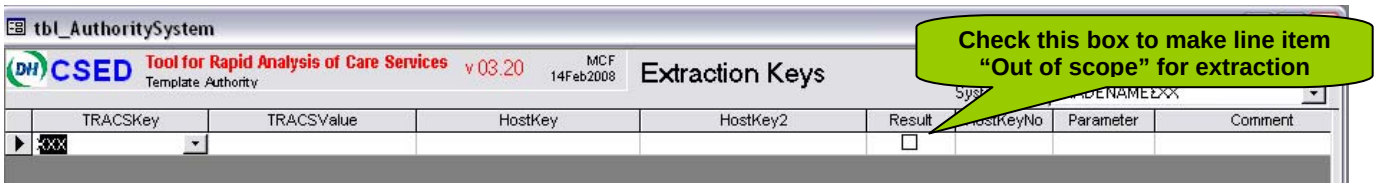
Key Mapping Areas

The most important areas to get right are the service groups, types or items as it is from this that the main part of the system is set up, the packages, agreements and price table items.

Another great use of the key table is to utilise the functionality embedded to automatically filter out packages, items, client groups etc that you are not interested in using for analysis, or perhaps have no cost/price data for.

When CSED write a set of extraction logic we will usually make children's services and equipment "out of scope". This means that when the extract is done it does not try to pull associated records across from your database system. This is as much for information security as it is performance reasons.

Once you have populated the keys table you can choose to make certain items out of scope by checking/un-checking the "Result" flag.

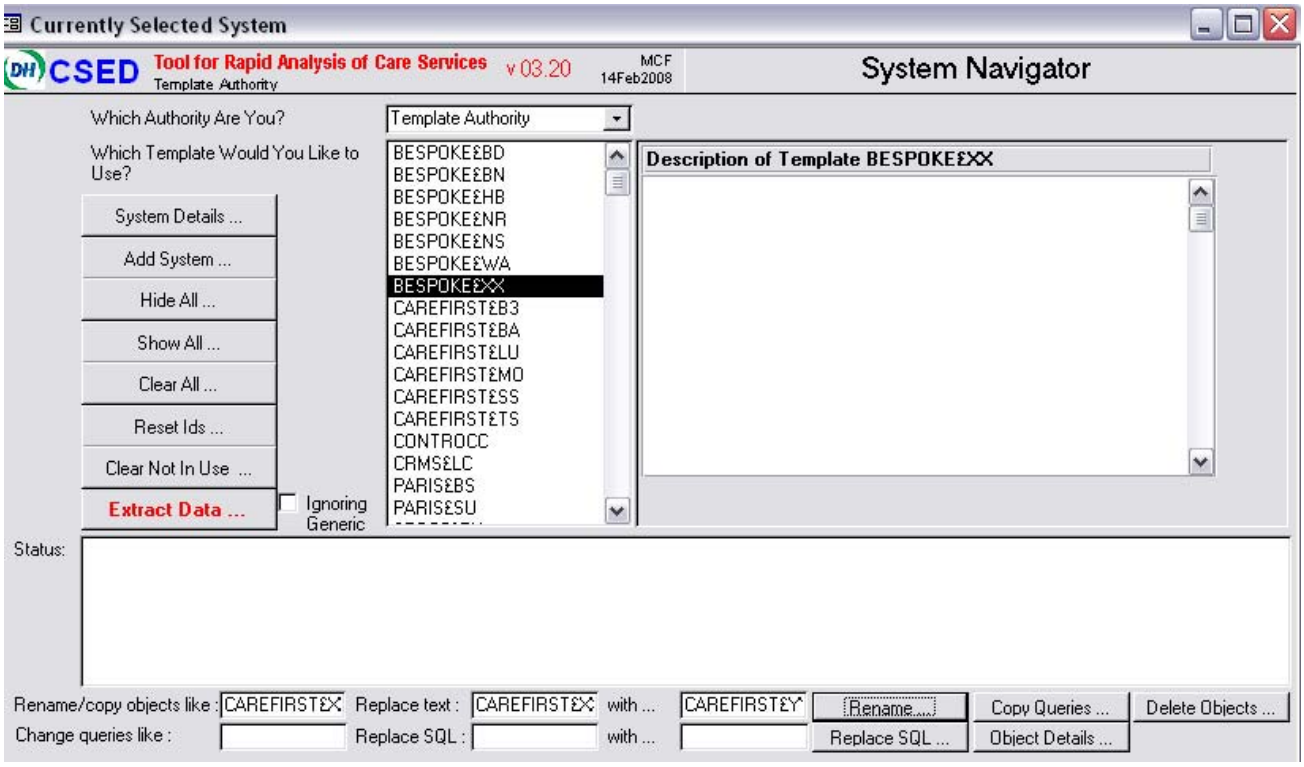


Copying a logic set

Once you are happy with the set of keys you are using you will need to copy the queries and table linkages etc from the copied logic to your own.

Copying Relevant Tables

If you are using one of the FULLY generic models you will be able to skip this step, as there should be no extra tables. If you choose to use a copy of another authority's model then you may need to copy any additional tables or queries



Although this can be done manually, there is a tool available to do this on bulk, automatically.

Towards the bottom of the screen you will see a the words "Rename/copy objects" then a series of input boxes.

Usage.

Like	***Replace text***	***With***
CAREFIRST£TS*	CAREFIRST£TS	CAREFIRST£XX

In the example above, after clicking the "Copy Queries" button, tables that start with "CAREFIRST£TS" will be the only tables affected. The name of the tables within the selection will be changed; CAREFIRST£TS will become CAREFIRST£XX regardless where the string appears in the object name. Use this tool and replace XX with your own authority code.

In addition to copying over any bespoke tables you will need, in all cases, to copy the queries that extract and manipulate the data from your system. To do this you will use the same tool as above;

The naming convention for queries is slightly different from the tables, for continuity purposes we will continue copying the model from the CAREFIRST£TS system.

Usage.

Like	***Replace text***	***With***
TRACS_CAREFIRST£TS*	TRACS_CAREFIRST£TS	TRACS_CAREFIRST£XX

Using the above entries, clicking the “Copy Queries” button will select those queries from the system you are wanting to emulate, take a copy and rename them appropriately.

If you make a mistake with the naming of your copied queries you can correct your entry in the input boxes then simply click the “Rename” button.

If any of the queries that you have copied utilise bespoke tables then you will have to change the SQL within them to reflect the newly named objects that you have created.

You can alter the SQL within a set of queries using the “Change Queries” tool. This is the second set of input boxes on the bottom of the form.

Usage.

Like	***Replace text***	***With***
TRACS_CAREFIRST£TS*	CAREFIRST£TS	CAREFIRST£XX

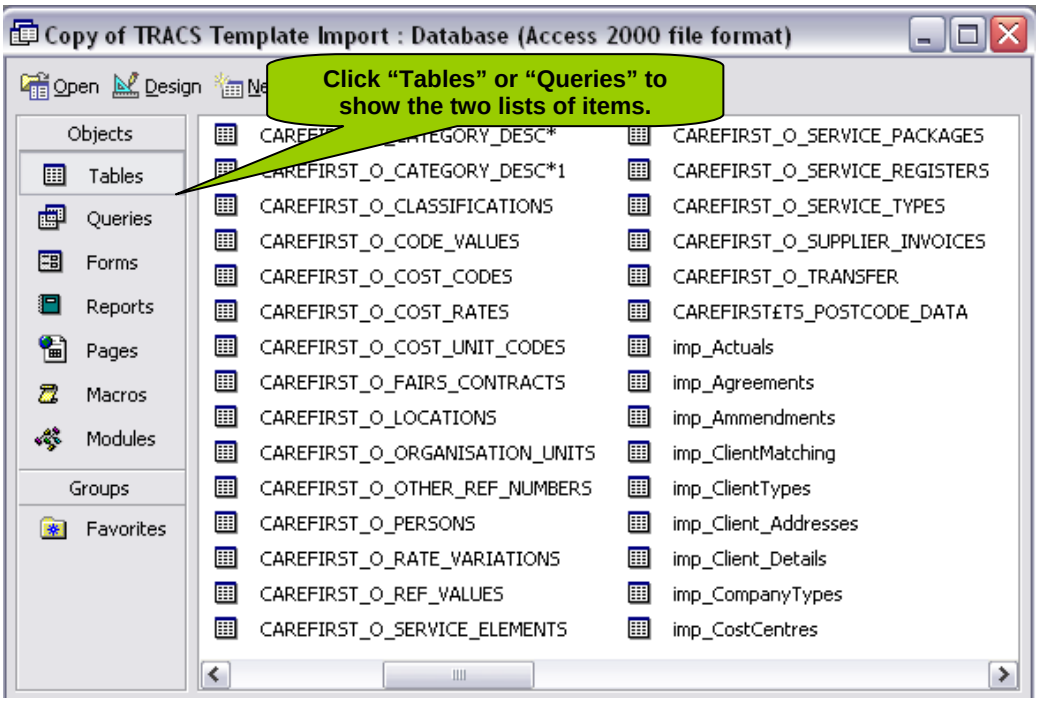
Using the above inputs, when clicking the “Replace SQL” button, will re-point table references from system CAREFIRST£TS to system CAREFIRST£XX within queries that start with TRACS_CAREFIRST£TS.

Running the extract

Once you have copied all relevant tables and queries, made sure that all the references are valid, and populated your extraction keys form for the currently selected system you are almost ready to actually run the extract.

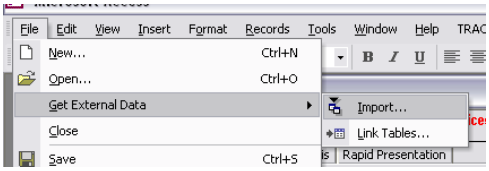
You could run your first extraction against your live system and hope for the best, however we suggest that you import a copy of the required tables to your import database and run the queries against this first. If you have any errors your can correct much them and re run much quicker. If you have made changes to any of the queries or made a mistake in the Extraction key table you may put undue/non-required strain on your system/network by taking too much, or non-required data.

Close the "Current System" form and switch to the Access system panel.



You can see from the screen shot above that there are a number of tables that are used from your care management system. You will need to import data in order to run the extraction.

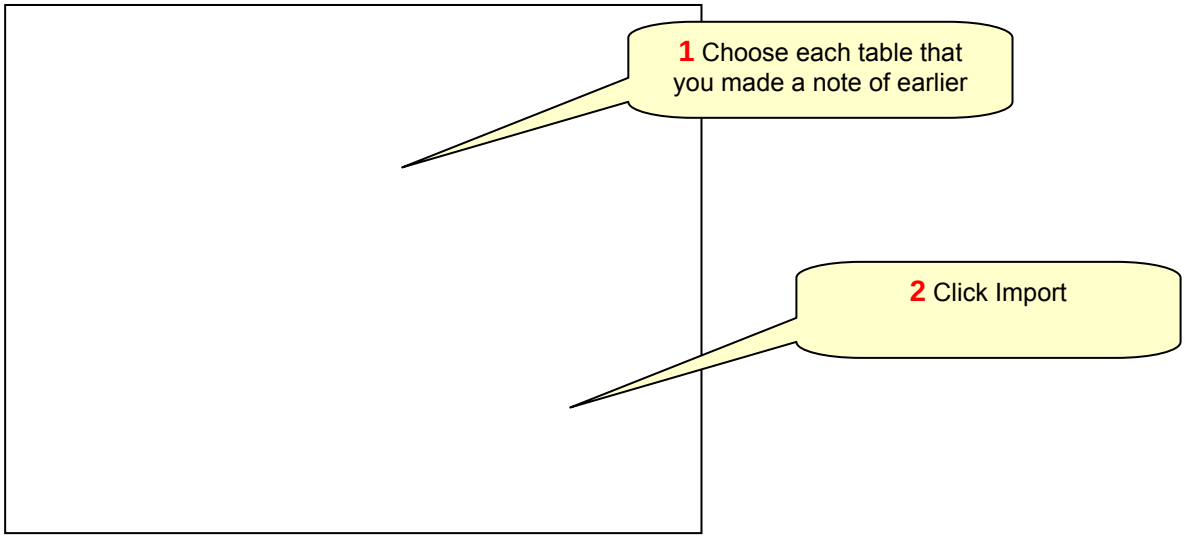
Make a note of all the system tables required (those starting with the trade name of your care management system), then import the relevant tables.



Go to the file menu -> Get External Data -> Left Click "Import". This will start the open file dialog where you choose the source for your data.

From the "Files of Type" drop down select "ODBC Databases".

A dialog will now open showing you a list of available ODBC database connections. Locate, and select, the ODBC connection that you created earlier ("TRACS").



Once the import has completed (can take around 15+ minutes depending on your network connection) rename the imported objects to match the original items. Doing so will replace the old empty tables with fully populated data tables.

Now that all the tables, queries and extraction keys are properly populated and referenced you can run an "extraction". TRACS will assume the tables you have imported in are your LIVE tables rather than copies and use the data within.

Open the "Current System" form using the TRACS menu and click Extract Data ... .

The Status window will inform you of the actions that are being performed, give an indicative time for the action and the number of records affected by it.

If any errors occur you will be informed via the status window, as and when they occur. TRACS will continue on with the extraction until all queries are ran. If the extraction runs without error, when the process is complete the status window will display a "Extraction Completed Successfully" message.

Error Messages

If you encounter errors TRACS will create a log of these, where they occurred, when and any associated information that is available at run time.

This information is stored in the table "tbl_errorlog". This should be your first port of call when diagnosing error messages.

If you feel that the error can not be resolved by yourself then please contact CSED at your earliest convenience.

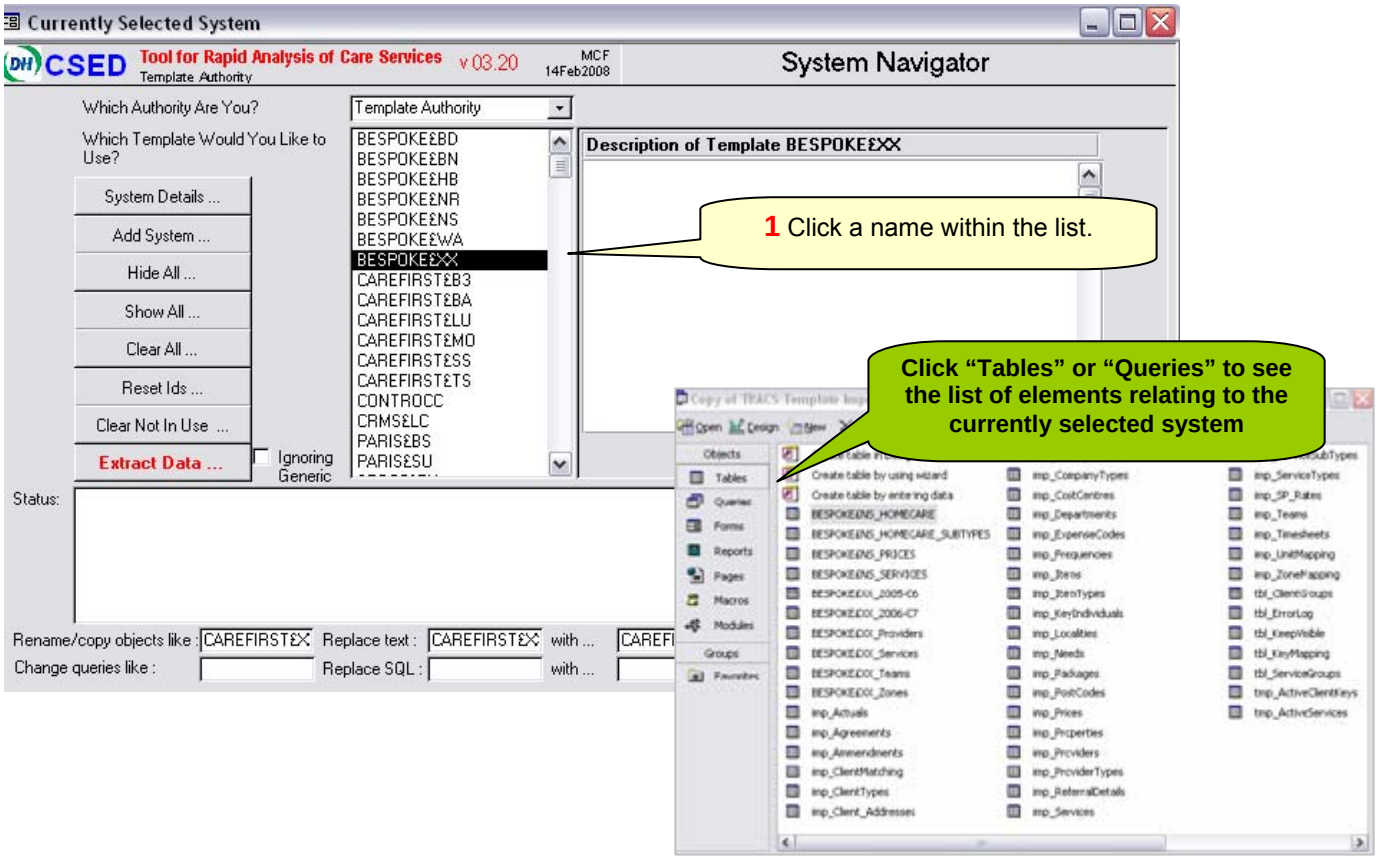
Using Bespoke System Logic

In addition to using the generic system templates that which are provided within the template databases, TRACS allows you to write your own set of extraction logic and pass this through the system.

