



# **INSTRUCTION FOR USING THE RECEPTOMETR APPLICATION IN POWER BI**

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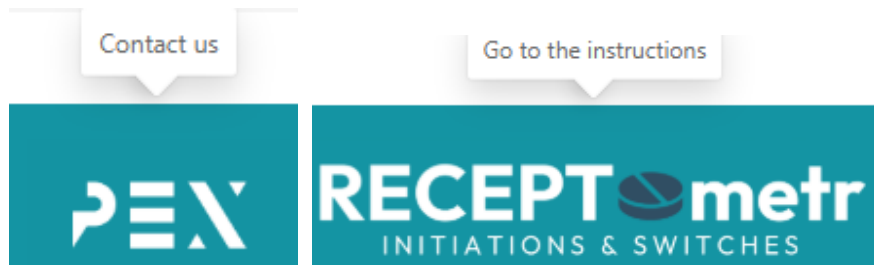
Material prepared by PEX Sp. z o.o.

# 1. GENERAL PRINCIPLES

## 1.1 SCREEN LAYOUT AND NAVIGATION

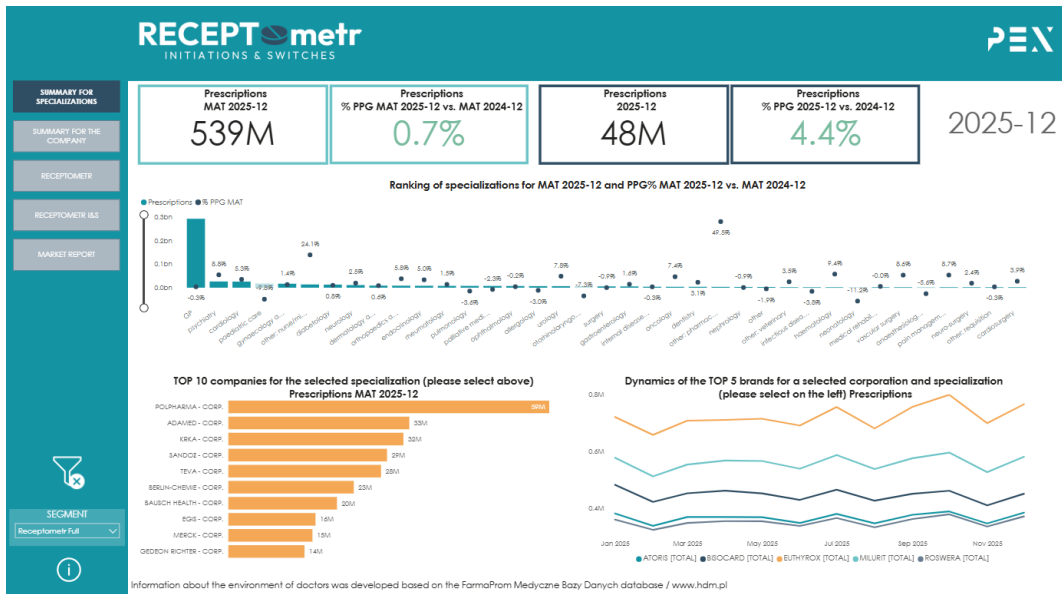
The top panel contains the name of the service, "RECEPTometr". The logo is also a button that takes the user to a detailed user manual.

The PEX logo serves as a button that takes the user to the contact form.



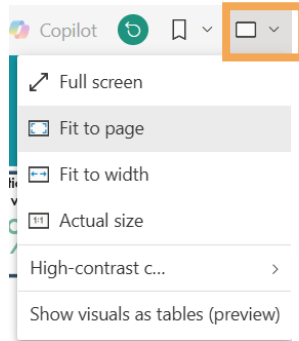
Pic. 1.2.1 Logo as a button

On the left side is a **turquoise sidebar**, containing navigation buttons to selected analysis sections (a detailed description of each sheet is provided below). On the right side, there is a **celadon-colored "Filters" tab** that allows the user to adjust the scope of the analyzed data. This panel can be expanded to select the appropriate filters.



Pic. 1.2.2 launcher

To adjust the screen size, click the **"View"** button, then select the appropriate option from the drop-down list to match the screen size to your preferred size.



Pic. 1.2.3 Location of the "View" button

## 2. SELECTION OF PRODUCT SEGMENTS

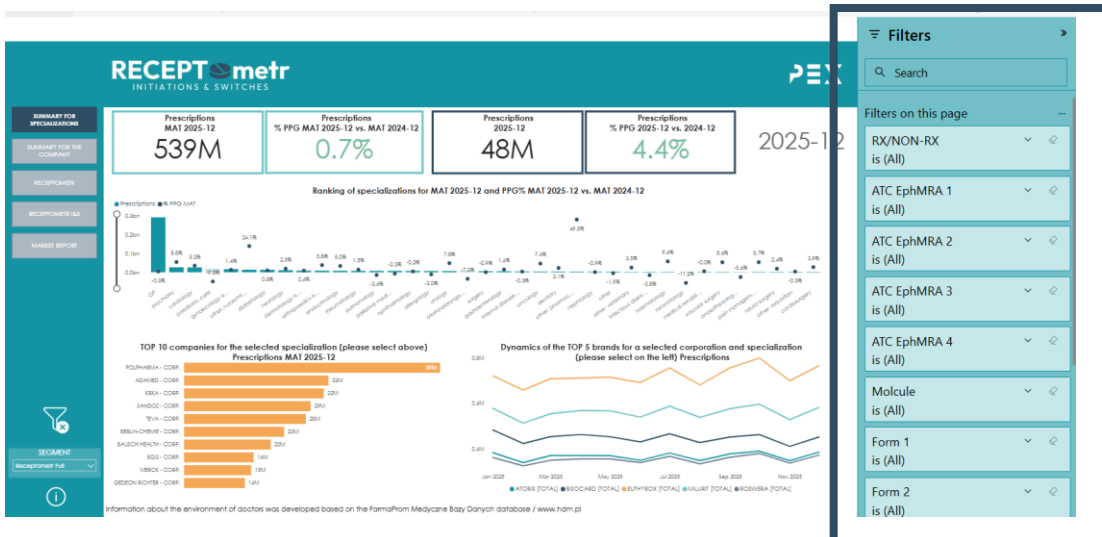
On the left side of the screen is a slicer, which allows you to select product segments of the Receptometr (if the user's license covers more than one segment). If currently purchased subscription does not include the FULL segment, the charts may be empty when the app is opened for the first time. In such a situation, the segment selection should be switched to the correct one. Selecting a segment on one report page synchronizes the selection **on all sheets in the app**.



Pic. 2 – The segment selection slicer

## 3. FILTERING DATA

The "Filters" are located on the right side (the celadon-colored panel).

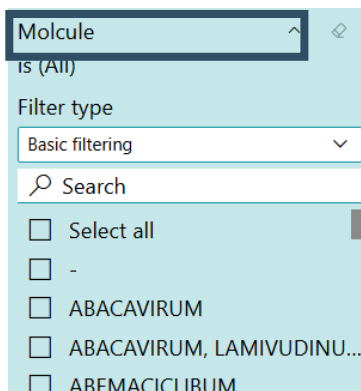


Pic. 3 Location of the data filtering panel

### 3.1. FILTER APPLICATION

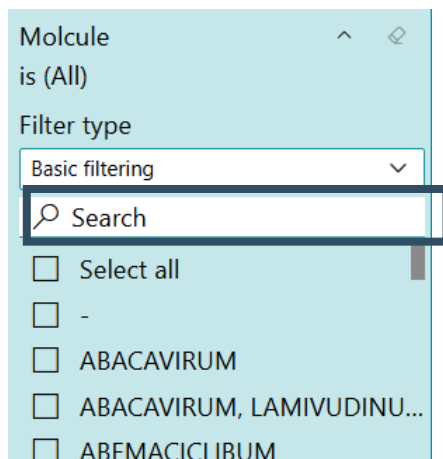
To apply a filter to data, do the following:

- Click the celadon-colored "**Filters**" bar on the right side of the screen.
- Find the interesting filtering criterion field and expand it. In this example, it would be the **Analytical Molecule** item.



