

AIM Octane

(Specialty Only)

User Guide



September 2011

AIM Octane

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Technical Support Contact Information

Clinic Team Members - If you are experiencing difficulties using any of the AIM tools (e.g. initial installation, setup and day to day use) it is highly recommended that you consult the table of contents of the appropriate user guide for support before contacting your assigned facilitator.

Facilitators - Similar to clinic users, facilitators should consult the table of contents of the appropriate user guide for support before contacting their Regional Support Team member when experiencing difficulties using any of the AIM tools. If you do not know who your Regional Support Team member is or your region is currently without one, please contact the AIM Measurement Support Team at the email address below.

Faculty Members - Faculty members should consult the table of contents of the appropriate user guide for support before contacting the AIM Measurement Support Team at the email address below.

Regional Support Team Members - Regional Support Team members should direct their technical issues to the AIM Measurement Support Team at:

measurement@albertaaim.ca

(Kylie Kidd Wagner or Randy Campbell)

Please NOTE:

- To help us troubleshoot your issue better, please provide a **detailed** description of the problem(s) in your email
- Emails received by the AIM Measurement Support Team will, in general, be responded to in the order in which they are received
- Requestors should expect a response to their issue(s) within one week
- In the event that a solution to an issue requires greater exploration by the AIM Measurement Support Team, the response will inform the requestor of those details
- All users should check the Alberta AIM Website periodically to ensure they have the most recently updated copy of the appropriate user guide(s) - <http://www.albertaaim.ca/measurment.html>

Octane – Quick Reference

Octane is a Specialty measure that focuses on the richness of the appointment mixture – *i.e.* ratio of “new” patient appointments to “total” patient appointments.


$$\text{Octane} = \frac{\text{New Appointments}}{(\text{New Appointments} + \text{Return Appointments})}$$

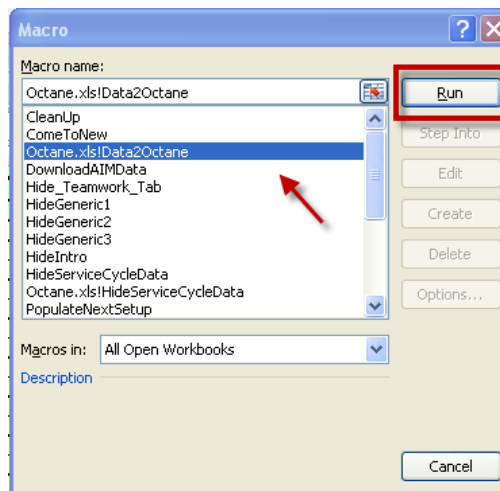
Initial Installation - Please refer to the appropriate section below for more details if required

1. Save the Octane.xls file to the same location as your AIMTracking.xls file (*i.e.* your AIM folder located on your C:\drive)
2. Ensure the Octane.xls file is named to “Octane.xls” exactly
3. Ensure your Excel security settings are appropriate (refer to the appropriate section below based on the version of Microsoft Excel you are using for more details)

Populating the Octane File - Please refer to the appropriate section below for more details if required

Take the following steps to download data from your AIMTracking.xls file into the Octane.xls file:

1. Ensure the Octane.xls file is named “Octane.xls” **exactly**
2. Ensure the AIMTracking.xls file of interest and the Octane.xls file are save to the same location (e.g.  C:\AIM)
3. Open both files
4. In the AIMTracking.xls file press Alt+F8
5. In the Macro window that appears select the *Octane.xls!Data2Octane* program



6. Press the Run button
7. The screens will flash while the program is running – once finished the Octane.xls file should be populated