Whether or not you base your logic on an existing set of extraction queries, they are a great place to start and an invaluable resource as there are many examples of different methods of "converting" data from one system type to the TRACS data field requirements.

Browsing Existing Logic Sets

To look through the existing sets of logic, first take a copy of the template import database and open it. When the application loads a form will be presented showing the different template sets that have already been created to date by CSED across the various implementations of the various care management systems out there.



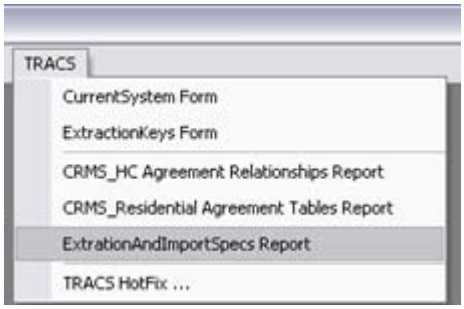
Import Specification

In order for TRACS to operate fully, there are a number of tables that must be populated. There are a number of ways that you can view these requirements. On the CD there is a PDF document named “TRACS Technical Import Specification v03_20 MCF 17Feb08” which contains a table and field level description(s) of the data required, type and format. This document also states if the data is required fully, or is optional.

The information within this document is taken from the elements within the import database itself. If you view the properties of any of the tables prefixed “imp_” (to denote import) you will see the information within the description field(s).

The TRACS menu at the top of the screen provides a mechanism for viewing the latest specification.

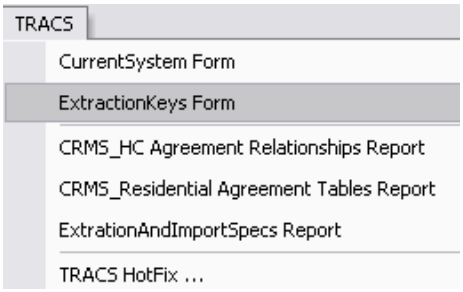
The “ExtractionAndImportSpecs Report” draws the up to date description information from the Import table elements. To ensure you are always viewing the most up to date information It is recommended that you at some point run this report as certain fields and tables may have been changed by system updates/hotfixes.



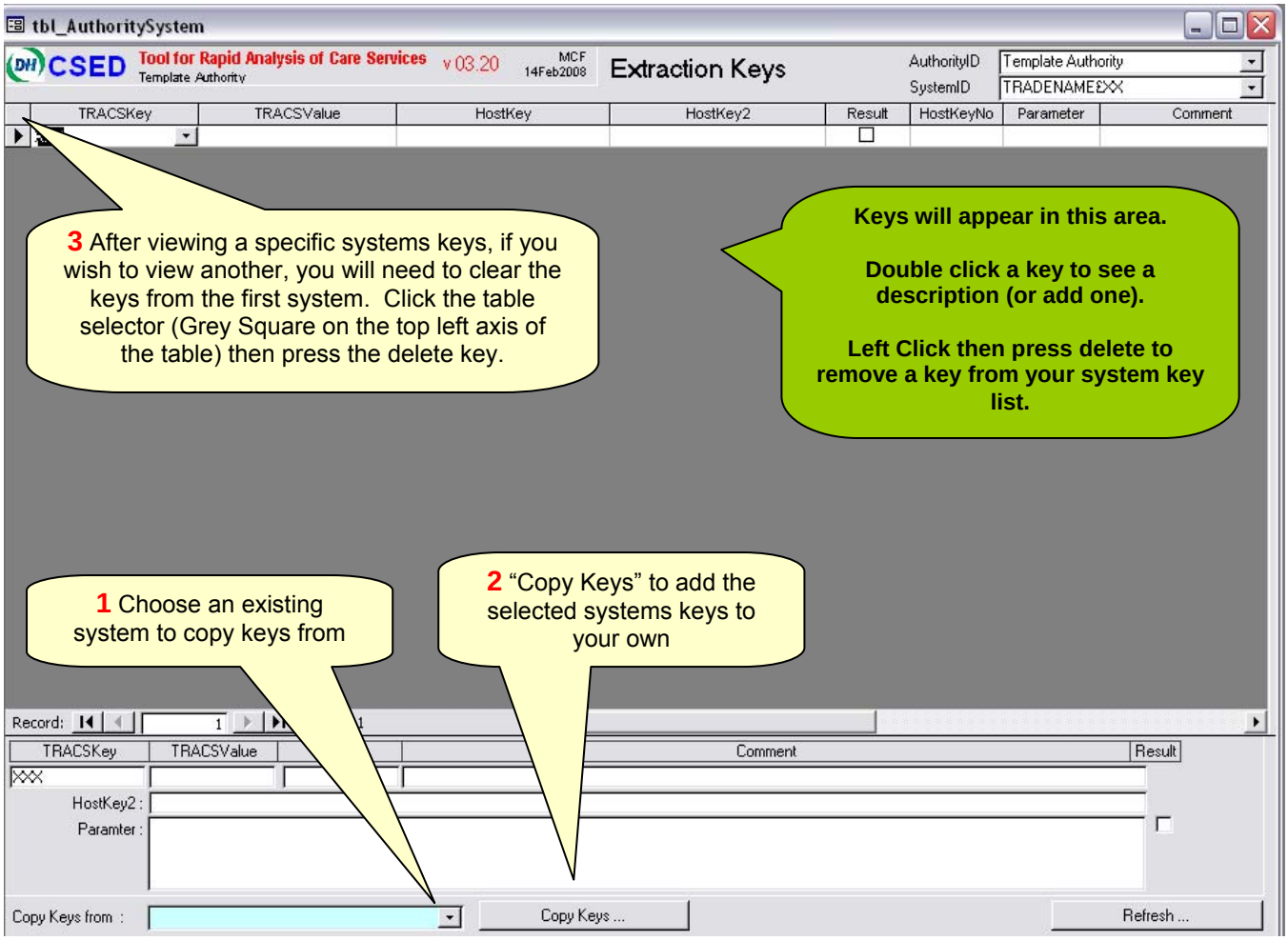
It is important to note that data types and field sizes within the import tables should NOT be changed, unless you find it absolutely necessary and are prepared to spend the time running through the application changing the references where necessary as otherwise this will result in various errors.

Key Mapping Areas

In addition to the template extraction queries and tables, we may have made use of a “Key Mapping” table. We introduced this mechanism to help streamline our generic processes, but also to make updating the extraction logic a lot quicker and easier if you have key field updates within your system.



Browse the keys that we have created in other systems to get an idea of the sort of fields that you may wish to make available to the key table.



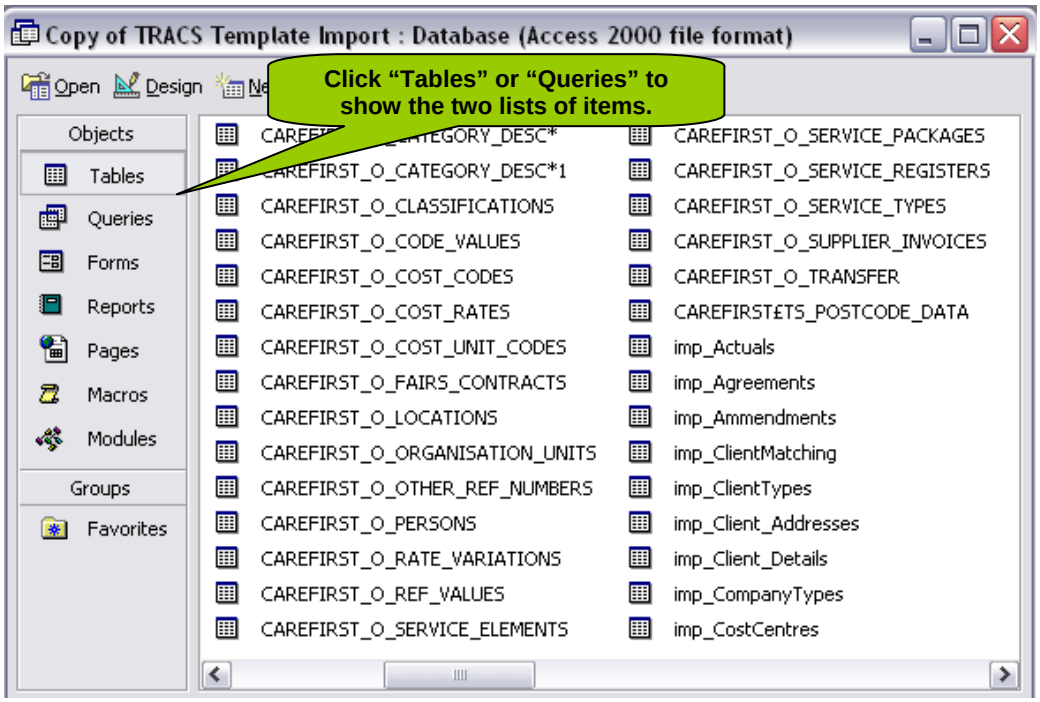
Within the template extraction sets you will see wide use of this screen to enable rapid selection of elements to filter out at source. We suggest that Community Equipment and Children’s services, in addition to others, are filtered out in this method as they usually have high numbers of records that are outside of the scope of the analysis that you would want to conduct using our tool.

Running the extract

Once you have copied all relevant tables and queries, made sure that all the references are valid, and populated your extraction keys form for the currently selected system you are almost ready to actually run the extract.

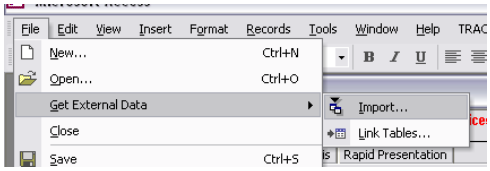
You could run your first extraction against your live system and hope for the best, however we suggest that you import a copy of the required tables to your import database and run the queries against this first. If you have any errors your can correct much them and re run much quicker. If you have made changes to any of the queries or made a mistake in the Extraction key table you may put undue/non-required strain on your system/network by taking too much, or non-required data.

Close the "Current System" form and switch to the Access system panel.



You can see from the screen shot above that there are a number of tables that are used from your care management system. You will need to import data in order to run the extraction.

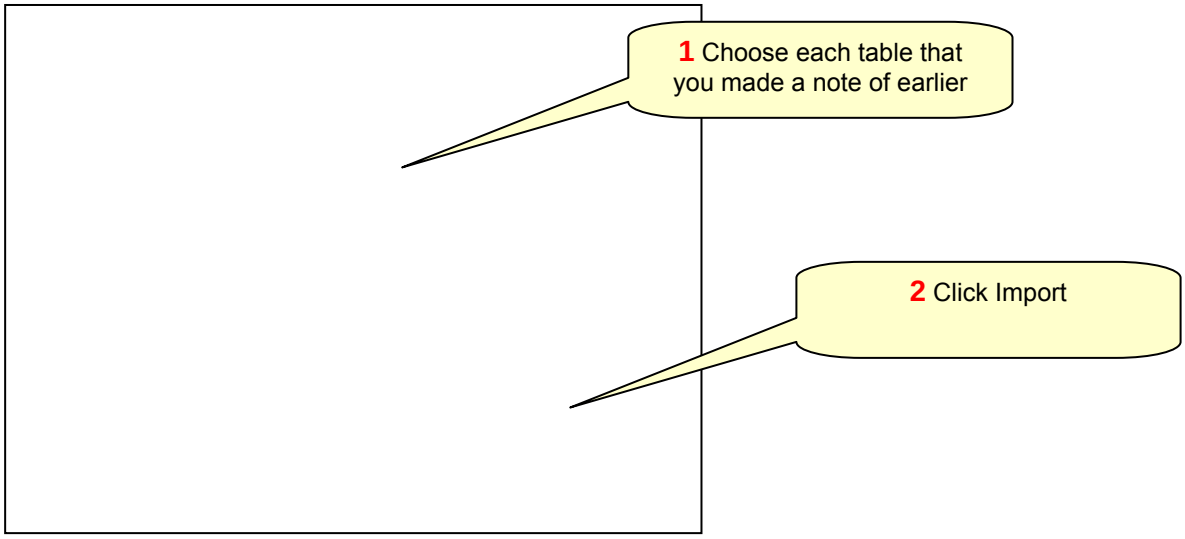
Make a note of all the system tables required (those starting with the trade name of your care management system), then import the relevant tables.



Go to the file menu -> Get External Data -> Left Click "Import". This will start the open file dialog where you choose the source for your data.

From the "Files of Type" drop down select "ODBC Databases".

A dialog will now open showing you a list of available ODBC database connections. Locate, and select, the ODBC connection that you created earlier ("TRACS").



Once the import has completed (can take around 15+ minutes depending on your network connection) rename the imported objects to match the original items. Doing so will replace the old empty tables with fully populated data tables.

Now that all the tables, queries and extraction keys are properly populated and referenced you can run an "extraction". TRACS will assume the tables you have imported in are your LIVE tables rather than copies and use the data within.

Open the "Current System" form using the TRACS menu and click Extract Data ... .

The Status window will inform you of the actions that are being performed, give an indicative time for the action and the number of records affected by it.

If any errors occur you will be informed via the status window, as and when they occur. TRACS will continue on with the extraction until all queries are ran. If the extraction runs without error, when the process is complete the status window will display a "Extraction Completed Successfully" message.

Error Messages

If you encounter errors TRACS will create a log of these, where they occurred, when and any associated information that is available at run time.

This information is stored in the table "tbl_errorlog". This should be your first port of call when diagnosing error messages.

If you feel that the error can not be resolved by yourself then please contact CSED at your earliest convenience.

Adding a system to the TRACS Database inventory.

In addition to adding your system to the Import inventory, you will need to make this new system available to TRACS before importing any data;

At present there is no front end interface to automate this process and will need to be done manually. This is something that is on our development list and you can expect an update shortly.

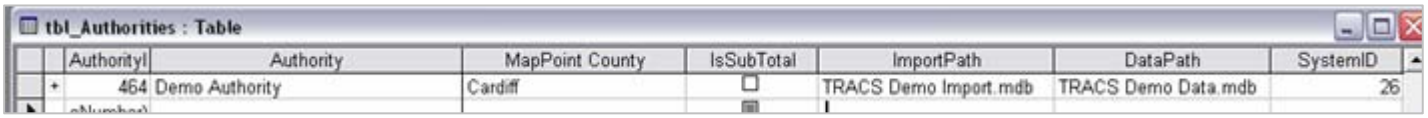
Firstly locate the TRACS application icon, which should be in the TRACS directory created earlier. When TRACS first opens there is usually a lot of processing that begins, in order to display the Analysis screen. As we have not yet set up your system within TRACS we want to avoid this running. Whilst holding the SHIFT key on your keyboard, double left click the program icon to start the application.

When MS Access starts it should display only the database system objects window.

Ensure that you are looking at the TABLE elements, you will note that the elements are prefixed “tbl_”.

Scroll through the list of tables until you find tbl_Authorities.

Open this table and scroll down the list of Authorities until you see your own. Then scroll right until you see the fields across the top that say “ImportPath”, “DataPath” and “SystemID”.



You will need to enter information into these three fields before TRACS can access your system and data.

Import Path
Enter the name of the file you created for your Import Database. You can either just enter the actual filename (i.e. TRACS Demo Import.mdb), or if you opted to store these outside the directory that the application file is held the full UNC path to the file (i.e. C:/YourFolder/TRACS Demo Import.mdb).

Data Path
Enter the name of the file you created for your Data Database. You can either just enter the actual filename (i.e. TRACS Demo Data.mdb), or if you opted to store these outside the directory that the application file is held the full UNC path to the file (i.e. C:/YourFolder/TRACS Demo Data.mdb).

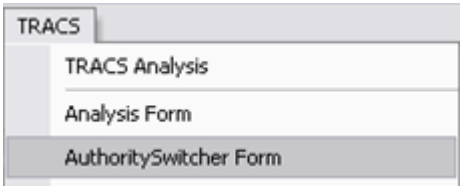
System ID
Enter the system ID that you used within the Import database. If you do not have this ID then please contact your CSED representative.

