Introduction

Analyser allows users with the appropriate permissions, to view and create Incident statistical Views based on selected filters and external comparison factors. The data in these Views can be

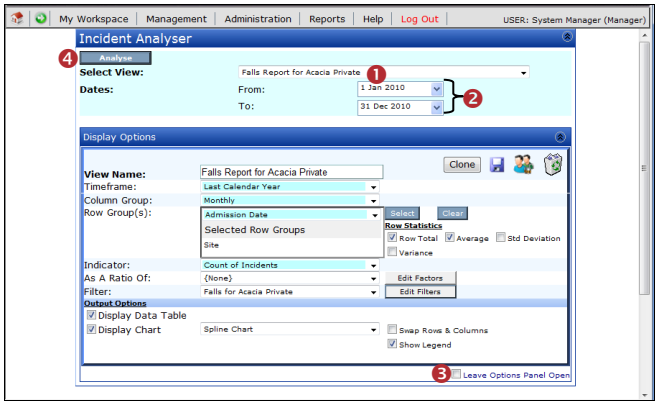
- Expressed as a count of incidents e.g. number of falls per month per location for a particular Facility; Number of Visits per Month per Program; or
- Expressed as a percentage (%) if based on a comparison factor e.g. % of falls based on the number of occupied bed days per month per Site; % of injuries incurred by staff in a particular Site, based on the total number of hours worked in a month or total number of Staff at each Site

The data is displayed in a table format with an optional chart.

Both the data and the chart can be exported to Excel™ if further analysis is required or if you wish to print out the report

How do I preview an Analyser View?

To create and view Analyser reports, from the menu select *Reports -> Analyser*

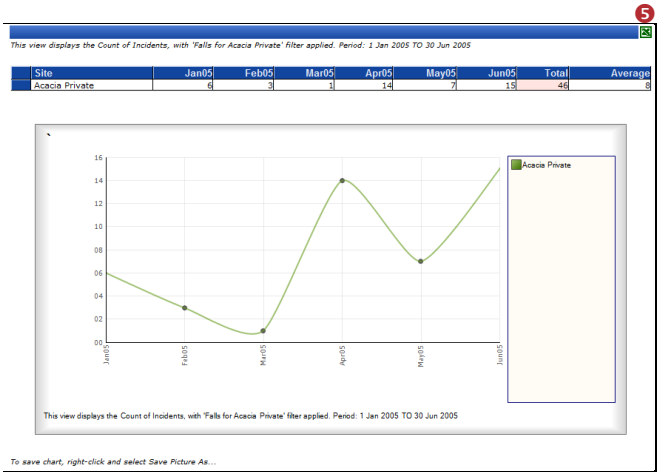


1. To preview an existing report, select one from the **Select View** ❶ list.
   - This list will display all the reports you have created or have been shared to you
2. A **date range** ❷ will display based on the Time frame selected in the report
   - This date range can be changed by entering the **From** and **To** dates ❷ in the respective fields

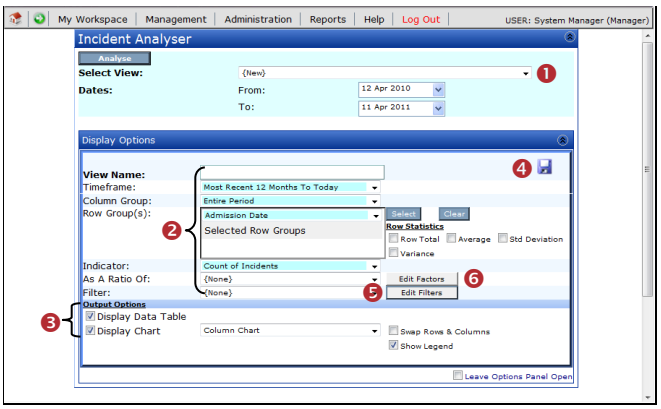
   *Note: The dates are based on the **Incident Date***
3. Check the **Leave Options Panel Open** ❸ option if you wish the **Display Options** section to be visible when you preview your report. If left unchecked, the **Display Options** section will minimise after you press **Analyse**

   You can maximise it again by clicking this button on the right hand side of the **Display Options** panel.

4. To **preview** the report press **Analyse** ❹
   - Content highlighted in pink (except for the Statistical columns e.g. Total) indicate that the value is 2 standard deviations from the Mean
5. To **print** the report
   - Export to **Excel™** by clicking on the ❺ icon
   - Both the table data and the displayed chart will be exported to Excel™



How do I create an Analyser View?

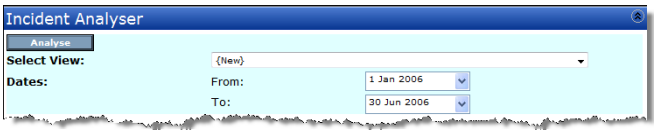


The above represent the 7 main steps to creating an Analyser View. Details of these steps are on the following pages

Step ❶: Select {New}

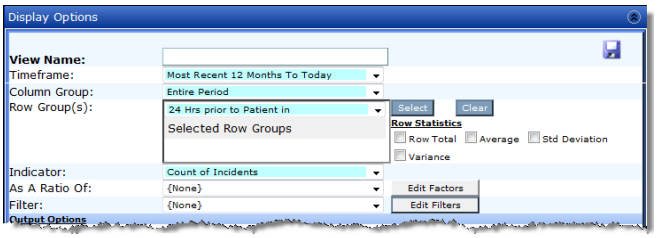
The first step to creating a view is to make sure your Analyser page is clear.