Initial Installation

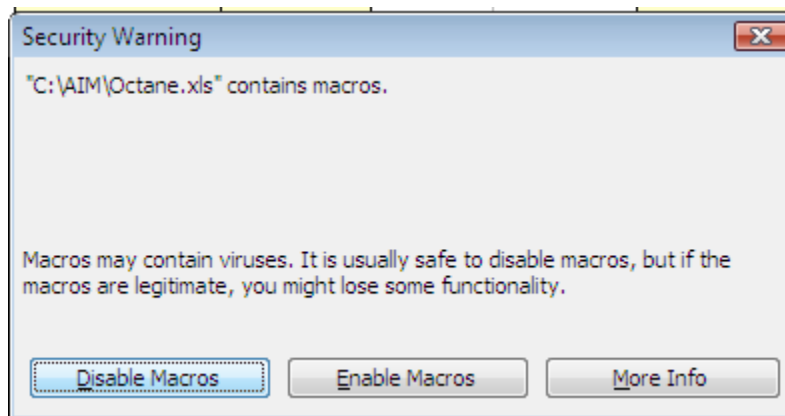
1. Save the Octane.xls file to the same location as your AIMTracking.xls file (i.e. your AIM folder located on your C:\drive)
2. Ensure the Octane.xls file is named to “Octane.xls” exactly.
3. Ensure your Excel security settings are appropriate (refer to the appropriate section below based on the version of Microsoft Excel you are using for more details)

Microsoft Excel 1997 to 2003 Users

Option 1 – Your Security Settings Do Not Need to be Changed

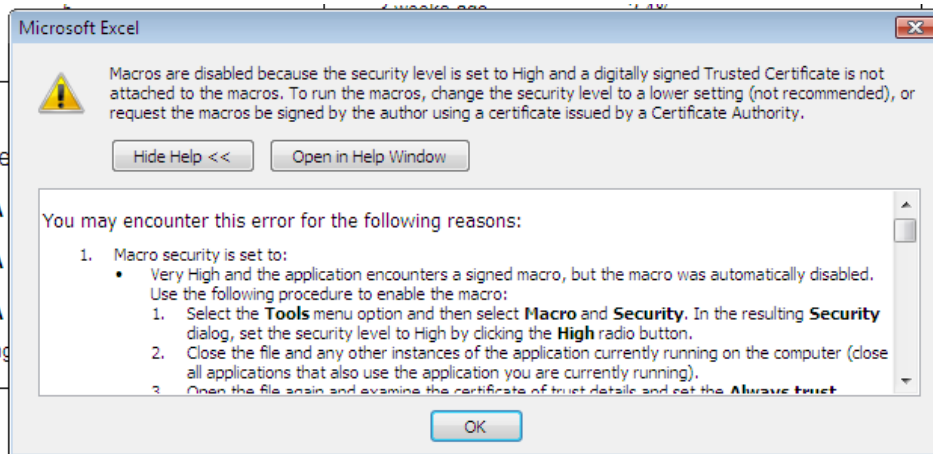
- If you receive the following pop-up message when opening the Octane.xls file your security settings do not need to be changed. They are already set to “Medium”.
- “Medium” Security means you will receive this same warning each time you open the Octane.xls file.
- Similar to the other AIM tools, for the file to function properly always click **Enable Macros** for the Octane.xls file.

NOTE: For any other file (i.e. non AIM files) from an unknown or un-trusted source, click **Disable Macros**.



Option 2 - Your Security Settings Need to be Changed

- If you receive the following pop-up message when opening the Octane.xls file the security settings in your Microsoft Office Excel need to be changed. They should be set to “Medium”.