Once you have entered this information close the table, close the Access application.

Now your system will be identified within TRACS you should be able to open the application in standard mode.

Depending on the state of the application before it was pressed to the CD, and your use of the Demo data there are two possible screens that you will see when you first open TRACS (double click the program icon without holding SHIFT).

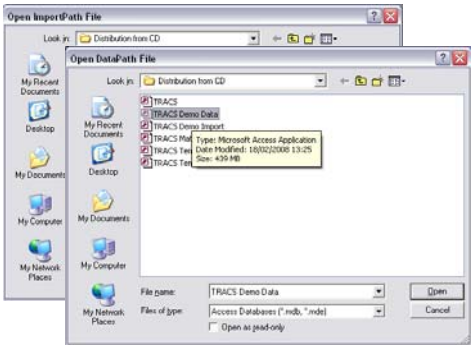
If the Analysis screen appears you will need to close this and open the Authority switcher form which can be accessed from the TRACS menu, in the menu bar.



Ensure that your Authority is selected in the RIGHT hand column then press the “Switch to Authority” button.

The Status window at the bottom of the screen will keep to you up to date with the progress of this process, which should take no more than a few seconds.

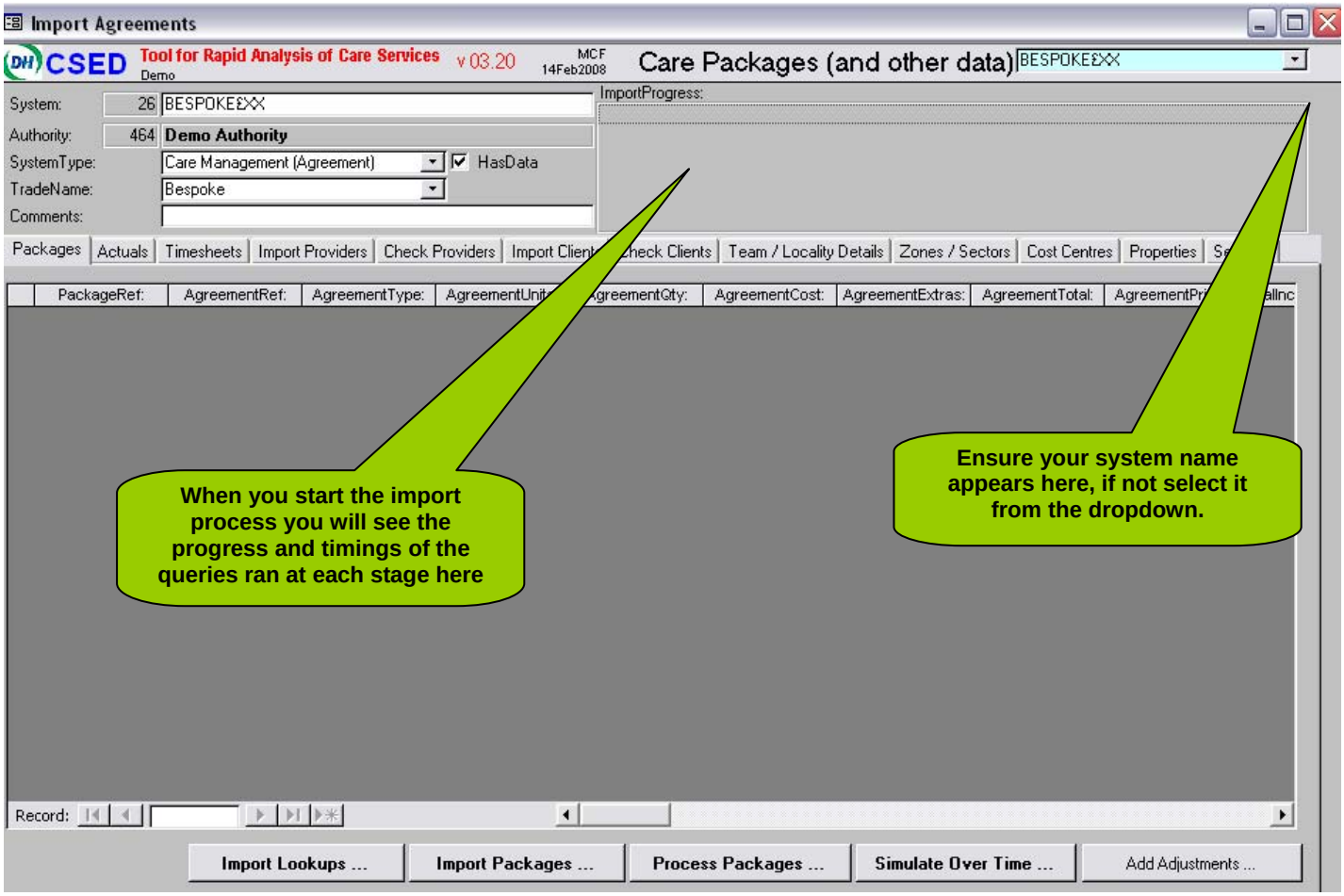
If you have not entered a correct path to your Import and Data files a “File Open” dialog will ask you to locate each of the files separately.



Once the Status window is showing that the process is complete, you can close the Authority Switcher window.

Loading your system data into TRACS.

Loading of data info TRACS is done via the “Packages Form”. Use the TRACS menu in the menu bar to open the “Packages Form”.



Getting the data into TRACS is currently a four stage process;

- Import Lookups
- Import Packages
- Process Packages
- Simulate Over Time

There is a mechanism available to “Add Adjustments”, however this is not a required step.

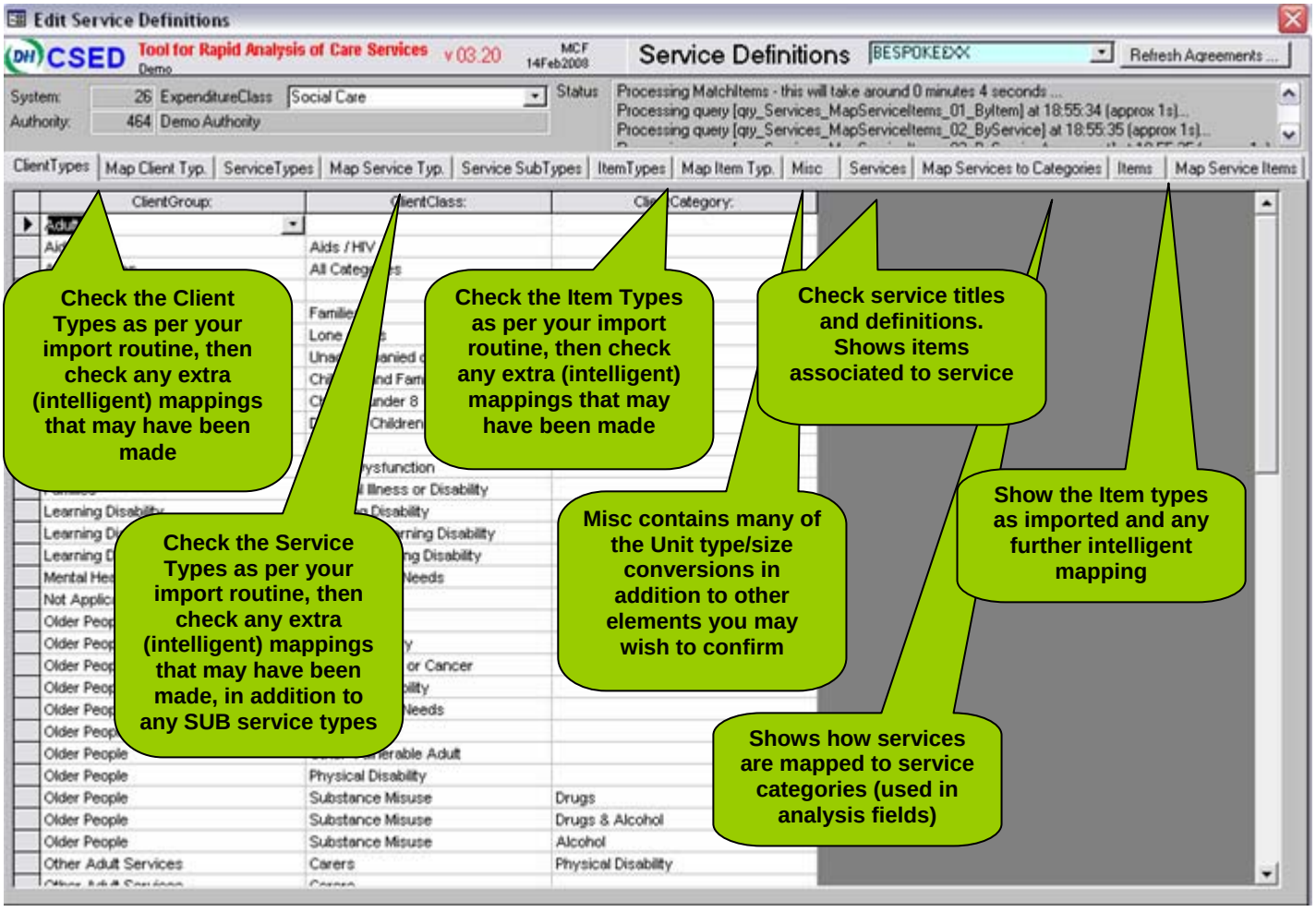
Import Lookups

Click the Import Lookup Button.
The first stage of the process imports the lookup tables and values from your care management system. This obviously needs to be done first so that actions later on in the procedure have the relevant data to work with.

Once the lookups have been imported the status window will display a message confirming this.

Import Packages

Click the Import Packages Button.
During this stage of processing TRACS will copy all the relevant care package information to the TRACS Data warehouse. Part way through the process a dialog box will appear so that you can confirm that the TRACS has made the correct assumptions with the data so far. This also gives you the opportunity to double check that the lookups are correct.

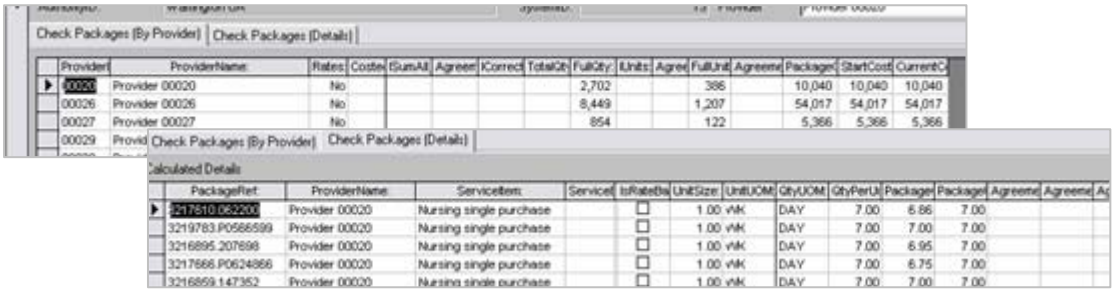


Once you are happy with the mappings as they appear close the dialog box to continue the process. Don't worry about not getting this 100% the first time you run this as you can always go back into the "Edit Service Definitions" form at a later date and re-process the packages.

Checkpoint A

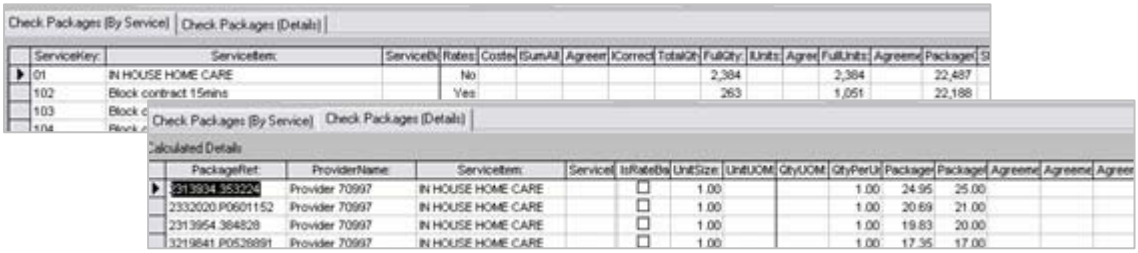
If you wish to see how the processing has gone so far, before you start the next stages, there are two screens which you may find really useful.

Using the TRACS menu open the “Check Packages by Provider” form.



You can use the form to check the quantities of units purchased per provider, then check the individual packages the selected provider is offering by clicking the next tab.

Using the TRACS menu open the “Check Packages by Service” form.



These screens show you the units used by SERVICE groupings, and again the packages offered by each service.

These screens are intended to be used to make sure that you are in the correct ball park when looking at amount of service offered/purchased.

If you are significantly out on one or two items then it would suggest that there is a unit conversion that needs to be amended (via the Edit Service Definition Form).

Process Packages

Click the Process Packages button.
Processing the packages uses the package data and the lookups and transfers it in a more logical, efficient way to the warehouse. Because processing of numbers is quicker than letters within this environment any repetitive text based keys are converted to numeric.

Simulate Over Time

Click the Simulate over Time button.
This part of the process simulates a service record for each week a clients service is open, allowing TRACS to calculate cost commitment, then if necessary overlay “actual” spend.

Checkpoint B

Once all four buttons have been pressed it is advised that you use the following forms to check the spend/items purchased against any figures you can obtain from your finance department.

There are three different views of this data, provided by Week, Month and Year.

These can be accessed via the following forms in the TRACS Menu;

- Check Providers by Week

- Check Providers by Month

- Check Providers by Year

Error Messages

As with all other processes within TRACS, there is comprehensive error trapping and reporting mechanisms. If during any of the stages of import you encounter errors, these will be displayed in the status window at the top right hand corner of the Packages window.

To view as much detail has been trapped with regards to these error(s) then you need to go to the "tbl_errorlog" table which holds details relating to which errors have occurred, the calling object and module, the date and time of this error, the system error number and any SQL which was being processed at the time.

If you feel you can diagnose the issue yourself this is certainly a good place to start. If after trying to repair the error you need additional support, use the Requests Form to log an issue, which will also send us a copy of your tbl_errorlog for analysis.

TRACS Functionality

The next section of this document will guide you through the core features and functionality of a populated TRACS environment.

Language Definition

It is important that you understand how the elements of TRACS are defined. These elements may be defined or named differently in your own environment.

Service Package

A specific service item detail offered as part of an agreement.

Agreement

A series of packages of support provided to the client

Service

The actual service fulfilling/providing the service items. I.e. Occupational Therapy, Older People Home Care

Item

Items are rationalised service item types that prices can be stored against. Multiple services can use the same item (i.e. a 15 minute visit)

Price Table

A group of prices for individual service items, with day, qty, rate band breaks. The Price table is linked to the current Option.

Option

An option is the framework that a your pricing model can be copied in to so that you can pull it apart and change it without destroying your original data.
The **option** price is the figure that changes and can always be compared against the original price column.
The price column is the **actual** value and doesn't change.
Option price is basically a 'what if' test comparator.

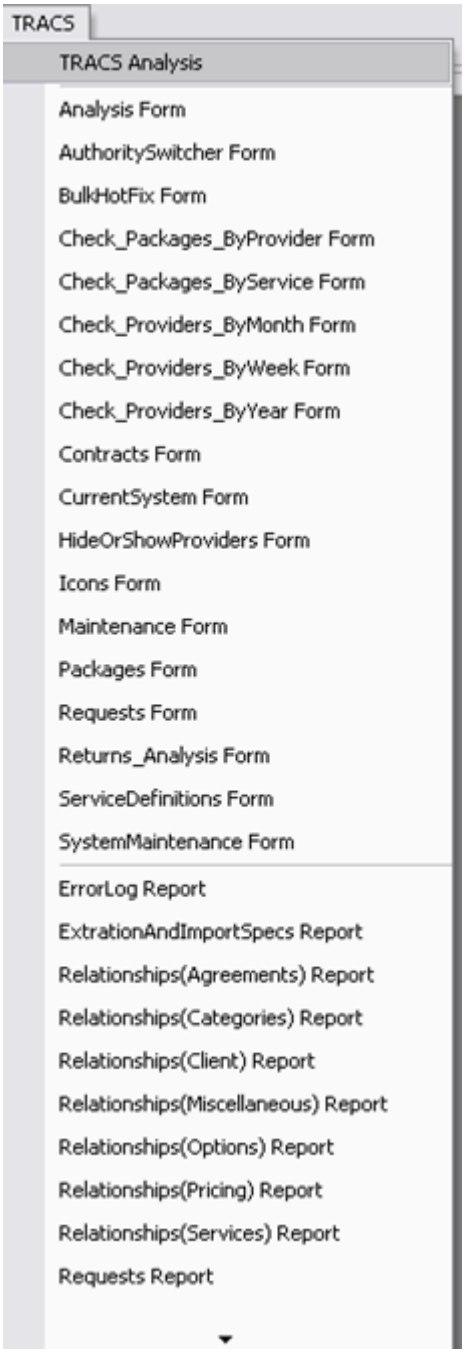
Contract

A framework of prices

TRACS Menu Bar

Accessible from all screens within TRACS you can select items from the TRACS Menu Bar. The items on this list are not context sensitive.

