AUSTRALIAN COMMISSION ON SAFETY AND QUALITY IN HEALTH CARE





November 2024

OrgTRx Module User Guide

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Version	Release date	Changes
1.0	September, 2015	Communicable Diseases Branch, Prevention Division, Department of Health
		Email: cdu.online@health.qld.gov.au
1.1	September, 2015	Removal of Queensland Health specific access information
		L. Davis
1.2	January, 2017	Updated support contact email address
		L. Davis
1.3	May 2017	Updated formatting & numbering
		L. Davis
1.4	July 2018	Updated to Necto 16 (DSS)
1.5	September 2019	Updated with HTML5 changes
1.6	November 2024	Updated Figure 1, Figure 3, Figure 4. Updated Section 12.2 to include example of how to create a Line Chart for the Second Y axis.

1. Aim

The aim of this OrgTRx user guide is to assist those requiring access to and reporting on antimicrobial data.

2. Scope

This user guide provides information to enable the user to perform the following tasks within OrgTRx:

- · request access to the Antimicrobial workboards
- · access the Necto work area through the application bar
- filter a slicer
- · use the dimension selector
- drill up, drill down, and drill through data
- generate a profile report, and subsequent drill through
- select members
- · add and remove members or sets
- · select highlighted members for viewing
- · add and remove dimensions via the grid
- replace sets (Cumulative Antibiogram workboard only)
- · change the grid layout
- · rotate the chart
- · create a folder structure for saving workboards in Private content folder
- save, share, and open workboards
- export data in various formats (PDF, Excel, image)
- · view and customise workboard charts.

3. Exclusions

This guide is for Decision Support System (DSS) functionality only and does not cater for individual position responsibilities or workplace processes required to effectively use the system.

Requirements:

- DSS access
- Basic windows navigation skills (expand and collapse folders/trees).

4. Introduction

The OrgTRx (antibiogram) system collects susceptibility data from the laboratory information system and makes a data cube available through the Queensland Health DSS. This enables the development of cumulative antibiograms and investigation of resistance trends. Clinicians with responsibility for antimicrobial stewardship (AMS) such as infectious diseases physicians, clinical microbiologists, microbiology scientists and AMS pharmacists have access to the data which they use to inform their local AMS program.

5. Terms & definitions

Term	Definition
Dimension	Represents a category for defining members. It may be flat or have a hierarchal structure with multiple levels, each of which contains members of the dimension (i.e. dimensions are microbial, facility ward etc.).
Member	A member is a selection within a dimension. For example, for the dimensions – 'specimen facility ward' and 'microbial' - the members could be 'specimen type', 'facility' and 'antimicrobial'.
Drill down	Drilling down lets users view a detailed breakdown of the data by expanding lower levels of grid members.
Drill up	Drilling up lets you hide lower levels of data by collapsing grid members into higher levels.
Drill through	Drilling through allows the user to drill a data cell down to the raw data at the base of the cell value.
Dimension Selector	Using the Dimension Selector allows the user to add and replace dimensions in the columns, rows and slicers of the view using drag and drop and to select and filter members.
View	View is the main component of a workboard. It retrieves data from a data source and shows it in a grid or a chart form. Views can be selected in three ways, either from the public, private or shared folders.
Workboard	Workboards provide a default view of data most commonly used. Users can also create personalised workboards and share workboards with colleagues.

Table 1. Terms & definitions

6. Access & login

DSS System access is requested via email, contact OrgTRx support directly.

Best accessed via Internet Explorer, users will require a

Username: _____

Password:

7. Support

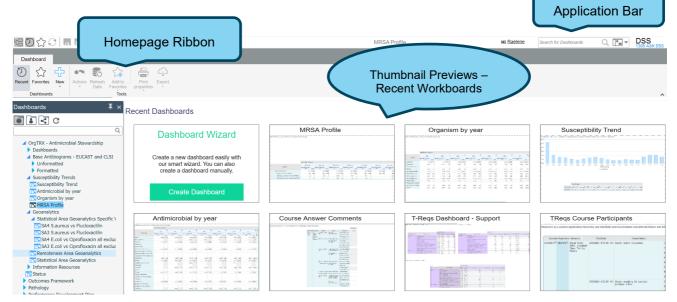
Contact: orgtrx-support@health.gld.gov.au