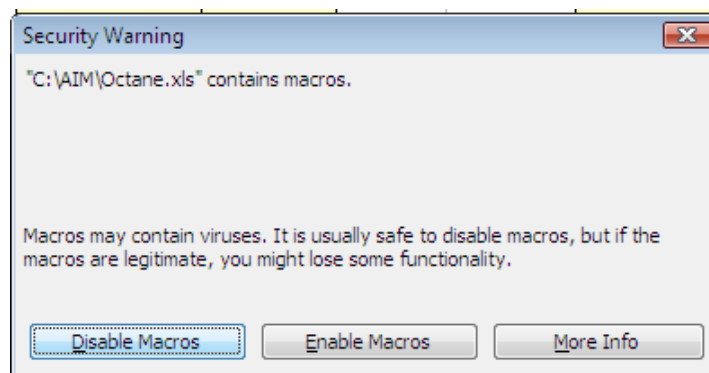


To check on your settings, or to change them, follow these steps:

1. Open the Octane.xls file
2. Under the Tools menu, click Options
3. Click the Security tab
4. Under Macro Security, click Macro Security
5. Click the Security Level tab, and then select the security level you want to use. (Choose Medium)
6. Close the file (save your changes)
7. Reopen the Octane.xls file and the new security level should be in effect

NOTE: once you change your security settings, they are changed for Microsoft Office Excel, not just for the Octane.xls file. They will stay on “Medium” until set to another level.

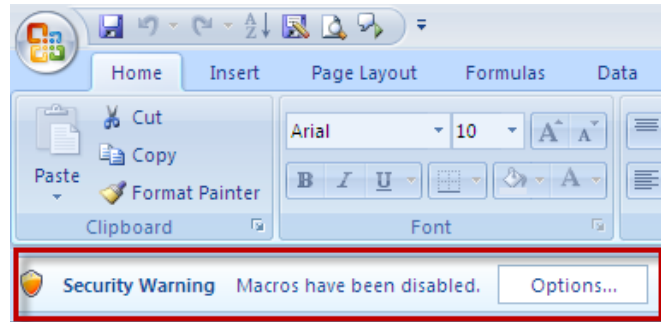
Taking the steps above will cause Microsoft Office Excel to present you with the Security Warning message (below) each time you open the Octane.xls file. Always click “Enable Macros” for the Octane.xls file. For any other file (i.e. non AIM files) from an unknown or un-trusted source, click “Disable Macros”.




Microsoft Excel 2007 Users

Unlike older versions of Microsoft Office Excel, those using Excel 2007 will need to create a **Trusted Location** in order for the Octane.xls file to function properly.

What is a Trusted Location? A trusted location is typically a folder on your hard drive (C:\ drive) or a network share. Any file placed in a trusted location can be opened and will be allowed to run without being checked by the Trust Center security system. As the Octane.xls file comes from a trusted source, allowing it to run without a security scan is safe. If you see the following Security Warning message below the Ribbons when you open your Octane.xls file this message means a Trusted Location needs to be created for the file.



To create your Trusted Location follow these steps¹:

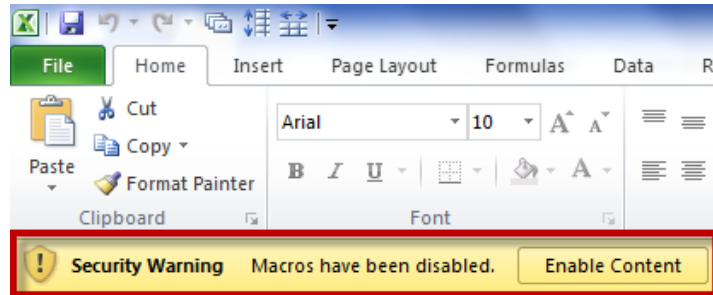
1. Open the Octane.xls file
2. Click the Microsoft Office Button , and then click **Excel Options**
3. Click **Trust Center** and then **Trust Center Settings**
4. Click **Trusted Locations**
5. If you want to create a Trusted Location that is not local to your computer (i.e. not on your C:\ Drive), select the **Allow trusted locations on my network (not recommended)** check box
6. Click **Add new location**
7. In the **Path** box, type the name of the folder that you want to use as a Trusted Location, or click **Browse** to locate the folder (e.g. the AIM folder you installed onto your C:\ Drive)
8. If you want to include subfolders as trusted locations, select the **Subfolders of this location are also trusted** check box
9. In the **Description** box, type what you want to describe the purpose of the trusted location (OPTIONAL)
10. Click **OK** (three times)
11. Save the file. Close and reopen it. You should no longer receive the “Security Warning – Macros Have Been Disabled” prompt