The Menu bar should be visible at all times located at the top left hand side of the screen. Simply left click the TRACS menu to open.



Because there are many items in the Menu, you may have to scroll the list to see the entire compliment.

The first item on the list is the form which will most commonly used by “end users”, and as such is created in a group by itself.

The next block of items contain forms within the system whose name is prefixed “frm_” (denoting that this is a form that you would like a user to be able to open”.

The next block of items is the list available reports.

The Final item (currently not show on the image to the right due to the need to scroll) is the TRACS HotFix form.

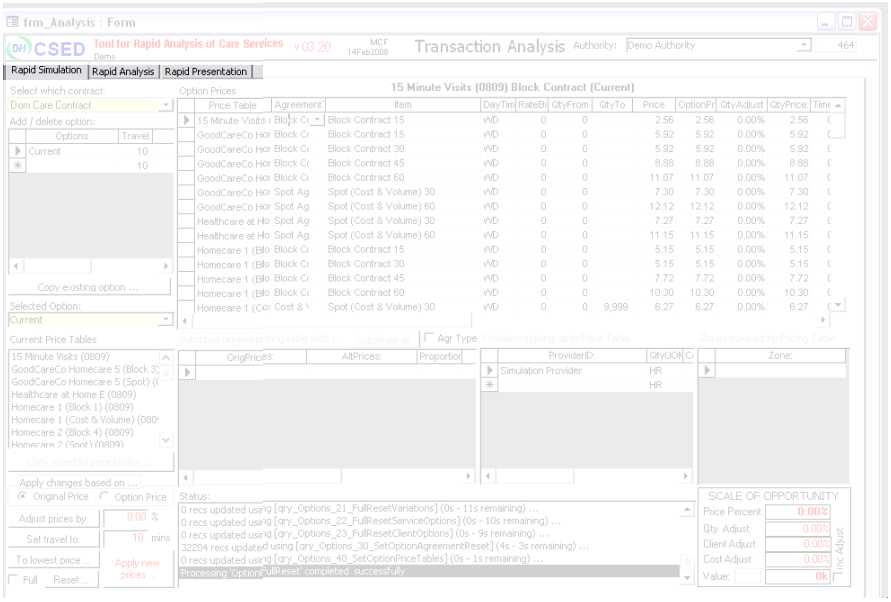
The Analysis Screen

The analysis screen houses a range of tabbed screens, selectors and functionality that form the hub of TRACS functionality.

The next section will talk through the functionality of each item within the three areas (tabs);

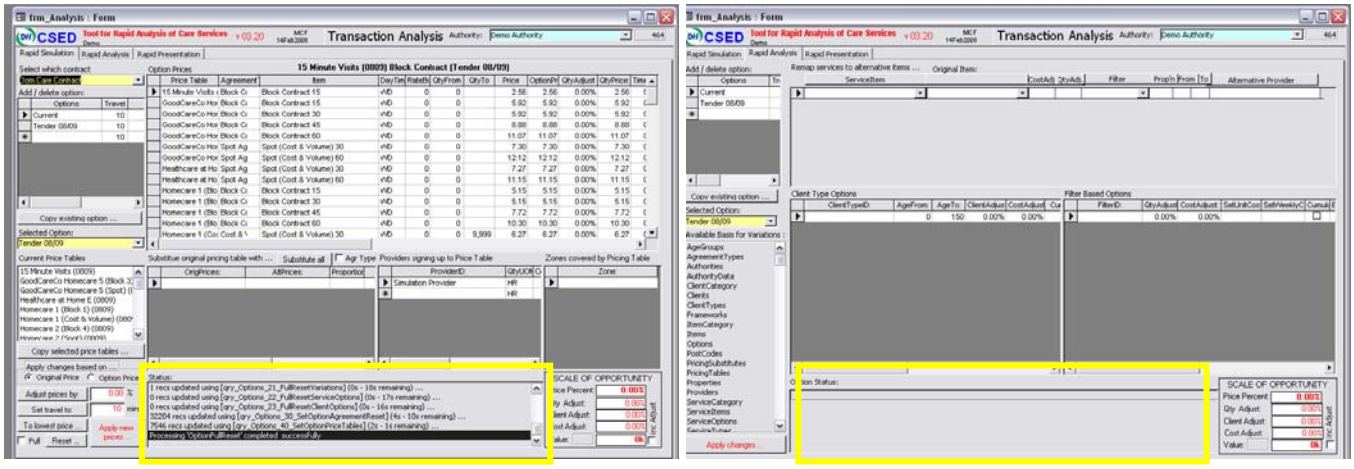
- Simulation
- Analysis
- Presentation

The “Simulation” tab is the default tab shown when the Analysis Form opens.



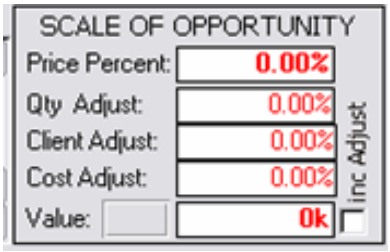
Status Window

The “Status” window appears on many screens within TRACS and is intended to keep the end user informed as to what is happening, and how long it is going to take and how many records have been affected by the current operation.



The status window will display notification of completed procedures and any errors that may occur.

Scale of Opportunity



The "Scale of Opportunity" area represents the Price percent and cost value of potential savings/increases based on your original (Current) price model.

The opportunity is calculated by taking the annualised cost of your care packages and applying the adjustments you have specified.

This screen is updated ONLY when new changes are applied. On the simulation screen this means pressing the "Apply New Prices" button. On the Rapid Analysis screen this means pressing the "Apply Changes" button.

The difference between the original cost and the adjusted cost provides the opportunity.

Price Percent
The percentage difference between the original and adjusted costs.

Qty Adjust
The percentage difference in volume based on changes you made.

Client Adjust
The percentage difference overall in client adjustments based on changes you made.

Cost Adjust
The percentage difference in cost based adjustments

Value
The cash value of potential opportunities.

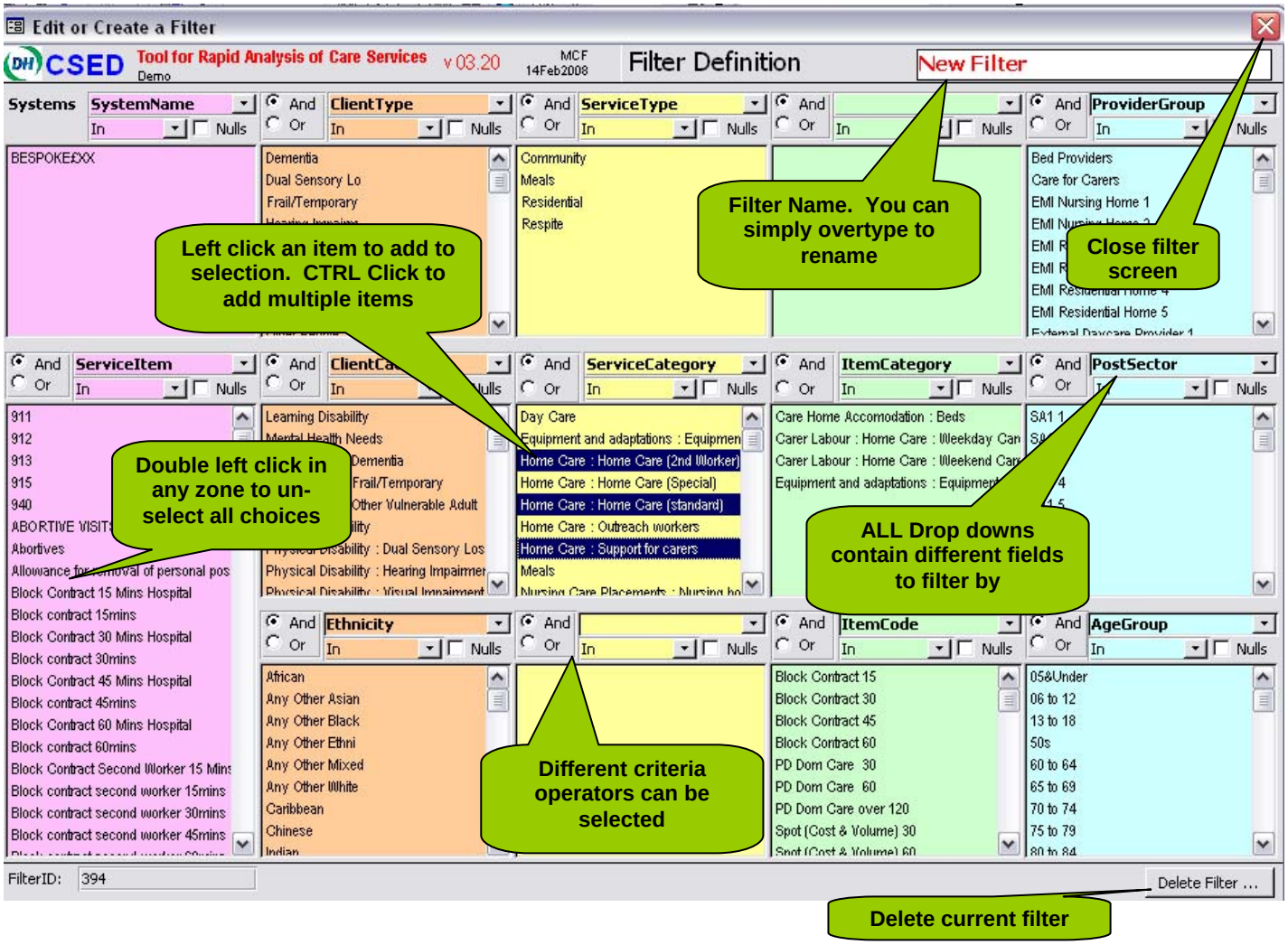
Inc Adjust
The "inc Adjust" flag allows you to switch on and off the impact of qty, client, cost based adjustments momentarily. By default this flag is not ticked, so you will need to tick the box to see the impact of the qty, client or cost adjustments.

Filter Screen

The filter screen can be accessed by a range of mechanisms to enable a consistent approach to selecting specific subsets of data.

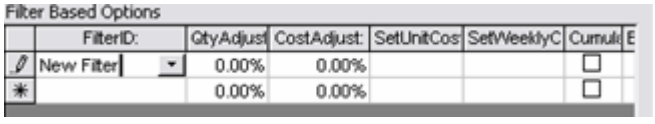
There are many different grouping elements to choose. These elements are populated from your own care management system so they are easily recognisable.

The filter screen can be called by typing a name of a filter within an area that has a filter field.



The filter screen is organised as best as possible into four vertical areas of similar type elements.

Filter fields range from Authority types, service items and care types to age, area, teams and finance based fields.

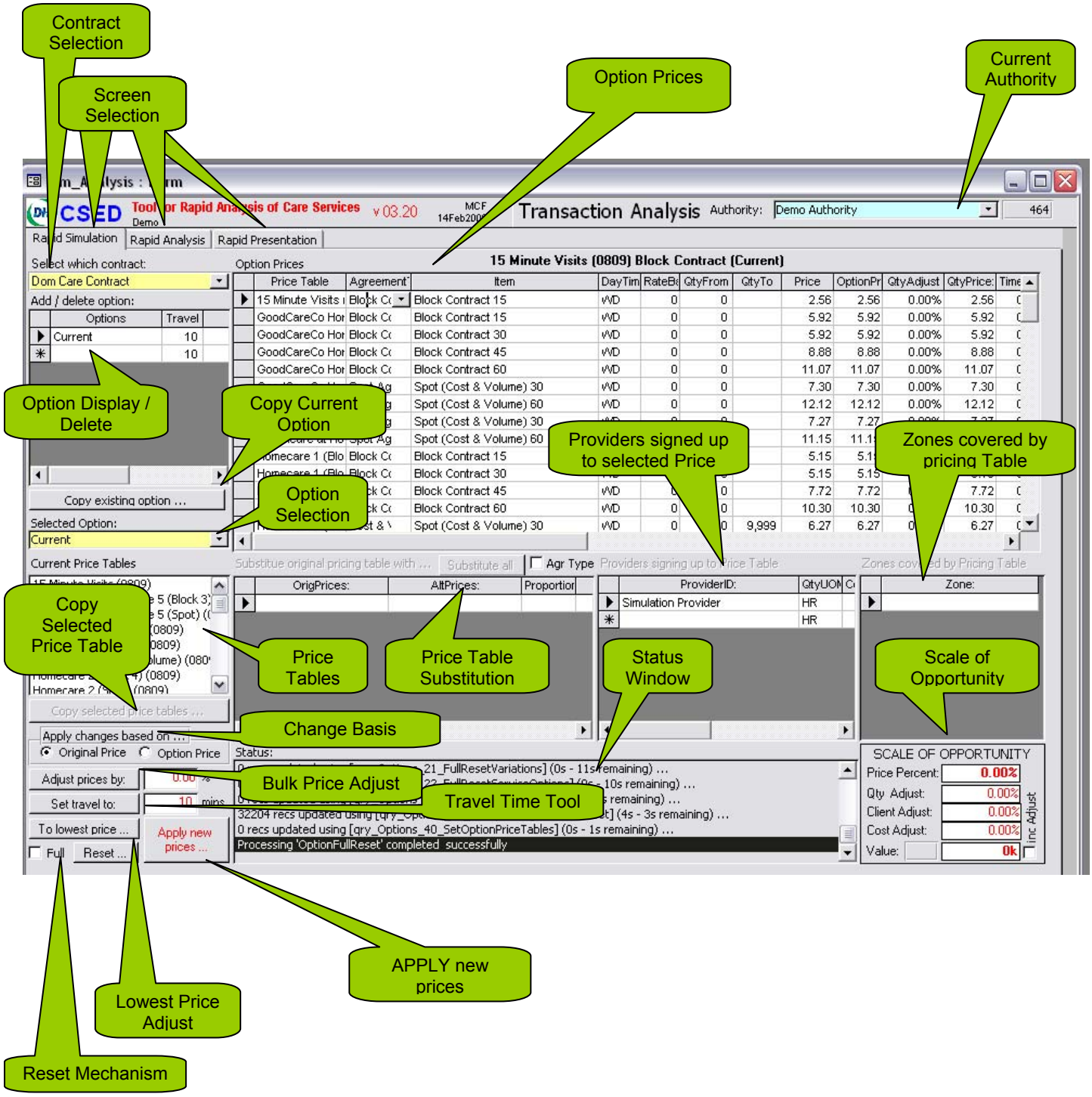


To recall the filter screen once you have created one, simply select the name of the filter from the dropdown then double left click the filter name within the field.

Rapid Simulation

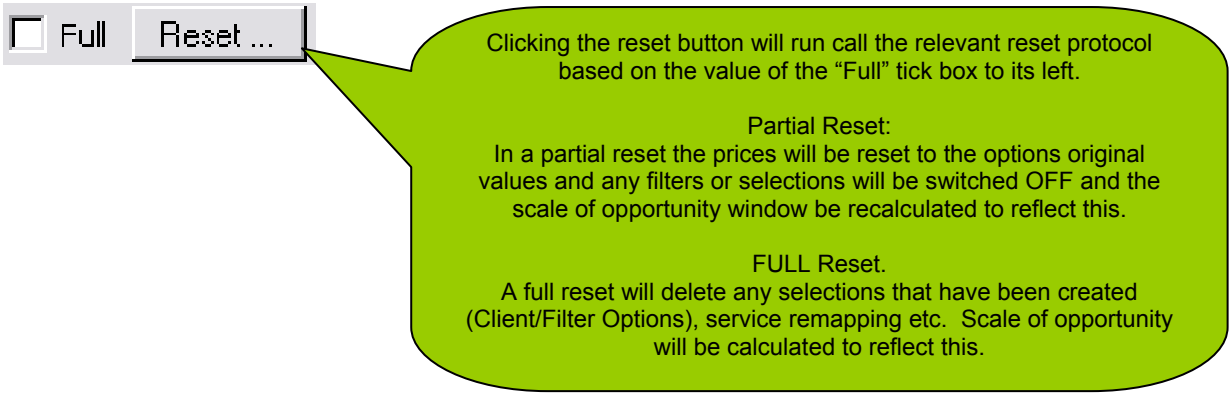
The simulation screen provides an interface to re-model your pricing table structure and analyse price-based changes. Options can be stored for later comparison in the presentation screen.

Screen Orientation



Reset Mechanism

The reset mechanism gives you the functionality to reset the currently selection option to its original state. There are partial and full reset options.