8. General navigation

The home page consists of three main areas (Figure 1):

- **Application bar** The Application Bar is positioned at the top of the workboard on the Necto HTML5 Client page, it contains the options that apply to the entire application.
- **Homepage ribbon** The Necto ribbon contains workboard link buttons and buttons for changing the thumbnail display layout.
- **Thumbnail Previews Recent Workboards –** when you log into DSS, the workboards you have visited recently display in thumbnail format.

Figure 1. Home page



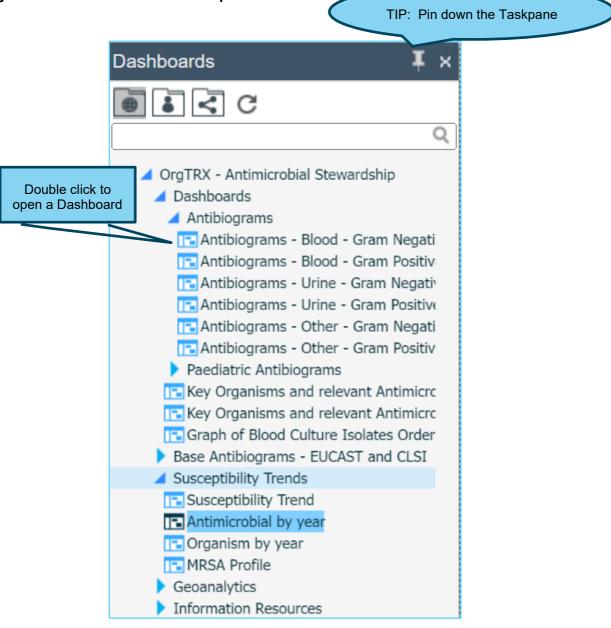
9. Necto work area

Figure 2. Application bar



The modules and its folders are located down the left side of the task pane; expand out each folder to view standard reports (Figure 3).





9.1 Table view screen (filtering slicer)

After running a standard workboard from the module in the Public Workboards pane (Figure 3), the table view screen is opened (Figure 4). Figure 4 details options to customise, search and filter in a workboard.

