Data Solutions Portal

Portal Functions Overview

DATA SOLUTIONS PORTAL

by STI

STI Data Solutions is committed to providing customers with unique, actionable insights that will allow for more informed, real-time decision making.

STI's reporting tools provide key insight into the three core pillars of data analytics: Descriptive, Prescriptive, and Predictive. All of these tools and services are delivered via the latest in cloud-based interfaces – easily accessible wherever you are.

We are excited to be able to assist you in better understanding and managing your business.

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Access

Login by visiting datasolutions.smartsti.com and enter your username and password.

Home

The Data Solutions Portal Homepage gives you an access point for your reports and tools
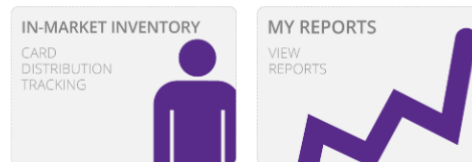
1. The **In-Market Inventory** tool is a web-based portal that allows you to track the card distributions that you have made to your healthcare provider (i.e. physicians, pharmacies, clinics, etc.)

2. Visit **My Reports** to access your collection of reports and view your data.

3. Use the **Training & Support** area to access walkthroughs and guides to help you understand and navigate the reports found on the Data Solutions Portal.

My Reports
Navigating Reports

All of the Data Solution Portal reports available to you will be displayed here under the heading "Workbooks".

Training materials for specific reports like the Business Overview report and the Coordination of Benefits report are available on www.dspsupport.ca.

My Reports
Portal Functions Overview

The views in the **My Reports** area give you many ways to explore many different aspects of your data. The tools available will allow you to create, edit, and share/export both standard and custom views.

Navigation

Account Tools
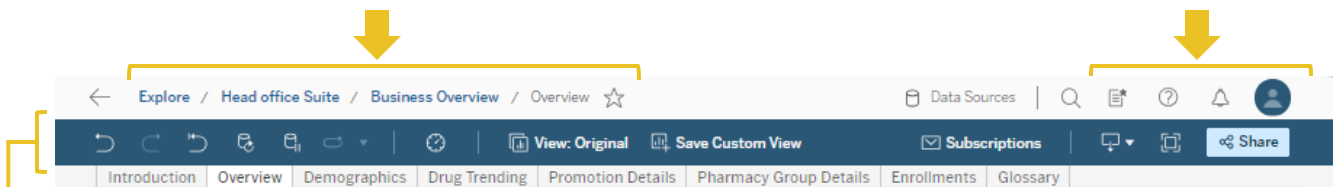
Report Tools:

1. Undo/Redo: Undo and redo changes to view settings.
2. Revert: Reverts view back to default setting.
3. Pause Data: Pause automatic refresh of the data source.
4. View Settings: Change and save a particular set of view settings.
5. Subscribe: Set up report summery emails on a set schedule.
6. Share: Share your views with other users.
7. Download: Download views to your local drive as CSV, image, or PDF.

Account Tools:

Favourites: This will show a list of favourited views.

Notifications: This will show a list of favourited views.
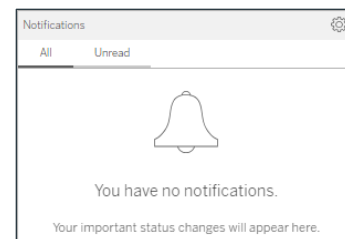
Account Menu: Access and manage account settings, subscriptions, etc.
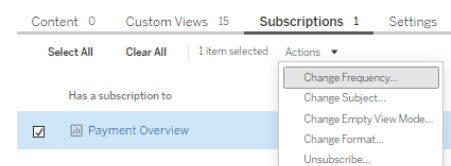
My Reports
Refresh & Pause Data Updates
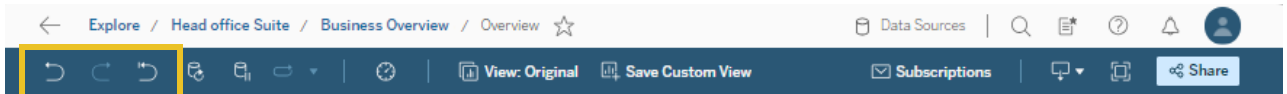
Undo, Redo, Revert Action: These tools allow you to undo, redo, and revert view settings back to their original state.
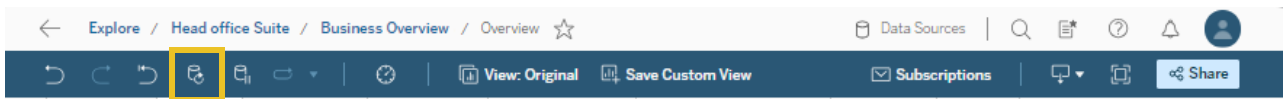
Refreshing Data: Reports are scheduled to automatically update daily on the report server. There is no live connection to the database and therefore, no need to refresh your reports using this tool.
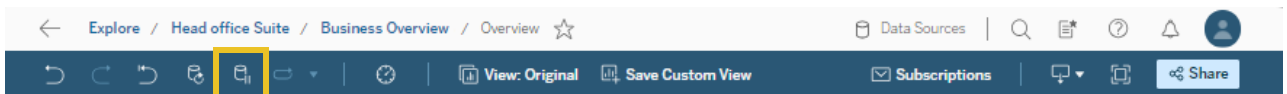
Pause Automatic Updates: There may be times when the server may send a query to the data source to update the views while you are interacting with the data in your reports. Sometimes these data updates are large and could take a long time. To avoid disruptions created by these updates you can select **Pause** on the toolbar to pause automatic updates while you're interacting with the reports. Select **Resume** to resume automatic updates and refresh your data with a single query to the data source.

