CRIS Analytics

Training Exercises

Table of Contents

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Introduction

Purpose

The exercises contained in the document are designed to provide delegates with self-guided learning following CRIS Analytics Pro Training.

Audience

This document is aimed at anyone who has attended a CRIS Analytics Training session. It is not designed to be used by anyone who has not attended training, as the content assumes a certain amount of functional knowledge in order to undertake the exercises.

CRIS Analytics - Training Objectives

The classroom based CRIS Analytics Training session will comprise:

- Trainer Demonstration
- Guided Exercises
- Test Exercises

Training Objectives	
All Users	
1. VIEW AND REFINE DATA	▪ Chart features – axes and legend ▪ Chart options – ellipsis menu ▪ Filtering data – range, legend, and drill ▪ Dashboard features – burger menu, new cells ▪ Chart Library
2. CHART CREATION	▪ Edit existing chart ▪ Edit drill chart ▪ Create new chart ▪ Design a chart
Admin Users	
3. DASHBOARDS AND USERS	▪ Understand Categories / Dashboard ▪ Understand how to add users to a category ▪ Understand Roles ▪ Understand how to create a user ▪ Allocate a category and a role to a user ▪ Security Settings ▪ Publish a layout

CRIS Analytics - Training Exercises

Part One – View and Refine Data

Exercise 1.1 - Log In

1. Log in with your username = wscap and password: wellbeingpro
   Alternatively, you may be asked to login using training accounts as follows:
   Username: train1, train2, train3, train4, train5 etc
   Password: magentus
2. You should be on the "HSS Home" dashboard

Exercise 1.2 - Request to Report Completion (Last 3 months)

1. Navigate to the **Last Quarter** dashboard
2. Open the chart ***Request to Report Completion (Last 3 months) – HSS*** in full screen
3. Filter by range: **Last 7 days of the range**
4. Filter by group: **Modality CT and MRI**
5. **What was the average waiting time for CT events that occurred on the 6 day of the range?**

   ____

6. **Close** Full Screen View

Exercise 1.3 - Outstanding Urgent Reports – Last 14 Days

1. Navigate to the **Last Fortnight** dashboard
2. Open ***Outstanding Reports (Last 14 Days)*** in full screen
3. Drill to events that are **14 days old**
4. Drill to events **reported by any radiologist** you choose **(or not assigned as applicable)**
5. Sort the data list by **Examination Name**
6. **Export to Excel** and open the file
7. **Drill back to the Top Level**
8. **Close** Full Screen View

Exercise 1.4 - Top Performing Radiologists (Reporting) – Last 14 Days

1. Open **Top Performing Radiologists (Reporting) – Last 14 Days in full screen**
2. Filter by a chosen **Modality**
3. Choose **a radiologist** and drill into **any examination** name as applicable
4. **What is the most recent event?**

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5. **Drill back to the Top Level**
6. **Close** Full Screen View

Exercise 1.5 - Add Charts to the Dashboard

1. You have all been given an individual workspace – i.e. Training User 1 – 16 to use for these exercises
2. Click the ≡ menu and ***select your individual workspace***
3. **Create four cells**
4. **Select Cell One** (Top Left) and click **[Replace Chart from Library] icon** to access Chart Library
5. **Search for '*Unreported*'**
6. Add "***Unreported – Last 24 Hours – HSS"***

Please note: HSS Training > WS Trainer Workspace is an example of how your Training Dashboard should look when all exercises have been completed.

Test 1.6 - Outstanding Urgent Reports (Last 14 Days)

1. **Select Cell Two** (Top Right) and click **[Replace Chart from Library] icon** to access Chart Library
2. Open **Chart Library** and search for "***Unreported over 2 weeks old - Last 3 months - HSS"***
3. **Open *Outstanding Urgent Reports (Last 14 Days)* in full screen**
4. Use filters and drilling to answer this question:
5. **What is the highest number of outstanding events allocated for reporting to an individual Radiologist?**

   ____

6. **Drill back to the Top Level**
7. **Close** Full Screen View

Part Two – Chart Creation

Exercise 2.1 - Edit a Chart

1. **Select Cell One** (Top Left)
2. Select **Edit Chart** and [Open Read Only]
3. **Change title to Unreported - Last 24 Hours AED – YOUR INITIALS**
4. **Save as a New Chart**
5. Click **[Replace Chart from Library] icon** to access Chart Library
6. Type your **Initials** and select your own "**Unreported - Last 24 Hours AED – YOUR INITIALS"** chart.
7. Select **Edit Chart** and make the following changes:

DRILL LEVEL 1 - DATA TAB:

8. Change **Y axis from Event to Exam Count Level 1** of the chart
9. Change **Legend from Report Urgency to Modality Description**

DRILL LEVEL 1 - CHART TAB:

10. Change chart to a **Stacked Bar Chart**

DRILL LEVEL 1 - FILTER TAB:

11. **Add Filter – Trust Name = Your Trust Name**

12. **Add filter – Patient Type Description is equal to A&E Attender**

<u>CHART CONFIG 'COG' ICON:</u>

13. Change **Chart Category** to your own workspace – i.e. Training User 1, 2, 3 etc.
14. Add **Version Control** to the **Help Text**

-----Version Control-----

INITIALS DATE - First Release

15. **[Save] your chart**

Exercise 2.2 - Edit a Drill Chart

1. Select <u>Edit Chart</u> for Unreported – **Last 24 Hours AED - YOUR INITIALS**
2. Select the **second drill level chart**

<u>DRILL LEVEL 2 - DATA TAB:</u>

3. Change **Event Count to Exam Count**

<u>DRILL LEVEL 2 - ATTRIBUTES TAB:</u>

4. Change **Chart Title** from **Outstanding {{Report Urgency Description}}** Reports to **Unreported {{Modality Description}} Reports**

5. Select the **third drill level chart**

<u>DRILL LEVEL 3 - DATA TAB:</u>

6. Add **Referring Location Description** and **Referrer Name**
7. **Reposition the Columns of data** based on your order preference

<u>DRILL LEVEL 3 - ATTRIBUTES TAB:</u>

8. Tick **"Full screen to display this Level"** to ensure the Table level data is displayed at full screen automatically.

9. **[Save]** your chart

Exercise 2.3 - Select, Copy and Edit Chart

1. **Select Cell Three** (Bottom Left)
2. Open **Chart Library** and search for "***Top 10 Performing Radiologists (Verifying) (Last 14 days)"***
3. Select **<u>Edit Chart</u>** and [Open Read Only]
4. **Change title to Unreported - Top 10 Performing Radiologists (Verifying) (Last 14 days) – INITIALS**
5. **Save a Copy**
6. Click **[Replace Chart from Library] icon** to access Chart Library
7. Type your **Initials** and select your own **"Top 10 Performing Radiologists (Verifying) (Last 14 days) – INITIALS"** chart.
8. Select **<u>Edit Chart</u>** and make the following changes:

<u>DRILL LEVEL 1 - FILTER TAB:</u>

9. **Add Filter – Trust Name = Your Trust Name**

10. **Add Filter – Reported by** is **not equal** and type the word **AUTO** (do not choose from the list)

CHART CONFIG 'COG' ICON:

11. Change **Chart Category** to your own workspace – i.e. Training User 1, 2, 3 etc.
12. Add **Version Control** to the **Help Text**

-----Version Control-----

INITIALS DATE - First Release

13. **[Save] your chart**

Exercise 2.4 - Creating a New Chart

1. **Select Cell Four** (Bottom Right)
2. **Name your chart** – enter a title **"Verified Reports by Radiologist and Patient Type (Last 3 Months) - [INITIALS]"**

LEVEL 1 - DATA TAB

3. From the ***Performance Indicators Last 3 Months*** folder select:
4. **Y Axis = *Event Count***
5. **X Axis** = ***Reported By Name***
6. **Legend** = ***Patient Type Description***

You may wish to consider turning off **AUTO** refresh if you are working in a Consortium

LEVEL 1 - CHART TAB

7. **Select Stacked Column Chart**

LEVEL 1 - FILTERS TAB

8. **Add Filter – Trust Name = Your Trust Name**
9. **Add Filter – *Is Verified* is equal** to ***true***
10. **Add Filter – Reported by** is **not equal** and type the word **AUTO** (do not choose from the list)

LEVEL 1 - ATTRIBUTES TAB

11. Add **X Axis label - *Reporting Radiologist***

Exercise 2.4.1 - Drill Level 2

12. Add **Drill Level 2** by clicking [+]

DRILL LEVEL 2 – DATA TAB:

13. **Y Axis = *Event Count***
14. **X Axis** = ***Modality Description***
15. **Legend** = ***Patient Type Description***

DRILL LEVEL 2 – CHART TAB:

16. Select **Stacked Bar Chart**

DRILL LEVEL 2 – ATTRIBUTES TAB:

17. Chart Title - **{{Reported By Name}} - Total Reporting by Modality**

Exercise 2.4.2 - Drill Level 3

18. Add **Drill Level 3** by clicking [+]

<u>DRILL LEVEL 3 – DATA TAB:</u>

19.<u>Y Axis</u> = *Event Count*
20. **<u>X Axis</u>** = ***Examination Name***
21. **<u>Legend</u>** = ***Patient Type Description***

<u>DRILL LEVEL 3 – CHART TAB:</u>

22. Select **Stacked Column Chart**

<u>DRILL LEVEL 3 – ATTRIBUTES TAB:</u>

23. **All {{Modality Description}} Examinations**

Exercise 2.4.3 - Drill Level 4

24. Add **Drill Level 4** by clicking [+]

<u>DRILL LEVEL 4 – CHART TAB:</u>

25. Select **Table** to create columns of Data

<u>DRILL LEVEL 4 – DATA TAB:</u>

26. Remove **# Event Count** using [-]
27. Add [+] the following **Data Fields** using the filter search as required:
    - Event Key
    - Request Datetime
    - Event Datetime
    - Referring Location Description
    - Patient Type Description
    - Referrer Name
    - Examination Name
    - Report Verified Datetime
    - Report Verified by Name

<u>DRILL LEVEL 4 – SORTING TAB:</u>

28. Add [+] Event Datetime

<u>DRILL LEVEL 4 – ATTRIBUTES TAB:</u>

29. Select "Full screen to display this level".

Exercise 2.5 – Chart Configuration

CHART CONFIGURATION

1. Check / Change **Chart Category** to your own workspace – i.e. Training User 1, 2, 3 etc.
2. Add **Help Text** and **Version Control**

Verified Reports by Radiologist and Patient Type (Last 3 Months) per Events / Request with drill paths to Modality Description, Examination Name and Chart Data.

-----Version Control-----

INITIALS DATE - First Release

3. **[Save]** your chart

Exercise 2.6 – Linking Charts

Linking charts is a useful function that enables a number of charts to be utilised in a Dashboard without compromising screen space and reducing chart loading times.

1. **Select Cell Three** (Bottom Left)
2. Select **Edit Chart**
3. Select **Chart Config**

CHART CONFIGURATION

4. Click [+] to add a Chart Link
5. Type the label **[Last Quarter]**
6. Click the Chart Links dropdown and search using your INITIALS
7. Select "Verified Reports by Radiologist and Patient Type (Last 3 Months) – INITIALS"
8. **[Save]** your chart

It is important to ensure you create links on all reciprocal charts (i.e. Create a Return Journey between Linked Charts) to prevent creating Orphaned Chart Links.

9. Click the new chart link button [Last Quarter] which will take you to the linked chart
10. Select **Edit Chart**
11. Select **Chart Config**

CHART CONFIGURATION

12. Click [+] to add a Chart Link
13. Type the label **[Last 14 Days]**
14. Click the Chart Links dropdown and search using your INITIALS
15. Select "Top 10 Performing Radiologists (Verifying) (Last 14 days) - INITIALS"
16. **[Save]** your chart

You should now be able to use the chart link buttons to toggle between charts.

Test 2.7 - Design a Chart

▪ Who is this chart for?	▪ What information do they want to see?	▪ Which events do you want to include or exclude?

1. Create a chart for a CT superintendent who would like to see all **Outstanding Outpatient Requests for a Modality – i.e. CT, MRI or XR**
2. Create a **drill chart** to find out which **Clinics the requests are from**, and **How long it has been since the request**
3. Add a **dynamic title** to the drill chart and add Chart Help and Version Control
4. Drill to [specified exam]. **Where did the first (oldest) order come from?**

Objectives	**Answers**
Who is this chart for?	Modality superintendent
What information do they want to see?	All outpatients requiring appointments for a specific Modality
Which events do you want to include?	Orders and requests, Outpatients, and a specific Modality
Which events do you want to exclude?	Everything except Outpatients and all modalities except the modality required
Chart title	Modality – Outstanding Outpatient Appointments - INITIALS
Y axis (number/count)	Folder: Outstanding Orders and Requests **#**Count Outstanding
X axis (dimension/ordering)	Examination Name
Legend (dimension/grouping)	Referring Location Name
Chart Type	Stacked Column Chart
Filters	Trust Name = Your Trust Name Patient Type Description = Outpatient Modality = C, M or R (depending on your requirements)
Sorting	Count Outstanding in Z to A for highest to lowest
Drill Level - Chart Type	Data Table
Drill Level - Chart Columns	Unique Key, Examination Name, Date Submitted, Referring Location Name, Referrer Name and Hours Old
Drill Level - Attributes - Chart Title	Outstanding {{Examination Name}} Outpatient Examinations
Drill Level - Attributes - Full screen	Tick "Full screen to display this level"
Chart Configuration – Choose Category	Logged in Training Users Category
Chart Configuration – Help Text and Version -	Modality Name - Outstanding Outpatient Requests with drill to data level information and -----Version Control----- INITIALS DATE - First Release