Figure 4. Public Workboards Taskpane

HDCC) (*)	4		view tab t ttons avai			nism by year	r Hi <u>Raelene</u>	Search	n for Dashboards	0,	DSS 1300 ASK DSS
Dashboard Co	llaboration	Analvse	Desian	View	Dimension	View Tools Members	Visuals	Format					
	Export Type	Chart Exceptio	Legend - E	All colun	Formula Man	age Filter By	Show Percent: Percent Forma	No tt: 0.00%	1	KMB Value forma	Prop	ata erties Data	<u>^</u>
Category Hiera	archy All excl. infe	otic	Hover mo		over the	Antimicrobial		1 Hierarchy	Laboratory Hierar		Facility Year Isolate		
Clicking th Dimension Se enables the u add and rep	elector iser to		text to mal from t			. Count	shortc		using the sed on th		2024 ICAST Sensitivity Pct	Gount	
dimensions i	n the				FUI	Count					FG	Count	
			82.98	6,811,122	83.85	7,213,753					83.93	4,951,425	
columns, row			82.98 79.61	6,811,122 4,320	83.85 79.39		78.29	4,777	79.63	5,890	83.93 82.31		
	rs and	ism	79.61 100.00	4,320	79.39	4,662			100.00	2	82.31	3,635	
columns, row slices of the	rs and view		79.61 100.00 74.05	4,320 4 131	79.39 73.96	4,662	77.99	159	100.00 72.12	2 269	82.31 72.78	3,635	
columns, row slices of the using drag an	rs and view d drop	bacilli	79.61 100.00 74.05 82.72	4,320 4 131 3,757,185	79.39 73.96 83.79	4,662 169 4,045,720	77.99 84.45	159 4,087,766	100.00 72.12 84.04 4	2 269 1,238,302	82.31 72.78 83.38	3,635 158 2,676,850	
columns, row slices of the	rs and view d drop		79.61 100.00 74.05	4,320 4 131	79.39 73.96	4,662 169 4,045,720 11,499	77.99	159	100.00 72.12	2 269	82.31 72.78	3,635 158 2,676,850 8,142	
columns, row slices of the using drag an	rs and view d drop	bacilli cocci acilli	79.61 100.00 74.05 82.72 78.58 61.16	4,320 4 131 3,757,185 10,067	79.39 73.96 83.79 76.37 60.65	4,662 169 4,045,720 11,499	77.99 84.45 76.62 60.67	159 4,087,766 13,804	100.00 72.12 84.04 4 77.44 61.26	2 269 1,238,302 15,424	82.31 72.78 83.38 77.73 61.97	3,635 158 2,676,850 8,142	
columns, row slices of the using drag an	rs and view d drop ity	bacilli cocci acilli cocci	79.61 100.00 74.05 82.72 78.58 61.16	4,320 4 131 3,757,185 10,067 17,406	79.39 73.96 83.79 76.37 60.65	4,662 169 4,045,720 11,499 17,726 3,117,226	77.99 84.45 76.62 60.67	159 4,087,766 13,804 21,457	100.00 72.12 84.04 4 77.44 61.26	2 269 238,302 15,424 22,563	82.31 72.78 83.38 77.73 61.97	3,635 158 2,676,850 8,142 14,555 2,239,299	
columns, row slices of the using drag an	vs and view d drop ity ⊛Gram positive	bacilli cocci acilli cocci n	79.61 100.00 74.05 82.72 78.58 61.16 83.44 82.79	4,320 4 131 3,757,185 10,067 17,406 3,006,940	79.39 73.96 83.79 76.37 60.65 84.07	4,662 169 4,045,720 11,499 17,726 3,117,226 4,999	77.99 84.45 76.62 60.67 84.53	159 4,087,766 13,804 21,457 3,170,393	100.00 72.12 84.04 4 77.44 61.26 84.82 3	2 269 238,302 15,424 22,563 8,529,696	82.31 72.76 83.38 77.73 61.97 84.75	3,635 158 2,676,850 8,142 14,555 2,239,299 2,179	

9.2 Dimension Selector

The Dimension Selector allows the user to add and replace dimensions in the columns, rows and slicers of the view using drag and drop functionality. It can also be used to select and filter members (Figure 5).

9.2.1 Add additional slicers – Dimension Selector

Additional members can be selected from the Dimension Selector and added into a workboard or used to filter data to assist with data analysis (Figure 5):

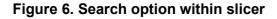
- 1. Click on the Dimensions Selector
- 2. Click and drag Slicers to and from the Columns and/or Rows Sections
- 3. Click on the Slicer, Measures or Rows to filter the data
- 4. The View now includes the additional slicers and filters. Click OK

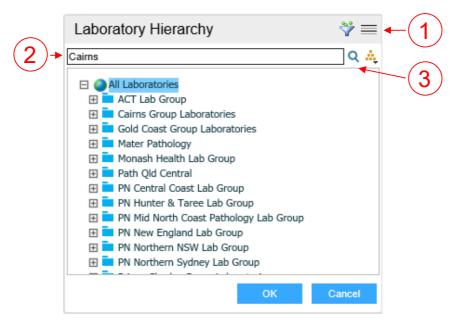
9.3 Search and filter a slicer

Search slicers via the Navigation Bar (Figure 6). Search by text or code via the search field depending on the slicer e.g. text, code and text or code.

To search within a slicer:

- 1. Click the slicer you wish to search
- 2. Type the description/code you are searching for
- 3. Click the *Q Filter* to search





9.4 Drill down and Drill up

Use the drill down option to expand to lower levels of the hierarchy. For example, if you are viewing the Period Hierarchy for 2017 you may wish to drill down to view the individual months or the individual days within the months (Figure 7).