MY REPORTS
VIEW
REPORTS

My Reports
Manage Views

Favourites: This will show a list of favourited views.
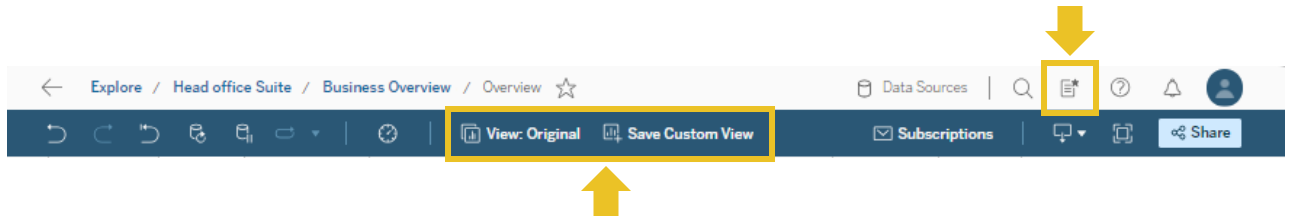
Views: This area will allow you to either change the default view, edit a custom view name, delete a custom view, or make it private, click the view name and then click **Manage**.
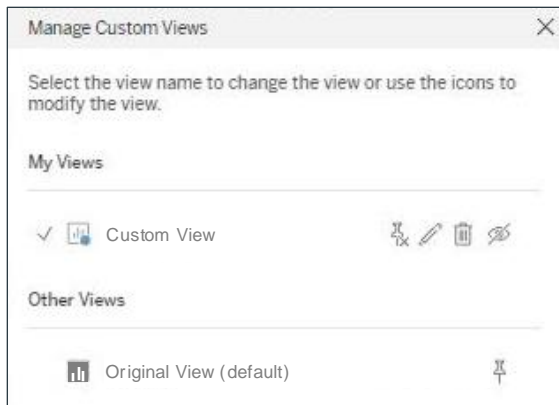
The default view is indicated by the 📊 icon. To change the default view, click the 📊 icon next to the custom view name in the **Manage** dialogue box.

You can favourite views (📌), edit views (✏️), delete views (🗑️), and adjust view share settings (👁️) in here as well.

MY REPORTS
VIEW
REPORTS

My Reports
Save Custom Views

When you interact with a view, you have the option to save any changes you've made to the view settings (sorting filtering, etc.) as a custom view.

If you make a change to the original view, the **Original View** menu in the toolbar indicates that the view has changed with as asterisk. You can access custom views by clicking on the **Original View** menu, or by clicking the name of the custom view in the same menu location.
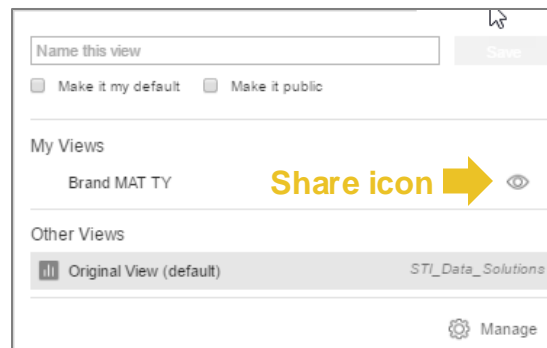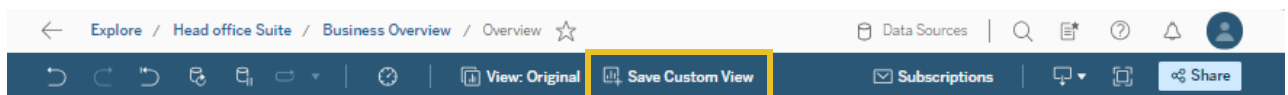
Share custom views:

To make a custom view available to others, select the **Make it public** option when you create the view. The public icon (👁) indicates that the view is shared. The private icon (👁) indicates that the view can only be seen by you.