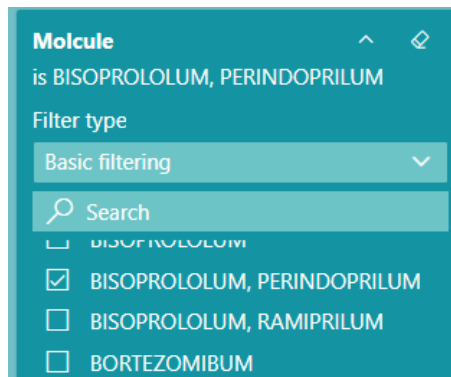
Pic. 3.1.1 Choosing a filtering field – criterion

- Select the appropriate values by checking the boxes. Most filters allow multiple selections.
- There is also the possibility of searching for values by entering parts of them.



Pic. 3.1.2 Place for entering search values

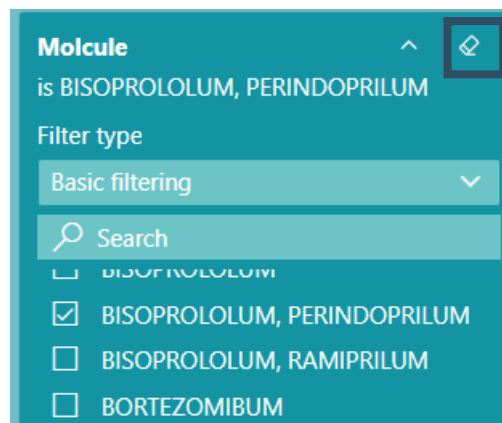
- After applying the filter, the search window turns dark turquoise, indicating that the filter is active.



Pic. 3.1.3 Filter activity indicator

## 3.2. REMOVING THE FILTERS

To remove the filter, click **the eraser icon** next to the selected field.



Pic. 3.2.1 Eraser icon

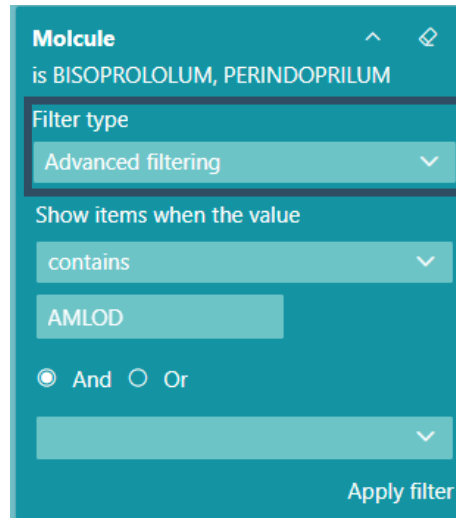
Additionally, a filter was placed on each page to clean all slicers on the given page. After pressing the icon, the screen will return to its original appearance.



Pic. 3.2.2 "Remove all filters" icon

## 3.3. ADVANCED FILTERING

**An advanced filtering** option is also available, allowing for more specific conditions, such as the "Contains" clause to search for values containing a specific part of the name (e.g., "amlod\*" will find all molecules containing "amlod").



Pic. 3.3.1 Advanced filtering

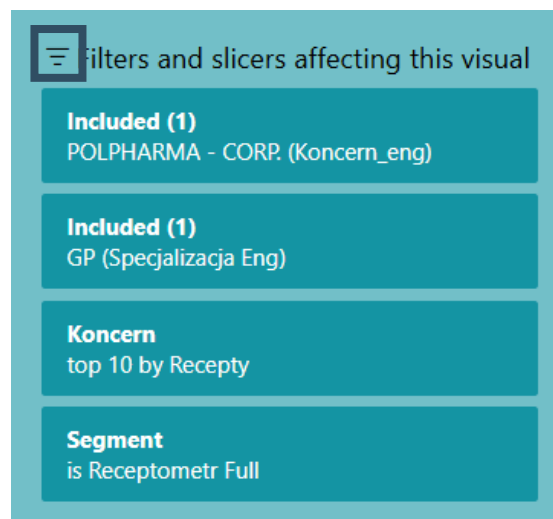
## 4. NAWIGACJA I INTERAKCJE

Each visual element in the report has a set of buttons that become available when you hover over them.




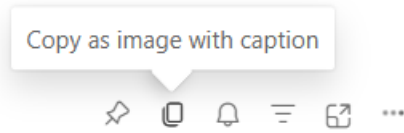
Pic. 4 – Buttons

To check which filters and slicers affect the visualization, click the button .



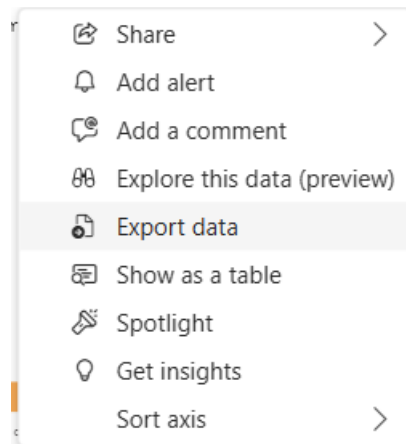
Pic. 4.1 "Funnel" button

To copy a given graph with a caption, click the button  .



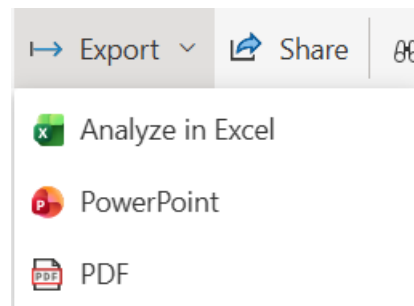
Pic. 4.2 "Copy" button

To export data to another format, e.g. **Excel** (max. 150,000 rows), click the icon in the set of buttons - "More options" and select the **"Export data"** option from the drop-down list.



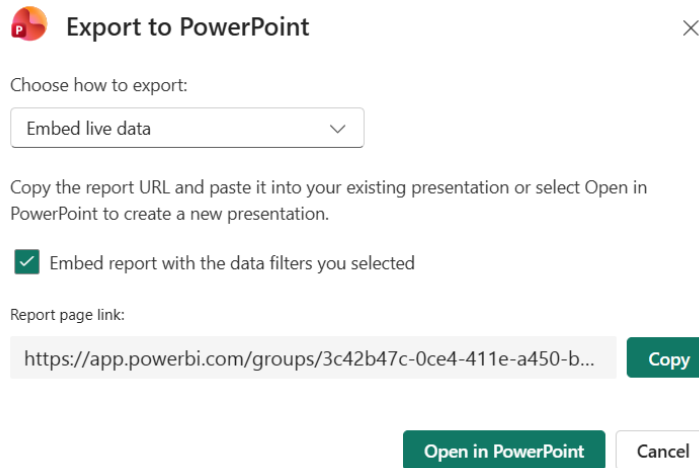
Pic. 4.3 "Export data" option

There is also the possibility of exporting entire analyses to PowerPoint (or individual visual elements available from the visualization toolbar – "More options"). To do this, click the Export button at the top of the screen and select PowerPoint.



Pic. 4.4 3 "Export" to PowerPoint option

In the pop-up window, confirm the selection by clicking the green **"Open in PowerPoint"** button.