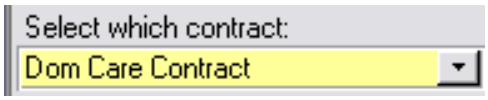


Change Basis

The "Adjust prices by", "Set Travel To" and "To Lowest Price" tools can be set to use the original pricing, or the "Option" price stored against each service item.

Simple switch between the two radio button items to choose the basis for the tools to make the calculations.

Contract Selection

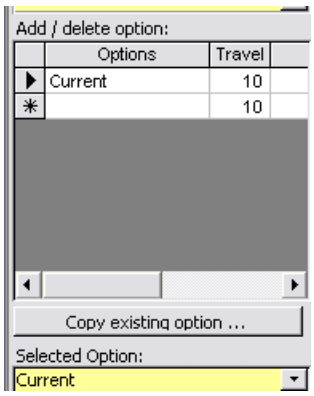


TRACS can store multiple frameworks of pricing. These are defined with a Contract. This mechanism can be used to separate pricing models for different types of service i.e. domiciliary care and residential care services.

To switch between your currently defined contracts, left click the drop down selector and choose the contract you wish to analyse. TRACS will automatically refresh the main screen to reflect the choice you have made. Progress is displayed in the status window.

OPTIONS

By default there is one "option" created by the import process. This option is based on your "current" pricing model, and has been named accordingly.

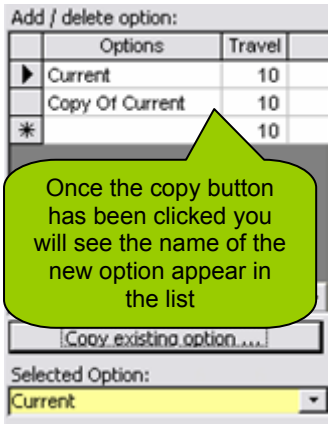


Options were created with analysis in mind, be this for comparing actual tenders received or creating hypothetical pricing models to examine a potential opportunity within the market place.

The information within any options you create can be graphically represented within the presentation screen, in addition to the "scale of opportunity" frame.

Options: Copy an existing option

To create a copy of the "current" option, simply click the "Copy Existing Option" button.

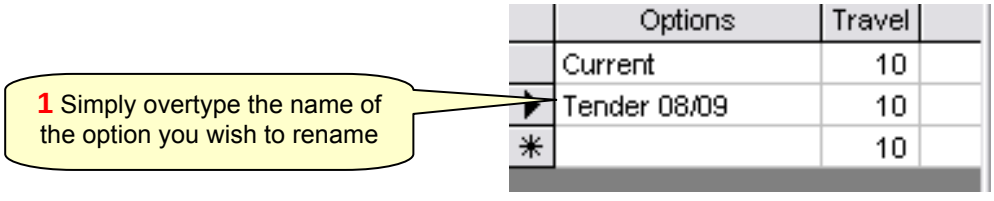


Copying an option takes a snapshot of all the data within the currently selected option. This includes any price table structure and pricing.

Because the "Current" option is linked to your current structure, certain simulation functionality has been restricted (to preserve your original dataset).

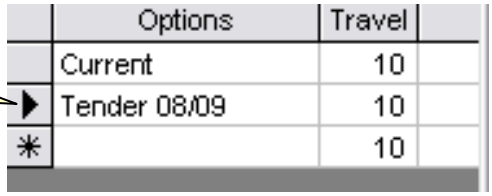
When creating a new option, TRACS does not automatically switch to this.

Options: Renaming options



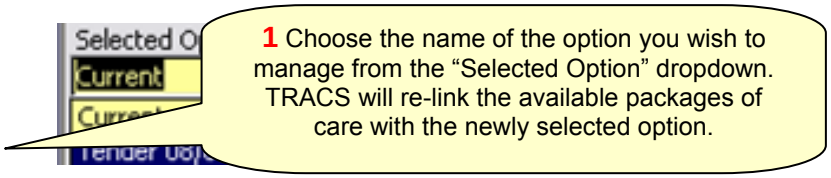
Options: Deleting Options

1 Either left click the record selector and press your keyboards delete key, or right click and choose delete from the context menu.
***You can only delete an option when it is NOT the currently selected option**



Options: Changing the selected option

Changing the selected option opens up further functionality that really allows you to fully re-model your framework of prices.



1 Choose the name of the option you wish to manage from the “Selected Option” dropdown. TRACS will re-link the available packages of care with the newly selected option.

You will notice that some of the options that were previously “greyed” out are now fully visible (and functional).

Options: Option Prices

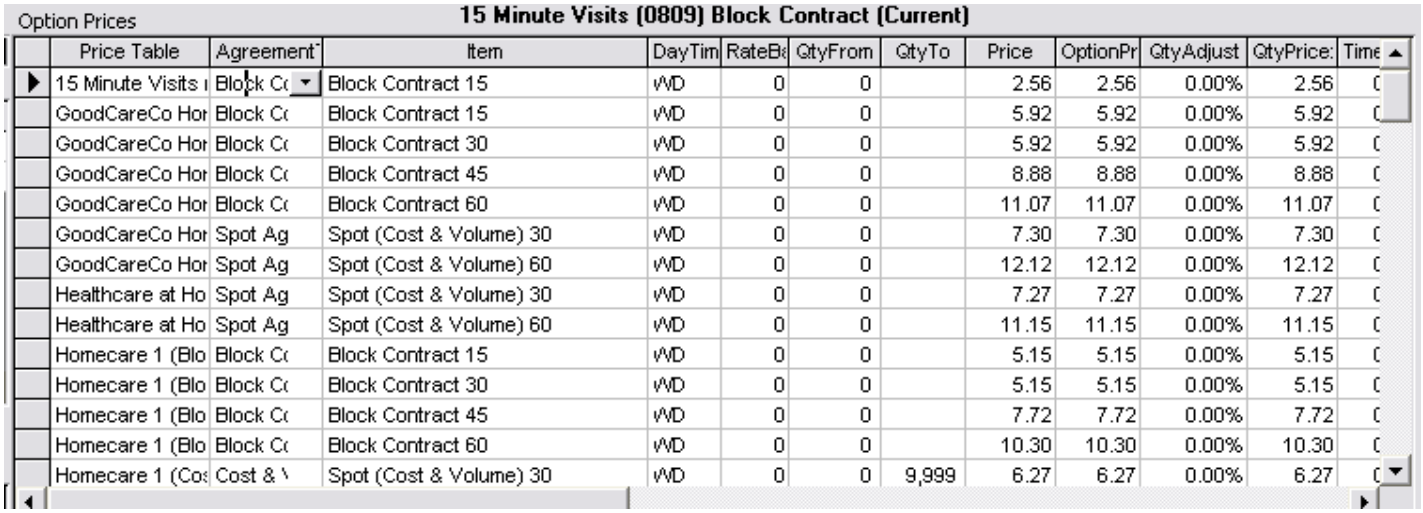
An option provides a function to record a price structure that can be dependant on many different variables, such as those available to you in commissioning.

Prices for service items can be set depending on the day, time, qty or rate band as part of block or spot contract arrangements. The price table structure allows prices to be applied for certain suppliers and for certain definable zones. The Option price is stored/displayed alongside the original price (for comparison).

While your current price structure is selected, you cannot remove/edit or create price tables, or substitute one for another.

Within your current structure you can;

- Set new 'option' price (using the travel time tool and the lowest price tool, in addition to manual adjustment)
- Adjust the qty purchased of certain item(s)


Option Prices

15 Minute Visits (0809) Block Contract (Current)

Price Table	Agreement	Item	DayTim	RateBa	QtyFrom	QtyTo	Price	OptionPr	QtyAdjust	QtyPrice:	Time
15 Minute Visits	Block Cc	Block Contract 15	WD	0	0		2.56	2.56	0.00%	2.56	0
GoodCareCo Hor	Block Cc	Block Contract 15	WD	0	0		5.92	5.92	0.00%	5.92	0
GoodCareCo Hor	Block Cc	Block Contract 30	WD	0	0		5.92	5.92	0.00%	5.92	0
GoodCareCo Hor	Block Cc	Block Contract 45	WD	0	0		8.88	8.88	0.00%	8.88	0
GoodCareCo Hor	Block Cc	Block Contract 60	WD	0	0		11.07	11.07	0.00%	11.07	0
GoodCareCo Hor	Spot Ag	Spot (Cost & Volume) 30	WD	0	0		7.30	7.30	0.00%	7.30	0
GoodCareCo Hor	Spot Ag	Spot (Cost & Volume) 60	WD	0	0		12.12	12.12	0.00%	12.12	0
Healthcare at Ho	Spot Ag	Spot (Cost & Volume) 30	WD	0	0		7.27	7.27	0.00%	7.27	0
Healthcare at Ho	Spot Ag	Spot (Cost & Volume) 60	WD	0	0		11.15	11.15	0.00%	11.15	0
Homecare 1 (Blo	Block Cc	Block Contract 15	WD	0	0		5.15	5.15	0.00%	5.15	0
Homecare 1 (Blo	Block Cc	Block Contract 30	WD	0	0		5.15	5.15	0.00%	5.15	0
Homecare 1 (Blo	Block Cc	Block Contract 45	WD	0	0		7.72	7.72	0.00%	7.72	0
Homecare 1 (Blo	Block Cc	Block Contract 60	WD	0	0		10.30	10.30	0.00%	10.30	0
Homecare 1 (Cos	Cost & V	Spot (Cost & Volume) 30	WD	0	0	9,999	6.27	6.27	0.00%	6.27	0

Changes made to pricing using other tools are shown in this frame.

Options -> Tools: Bulk Price Change

You can adjust all prices within your current option by a set percentage by simply entering a percentage to adjust by in the bulk price adjuster tool.

Price	OptionPr
2.56	2.61
5.92	6.04
5.92	6.04
8.88	9.06
11.07	11.29

You can enter both positive and negative numbers into the input box. When you click the "Adjust prices by:" button you will note that all the "option price" entries in the option prices frame are the specified percentage different from the original price.

Apply the prices to see the cost differential in the scale of opportunity frame.

This can be a useful tool for calculating to potential impact of an agreed uplift built into your contracts, or inflation etc.

Options -> Tools: Travel Time Tool

The travel time tool can be used to calculate the premium paid on shorter visits in certain pricing environments. It can also be used to calculate the impact of paying an agreed additional cost based on travel time (i.e. factoring 10 minutes travel time per visit).

Enter 0 into the travel time box and press "set travel to:"

You will see the option price updated to show the impact of paying 15/30/45 minute visits directly proportionate to the cost of the 60 minute rate recorded. Applying the prices will calculate the cost impact of completely removing premiums (if existing) on your shorter visits.

If you entered 10 minutes into the tool for example, the option price would be calculated as follows;

15 minute visits = ((15 + 10) / (60 + 10) x original hourly rate)
30 minute visits = ((30 + 10) / (60 + 10) x original hourly rate)
45 minute visits = ((45 + 10) / (60 + 10) x original hourly rate)
60 minute visits = ((60 + 10) / (60 + 10) x original hourly rate)

As you see, this uses a consistent approach to the issue of travel time, and often results in a cost saving (apply prices to check).

Options -> Tools: Lowest Price Adjust

The lowest price adjustment button is essentially a "check pick" option. Pressing the "to lowest price" button will apply the lowest price for any service item across price tables to the option price of like services.
This can be used to see the scale of opportunity within your marketplace If the cheapest provider could offer the same service across price tables.

Apply prices to see potential impact.

Options -> Tools: Manual Option Price Adjustment

Perhaps the simplest feature to use; TRACS provides functionality to change the option price of individual service items.

Price Table	Agreement	Item	DayTim	RateB	QtyFrom	QtyTo	Price	OptionPr
15 Minute Visits	Block C	Block Contract 15	WD	0	0		2.56	2.56
GoodCareCo Hor	Block C	Block Contract 15	WD	0	0		5.92	5.00
GoodCareCo Hor	Block C	Block Contract 30						5.92
GoodCareCo Hor	Block C	Block Contract 45					.88	8.88

1 Simply overtype the Option Price with the new price you wish to test. Then apply prices to check impact.

Options -> Price Table: Copy Price Table

You can only copy price tables when you are not using your "current" price option. Ensure you have a "copy" presently selected to active the "copy price table" button.

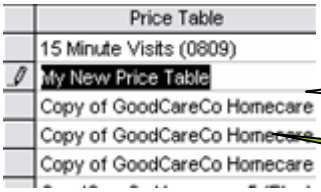
1 Select the name of the price table you wish to copy

2 Click the "Copy Selected Price Table" button

You should see the price table you selected appear in the option prices frame, prefixed "copy of".

Price Table	Agreement	Item	DayTim	RateB	QtyFrom	QtyTo	Price	OptionPr	QtyAdjust
15 Minute Visits (0809)	Block C	Block Contract 15	WD	0	0		2.56	2.56	0.00%
Copy of GoodCareCo Homecare	Block C	Block Contract 15	WD	0	0		5.92	5.00	0.00%
Copy of GoodCareCo Homecare	Block C	Block Contract 30	WD	0	0		5.92	5.92	0.00%
Copy of GoodCareCo Homecare	Block C	Block Contract 45	WD	0	0		8.88	8.88	0.00%
Copy of GoodCareCo Homecare	Block C	Block Contract 60	WD	0	0		11.07	11.07	0.00%
GoodCareCo Homecare 5 (Block	Block C	Block Contract 15	WD	0	0		5.92	5.92	0.00%
GoodCareCo Homecare 5 (Block	Block C	Block Contract 30	WD	0	0		5.92	5.92	0.00%
GoodCareCo Homecare 5 (Block	Block C	Block Contract 45	WD	0	0		8.88	8.88	0.00%
GoodCareCo Homecare 5 (Block	Block C	Block Contract 60	WD	0	0		11.07	11.07	0.00%

Options -> Price Table: Rename Price Table

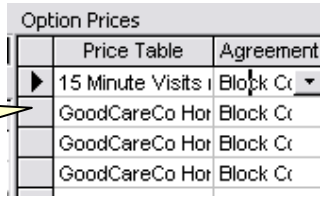


1 Simply overtype the name of one instance of the price table and click into another cell when done.

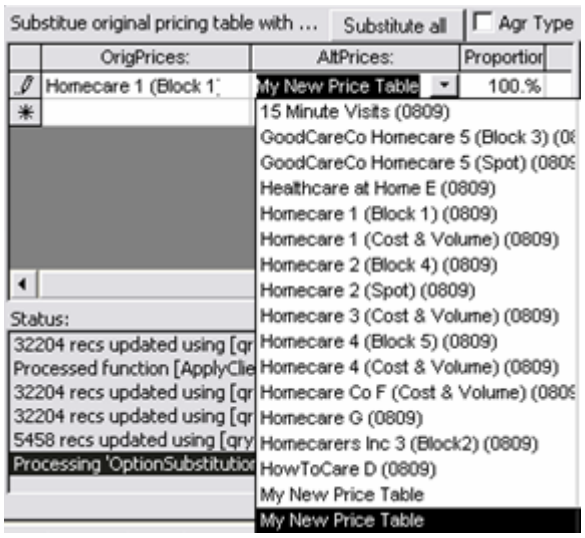
Once you have renamed one instance, TRACS will change the name in the other cells for you

Options -> Price Table: Delete Price Table

1 Left click the record selector against one (or more with CTRL Click) and press your keyboards delete key, or right click and select delete from the context menu



Options -> Price Table: Substitute Price Table



TRACS allows you to simply swap out one price table for another, and see the impact of doing so.

This is done using the price table substitution frame.

There are four inputs to the screen;

Original Prices
Select the Price table you wish to replace

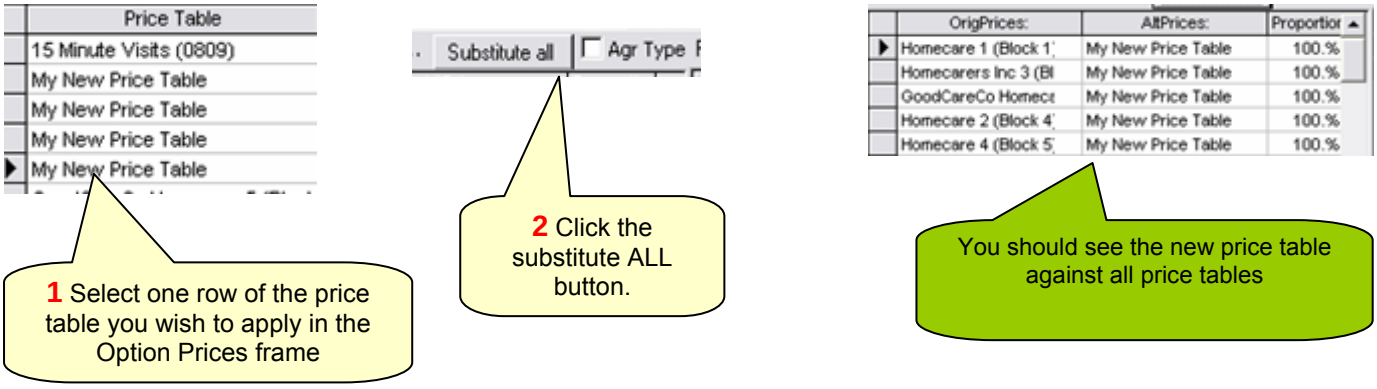
Alt Prices
Choose the price table you want to use in place

Proportion
If you want to swap price table for a set proportion of the selection, enter the % in this column. This is especially useful for distributing an old supplier to a selection of new suppliers.