Part Three – Configuration

Exercise 3.1 - Publish A Layout

Having designed a required dashboard, you will need to publish this as the default layout for access by other users.

1. Clicking the icon at the top right of the Analytics menu-bar and select "Save as Default Layout"

Exercise 3.2 - Create Your Own Dashboard Category

Categories are the Menu options accessed via the 'Burger' Menu in the main Analytics HTML client. It is also possible to create nested categories – i.e. Parent and Child Menu such as the HSS Training Category (Parent) and nested Training Workspace categories (Children).

1. Click the icon at the top right of the Analytics menu-bar to access Analytics Configuration
2. Select the **Categories** tab and **Training Workspace** subcategory
3. Create a **new category using [*] icon** on the Category folder
4. **Category Description** = **Initials Workspace** (i.e. ESM Workspace – Dashboard)
5. **Label** = **Initials Dashboard**
6. **Parent category** = ***Training Workspace***
7. **[Save]** category by clicking the [Save]
8. Now click **User Access > Category**
9. Click the new Category – INITIALS Workspace and select the Filter Role Name ***Training Delegate***
10. [Save] and go [Back to Dashboard] to see the menu option / category that has been added

Exercise 3.4 - Create a New User

Magentus recommend generic system logins for groups of users – i.e. MODLEADS or ADMINMGRS since Analytics' is query, rather than data entry tool.

However, to create a new user account for yourself navigate to the Users and click + to add a New User

1. Create a new user as follows:

Username	=	Same as **CRIS Userid**
User Type	=	***Select Designer (D)****
Parent User	=	**Admin Managers** (only for Super Users / Key Users)
Forename	=	**Your Name**
Surname	=	**Your Surname**
Email	=	Enter e-mail address as this is a mandatory field
Allow Password Login	=	**Ticked**
Password	=	Set a generic password (i.e**. *crisuser***)
Password Expires	=	**Tick / Select** (to ensure password resets on first login)
Allow External Login	=	Tick to allow login from a Chart URL
User Expiration Date	=	Add Expiration Date or Leave Blank to negate expiry

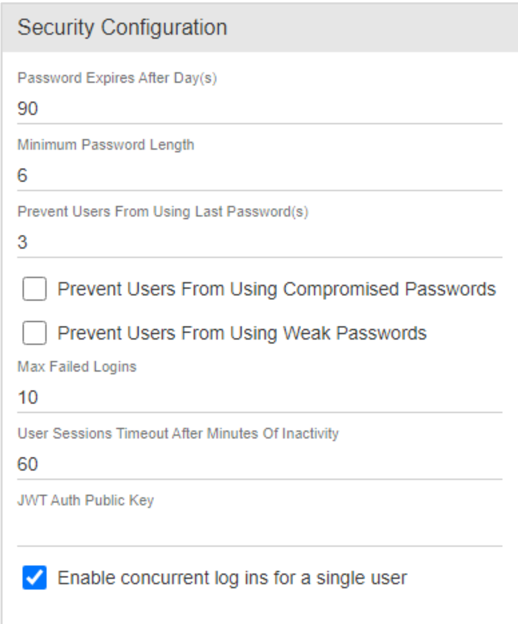
Theme = Leave Blank

2. **[Save]** the new user account
3. Navigate to **User Access Tab** and chose your user – i.e. Training User 1 and add the following roles to the User Account:
    - Training Delegate
    - Analytics Free View
    - Analytics Pro
4. **[Save]** the Role access
5. Return to the main Analytics HTML client and login in using the new user account / temporary password.
6. Create a new password for future use in the system

***Details of Roles and Security Permissions** are explained on Page 23. of CRIS_CRIB601_Analytics_Manual*

Exercise 3.5 – View User Level Configuration Settings

It is possible to configure Various **Security Configuration** via the **Settings** menu as follows:



1. Do not make changes without agreeing these centrally.
2. [Save] any changes as applicable.

Document Control

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