- 1. Click the **H** plus to expand to lower levels
- 2. Click the **_** minus to collapse the levels

Figure 7. Drill down and Drill up

	Period Hierarc	hy Me	easures				
	2015	±	2016	Ŧ	2017		
Organism	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	
🖃 All Organisms		1,000,000	-	1.140,013	-	1.000.000	
Anaerobes	14.00	-		-	-		
Gram negative bacilli		1,000,075	-	101.00		1.00.00	
Gram negative cocci		1.000	14.00		1.46		
Gram positive bacilli	-	1.000	-		-	1.00	
Gram positive cocci				440.716		10.00	
Mycobacterium		1.162			10.04		
Nocardia/Actinomycete			1.4				
			-				

9.5 Drill through

Drilling through allows the user to drill a data cell down to view the base data of the cell value (Figure 8).

- 1. Right mouse click on a cell from the grid e.g. Count
- 2. Click Drill through from the menu a new window will open
- 3. Click in the boxes to select/deselect Report Layout Parameters
- 4. Click Preview to generate the report

Figure 8. Drill through

	20	15	20	016 🗶	2017 🛨			
Organism Count		Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	$\overline{}$	
All Organisms	1,688,244		1.140,010		1,000,000			
+ Anaerobes	487	14.00	-	Report Dr	illthrough	~		
Gram negative bacilli	1,000,075	Actions.		Report L	ayout Parame	ters		
Gram negative cocci		Find peo	-	Report	Columns De	select All		
	1.00	Collabora			nt Code	✓ Sex	Post Code	Patient Category
Gram positive cocci	0	▲ 85.64	008,/10			✓ Facility	SubFacility	✓ Ward
	1.140	-	114	✓ Date	of Collection	Order Number		Laboratory Code
Nocardia/Actinomycete		-			imen Category	-		Specific Site
⊕ Yeast					nism List itivity Count	Antimicrobial	Age Age	Sensitivity Status Code

9.5.1 Profile report – check

Some workboards allow users the option to view a Profile Report e.g. MRSA Profile report. Similar to a drill through, this option provides the user with more detailed information about the susceptibility patterns of an organism to selected antimicrobials.

Access a Profile Report (Figure 9):

- 1. Right mouse click on a cell from the grid e.g. Count
- 2. Click Profile Report from the menu a new window will open
- 3. Click Export to Excel *Export to Excel* from the top of the window

Figure 9. Profile report

	Antimicrobial	Y Mea	sures 7								
	Flucloxa	cillin	Gentamic	in							
Organism	Sensitivity Pct	Count	Sensitivity Pct	Count		_					
 Staphylococcus aureus 			98.60	11,657	ζ≁−(1)					
Staphylococcus aureus	-	c 🐼	Actions			<u> </u>					
Staphylococcus aureus					£						
		2	Find people	2						1	-
 Staphylococcus aureus (MRSA) 		2 🚢	Find people		icin E	rythromycir	Ciprofloxacin				-
Staphylococcus aureus (MRSA)		2	Find people Collaborate	•	icin E	S	S	S	S	S	67
Staphylococcus aureus (MRSA)			Collaborate		icin E	S	S	S	S S	S	67
⊟ Staphylococcus aureus (MRSA)			Collaborate Drillthrough	•	icin E	s s s	S S S	S S S	S S R	S S S	67
⊟ Staphylococcus aureus (MRSA)			Collaborate	•	icin E	S	S S S S	S S S S	S S	S S S S	6
⊟ Staphylococcus aureus (MRSA)	(2)+	Collaborate Drillthrough Profile Repor	•	icin E	s s s	S S S	S S S	S S R	S S S	6
Staphylococcus aureus (MRSA))+ 5555R5	Collaborate Drillthrough Profile Repor	•		S S S R	S S S S	S S S S	S S R S	S S S S	6
E Staphylococcus aureus (MRSA))+	Collaborate Drillthrough Profile Repor	۰ t		S S R R	S S S S S	S S S S S	S S R S S	S S S S S	6
Staphylococcus aureus (MRSA)	2)+ SSSSR	Collaborate Drillthrough Profile Repor	t s		S S R R R S	S S S S S S S	S S S S R	S R S S S S	s s s s s s	67

9.5.2 Profile report drill down – check

Users can drill down on a Profile Report to view detail for an instance (Figure 10).