Filter
You can use a filter to further refine the subset of data the substitution applies to. Choose the filter from the list, or type a new name to define a new filter.

Options -> Price Table: Substitute All

With the “substitute all” functionality you can choose one price table, and apply it where other price tables contain the same service items in the table you selected. This can be used in rationalisation exercises. Create one set price for a set of services, then apply them to ALL packages within the specified services.

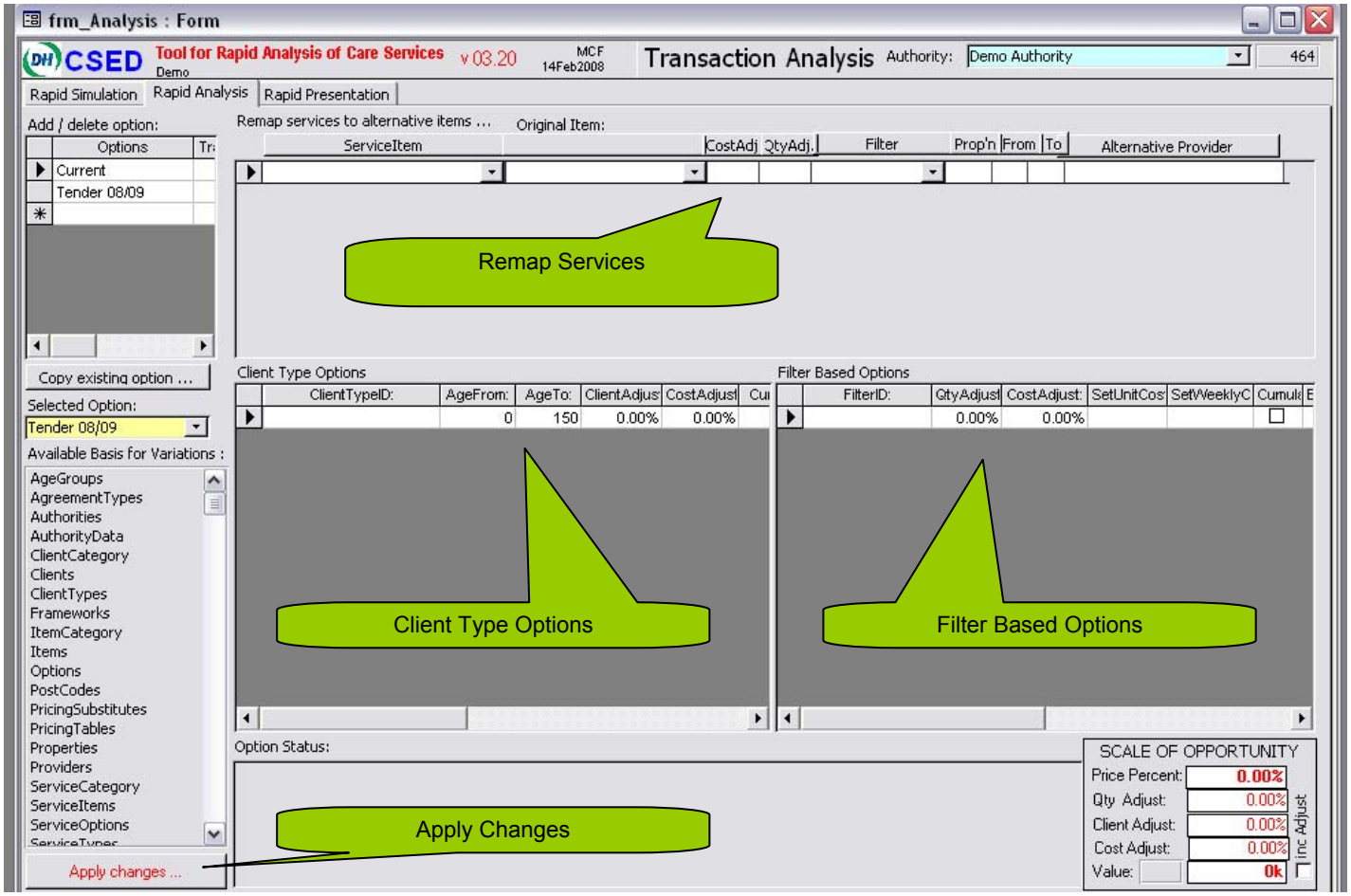


Apply the prices when happy, this should have changed your variable priced environment to a single priced environment, and highlighted any scale of opportunity by applying one flat rate.

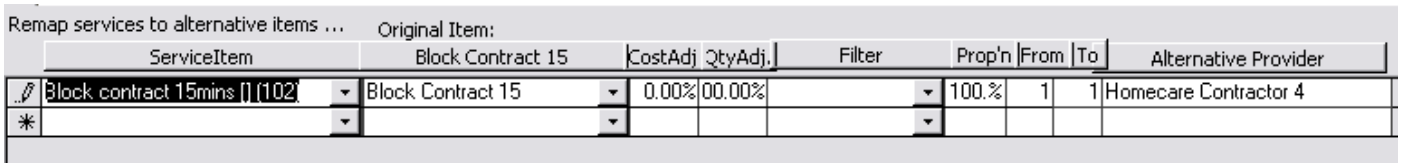
Rapid Analysis

The analysis screen houses functionality to remap service items in a more specific, definable manner. It also allows adjustment of the quantity and cost of multiple subsets of your care package data. Some of the elements on this screen lend themselves to incorporate data from other CSED Tookits, such as POPPI and FLoSC.

Screen Orientation



Remap Services



The remap services frame has a number of inputs;

Service Item
The original service item you wish to swap out

Alternative Item
The service item you wish to replace the original item with.

Cost Adjust
In addition to swapping out the item, you can add an adjustment to the service item price

Qty Adjust
You can also add an adjustment to the volume of the service items being purchased.

Filter
Using the same broad ranging filter mechanism as in the Analysis and presentation screen you can choose a subset of items, or criteria for the remapping to apply to.

Proportion
You can choose to swap out on a certain percentage of the items

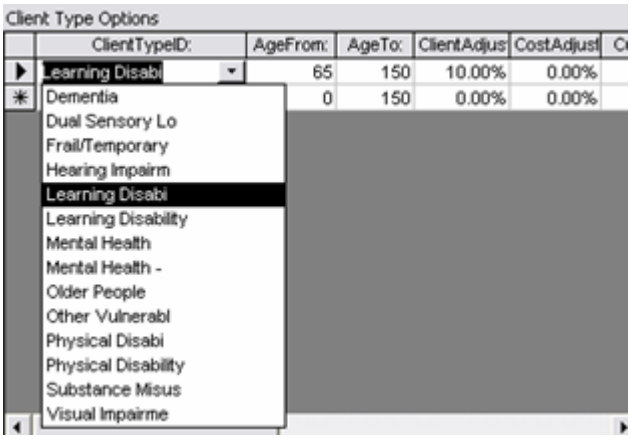
From / To
The from/to fields combine to create a ratio which is applied to the new pricing. This has been added with service remapping for services of a non similar nature in mind. Swapping 15 minute visits for 30 minute visits etc; these fields would be left both as 1.

If you wanted to swap 7 units of 30 minute visits for 1 day residential care, you can use the from/to to balance this out.

Alternative Provider
The alternative provider field is context sensitive, related to the Alternate Item field. Only providers that offer the service requested is shown. You can choose a specific supplier from the list.

Use the “Apply Changes” button to see the impact in the “Scale of Opportunity” frame.

Client Type Options



The client type options are the ideal mechanism to apply the figures that are obtainable through POPPI.

This mechanism allows you to select multiple client types, specify an age range and adjust the number of clients, or costs based on those clients.

For example, you could use this to see the impact of your 65+ LD population growing by 10% over 5 years

You can add many rows

Client Type ID
The client types here are populated from your own care management system.

Age From
Start of age range to calculate impact

Age To
End of age range to calculate impact

Client Adjust
Specify a % amount to adjust the selected client base by

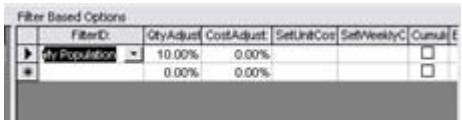
Cost Adjust
Select a % amount to adjust the costs for the selected client base by

Cumulative
Apply changes on a cumulative basis, or on the basis of overlapping adjustments are made in the most conservative view

Execution Order
The order that the adjustments are applied

Adjust on
This allows adjustments to be set up and turned on and off as required.

Filter Type Options



The filter type options allow you to select multiple subsets of data using multiple selection criteria to allow true flexibility over making cost/volume based adjustments of your data set.

Filter ID
The name of a predefined filter that you have already used, or type a new name to launch the filter selection screen.

Qty Adjust
A factor to adjust the qty by

Cost Adjust
A factor to adjust the Unit cost by

Set Unit Cost
Use this to set the unit cost to a specific value (leave blank if not required)

Set Weekly Cost
Use this to set the weekly cost to a specific value (leave blank if not required)

Cumulative
Apply changes on a cumulative basis, or on the basis of overlapping adjustments made in the most conservative view

Execution Order
The order that the adjustments are applied

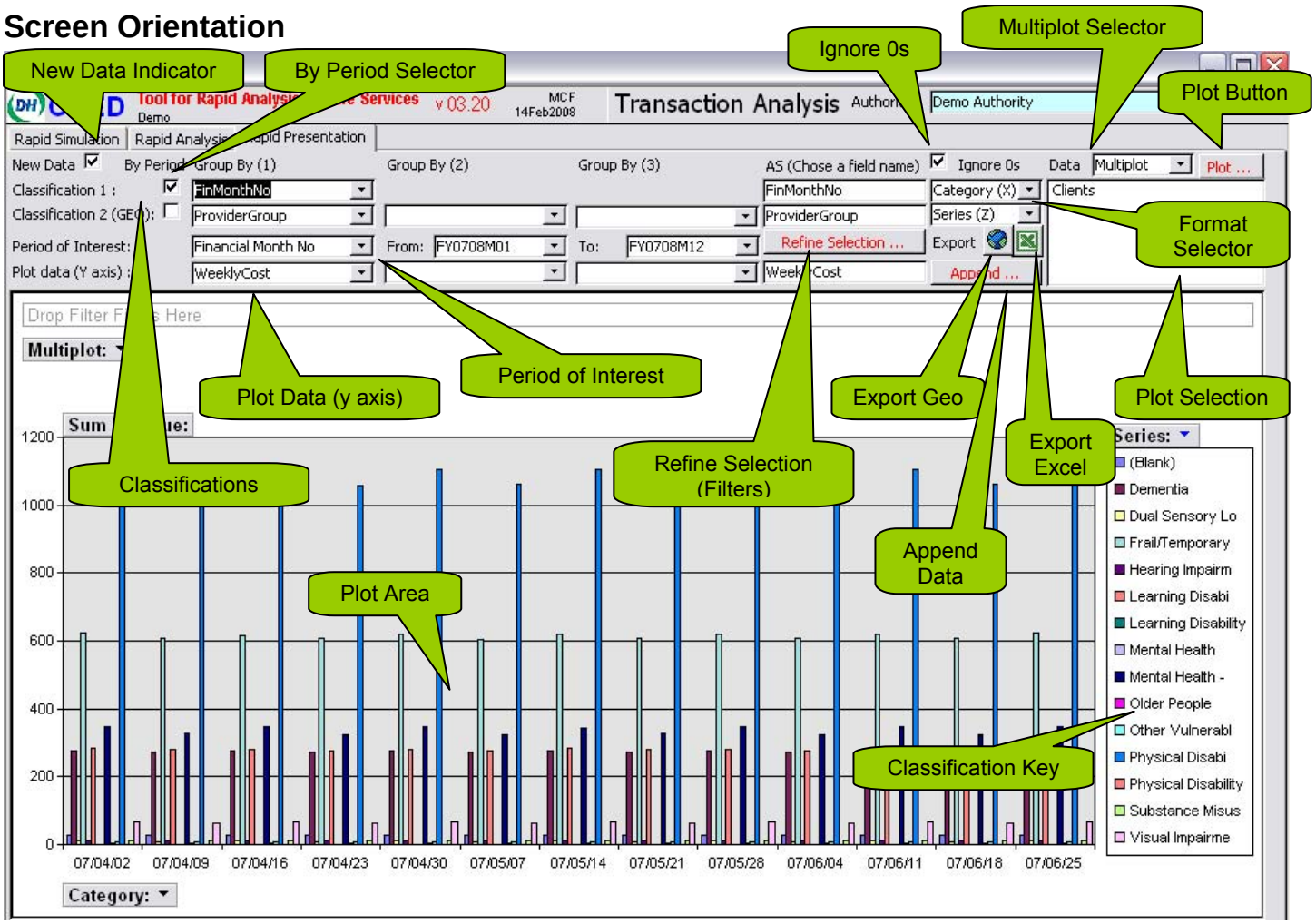
Adjust on
This allows adjustments to be set up and turned on and off as required.

Apply Changes to see impact.

Rapid Presentation

The presentation tab allows rapid graphic based analysis of your care services data. You can plot actuals vs commitment, and view the difference between various pricing models and options.

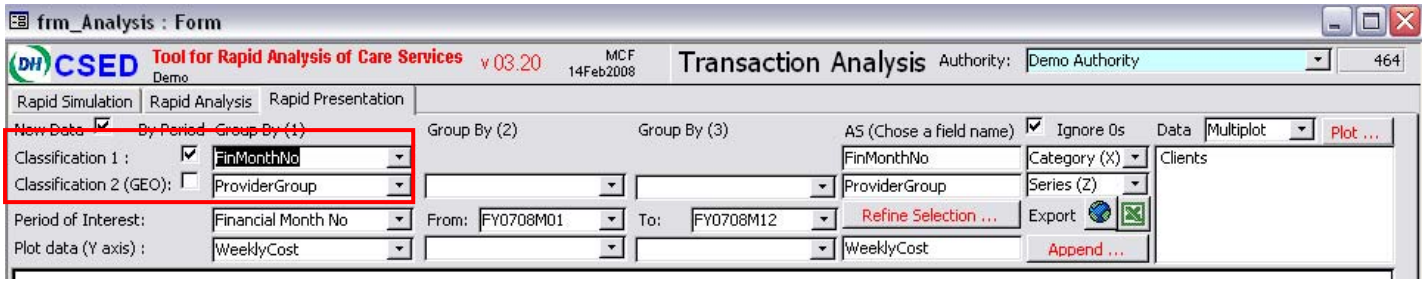
Screen Orientation



Plotting Data : Single Series

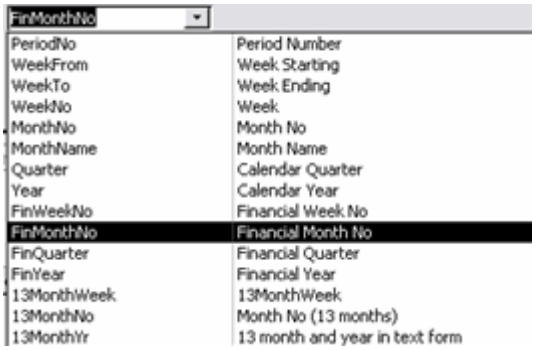
The interface for the Plot screen has been designed so that you can choose for yourself which element appears in which axis, and which data you plot.

As well as a range of elements taken from your system for grouping purposes there are calculated fields (Analysis Fields) available to choose from (or with a little technical know how add your own).