Important Consideration When Creating Your Trusted Location - We strongly recommend that you do **NOT** make a location common to all computers (e.g. your entire C:\ Drive, your Desktop or your My Documents folder) a Trusted Location. Doing so will put you at a security risk (e.g. make you vulnerable to viruses).

Microsoft Excel 2010 Users

Unlike older versions of Microsoft Office Excel, those using Excel 2010 will need to create a **Trusted Location** in order for the Octane.xls file to function properly.

What is a Trusted Location? A trusted location is typically a folder on your hard drive (C:\ drive) or a network share. Any file placed in a trusted location can be opened and will be allowed to run without being checked by the Trust Center security system. As the Octane.xls file comes from a trusted source, allowing it to run without a security scan is safe. If you see the following Security Warning message below the Ribbons when you open your Octane.xls file this message means a Trusted Location needs to be created for the file.



To create your Trusted Location follow these stepsⁱⁱ:

1. Open the Octane.xls file
2. Click the **File Menu**, and then select **Options**
3. Click **Trust Center** and then **Trust Center Settings**
4. Click **Trusted Locations**
5. If you want to create a Trusted Location that is not local to your computer (i.e. not on your C:\ Drive), select the **Allow trusted locations on my network (not recommended)** check box
6. Click **Add new location**
7. In the **Path** box, type the name of the folder that you want to use as a Trusted Location, or click **Browse** to locate the folder (e.g. the AIM folder you installed onto your C:\ Drive)
8. If you want to include subfolders as trusted locations, select the **Subfolders of this location are also trusted** check box
9. In the **Description** box, type what you want to describe the purpose of the trusted location (OPTIONAL)
10. Click **OK** (three times)
11. Save the file. Close and reopen it. You should no longer receive the "Security Warning – Macros Have Been Disabled" prompt

Important Consideration When Creating Your Trusted Location - We strongly recommend that you do NOT make a location common to all computers (e.g. your entire C:\ Drive, your Desktop or your My Documents folder) a Trusted Location. Doing so will put you at a security risk (e.g. make you vulnerable to viruses).

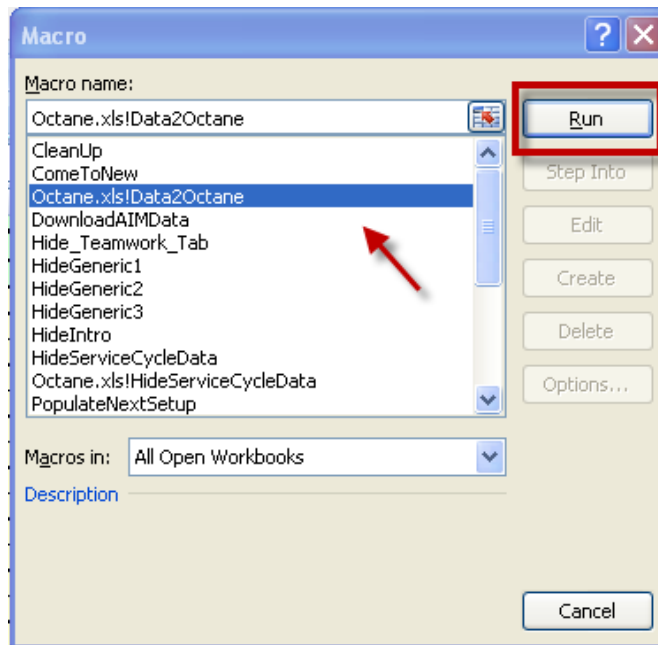
Populating the Octane File

IMPORTANT:

- The Octane.xls file can **only** be connected to one AIMTracking.xls file at a time

Take the following steps to download data from your AIMTracking.xls file into the Octane.xls file:

1. Ensure the Octane.xls file is named "Octane.xls" **exactly**
2. Ensure the AIMTracking.xls file of interest and the Octane.xls file are save to the same location (e.g. [C:\AIM](#))
3. Open both files
4. In the AIMTracking.xls file press Alt+F8
5. In the Macro window that appears select the *Octane.xls!Data2Octane* program



6. Press the Run button
7. The screen will flash while the program is running – once finished the Octane.xls file should be populated

Using the Octane File

Octane is a Specialty measure that focuses on the richness of the appointment mixture – *i.e.* ratio of “new” patient appointments to “total” patient appointments.

$$\text{Octane} = \frac{\text{New Appointments}}{(\text{New Appointments} + \text{Return Appointments})}$$

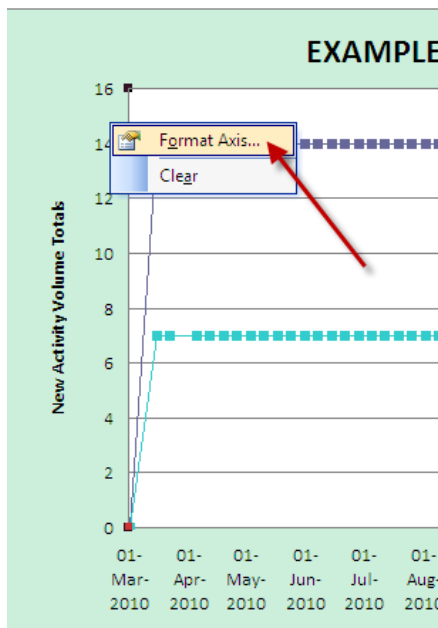
How to Reformat the Scaling on a Graph Axis

Each of the Octane.xls graphs can be customized. Most commonly, users may want to reformat the scaling on the y-axes of multiple graphs for comparison.

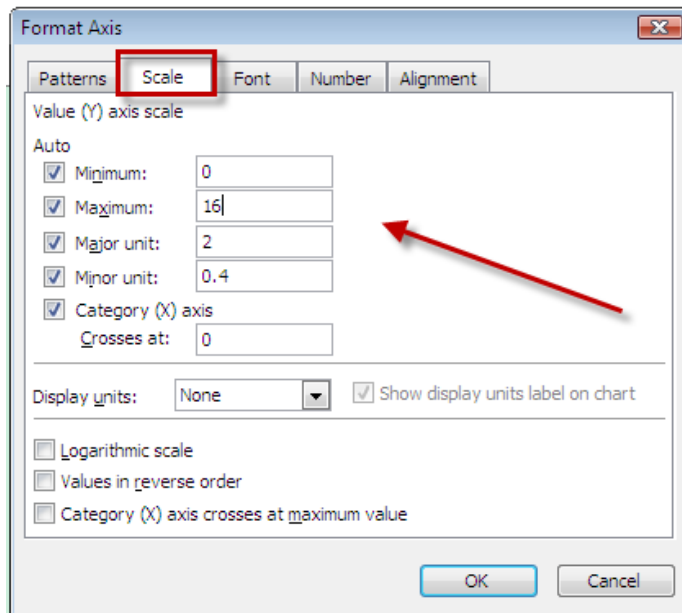
Please use the set of instructions below specific to your version of Excel.