Select **{New}** from the **Select View** list to clear your page



Step ❷: Display Options

The second step to creating your View is to select your Display Options as described below



View Name: Name of your report

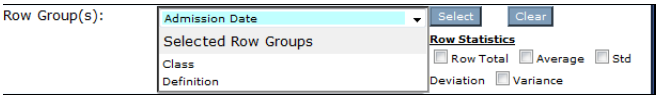
Timeframe: Select a default date range for your report from the list of categories. On previewing the report this default date range will display, but it can be changed if required

Column Group: Select an Incident field or a time interval e.g. monthly, quarterly, entire period, for displaying the data in the column of your table. You will **ONLY** be able to select **ONE** column group. In most cases a time-based measure is used as the Column Group

Note: *If you select a field other than a time-based field, ensure that the field* ***only*** *contains a* ***small list*** *e.g. Site, Severity, Risk Rating, Incident Involved. For all other fields e.g. Location, Specialty, Department, Supergroup, Class, Definition, select these fields in the Row Groups*

Row Group(s): Select one or more fields to appear in the rows of your table *(the example below shows a selection of 2 fields from RiskCat).* To select a Row Group:

- Locate the field in the drop down list and press the **Select** button.
- Repeat above step if you wish to add more fields
- To remove a row selection or re-order your row selections you will need to press **Clear**. All the row selections will then be removed. You will then need to re-select the Row Groups again



Row Statistics: Select the options you wish to include in your data table using the checkboxes shown ie. Row Total, Average, Standard Deviation, Variance

Note: *Column statistics are not available. These can be added when you export your View to Excel™*

Indicator: This option will always display **Count of Incidents**.

As a ratio of: Contains a list of external factors that are available to report against e.g. Occupied bed days per Month per Site; Number of Visits per Month per Department; Number of Staff Hours per Month per Site *(refer to* ***Step ❼ Creating External Factors*** *for more information)*

Filter: Contains a list of filters (restriction criteria) e.g. Falls, Staff Injuries that you are able to use with your report *(refer to* ***Step ❻ Creating Filters*** *for more information)*

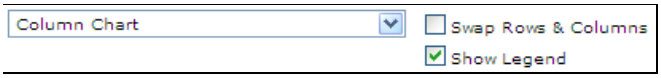
Step ❸: Output Options

The third step to creating your View is to select your **Output Options** for your View as described below:

Display Data Table: When this option is checked, the results of your analysis will appear in a data table.

Display Chart: When this option is checked, the result of your analysis will display in a chart. Additional options for charting your data will appear.

- Select your desired chart type from the **Chart** list.
- **Swap Rows & Columns:** If checked, data types displayed on the axes of your chart will be switched
- **Show Legend**: Check this box if you want a data legend to be displayed to the right of your chart



Note: *Charts are useful if you only have one row group in your report. If you have more than one row group it is recommended that you do not use the Analyser Charts. Once the report is exported to Excel you could use Excel's charting*

Step ❹: Save the View

Press the **Save** icon when you have completed your report.

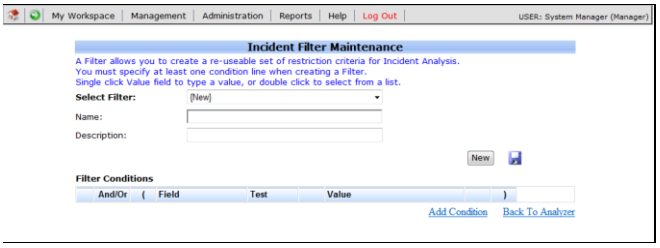
Step ❹: Create a Filter

Each Analyser View should have an accompanying filter so that you only see the relevant incidents in your View

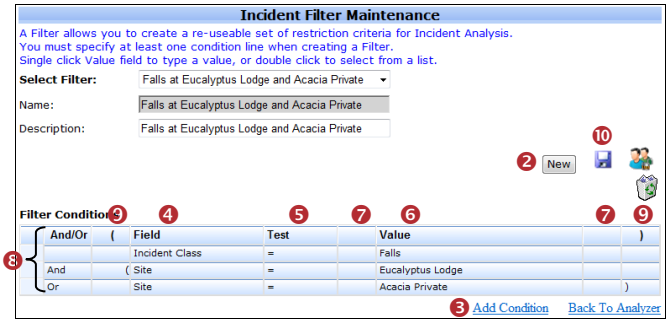
***Note:** Analyser will **not obey** any restrictions that you have in your User profile so if there are no filters assigned to a view you will see **ALL** incidents (based on the date range in your report)*

1. To create a filter, press **Edit Filters** ❶

2. The Incident Filter Maintenance page will open



3. If you select a filter from the **Select Filter** list and you wish to create a new one press **New** ❷



4. Press **Add Condition** ❸

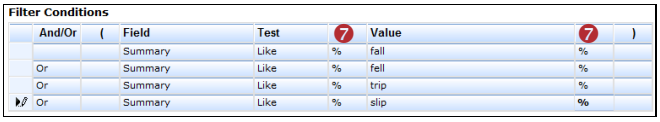
5. Select one of the **Fields** ❹ from the drop down list that you want to base your condition on

6. Select a comparison **Test** ❺ based on the type of field selected – refer to recommendations below

   - **List & Classification fields:** =, <> (not equals), Is Null (empty), Is not null (not empty), Like, Not Like
   - **Date, Time or Numeric fields:** =, <>, >, >=, <, <=, Is Null, Is Not Null
   - **Text fields:** Is Null, Is Not Null, Like, Not Like

7. Enter or select the **Value** ❻ for the filter - this will depend on the type of field selected

Text fields: Enter the text in this field. It is advised that the Wildcard **"%"** ❼ is selected at the **beginning** and **end** of the text you are entering, to ensure the report finds the Incidents that **contain** your entered text, e.g. **Summary like %fall%** to show all incidents where "Fall" appears in the "Summary" field *(see example below)*

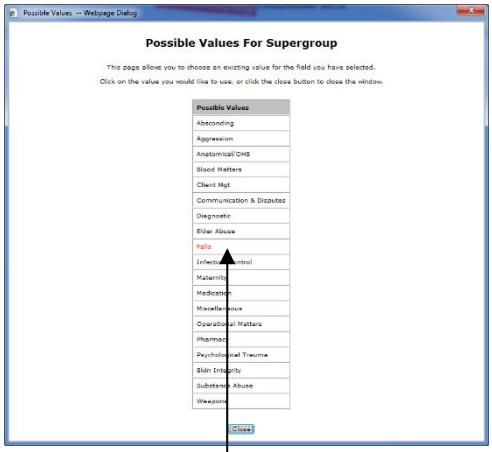


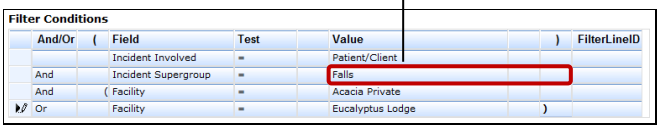
Date fields: Enter the date as **1 Jan 2010**