Pic. 4.5 Confirmation of export to PowerPoint

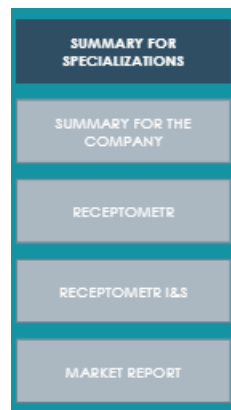
The exported **PowerPoint** file is fully interactive and works the same way as the **Power BI** analysis. The file has **a live connection** to the current data in **the Power BI** service model, which means that after refreshing the model, the latest available data will be displayed.

For the analysis to display correctly, the user must be logged into **PowerPoint** with the same **Microsoft** account used in the **Power BI** app.

Login status can be checked by clicking the icon with user's initials in the **top right corner** of the app. If the user is not logged in to **PowerPoint**, they must log in with the same credentials as they use for **Power BI**.

## 4.1. NAVIGATION BETWEEN SHEETS

To switch between the report sheets, use the buttons located in the side panel on the left side of the screen.



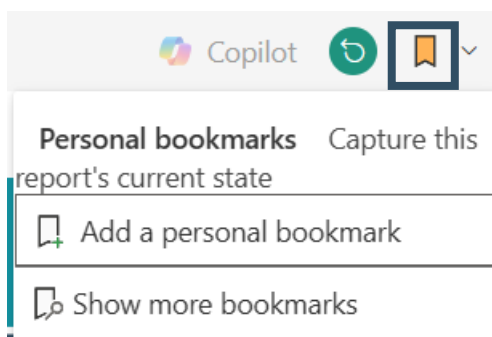
Pic. 4.1.1 – Left navigation panel between sheets

## 5. PERSONAL BOOKMARKS

In Power BI, there is a **Bookmarks** option that allows you to save an analysis configuration in a selected layout. It allows you to easily return to data in the same form, with a fixed set of filters, by changing only the data period.

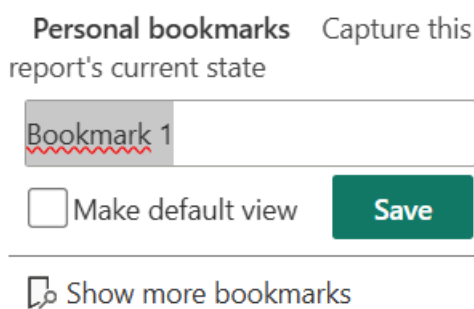
To create a bookmark, do the following:

- Set the analysis to the desired state by selecting, for example, the elements displayed in the table.
- Apply appropriate filters, e.g. date, molecule, class selection.
- Save the configuration as a Bookmark to quickly return to a specific analysis view.



Pic. 5.1 Adding personal bookmarks


The bookmark should be named according to the needs, and optionally, you can check the "Set as default view" option to open the report in the saved state by default.

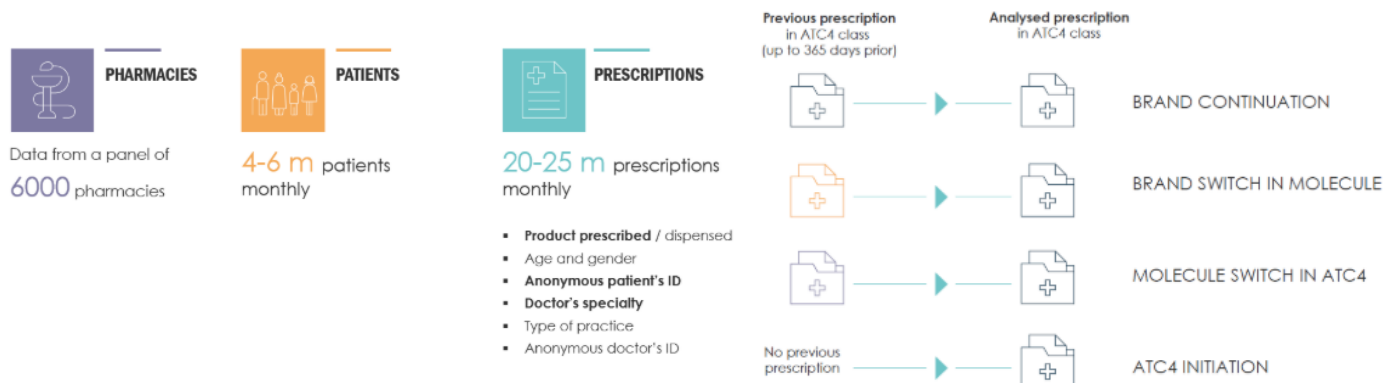


Pic. 5.2 Naming personal bookmarks

After selecting a bookmark from the list of saved analyses, the analysis will be restored to the saved state – it will go to the corresponding page, and the applied filters and selected visual elements, such as measures, periods, etc., will be restored.

## 6. INFO ICON

Depending on the sheet, hovering over the "Information" icon  in the bottom left corner of the dashboard will provide basic information about the pharmacy panel, the number of patients, the number of prescriptions, or the definition of a dynamic segment.

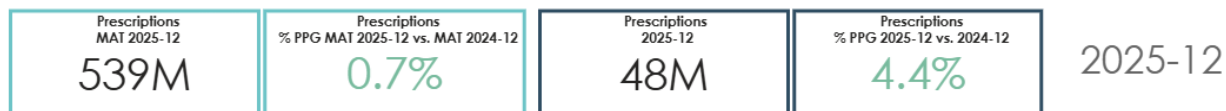


Pic. 6.1 Information on the pharmacy panel (as of 06.2025) and the dynamic segment

## 7. "SUMMARY FOR SPECIALIZATION" SHEET

- General **market summary** based on the latest **MAT** data.
- Results based on the measure **Prescriptions**
- Specialization rankings for the last MAT in data and PPG % year-over-year
- TOP 10 largest players for the entire or narrowed market (and their dynamics)
- The dynamics of the largest brands in the market for the largest players over time

To adjust the displayed data, use the celadon-colored "**Filters**" menu available in the drop-down bar on the right side of the screen (filtering is described in detail in point 3).



Pic. 7.1 Summary panel above

The sheet contains fixed-calculated measures for the entire market or a narrowed market through filters.

From left to right:

- Number of prescriptions for the last MAT in the data
- Change % year-over-year (Last MAT to MAT year before)
- Number of prescriptions for the last month in the data

- % change month-on-month (last month to corresponding month a year earlier)

The most current month in the data is also displayed.

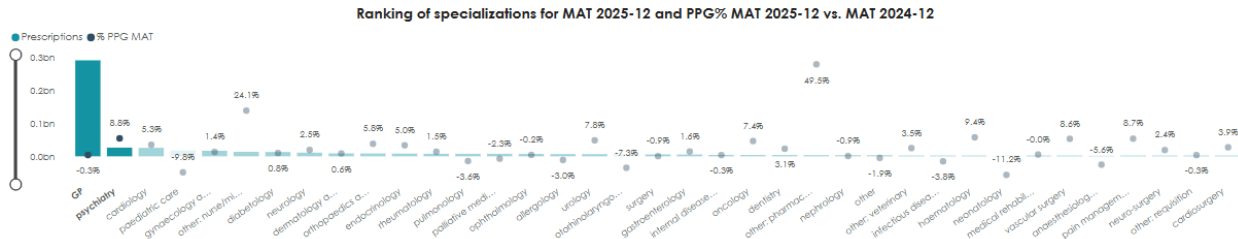
## 7.1. INTERACTION BETWEEN GRAPHS

Clicking on the chart will allow you to interact with other elements of the report by filtering the data.

It is possible to narrow down several items by holding down the "ctrl" button.