Click on the symbol to drill down to view for example Patient_Code, Lab number etc.

Once expanded, click on the 🖃 symbol to drill up.

Figure 10. Expanded profile report

+ RSSSSRR	R	S	S	S	S	R	R	1
- GRRRRSR	S	R	R	R	R	S	R	1
Detail								
	1111	111111						
							•	
	ew - Interr	net Explorer						
SSSSSRS	S	S	S	S	S	R	S	985
Detail								
Patient_Code	Orde	r_Number	Specimen	_Category		Organism		
A7901372	731.3	13940	Tissue / Flu	uid / Pus / Pros	thesis	Staphylocod	cus aureus	
47004968	76.09	01400	Tissue / Flu	uid / Pus / Pros	thesis	Staphylocod	cus aureus	
47016074	761.0		Tissue / Flu	uid / Pus / Pros	thesis	Staphylococ	cus aureus	
47017869	7610	12.788	Tissue / Flu	uid / Pus / Pros	thesis	Staphylocod	cus aureus	
47922395	7610	19.067	Tissue / Flu	uid / Pus / Pros	thesis	Staphylocod	cus aureus	
47031040	7610	18181	Tissue / Flu	uid / Pus / Pros	thesis	Staphylocod	cus aureus	

9.6 Select members

Users can make specific member selections and change the data in the grid via the Select Members option (Figure 11). This functionality allows users to select members and customise the grid to display specific data.

To select members (Figure 11):

- 1. Click on the member to display the options for example Organism List
- 2. Click Select Members, this will open the Select Members in Measures Panel
- 3. Select the Members you would like to add from the list on the left or remove from the list on the right

4-

- 4. Click *Arrow* to move the *Members* you have selected to the left, or click to remove from the list on the right
- 5. Click OK OK once you are happy with your selection

Figure 11. Select members

(1			
Organis	m List	Ampicillin List with Count	
Escherichia coli Staphylococcus aurei	Add before	33,508 Select members in Organism List	? Х
Pseudomonas aerugi		Select members and/or sets Image: All the set of the s	(- ()
Staphylococcus aurei Streptococcus pyoge Klebsiella pneumonia Enterococcus faecalis Proteus mirabilis Enterobacter cloacae Haemophilus influenz Escherichia coli (ESB Staphylococcus epide	Show Layout Grand Totals Sub Totals Select members	 Clostridium sp. Clostridium sprogenes Clostridium spp. Clostridium subterminale Clostridium tertium Coagulase negative Staphylococcus Coagulase negative Staphylococcus (Unit Coagulase Negative Staphylococcus (Unit Coliform Coliform ? Coliform ? Coliform ? Coliform ? Klebsiella sp. Coliform ? Proteus sp. 	
	2		now caption

9.7 Select highlighted members

The Select highlighted members option allows users to select specific measures and/or members to display in the grid. Multiple members may be selected by holding down the control or shift keys.

To select highlighted members (Figure 12):

- 1. Click to highlight the member(s) you want to keep. Use the shift or Ctrl key to select a range
- 2. Right mouse click on a selected member
- 3. Click Select highlighted members from the menu

Figure 12. Select highlighted members

	1 2 Period Hierarchy Measures		
	* *	2008	± 3
Antimicrobial	Sensitivity Sensitivity Sensitivity Pct Count Pct Count Pct		Count
Amikacin	Sort by Sensitivity Pct	.78	47,552
Aminosalicylic acid	🗙 Hide 🕨		
Amoxicillin and enzyme inhibitor	🚺 Value Filter	.12	45,831
Amphotericin B	∫ Formulas		
Ampicillin	Actions	.04	54,957
Ampicillin and enzyme inhibitor	Netons		
Azithromycin			
Aztreonam	Expand Sensitivity Pct to	.63	1,517
Benzylpenicillin	Select highlighted members	.93	42,514
Capreomycin	1 Create Set from highlighted members	0.00	9
Cefaclor	Reorder	.50	16
Cefalexin		.51	49,254

9.8 Add and remove dimensions

Users can add, remove or replace a dimension from within the grid. Dimensions are located in the dimension heading.