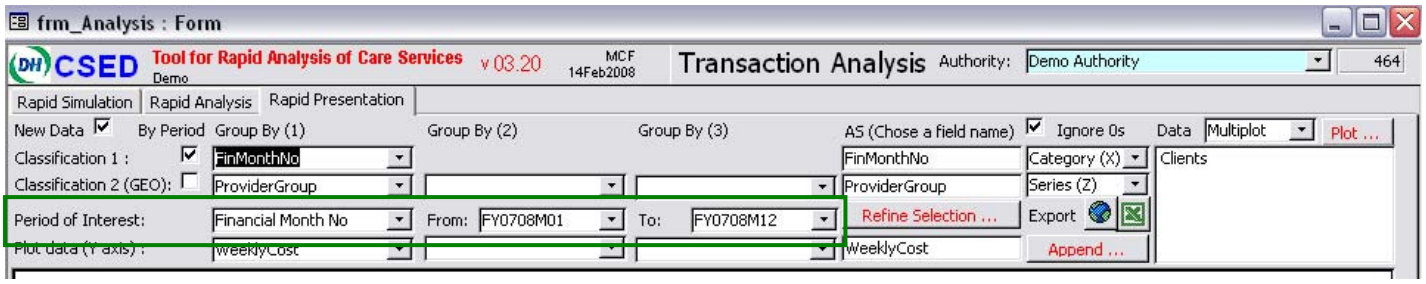


The area highlighted red usually determines the elements that are used as the categories and series for the plot.

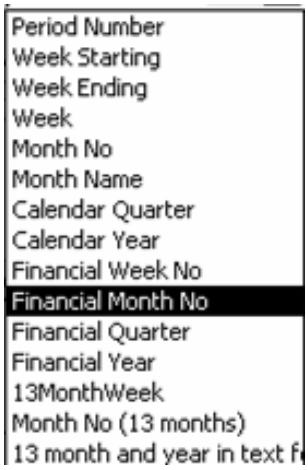
The “By Period” selector changes the list of available fields to choose. With the selector box ticked the options available are as below;



With the selector box de-selected the options list is as below;



The area highlighted in green is the responsible for determining the timeline for the analysis.

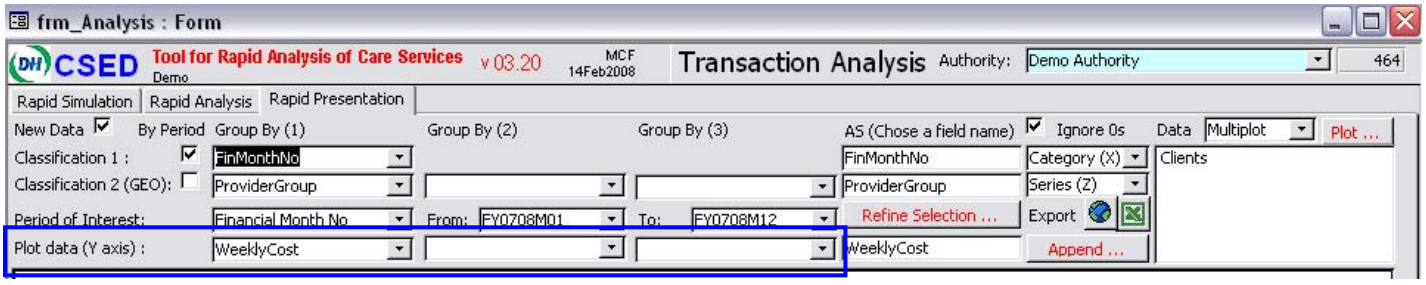


The period of interest can have various different descriptors;

The from and to fields are context sensitive and will change depending on the value of the “period of interest” field.

For ease of viewing the general rule for the date format is;
Year / Month / Week / Day – Depending on which item is selected.

FY – Represents financial year
Q – Represents quarter
M – Represents month
W – Represents Week

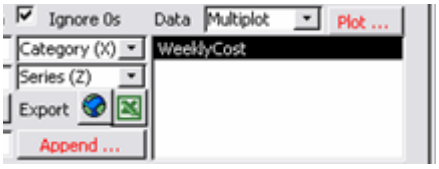


The area highlighted in blue is where the analysis field which is used as the actual plot data is selected.

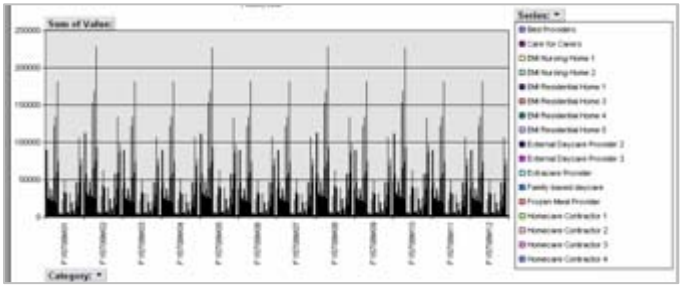
Before you plot any data for the first time, or you make a change to either of the x/z axis selections, you will notice that the “New Data” flag is ticked.

When the flag is ticked, upon pressing the “Append Data” button a series of queries will run which dynamically creates the data set. This dataset is stored in a temporary table and is used to derive the calculated fields in the plot.

Because TRACS simulates a record of service for each week, each client, this can take a few moments. Once this has completed for the first time you can change the plot selection and append almost instantaneously (depending on the timeframe chosen).



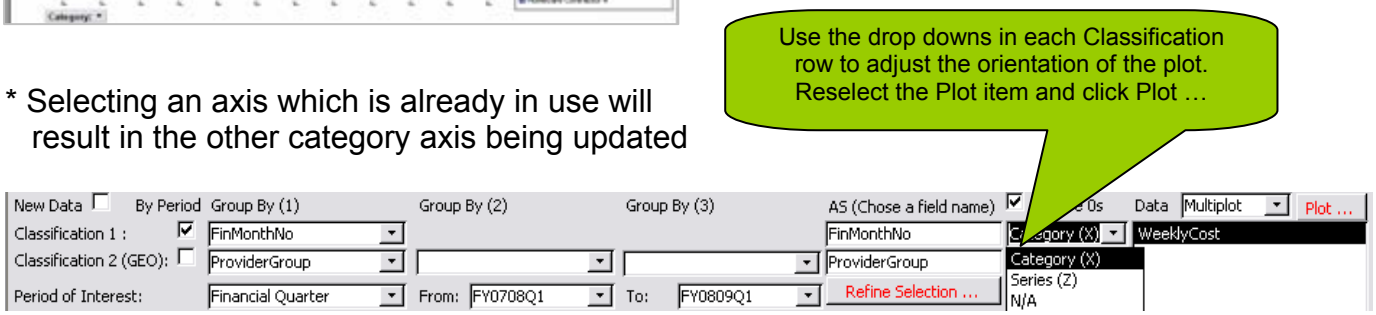
for



Clicking the “Append Button “ should result in the Plot Data field appearing in the plot selection box.

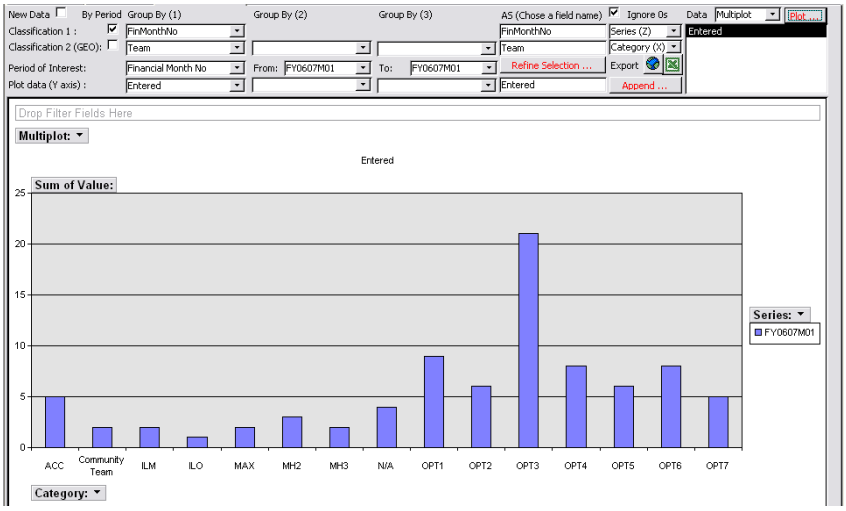
Click the “Plot …” button to update the plot area.

* Selecting an axis which is already in use will result in the other category axis being updated



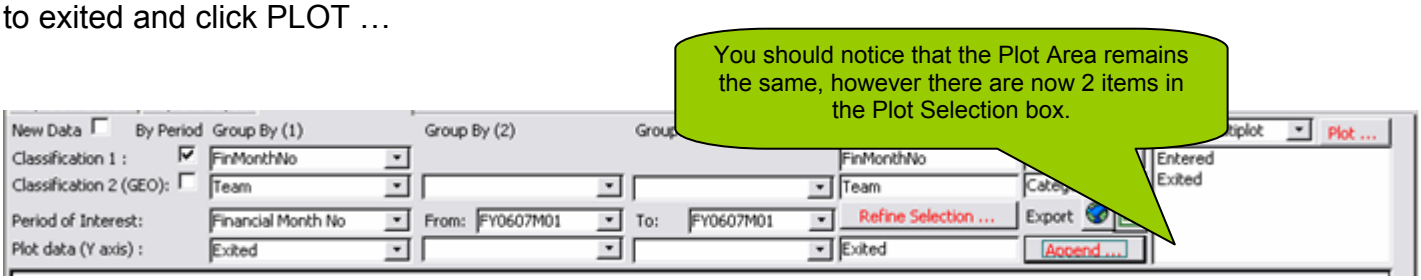
Plotting Data : Multiple Series

To plot multi series on the graph you must first follow the instructions for a single plot. All the same rules apply.

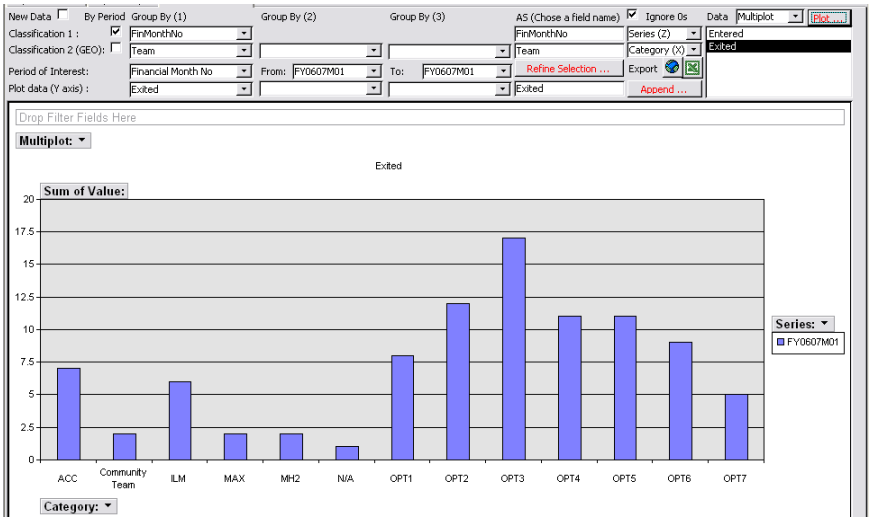


The graph above is a single series plot. Classification 1 is a time based field (Financial Month Number) which is acting as the SERIES (Z) – My period of interest is a single month so this will only produce one series item. Classification 2 is the TEAM field and is active as the CATEGORY (Z), with the plot data (Y) being populated with the number of clients who entered service during the period of interest.

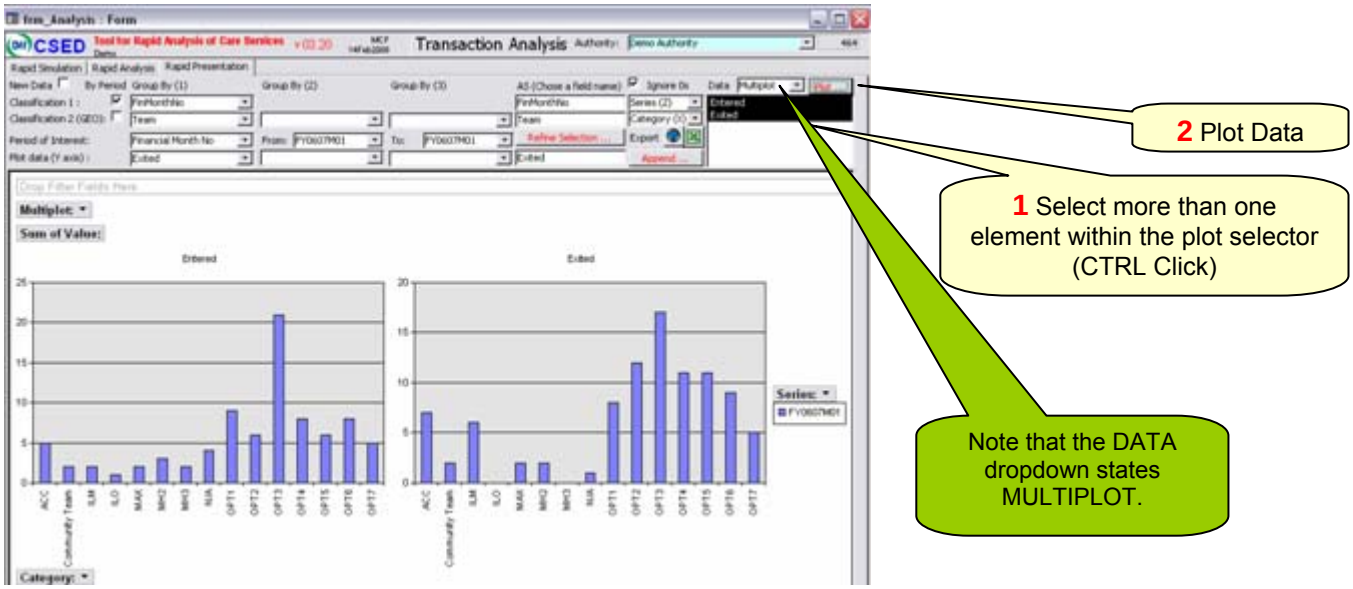
If we wanted to see the number of clients who exited service during the period, we could change (Y) to exited and click PLOT …



Selecting “Exited” then Plot will generate a very similar looking plot;

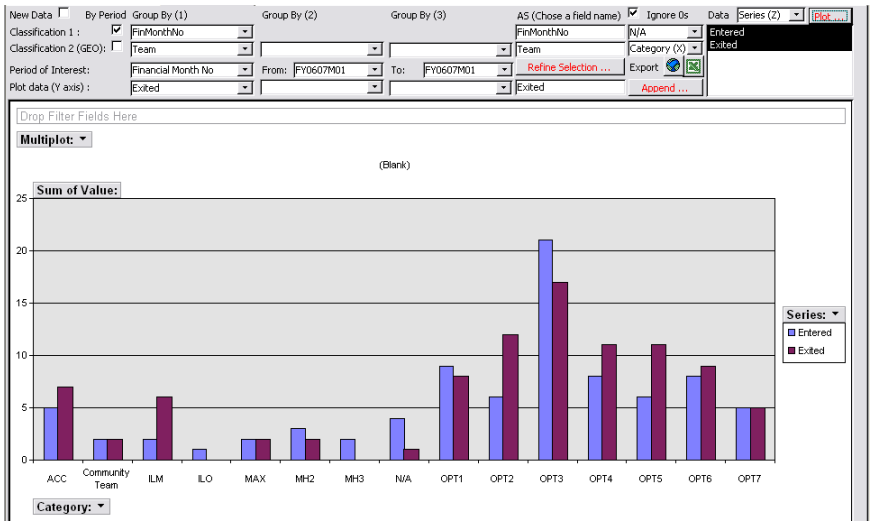


Although the information contained within the plots are useful on their own, it would be useful further still if the two datasets could be presented on the same chart.



To display both datasets on the ***same*** plot, change the DATA dropdown to state “Series”. You will note that TRACS will adjust the item which is your current “Series” to “N/A” and it will no longer appear on the plot.

The result is shown, as below.