Time fields: Enter the time as **15:15** (24 hr clock)

Numeric fields: Enter the number e.g. 4, 50

List or Classification fields: Place your cursor over the **"blue"** space in the **Value** ❻ field and double click your mouse. The available list items will display. Click **ONE** of the items in the list





Note:** The fields from RiskCat are called **Incident Supergroup**, **Incident Class** & **Incident Definition

8. If another condition is required press **Add Condition** ❸

9. If 2 or more conditions are added to your filter, select **"And"** or **"Or"** ❽ at the beginning of the Condition

   When to use "And": When more than one condition must be met e.g. "Incident Supergroup = Falls" **And** "Incident Involved = Patient/Client", then both conditions must be met before the incident is included in the report

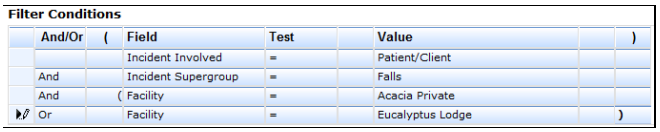
   When to use "Or": When at least one condition must be met e.g. "Incident Involved = Patient/Client" **Or** "Incident Involved = Resident", then only one of the

conditions must be met before the incident notification is included in the report

10. If required add **Brackets** ❾ around the conditions. Brackets may be required around some conditions to ensure the alert is triggered correctly

    A common scenario where you would need to use brackets is when:

    - You have more than one condition to test for, and
    - At least one of those conditions has more than one option that could satisfy it

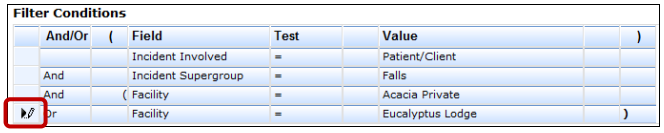


Example: *In this example we have 3 distinct conditions but one of those conditions, Facility, has 2 options. Therefore we put brackets around the Facility conditions*

11. If you wish to **delete** a condition click on the box at the front of the condition and the icon will display *(refer to example below).*

    Press the **Delete** key on your keyboard.

    You may need to modify your **"Or"** and **"And"** options and your **brackets**



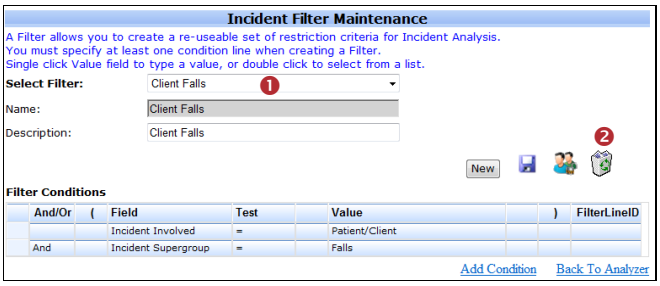
12. Once you have completed creating your Filter

    - Press the **Save** ❿ icon**.**
    - This filter can now be linked to any View that you have created on the main Analyser page

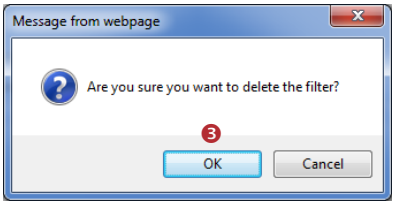
Can I delete a Filter?

If you wish to delete a filter, RiskMan will check that the filter isn't being used in an Analyser View. If the filter is being used it will need to be removed from the Analyser View first and then it can be deleted

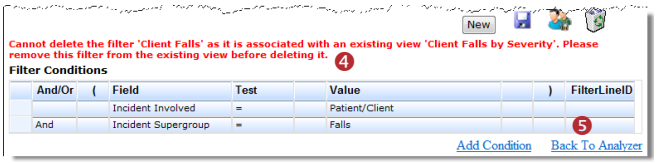
1. If you are not on the Incident Filter Maintenance page, click on the **Edit Filters** button on the Analyser page
2. In the Incident Filter Maintenance page, select the filter ❶ that you wish to delete
3. Press the **Delete** ❷ icon



4. Press **OK** ❸ to the pop-up message



5. If the Filter is being used the following message ❹ will display
6. Press the **Back to Analyser** ❺ link and open the **View** that this filter is linked



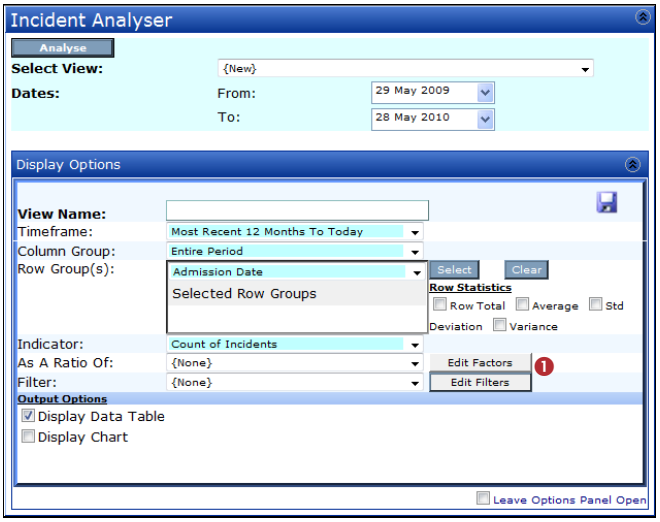
7. Either change the filter in the **Filter** list or select **None**
8. **Save the View** and repeat steps 1- 4

Step ❺: Create an External Factor

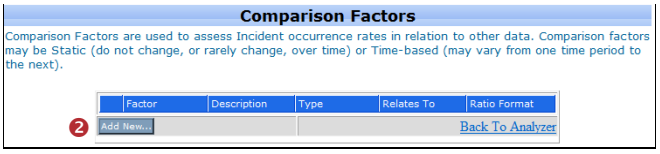
An external factor contains information that comes from an external source, but can be either uploaded or manually entered into RiskMan e.g. Total number of occupied bed days per month per site; Number of visits per Program per Month; Total number of staff hours per month per Site. These factors can be used to compare your Incident data e.g. Compare number of falls per occupied bed days per month per Site; Compare number of staff injuries per total staff hours worked per month per Site.