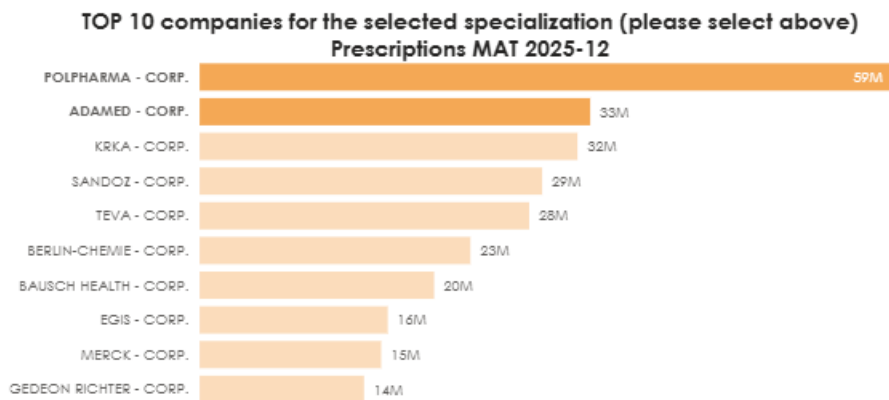
For example:

For the following marked specialties (GP + Psychiatry).



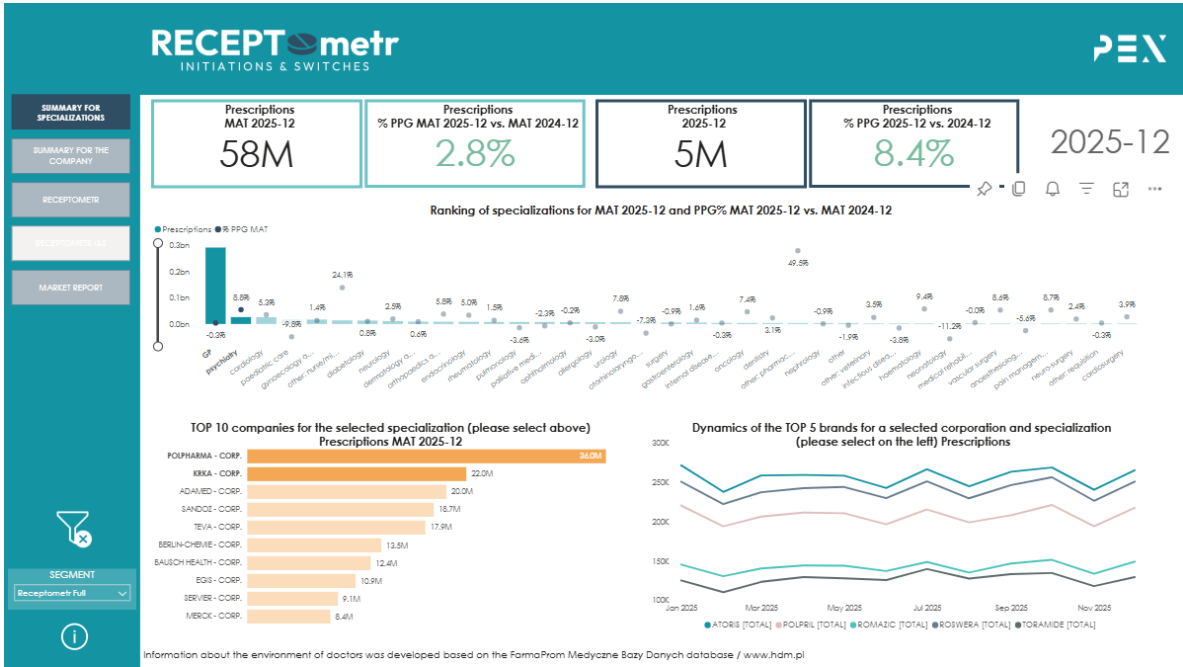
Pic. 7.1.1 Selecting chosen specializations

It is possible to select several companies (TOP 10 for a narrowed market):



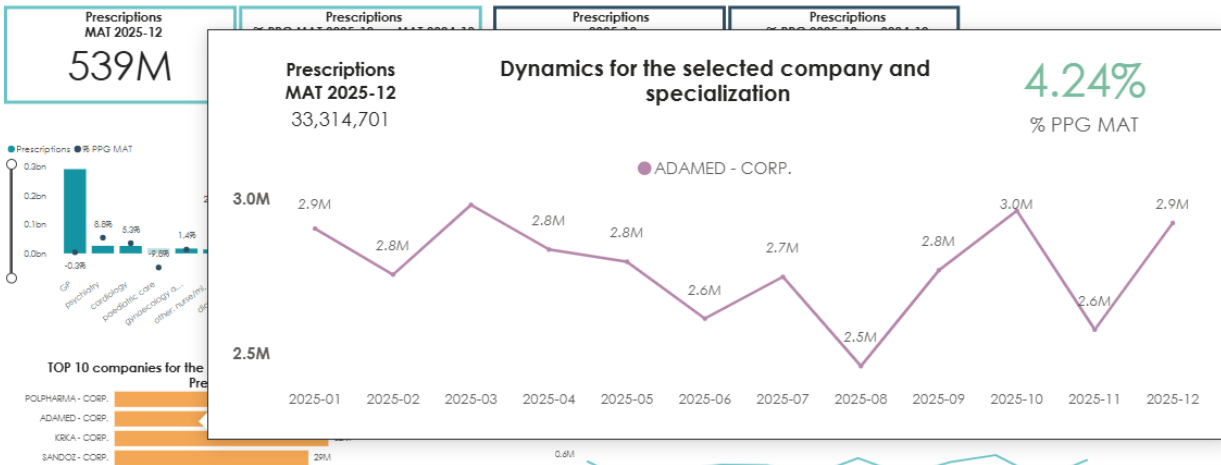
Pic. 7.1.2 Selecting chosen companies

To see the dynamics over time for the TOP 5 largest brands (in a given specialization and for a given company). Calculations at the top of the panel will also be recalculated.



Pic. 7.1.3 Influence of markings on individual specializations

Additionally, when the cursor is moved over a given specialization, a window will appear with the time dynamics for the selected company (the latest MAT in monthly periods) with a PPG summary. Example below:



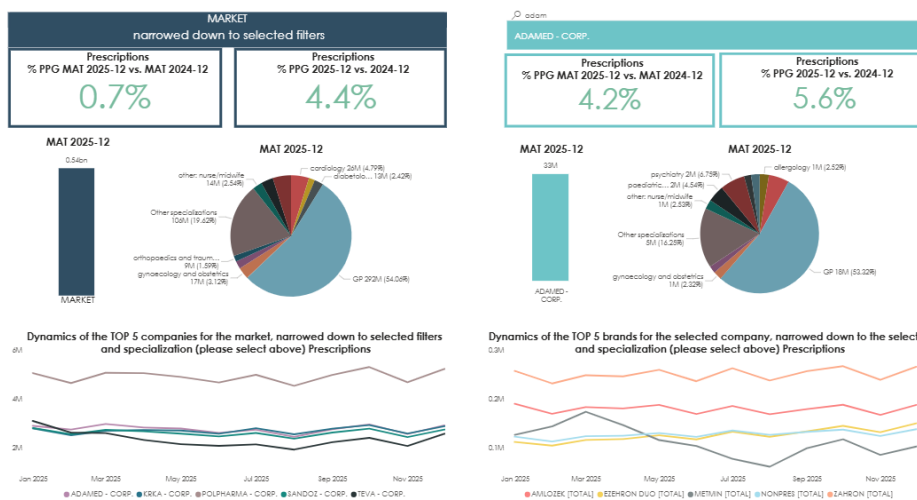
Pic. 7.1.4 Dynamic window of the company

## 8. "SUMMARY FOR THE COMPANY" SHEET

The sheet presents a report comparing a selected company to the entire or narrowed market. It facilitates looking at the prescriptions of the entire portfolio and their dynamics through the prism of the main specializations. The report is based on prescriptions.