Microsoft Excel – Excel 1997 to 2003 Users

1. Select the graph you wish to change
2. Right click on the y-axis and choose the **Format Axis** option



3. Under the **Scale** tab - type in your preferred values for the Minimum, Maximum and Major Unit parameters (ensure the Auto box is not checked)

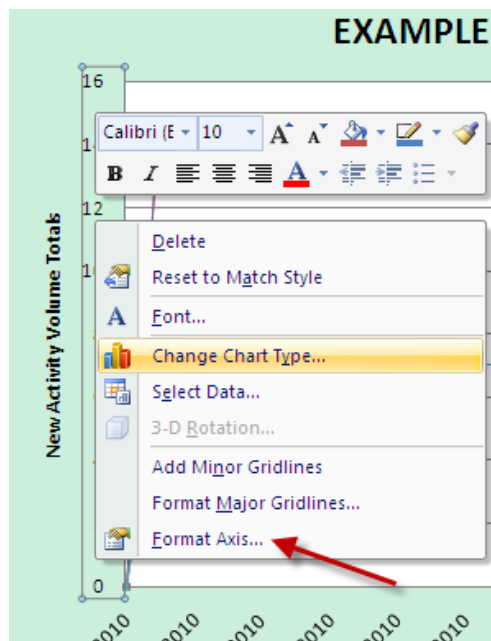


4. Click **Ok** – your changes should be visible

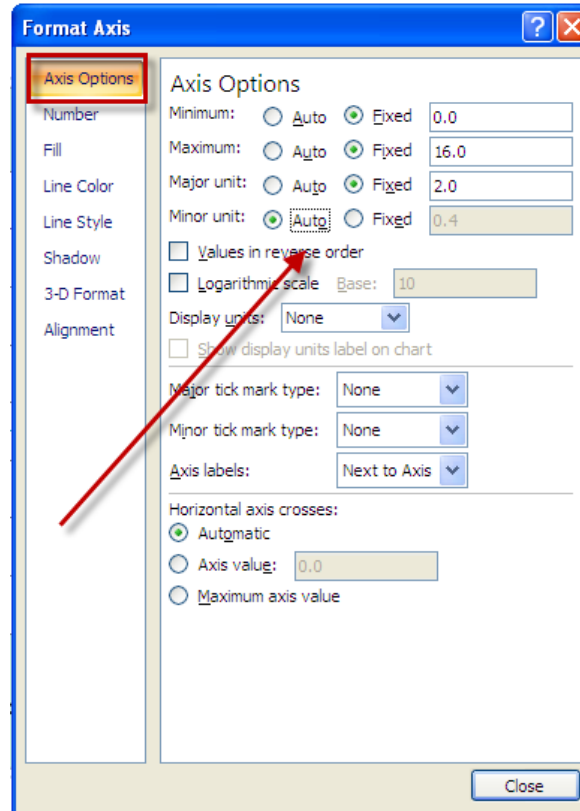
NOTE: if you'd like to change the scaling back to automatic, repeat steps 1 - 3 and check the **Auto** alternative for each parameter under the **Scale** tab

[Microsoft Excel – Excel 2007 and Newer Users](#)

1. Select the graph you wish to change
2. Right click on the y-axis and choose the **Format Axis** option



3. Under the **Axis Options** - select the **Fixed** alternative before typing in your preferred values for the Minimum, Maximum and Major Unit parameters



4. Click **Close** – your changes should be visible

NOTE: if you'd like to change the scaling back to automatic, repeat steps 1 and 2 and select the **Auto** alternative for each scaling parameter under the **Axis Options**

How to Print a Graph

Selecting the Print function in Excel will print all the graphs in the current tab. To print a single graph, click on it before selecting the print function.

Saving Your Changes

If you save changes, such as reformatting the scaling on an axis, they will continue to exist the next time you open your Octane.xls file. Only save your changes if you want them to be permanent.

As the Octane.xls file does not hold any data (*i.e.* it is populated via a link to your AIMTracking.xls file) replacing it with a fresh copy will not result in a loss of data. When your current copy of Octane.xls isn't functioning properly or it has lost too much automatic formatting start using a fresh copy.

ⁱ Steps directly from <http://office.microsoft.com/en-us/excel/HA100319991033.aspx>

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