Note: *Any external factors that you use in Analyser can also be referenced from the Indicators page to compare Indicator data*

1. To add or view External Factors, press the **Edit Factors** ❶ button



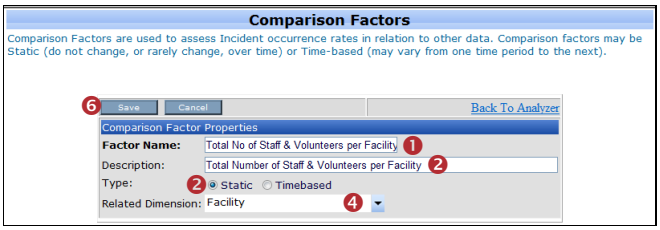
2. To create a new factor, press the **Add New** ❷ button



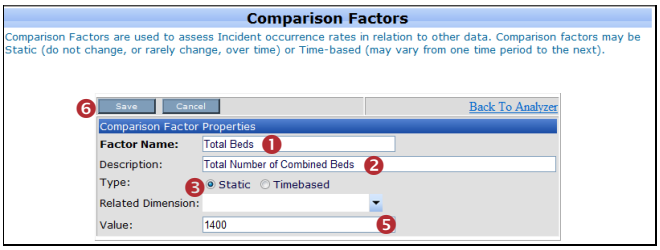
Static Factors

A static factor is one that does not change over time e.g. Available Beds

1. Enter a **name** for your factor ❶ *(appears in the **As a Ratio** drop down list on the Analyser page)* e.g. Occupied Bed Days, FTE (Full Time Equivalents)
2. Enter a more detailed **description** ❷ of your factor e.g. Occupied Bed Days per Month per Site
3. Select **Type** = **Static** ❸
4. **Optional:** If the Static factor is different base on a dimension e.g. Site, Program, Department then select the respective fields from the **Related Dimension** ❹ list
5. If you **do not** select a **Related Dimension** then enter your value in the **Value** ❺ field
6. Press **Save** ❻ when complete



Example: *Static Factor based on Related Dimension*



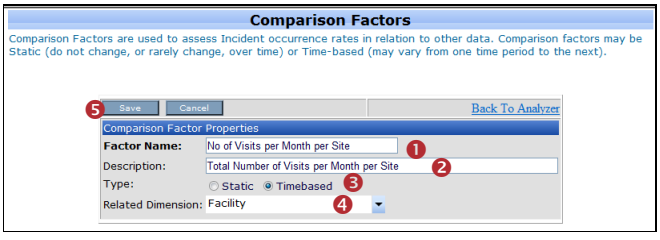
Example: *Static Factor with a constant value*

Time Based Factors

A **Time Based Factor** is one that changes over time and needs to be based on a dimension e.g. Site, Program, and Department

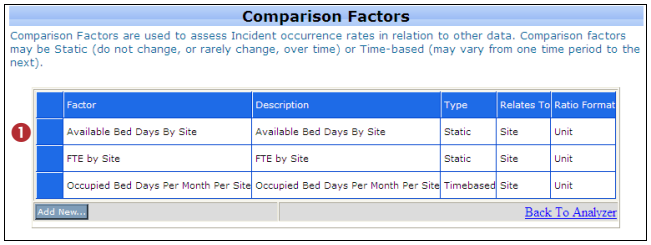
Note: *In Analyser, Time Based Factors need to have a Related Dimension otherwise they won't be available to select in an Analyser View*

1. Enter a **name** for your factor ❶ *(appears in the **As a Ratio** drop down list on the Analyser page)* e.g. No of visits per month per Site)
2. Enter a more detailed **description** ❷ of your factor e.g. Number of visits per month per Site
3. Select **Type** = **Time-Based** ❸
4. Select a **Related Dimension** ❹ e.g. Site, Location, Department
5. Press **Save** ❺ when complete

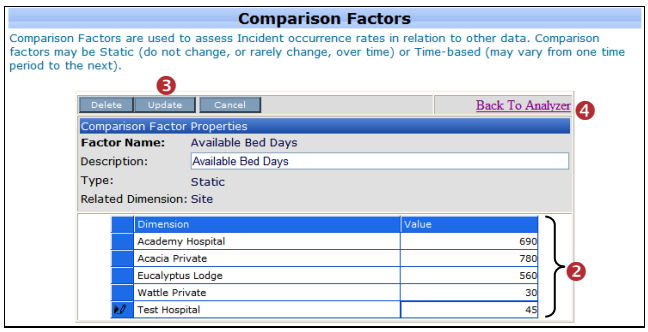


Adding Values to Static Factors based on a Related Dimension

1. From the **Comparison Factors** page click the blue box ❶ next to the **Static factor** you created



2. In the example below, the **Related Dimension = Site**. Accordingly, all sites have been displayed.

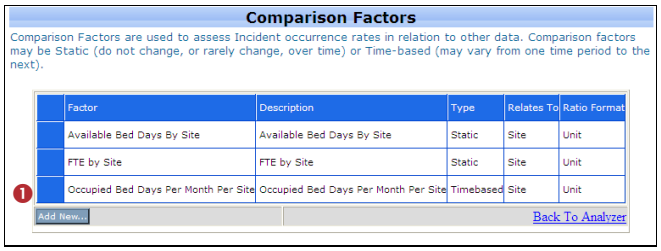


3. Add the value next to each dimension in the respective **Value** ❷ field
4. If you wish to modify a value, just enter the new value in the corresponding **Value** ❷ field
5. When finished press the **Update** ❸ button. Your comparison is now ready to use in your Analyser Views