As you browse views on the server, you can see and use custom views that other people have shared with you.

MY REPORTS
VIEW
REPORTS

My Reports
Subscribe to Views
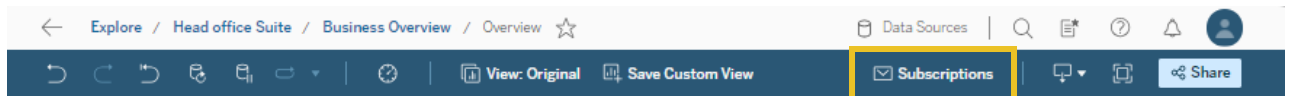
Subscribe allows you to get regular updates sent directly to your inbox on a set schedule. To set up a subscription email simply select subscribe in the toolbar.

Select the current view (**This View**) or, if the workbook includes multiple views, select **All Views**. Pick a schedule, enter a subject line, and then click **Subscribe**.

You can **Manage Subscriptions** from this window or under your profile or under subscriptions > manage subscriptions.

My Reports
Download Data
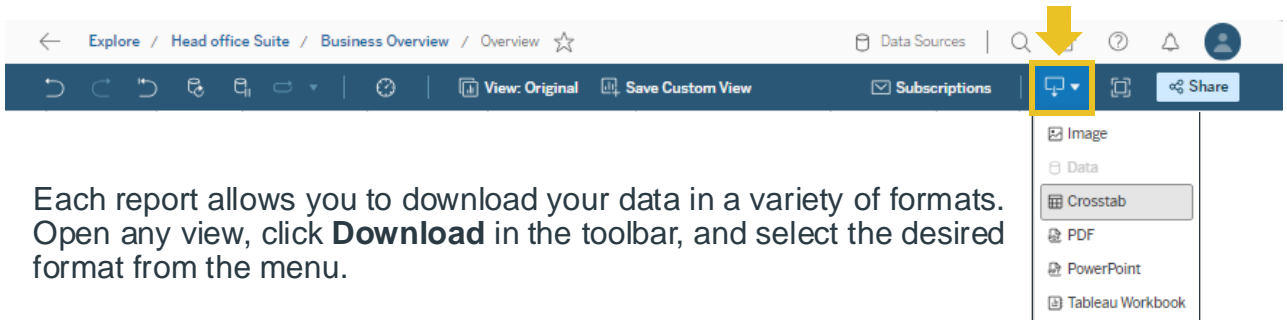
Each report allows you to download your data in a variety of formats. Open any view, click **Download** in the toolbar, and select the desired format from the menu.
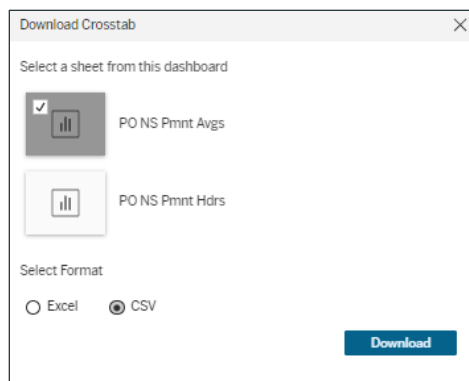
Crosstab downloads allow you to open your data in software like excel.

For PDF downloads:

1. Choose the layout and paper size.
2. Select the **Content** you would like to download.
3. Select the **Sheets to Download**. Click a sheet thumbnail to select and deselect sheet or use the CTRL key to select multiple sheets.
4. Click **Download**, then in the Download PDF dialog box, click **Download** again.

My Reports
Full Screen & Share Views
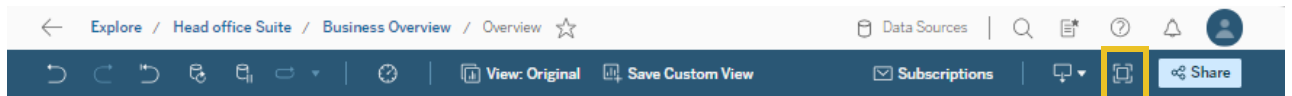
Click on the focus icon to see a view in **Full Screen**.
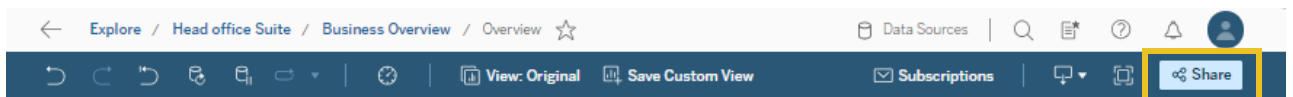
To share a view with another party simply click on **Share** in the toolbar and use the link provided.