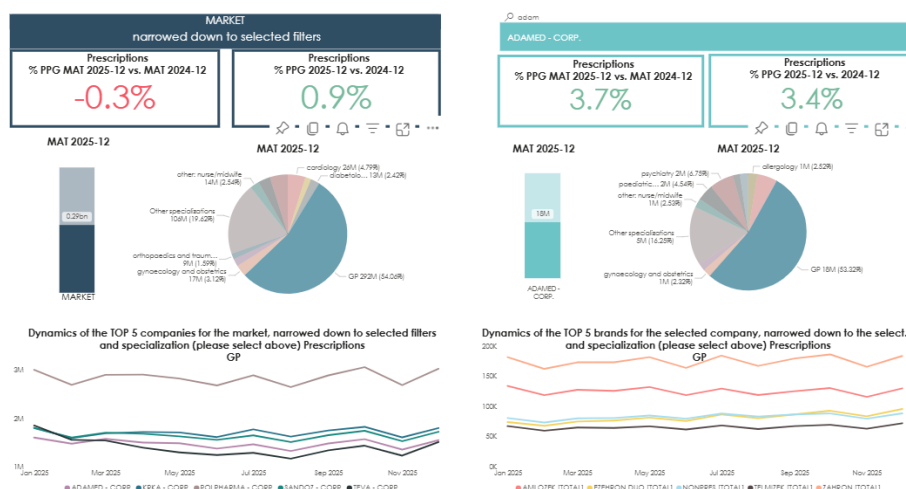
The sheet is visually divided into two parts, the left one concerning the market (which can be narrowed down using the side filters) and the right one concerning the selected company (note! Side filters filter the entire report page).

The sheet consists of 3 sections:



Pic. 8.1 Summary for the market and the company

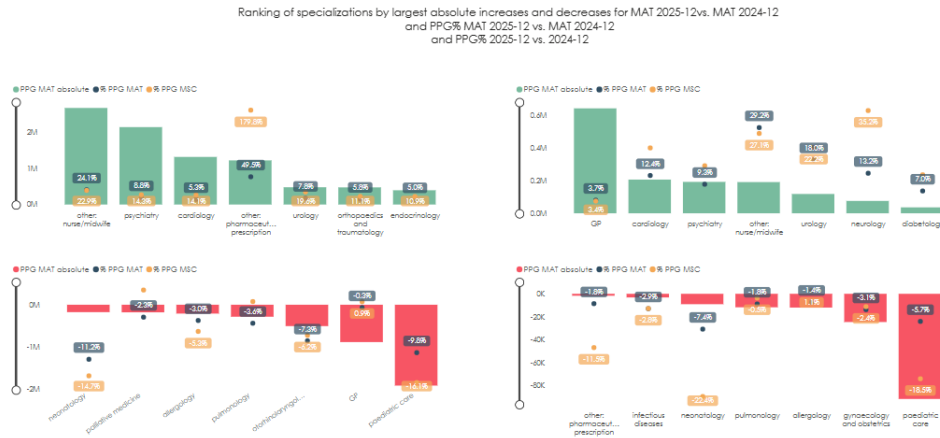
Overall view of the market and the selected company in total, broken down by leading specializations and dynamics over time for the last year, divided by the largest market players in the market section, and broken down by the largest brands in the company section. The files display the percentage change from year to year and month to month from the previous year, which helps compare the market dynamics to the selected company.



Pic. 8.2 Summary for the market and the company (narrowing of specialization)

Additionally, the report allows you to review the dynamics of top brands/companies for a selected specialization through its filter..

### Ranking of specializations in terms of increases and decreases

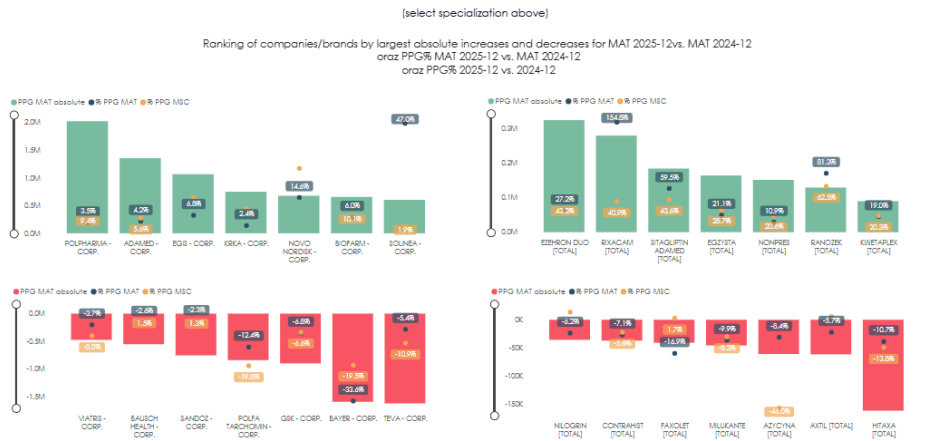


Pic. 8.3 Ranking specializations by growth and decline

Both for the selected market and the corporation, a ranking of specializations is presented in terms of the largest absolute increases and decreases. The absolute value and year-over-year change (PPG % MAT-0 vs MAT-1) and month-over-month change are provided.

Similarly, the above visual elements can interact with each other, filtering the following section:

### Ranking of companies/brands in terms of growth and decline



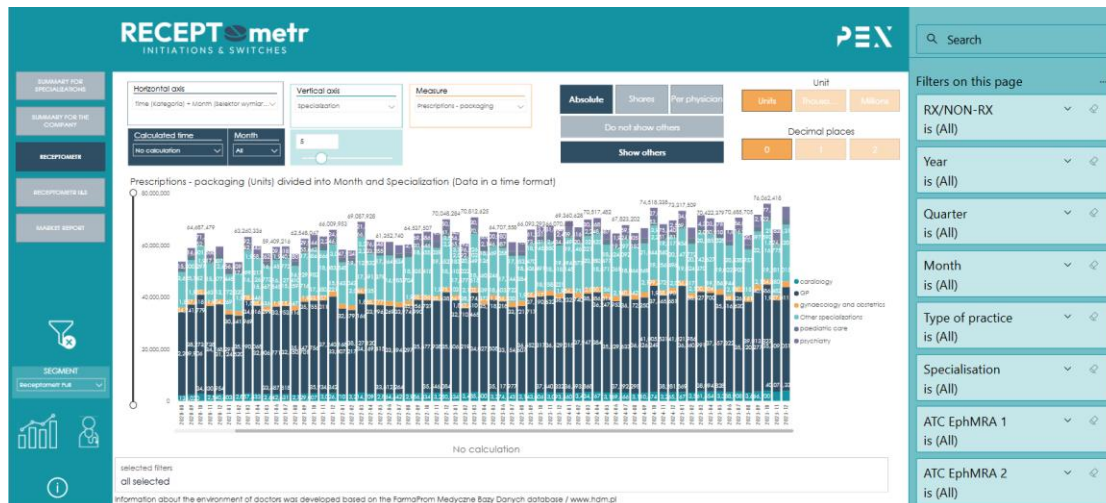
Pic. 8.4 Ranking specializations by growth and decline

The last section of the sheet contains a ranking of companies (for the selected market) and a ranking of brands (for the selected manufacturer). Ranking is calculated in the same way for the largest increases/decreases over the past year in absolute terms.

Additionally, when the cursor is moved over a given specialization/company/brand, a window will appear with the dynamics over time for the selected division (last 2 years in monthly periods) with a PPG summary.