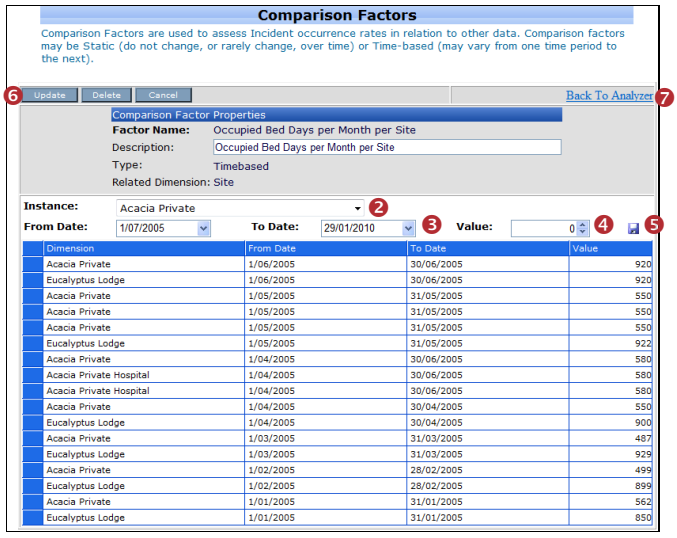
   In the example above the factor will **only** be available if the **"Site"** related field e.g. Facility, Campus has been selected in the Analyser View
6. To return to main **Analyser** page
   - Click on the **Back to Analyser** ❹ link

Adding Values to Time Based Factor based on a Related Dimension

1. From the **Comparison Factors** page click the blue box ❶ next to the **Time Based factor** you created



2. The example above, the **Related Dimension = Site** and the factor is based on **time**



3. Select the dimension e.g. **Site** from the **Instance** ❷ list
4. Enter a date range in the respective **From Date** and **To Date** ❸ fields
5. Enter the value in the **Value** ❹ field
6. Press the **Save** ❺ icon
7. Repeat **steps 2-5** until you have entered all the values for each instance e.g. Site
8. When finished press the **Update** ❻ button. Your comparison is now ready to use in your Analyser reports. In the example above the factor will **only** be available if the **"Site"** related field e.g. Facility, Campus has been selected in the Analyser View
7. To return to main **Analyser** page
   - Click on the **Back to Analyser** ❼ link

***Note:** External Factors that appear in the **"As a Ratio"** list on the Analyser page are available to anyone who has access to creating Analyser reports. If a related dimension is included in the factor, the factor will only display if the related dimension has been included in the report you are creating e.g. if your external factor involves Site, then Site needs to be a selected field in your View*

***Note:** If you wish to import your External Factors contact RiskMan Support - https://hub.rldatix.com/SupportHUB/s/ for more information*

Can I delete a row of data in a Time-Based Factor?

Unfortunately there is no facility to delete a row in a time-based comparison factor.

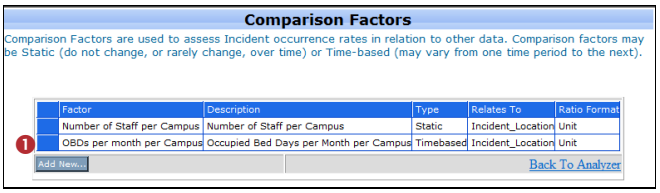
However you can change elements in a row e.g. the **From** and **To** date and the **Value**

If this is not suitable, you will need to delete the entire Time Based Factor and create a new one (refer to details below on how to delete a comparison factor)

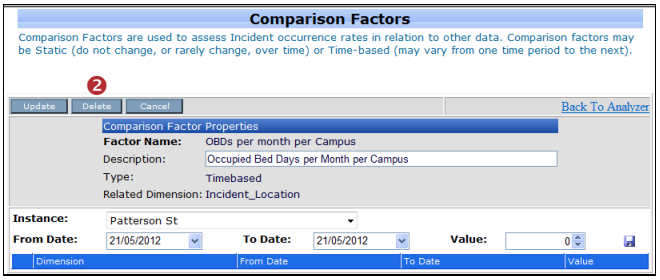
Can I delete a Comparison Factor?

If you wish to delete a Comparison Factor, RiskMan will check that the comparison factor isn't being used in an Analyser View. If it is being used, it will need to be removed from the Analyser View first and then it can be deleted

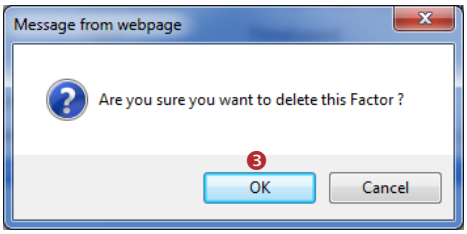
1. Click on the **Edit Factors** button on the Analyser page
2. Click on the ❶ icon next to the factor that you wish to delete and the Comparison Factor details will display



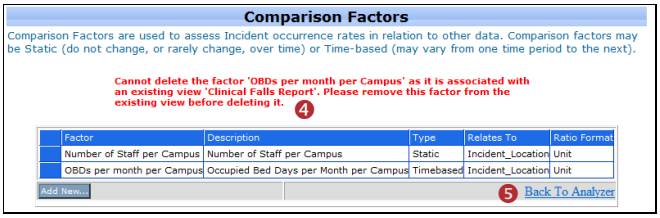
3. Press the **Delete** ❷ button



4. Press **OK** ❸ to the pop-up message.



5. If the factor is linked to an Analyser View the following message ❹ will display. You will need to remove the factor from the View/s that it is linked to before you can proceed with deleting the Comparison Factor



6. Press the **Back to Analyser** ❺ link to return to your main **Analyser** page

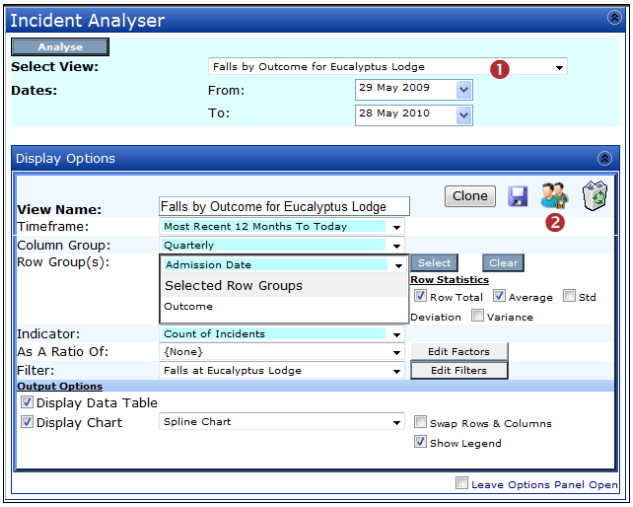
If you need to remove the Comparison Factor from your View

1. Open the **View** that this factor is linked to
2. Either change the comparison factor in the **As a Ratio List** or select **None**
3. **Save the View**
4. You can now delete the Comparison factor

Can I share my View to other RiskMan Users?