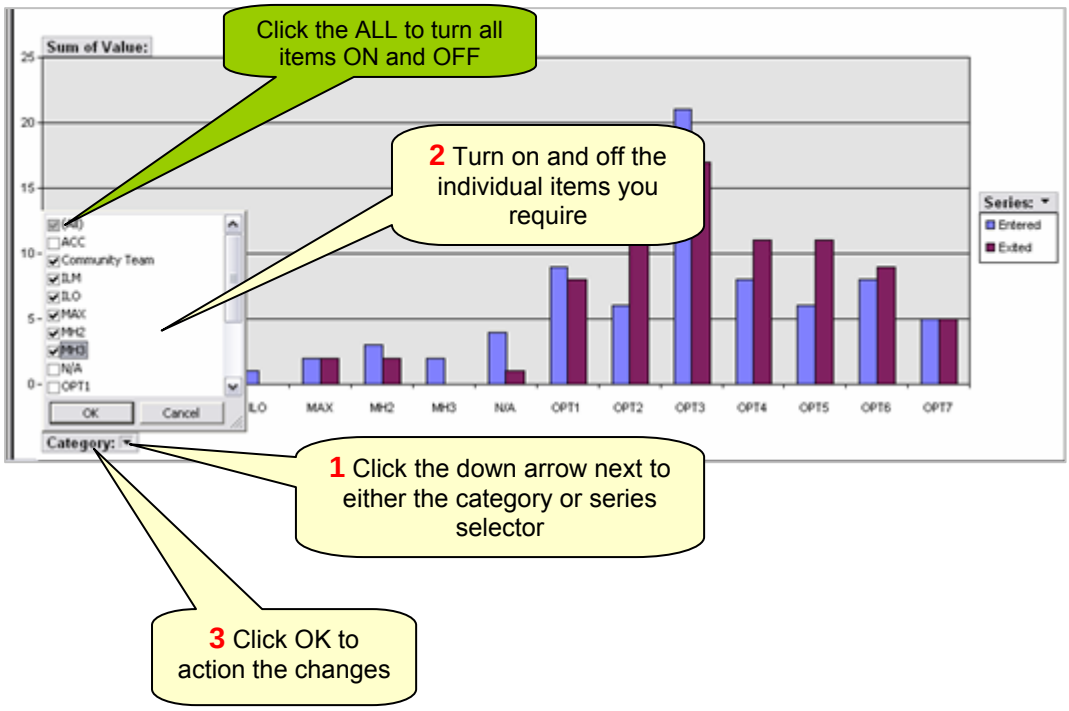


Plotting Data : Refining the selection to display

There are a few methods you can use to restrict the amount of data shown on the plot area.

Clicking the refine selection button will launch the familiar filter screen that is used in other areas of TRACS. Make your selection then MINIMISE the filter screen rather than CLOSE it. As long as the filter is minimised rather than closed the restriction will stay in place. You will need to Append Data for this to take effect. You will notice that while the filter is open, the button retains the name of the currently selected filter.

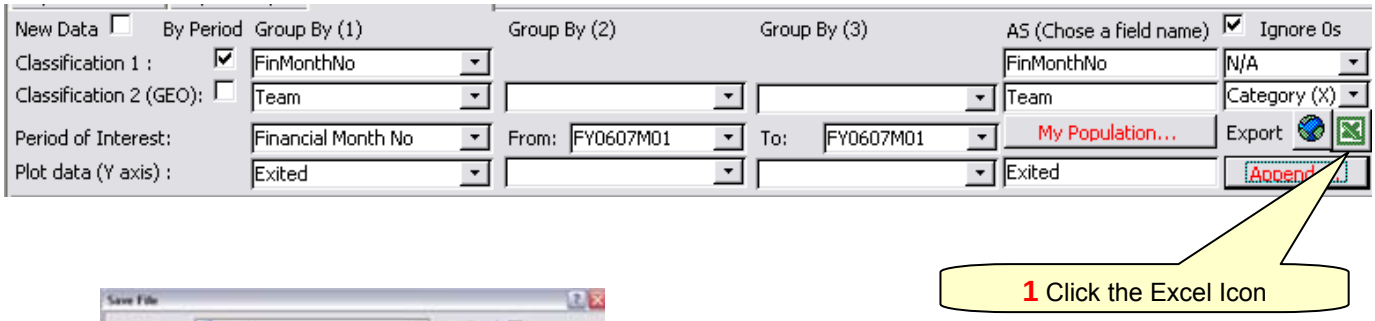
In addition to, or instead of the method mentioned above, you can use the selectors on the plot area themselves to turn on/off data elements.



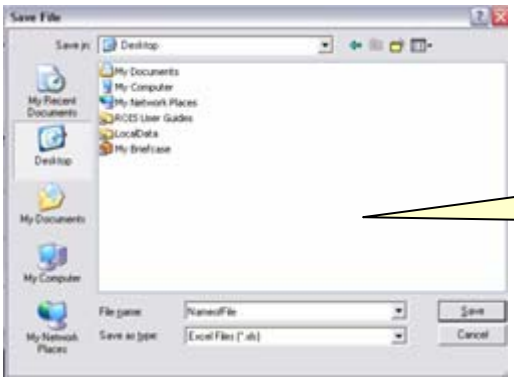
***N.B. IF YOU DO NOT SEE A GRAPH THIS, OR SUBSEQUENT PLOTS RESELECT THE "ALL" SELECTOR AND CLICK OK.**

Plotting Data : Exporting to Excel

Once you have sent your data to plot, if you wish to view the data behind the plot, TRACS can create an Excel file with this data for you.

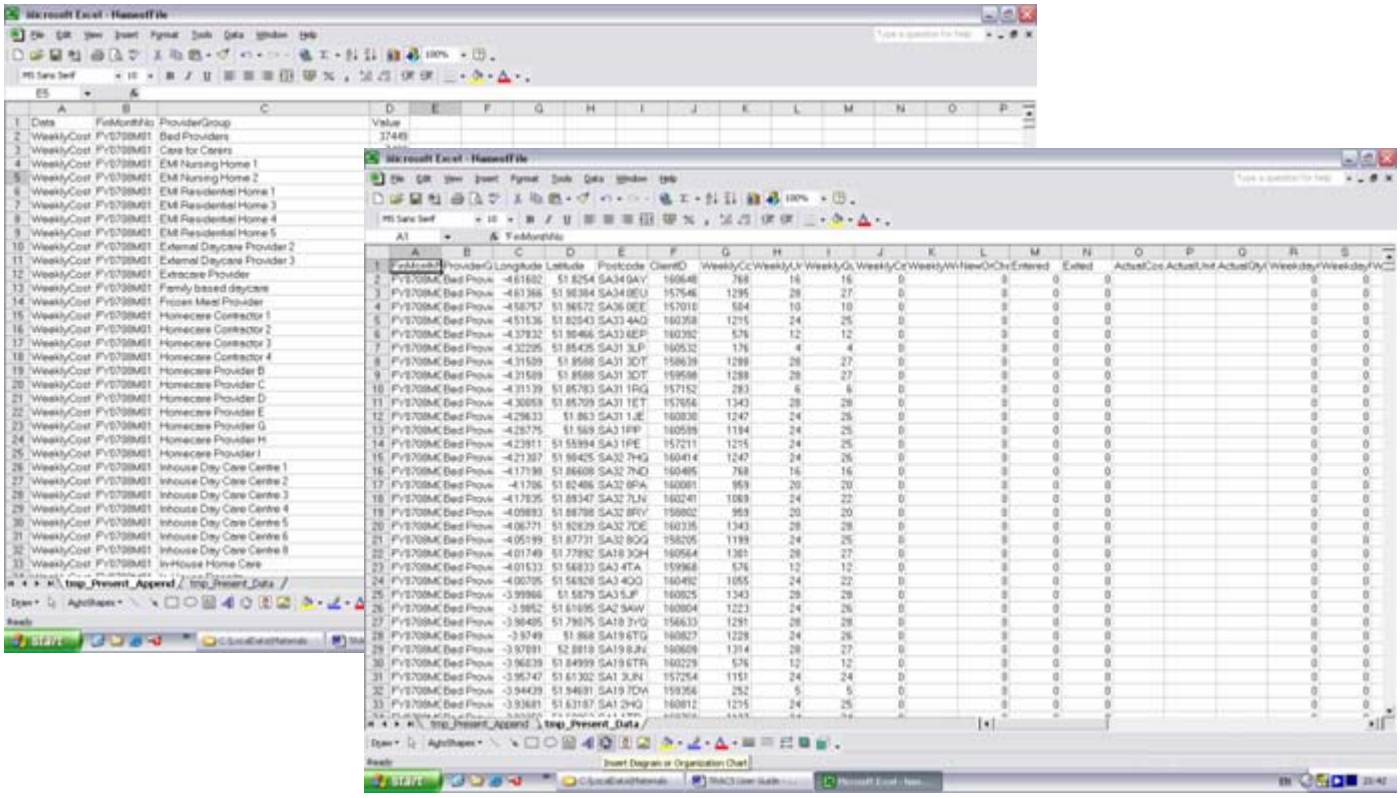


1 Click the Excel Icon



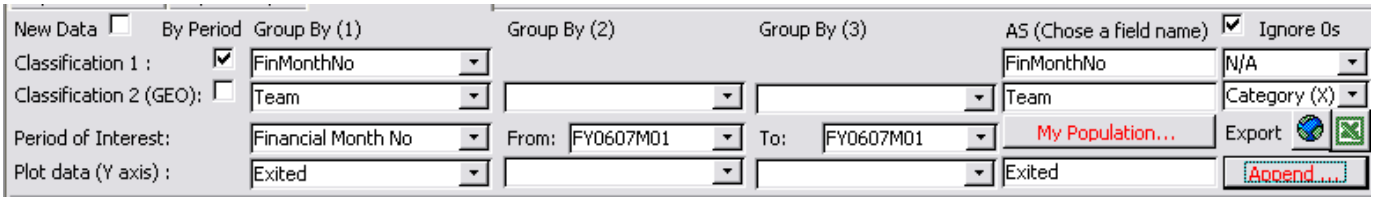
2 When the save dialog appears name your file and select where you wish for it to be saved.

The Excel file contains two sheets of data. Sheet 1 contains the basic numbers behind the plot, and sheet 2 contains the full package data and calculations that were used to create the plot data.



Plotting Data : Exporting to Google® Maps (G.I.S.)

In addition to plotting data on a chart, you can transfer your data almost instantly to a geographical representation.



The plotting of your data should be done in exactly the same way as you would for the charting.

When you are choosing your fields you need to take into account that the item which will be used as the “Category” within the mapping screen will be “Classification 2 (GEO)”.

Once you are happy with the data you have selected for your plot click 

button to begin the mapping tool.

The next dialog screen that opens allows you to assign a map icon to your category items.

TRACS currently has 16 different icons (8 colours x 2 shapes).

TRACS will automatically assign icons to the items. If there are more than 16 category items the list of icons will start again at the beginning.

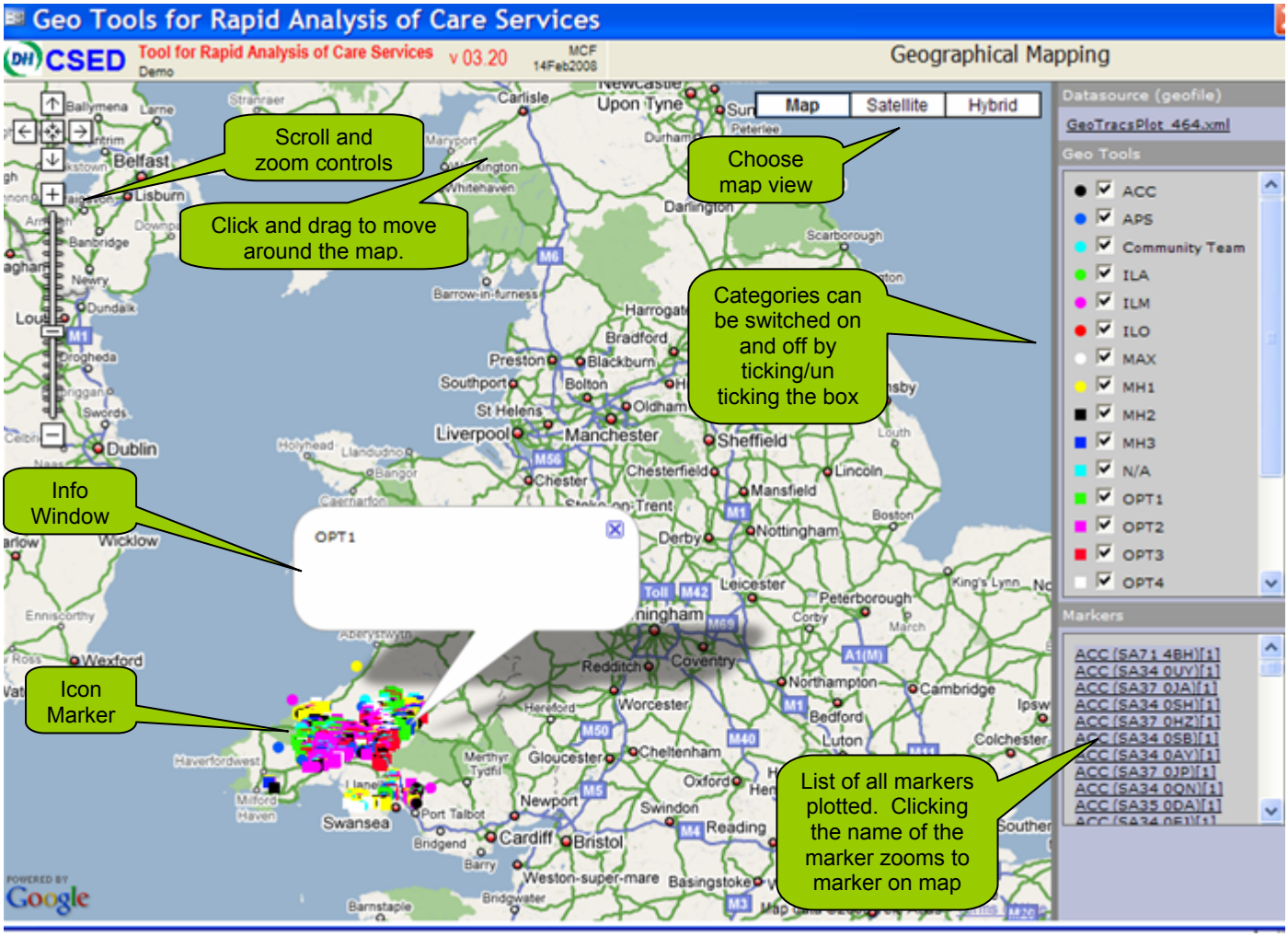
Close the dialog when you are happy with your selections.

TRACS will now open a new dialog screen with an embedded web browser. To get around most problems encountered with firewalls and other security applications TRACS has been designed to use only HTTP controls. For the mapping interface itself your browser will require Javascript to be active.

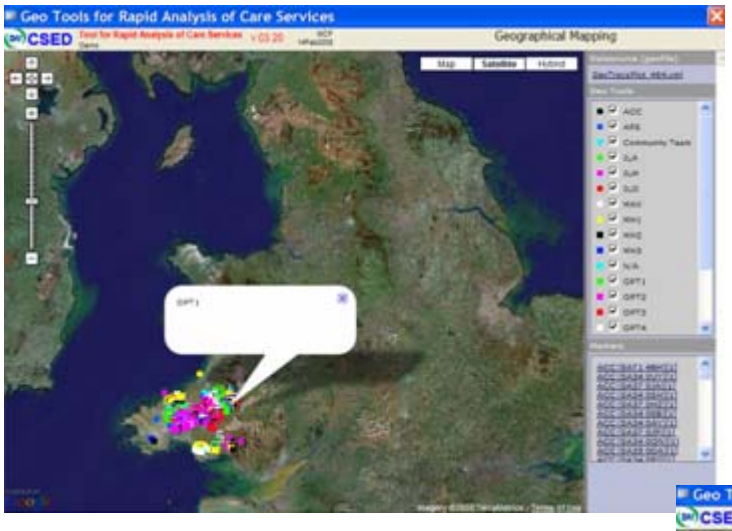
The first screen that appears is actually submitting XML data to a council specific folder on our server.

Once the data has been uploaded the browser is redirected to our Google® maps interface and connects to the XML data which has been uploaded.

Because the mapping points are loaded into an array within the browser this can take a few moments if you are displaying large datasets.

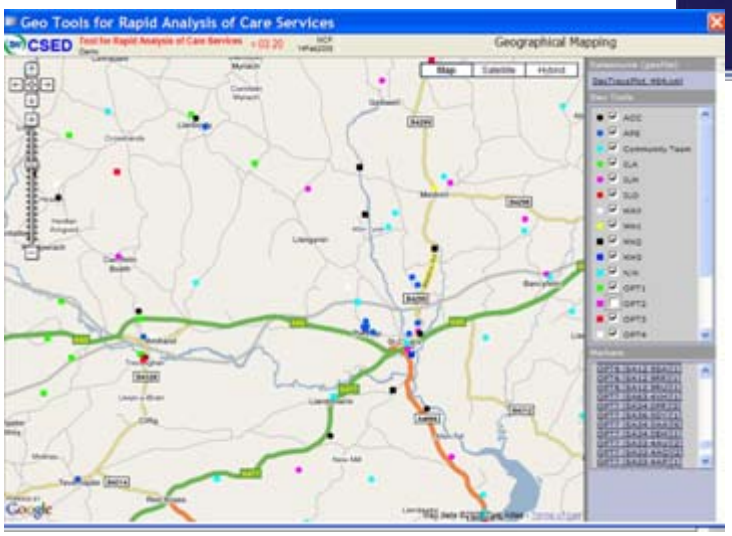


Other Views



Satellite View

Hybrid View



Zoomed Map View with one category turned off.

To return to TRACS close the map window.