To Add and Remove dimensions (Figure 13):

- 1. Right mouse click on the Measures in the Heading of the Dimension (e.g. *Period Hierarchy*)
- 2. Select from the Dimension Menu; *Replace Period Hierarchy with, Add before* or *Add after*
- 3. Select the *Dimension* you would like to add (e.g. *Laboratory Hierarchy*)
- 4. Right mouse click to display options in the *Heading* of the *Dimension* (e.g. *Laboratory Hierarchy*)
- 5. Select Remove Dimension (e.g. Laboratory Hierarchy)

Figure 13. Add and remove dimensions

Antimicrobial Amikacin Aminosalicylic acid	Period Sens F		2008 2 Pensitivity 2 Organism C Facility Ward Hierarchy	1		
Amoxicillin and enzyme inhibitor Amphotericin B Ampicillin		Show	Specimen Category Hierarchy Laboratory Hierarchy	-3		
Ampicillin and enzyme inhibitor Azithromycin Aztreonam Benzylpenicillin		Grand Totals	Antimicrobial		tory Hierarchy Period Hierarchy Measures	
Capreomycin Cefaclor	1	Select members	Amikacin Aminosalicylic acid Amoxicillin and enzyme inhibitor	Sensi Po		-(5)
			Amphotericin B	7	Z 🛃 Layout 6.78	

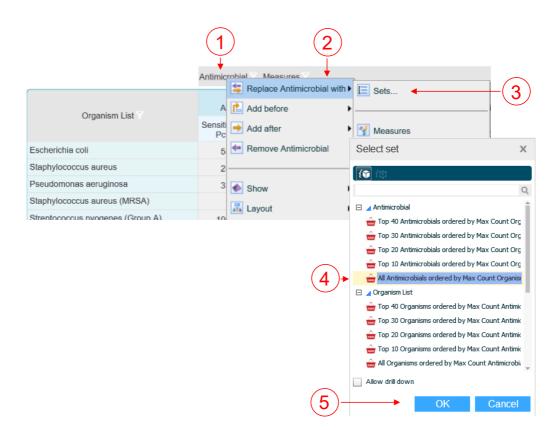
9.9 Replacing sets

The workboard Cumulative Antibiogram defaults to display the Top 20 Antibiotics and Organisms only.

To change the Sets (Figure 14):

- 1. Right mouse click to display the menu on the Dimension e.g. Antimicrobial
- 2. Select Replace Organism List with
- 3. Click Sets
- 4. Click the set you wish to view e.g. All Antibiotics ordered by Max Count Organism
- 5. Click OK OK

Figure 14. Replacing sets



9.10 Change grid layout

The Layout tab provides multiple ways to display a hierarchy in the grid.

To change the grid layout (Figure 15):

- 1. Right mouse click on the measure in the workboard e.g. Organism list
- 2. Select Layout
- 3. Choose the preferred layout:
 - a) Standard layout displays hierarchal format with no subtotals at a parent level
 - b) Standard with parents displays hierarchal format with subtotals for the parent members
 - c) Tree layout displays members and their parents with subtotals at parent level
 - d) Flat layout removes hierarchies by hiding the parent member

Figure 15. Change grid layout

		Ampicillin		Amoxicillin nzyme in		Trimethop	orim	Gentamicin	
Organism List	*	Replace Organism List with Add before) }	sitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count
Escherichia coli	•	Add after	F	10.0	1.45	10.14	1.45	10.75	1.18
Staphylococcus aureus		<u> </u>		-				-	
Pseudomonas aeruginosa		Show Layout		- C+	andard			-	1.4
Staphylococcus aureus (MRSA)					andard with	n totals			
Streptococcus pyogenes (Group A)	*	Grand Totals		Tr	ee				
Klebsiella pneumoniae	ē.	Sub Totals		Flat			1.000	-	-
Enterococcus faecalis		Select member properties							
Proteus mirabilis									1.76
Enterobacter cloacae		Select members		-					

9.11 Rotate grid

Grids, by default, are plotted along the vertical axis of the grid as the data series and the horizontal axis of the grid as the values (Figure 16).