1. To share your view (provided you have permission), select the View that you wish to share from the **Select View** ❶ list

2. Press the **Share** ❷ icon



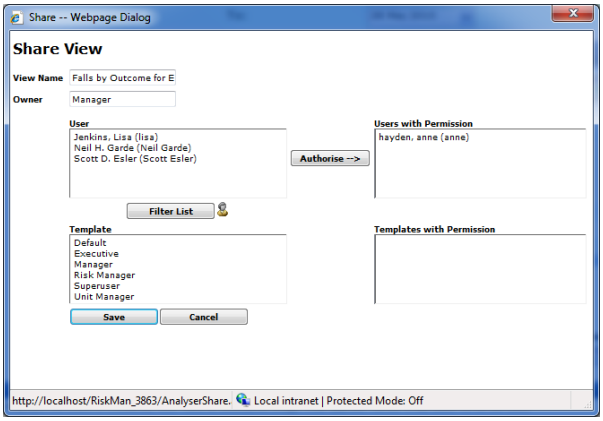
3. **To share a report:**

   - Either search for specific users using the **Filter List** option, highlight the user/s *(hold your CTRL key if you wish to select more than one)* and press **Authorise** or
   - Select one or more **Templates** *(hold your CTRL key if you wish to select more than one)* and press **Authorise**

4. **To remove sharing on a report:**

   - Either highlight the users that have already been shared the report *(hold your CTRL key if you wish to select more than one)* and press **Remove** or
   - Highlight the **templates** that have been shared the report *(hold your CTRL key if you wish to select more than one)* and press **Remove**

5. Press **Save** to save your changes and **Cancel** to return to the main **Analyser** page

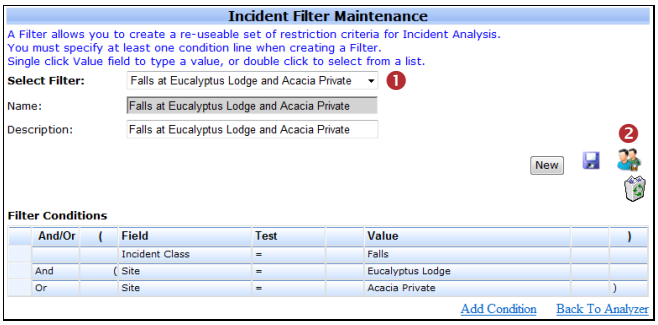


Can I share a Filter with other RiskMan Users?

If you have linked a filter to a view that you have shared to other users, that filter will **only** be available in that view. However if you wish others to be able to use a filter you have created for their own views, you can share that filter provided you have the appropriate permissions

1. In the Incident Filter Maintenance page, (provided you have permission) select the filter you wish to share, from the **Select Filter** ❶ list

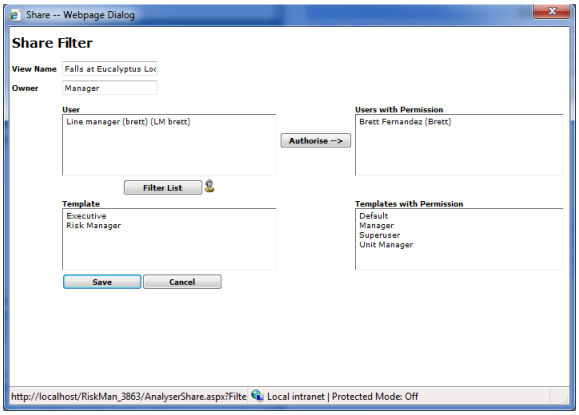
2. Click on the **Share** ❷ icon



3. **To share a filter:**
   - Either search for specific users using the **Filter List** option, highlight the user/s *(hold your CTRL key if you wish to select more than one)* and press **Authorise** or
   - Select one or more **Templates** *(hold your CTRL key if you wish to select more than one)* and press **Authorise**

4. **To remove sharing on a filter:**
   - Either highlight the users that have already been shared the filter *(hold your CTRL key if you wish to select more than one)* and press **Remove** or
   - Highlight the **templates** that have been shared the filter *(hold your CTRL key if you wish to select more than one)* and press **Remove**

5. Press **Save** to save your changes and **Cancel** to return to the main **Analyser** page


Share -- Webpage Dialog
Share Filter
View Name
Falls at Eucalyptus Loc
Owner
Manager
User
Line manager (brett) (LM brett)
Authorise -->
Users with Permission
Brett Fernandez (Brett)
Filter List
Template
Executive
Risk Manager
Templates with Permission
Default
Manager
Superuser
Unit Manager
Save
Cancel
http://localhost/RiskMan_3863/AnalyserShare.aspx?Filte
Local intranet | Protected Mode: Off

Can I import data from Excel and other files?

Yes, comparison factor data can be imported from Excel (XLS, XLSX) or comma separated (CSV) files. Uploaded data will be **appended** to the data already stored in a factor. You must adhere to the following prescribed format for the upload to be successful:

Column A must contain the name of the existing factor to which data will be appended

Column B must contain the respective related dimension (e.g. site value)

	A	B	C	D	E
1	Factor Name	Dimension	From Date	To Date	Value
2	OBDs per Campus	Acacia Private	1/01/2015	31/01/2015	754
3	OBDs per Campus	Eucalyptus Lodge	1/01/2015	31/01/2015	311
4	OBDs per Campus	Wattle Private	1/01/2015	31/01/2015	206
5					
6					
7					

Please note that the values in these columns must match the values in your database verbatim, or the import will fail.