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MY REPORTS
VIEW
REPORTS
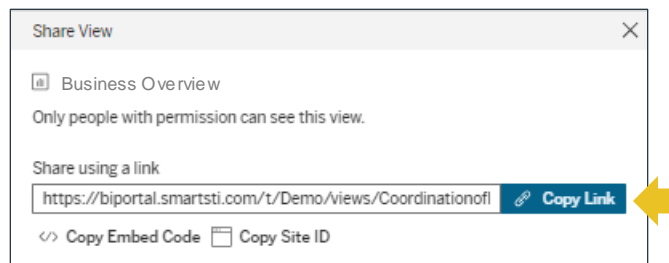
My Reports
Report Filters

Each report includes views that contain Global Settings, which are filters to further narrow your search criteria.

Global Settings

Time Period	Custom From	Custom To	Program Name	Brand	DIN	Province	Prev Payer Type
MAT Daily TY	Jan 1, 2018	Jan 1, 2018	(All)	(All)	(All)	(All)	(All)

Redemptions Growth for the Most Recent Complete Period

Program Name: All Brand: All DIN: All Province: All Prev Payer Type: All

| Growth Calculation	Current Date Range	Previous Date Range	Current	Previous	Growth	Growth %
MAT Daily TY over MAT Daily LY	Feb 7, 2024 to Feb 6, 2025	Feb 7, 2023 to Feb 6, 2024	45,287	43,786	1,501	3.4%

Redemptions by Province

Feb 7, 2024 to Feb 6, 2025
Program Name: All Brand: All DIN: All Province: All Prev Payer Type: All

Redemptions by Drug

Feb 7, 2024 to Feb 6, 2025
Program Name: All Brand: All DIN: All Province: All Prev Payer Type: All

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MY REPORTS
VIEW
REPORTS

My Reports
Tooltips & Glossary

On-screen tooltips and guides made available throughout the report, and through our Customer Service channels allow you to get assistance or instruction on filtering or sorting a specific view. Our **Glossary** helps you find the definition for any unfamiliar terms.

Glossary

Search

Search Term
Cards Distributed

Term

Cards Distributed   Count of cards shipped to market. Cards can be distributed to Head Office, Rep, Pharmacy and Physicians.

Tooltips: Place your cursor over a mark in the view to see the tooltip for that mark. Tooltips provide information of the values of dimensions and measures for the selected mark.

8,361 redemptions in ON, representing 45.9%
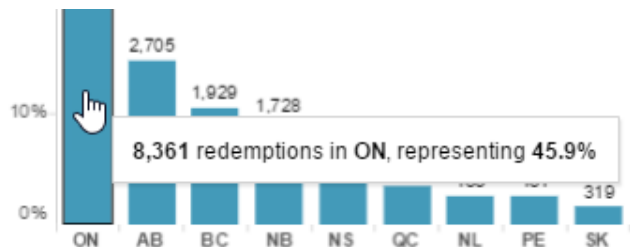
Switch from the month, to week, or day by doing a mouse roll-over on bottom left in trend charts (+). Simply use browser back button to undo.

DIN: All   Redemption Instance: All
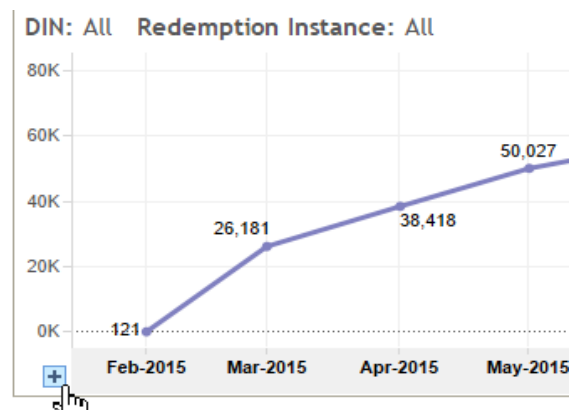
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If you need assistance with logging in,
unexplained errors, or general questions
please contact STI customer service:

customerservice@smartsti.com

1-877-790-1991

Visit www.dspsupport.ca for other
comprehensive guides on report analytics
so you can turn insights into action!