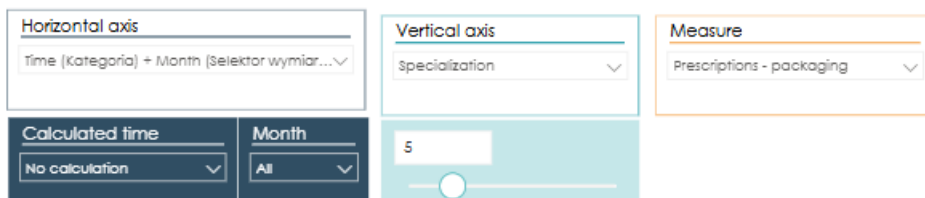
## 9. EXPLORATION SHEETS "RECEPTOMETR" AND "RECEPTOMETR I&S"

Both sheets are functionally identical. They allow you to create your own divisions on the graph. The differences are listed in the lower section. The viewing of the product/market is also narrowed down using the side filter bar.



Pic. 9.1 Data exploration

### 9.1 SETTING MEASUREMENTS AND DIMENSIONS



Pic. 9.2 Choosing an axis and a measure

**"Horizontal axis"** – defines the elements in the chart's rows on the horizontal axis (multiple selection possible using the Ctrl key). It is divided into categories:

- No division (no horizontal axis division)
- Time (select from: Year, Quarter, Month)
- Physician (select: Specialization, Type of practice)
- Patient (select: Patient's Age, Patient's Gender)
- Refundation (select: Refund status, Payment category, Limit group)
- Market/Product (all parameters defining the product/market, including ATC class, molecule, total brand, company, dose, or form)

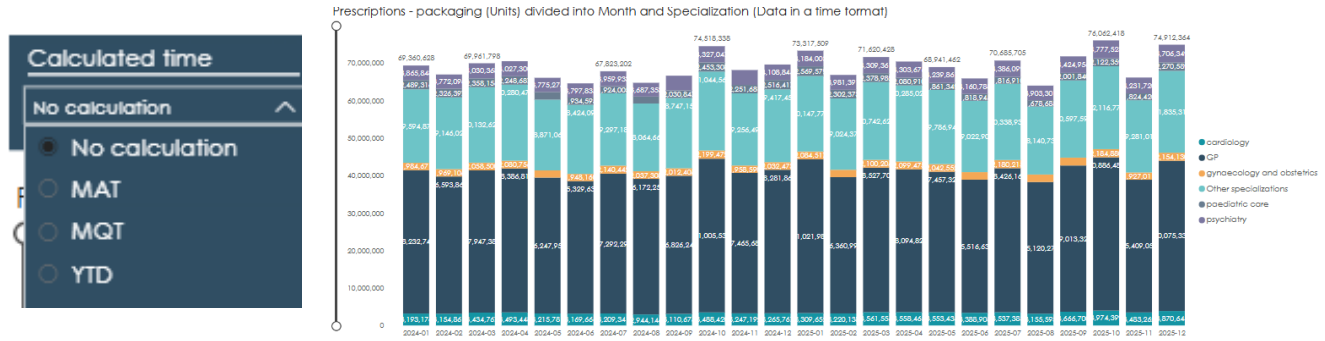
**"Vertical axis"** – defines the elements in the chart legend (on the vertical axis). It takes values such as the horizontal axis. The TOP N parameter determines the number of categories displayed on the graph. The rest of the categories will be calculated in the "Others" line. The value of TOP N is always determined based on the current filters.

**"Measure"** – displays the current value for the displayed measure.

### 9.1.1 TIME CALCULATION

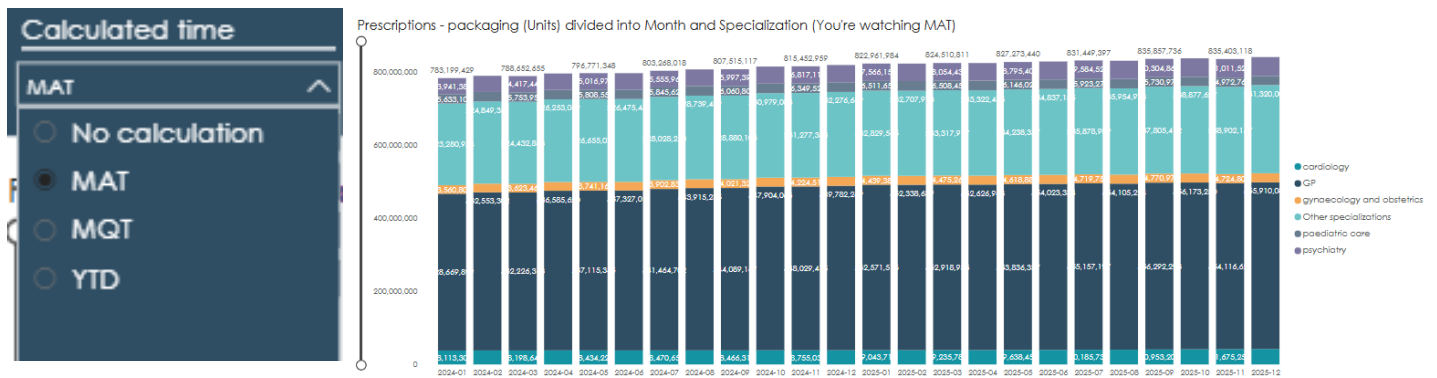
Depending on the "Calculated time" parameter and the horizontal axis division, the user can obtain different calculations.

1) When we choose "No calculation" and divide the horizontal axis by time, we get a monthly data image – data in a time-based layout.



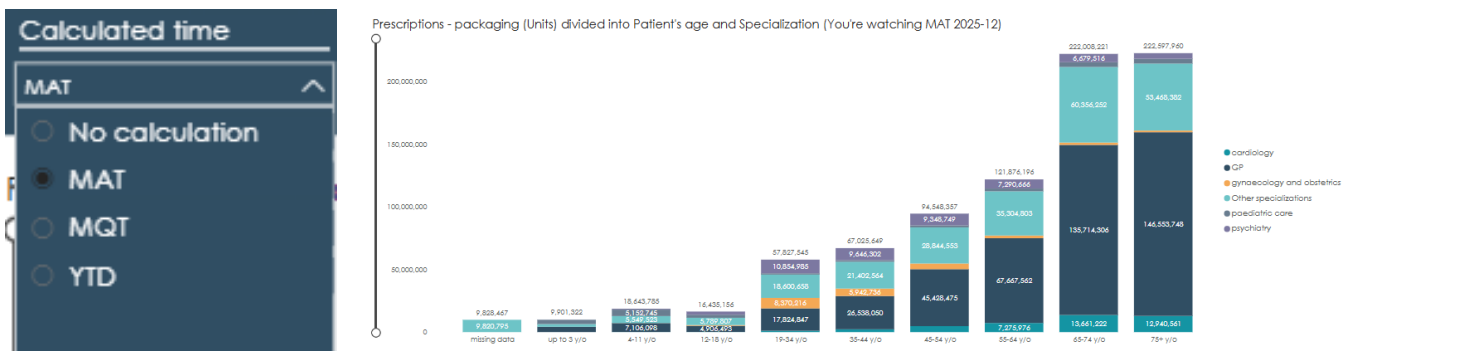
Pic. 9.1.1 Choosing no calculation in the time-based layout

2) When selecting the calculated measures MAT/MQT/YTD and dividing the horizontal axis by time, we will obtain the calculated measure MAT/MQT/YTD for each month.



Pic. 9.1.2 Time-based calculation selection

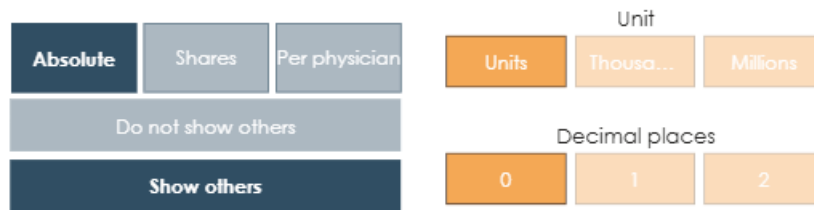
3) When selecting calculated measures MAT/MQT/YTD and a horizontal axis division other than time, we will obtain a calculated measure MAT/MQT/YTD for the last period in the data.