To import data:

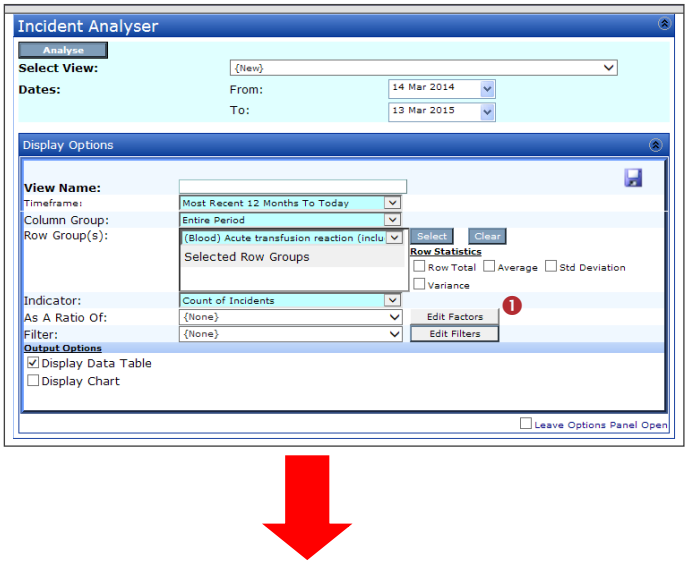
❶ Click on the **Edit Factors** button

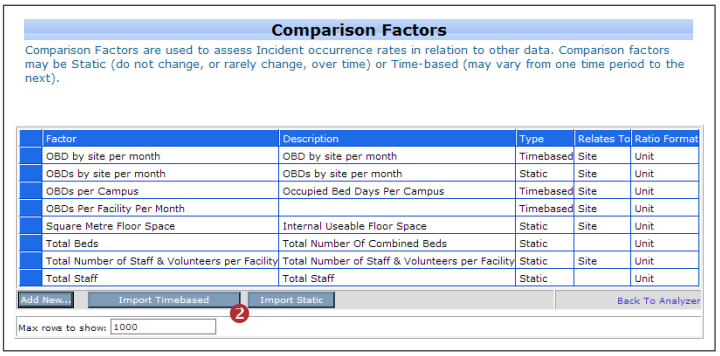
❷ Two new buttons will appear at the bottom of the list of comparison factors. Choose whether you want to import **timebased** factor data or **static** factor data. A pop up screen will subsequently appear.

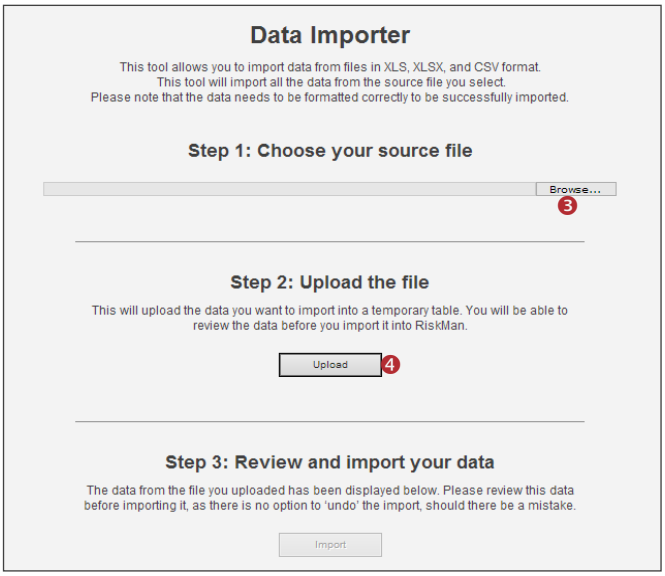
❸ Click the browse button to locate your file

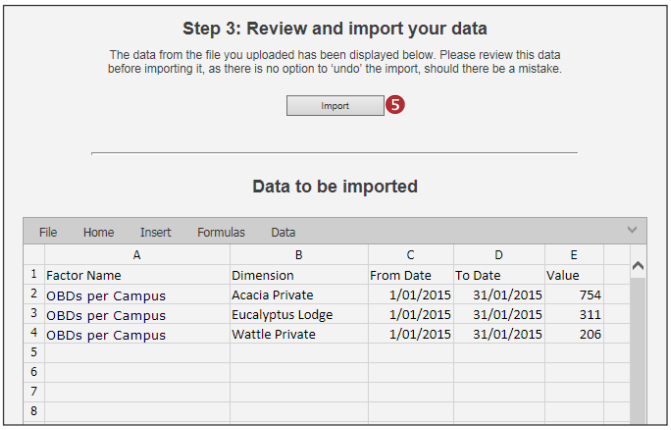
❹ Click **upload**. Note that you will be able to review the data before you import it.

❺ Click the **Import** button to complete the process

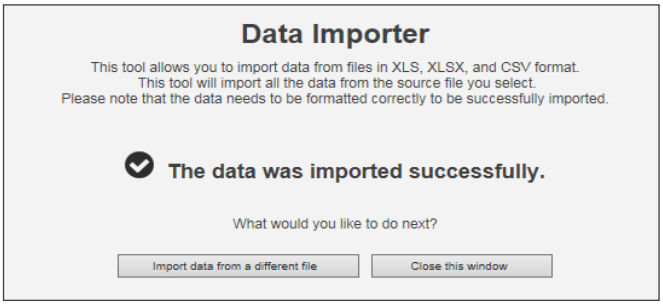






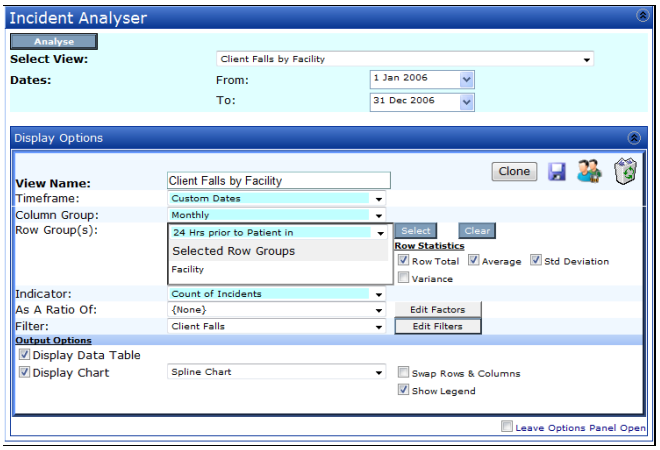


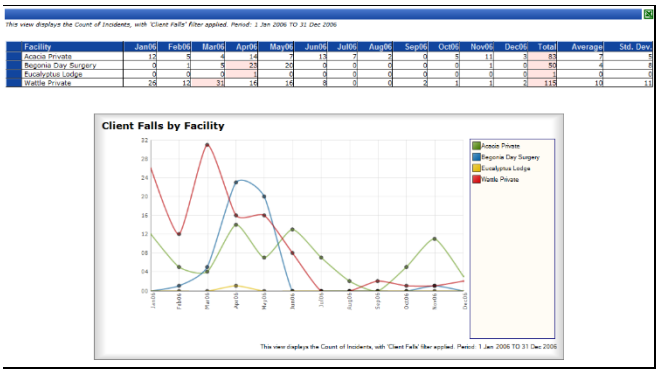
Once the data has been imported the following screen will appear:



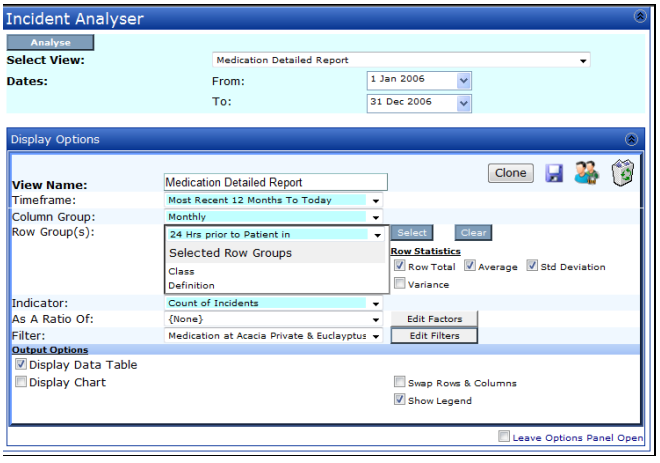
Examples of Analyser Reports

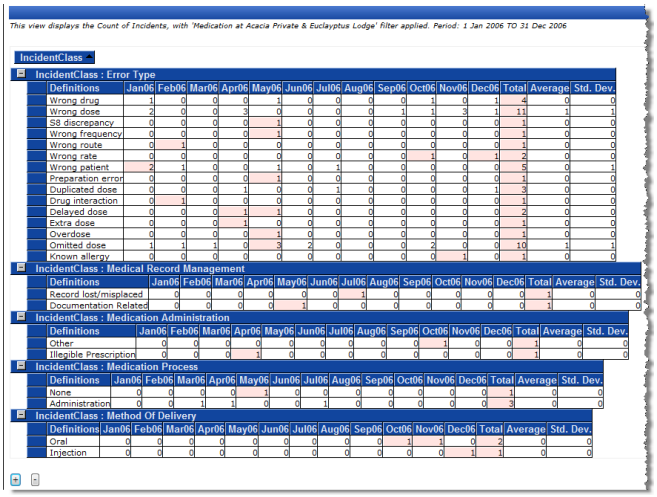
Client Falls report by Facility



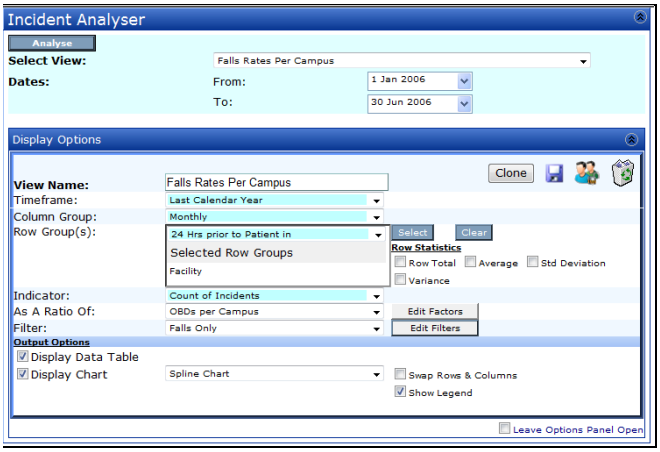


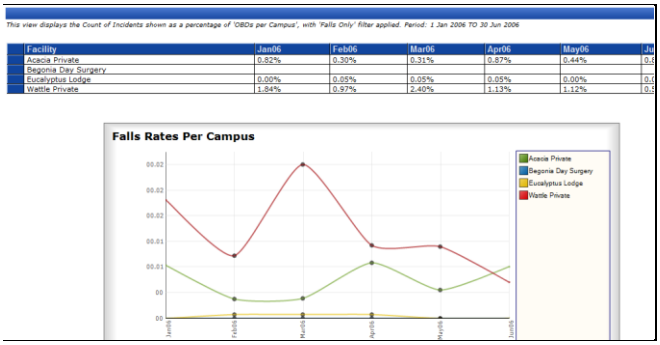
Medication Summary report





Falls report showing the number of falls expressed as a percentage (%) based on the number of occupied bed days per month per site

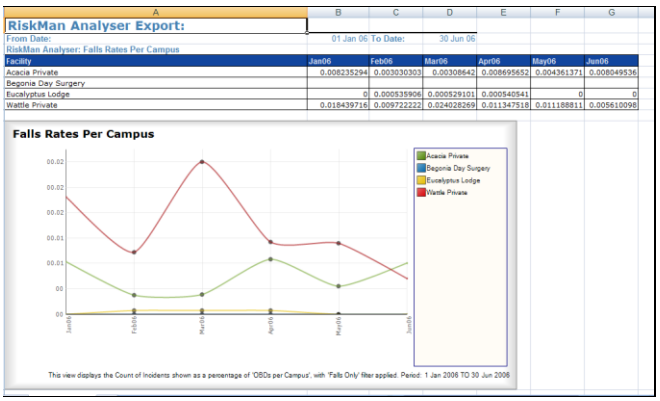




Above report exported to Excel™

The percentage (%) value will be expressed as a number in the Excel™ report. You can change the value to a percentage by re-formatting the respective cells in the Excel spreadsheet

Note: *If the occupied bed days per site per month needs to be expressed as a per 1000 amount, then multiply the values by 1000*



RiskMan Analyser Export:						
From Date:	01 Jan 06	To Date:	30 Jun 06			
RiskMan Analyser: Falls Rates Per Campus						
Facility	Jan06	Feb06	Mar06	Apr06	May06	Jun06
Acacia Private	0.008235294	0.003030303	0.00308642	0.008695652	0.004361371	0.008049536
Begonia Day Surgery						
Eucalyptus Lodge	0	0.000535906	0.000529101	0.000540541	0	0
Wattle Private	0.018439716	0.009722222	0.024028269	0.011347518	0.011188811	0.005610098