Pic. 9.1.3 Choice of calculation in the participation of specialization in the patient's age

## 9.2 DISPLAY PANEL

Each setting on the graph can be displayed in three dimensions. Absolutely, in terms of shares and per physician per month.



Pic. 9.2.1 Display panel

The "Show remaining/Don't show remaining" slicer allows you to hide the "Remaining" values. It is useful when comparing very large "Remaining" values on graphs vs small values of individual elements.

Data in the Absolute system and per physician can be displayed in units, as well as in thousands and millions. The user also has the option to display decimal places.

Data viewed in a % format are displayed with 2 decimal places.


## 9.3 SELECTED FILTERS

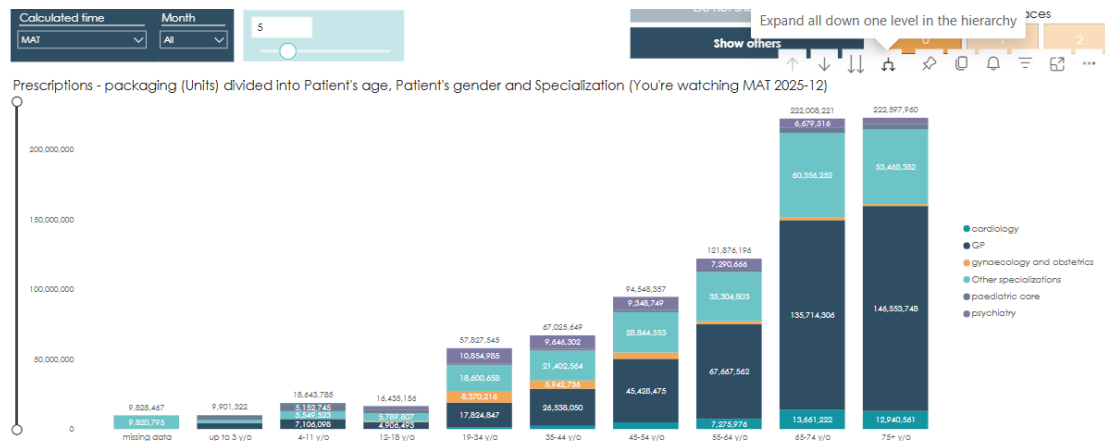
For active side filters, the window below the graph will display filters that work on the given update. The window will display the first 5 filtered categories and count how many other categories from the given filter are selected. Note: The order of selection applies.



Pic. 9.3.1 Selected filters

## 9.4 DETAIL LEVEL OF DATA

After selecting more than one value, it is possible to expand the levels of detail using the  button or by right-clicking on the horizontal axis and selecting the "Expand to next level" option.



Pic. 9.4.1 Expanding data to the lowest level

## 9.5 EXPORTING DATA

The "DATA" icon takes the user to the "Exports" tab, which contains a table designed for exporting data for further processing, e.g., in Excel. The table does not include subtotals for the data. The columns displayed in the analysis can be specified using the slicer placed above the table – their order in the table corresponds to the order of marking fields in the slicers.



Pic. 9.5.1 "Data" icon

Using side filters, we can determine a personalized database on which the user will want to take further actions.

Note: Filters in the side panel are NOT automatically transferred from the exploration page.

Using the "Dimensions" slicer, the user specifies the division to be displayed. The table displays all the available measures in the report.

Patient's age	Patient's gender	Prescriptions - packaging	Prescriptions - prescription	Prescriptions - SU	Prescriptions - ODD	Prescriptions - PIN (total)
75+ y/o	woman	745 297,167	488 413,384	30 777 248,328	22 636 768,817	25 162,889 876,11
65-74 y/o	woman	698 521,809	441 856,448	27 648 236,367	21 800 554,021	21 055 234 894,21
65-74 y/o	man	831 110,209	330 709,339	21 007 147,848	17 600 756,830	18 189 398,392 20
55-64 y/o	woman	452 378,627	266 139,456	15 628 246,011	12 937 801,742	12 625 180 339,66
55-64 y/o	man	387 792,098	231 679,731	15 884 386,854	10 560 491,831	10 126 111 652,00
45-54 y/o	woman	345 653,699	221 344,480	13 260 485,963	11 281 075,387	11 465 209 778,92
45-54 y/o	man	274 429 912	165 000,970	10 088 836,468	8 179 178,658	10 075 880 627,48
35-44 y/o	woman	222 784,268	141 848,294	8 341 431 916	7 036 854 302	8 047 005 976,68
35-44 y/o	man	214 952,200	149 716,422	7 871 480,930	6 102 584 611	9 079 117 876,93
19-34 y/o	woman	210 943,466	149 127,487	7 309 881 540	6 716 058 549	8 898 924 682 80
19-34 y/o	man	181 189 837	100 879 794	8 887 071 640	4 378 704 919	6 211 413 432 24
19-34 y/o	missing data	113 316,800	74 604,804	4 345 404 974	2 814 922 182	4 855 781 898,65
4-11 y/o	woman	60 358 438	49 394 048	2 386 107 422	861 819 882	2 228 304 063 94
4-11 y/o	man	69 789 344	37 169 233	8 771 163 268	3 200 432 061	2 684 128 742 21
4-11 y/o	missing data	48 304 788	40 747 239	1 848 914 928	476 178 040	1 742 428 788 08
12-18 y/o	woman	45 605 207	31 649 605	1 974 905 921	1 093 741 028	1 304 806 449 80
12-18 y/o	man	42 928 875	32 208 467	8 648 043 854	378 480 303	2 046 202 247 90
12-18 y/o	woman	39 075 292	30 168 761	3 333 732 738	247 782 964	1 004 933 317 18
12-18 y/o	man	36 189 410	23 948 886	1 394 084 918	813 078 280	1 484 548 611 16
12-18 y/o	missing data	542 226	283 108	30 020 037	9 744 344	13 376 785 40
12-18 y/o	missing data	270 164	157 300	16 491 437	6 330 941	7 794 036 76
75+ y/o	missing data	703	526	29 249	18 304	33 230 40
65-74 y/o	missing data	488	411	18 916	16 001	14 239 70
19-34 y/o	missing data	400	162	14 122	5 980	19 247 41
35-64 y/o	missing data	374	279	14 899	10 472	33 209 82
45-54 y/o	missing data	275	181	10 910	6 878	88 347 68
35-44 y/o	missing data	222	180	2 200	6 088	47 746 88
12-18 y/o	missing data	43	33	2 299	1 161	1 410 29
4-11 y/o	missing data	42	42	1 348	658	10 308 13
19-34 y/o	missing data	25	25	913	21	232 32
<b>total</b>		<b>4 619 749 670</b>	<b>2 999 464 371</b>	<b>195 022 339 904</b>	<b>138 209 244 498</b>	<b>189 979 024 809 78</b>

Pic. 9.5.2 Export table

To return to exploration, press the "Back" button located next to the PEX logo.



Pic. 9.5.3 "Back" button

## 9.6 RECEPTOMETR VS RECEPTOMETR I&S – DESCRIPTION OF DIFFERENCES

The I&S Receptometr **contains** an additional division field, which is a dynamic segment..

- Initiation in the sense of initiation of class ATC4 (no previous prescription or reappearance after more than a year since the last recorded transaction)
- Continuation of the brand
- Switch brand in the molecule
- Switch molecules within a class

The I&S Receptometr, on the other hand, **does not include** a breakdown by patient age, patient gender, or payment category.

## 10. MARKET REPORT SHEET

The market report was prepared to provide the user with a detailed comparison of the selected product/product group and the selected defined market in terms of specialization, patient, dynamics, etc.

The sheet consists of 7 tiles:

- Selecting a PRODUCT and a MARKET
- The prescribing potential of physicians
- Physician's prescribing behavior
- Patients
- The competitive position of my brand in the market
- Patient's payment
- Dynamic segment



Pic. 10.1 Navigation in the market report

### 10.1 PRODUCT AND MARKET SELECTION

Clicking on the purple tile will display a panel with filters on the left and right sides. Turquoise slicers are used to narrow down the analyzed product/product group, while orange slicers are used to narrow down the market.

On this sheet, side filters are NOT AVAILABLE.

Pic. 10.1.1 Product and market selection

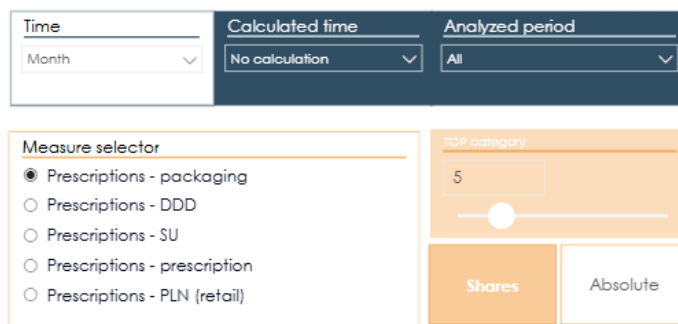
Both the product and the market can be filtered broadly. As a product/product group to be analyzed, the user can narrow down to a group of brands, SKUs, select a specific form, and narrow down to a class or molecule. Similarly, the market can consist of one or many classes, molecules, brands, etc.

Note: The market and product are fully flexible in their selection. The user must personally ensure that the product is available in the market.

Based on the filtered data on this tab, the sheet will be automatically recalculated for all charts. To change the product or market, the user must return to this page.

## 10.2 START PANEL IN ANALYSIS TABS

The remaining tabs with individual analysis sections have one common navigation panel:



Pic. 10.2.1 Navigation panel

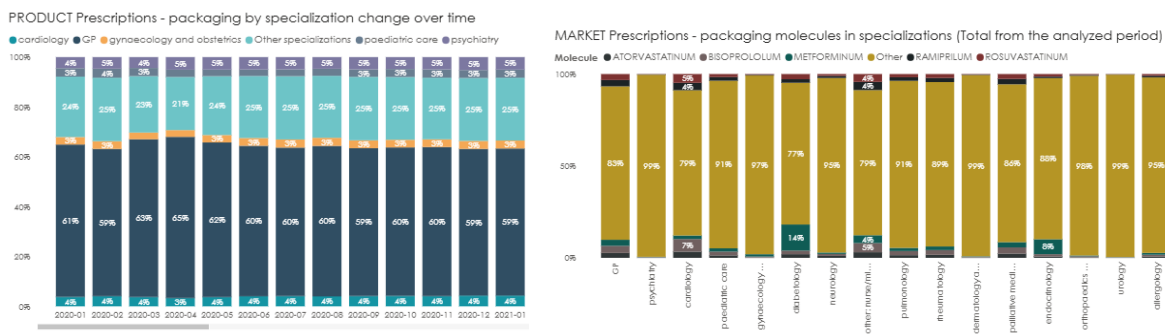
**Time** – user-defined data division (visible effect on time-series graphs). Accepts values: month, quarter, year.

**Calculated time** – parameters and operation described in section 9.1.

**Analyzed period** – the ability to set the exact analyzed period. It is divided into specific years, quarters, and months (especially important for analyses based on the sum of the marked period).

**Measure selector** – Single-choice custom filter. Applies to the entire report.

**Top category** – Depending on the chart analyzed, TOP category may refer to different dimensions. May concern the most watched specialties or molecules or brands.



Pic. 10.2.2 TOP category action depending on the graph

Make a choice of specialization if TOP does not meet your needs.	Top specializations in a given market. Hint for the user to make a specialization choice.	
Specialization selection	<b>Specialization</b>	<b>Prescriptions - packaging</b>
All	GP	2,585,246,779
	psychiatry	252,527,520
	cardiology	214,436,387
	paediatric care	148,789,696
	gynaecology and obstetrics	139,418,861
	diabetology	119,603,473

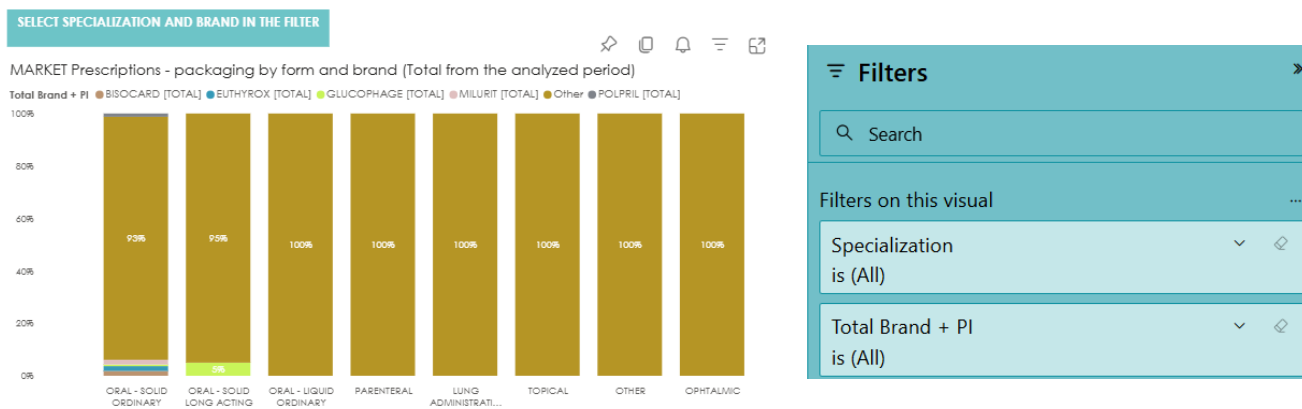
Pic. 10.2.3 Personalized selection of specialization

To enable the user to personalize the report, if the TOP specializations are not satisfactory for the user, it is possible to build a report for selected specializations.

Note: The filter will affect all charts in the market report.

The user can have additional influence on selected graphs (by, for example, filtering the graph to selected brands/molecules in the market area – the functionality enables, among others, looking at the share of a selected product against a selected competition).

To do this, click the left mouse button on the chart and narrow down to the filters in the sidebar.



Pic. 10.2.4 Personalized selection of specialization and brand

## 10.3 RESULT TABS

Each tab contains a set of unique charts for the product and market in specific divisions. The charts are calculated for a selected period or show dynamics over time. The report takes the user through the market situation in detail, in individual shots. Below is a description of the individual sections:

### The prescribing potential of physicias

- The potential of individual specializations
- The potential of physicians by specialization
- Potential for specialization by type of practice

- The potential of physicians by specialization and type of practice

### **Prescriptive behavior of physicians**

- Molecules and doses used by the main specializations
- Package size
- Prescription size

### **Patients**

- Patient's age
- Patient's gender
- Patient's age and gender by specialization

### **The competitive position of my brand on the market**

- The position of the selected brand and its competitors in the main specializations
- Position in prescriptions by age and gender of patients
- Position in prescriptions by prescribed dose and form

### **Patient's payment**

- Refundation scale
- Category of payment in the main specializations
- Category of payment by patient's age and gender

### **Dynamic segment**

- Dynamic segment scale
- Dynamic segment in the main specializations
- The potential of a physician in a given specialization according to the dynamic segment