Figure 16. Rotate grid

→ (1)	Antimicrobial T Measures T					
Oracity List 2	Ampici	Amoxicillin and enzyme inhibitor				
Organism List	Sensitivity Pct	Count	Sensitivity Pct	Count		
Escherichia coli						
Staphylococcus aureus						

Click on the Rotate Grid button to rotate the grid

10 Saving workboards

There are three parent folders in the Workboard Task Pane (Figure 17). The folders are visible when the *Workboard* tab and *Explore Workboards* button are selected in the ribbon.



Show public content - contains public reports based on a user's access approved access

Show private content - contains saved private workboards which can be edited and re saved.

Content in this folder cannot be viewed by others unless you share it with them

Show shared content – contains workboards that other users have shared with you

Figure 17. Folder structure

년 <mark>문</mark> Workboard	
Workboards	¥ ×
5 5	
	Q

10.1 Create a folder structure

Users can save workboards in their Private content folder. A folder structure can be created for saving private workboards (Figure 18):

- 1. Click Show private content
- 2. Right mouse click on the v symbol beside your username
- 3. Click New folder
- 4. Click in the *Enter folder name* pane and type in a name for your folder
- 5. Click OK OK

Figure 18. Create a new folder

	Workboards		Į,	<		
\frown	📸 📑 i	12				
(1)-			c	-(2)		
	⊿ dilleenb →	New		\mathbf{Z}		
		New fold	er ┥	-(3)		
	F	Share				
	 Based 					
		Paste	Create nev	v folder		
			Enter a new n	ame and then click o	k.	
		4-	Enter folder nam	e: ORG TRx Reporting		
		(5)-			OK	Cancel

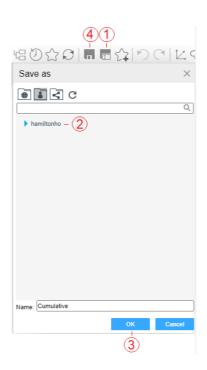
10.2 Save a workboard to your private content folder

Users can save workboards to their private content folder. Saved workboards can be edited and shared with other users.

To save a copy of a workboard in your private folder (Figure 19):

- 1. Click Save as in the application bar
- 2. Enter the report name in the Name field
- 3. Click OK OK
- 4. Once the workboard is saved, click **G** Save to save changes over a pre-existing workboard

Figure 19. Save as

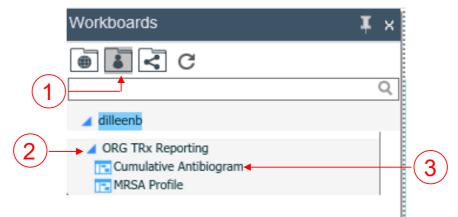


10.3 Open a private workboard

To open a private workboard (Figure 20):

- 1. Click the Private content folder
- 2. Click the sub-folder (if you want to save to a folder) then;
- 3. Double-click the workboard to open

Figure 20. Open a private workboard



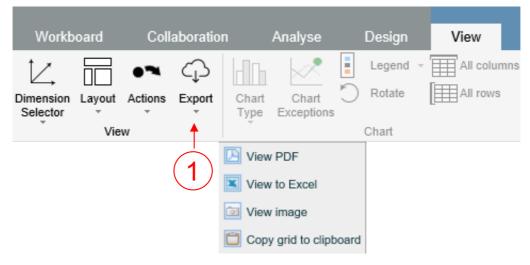
10.4 Export

Data can be exported in multiple formats.

To export data (Figure 21):

- 1. Click *Export* button to view and select from the following options:
 - View to PDF a PDF document will be generated
 - View to Excel data will be exported in a formatted Excel format (.xls)
 - View image an image of the workboard is created. The image can be saved to your computer
 - Copy grid to clipboard allows users to copy the grid and paste into an Excel spreadsheet

Figure 21. Export



11. Sharing workboards

Users have the ability to share workboards. To share a workboard, you must first save a copy in your Private content folder (refer to the previous section for instructions).

11.1 Sharing a workboard with another user

To share a workboard with another user (Figure 22):

- 1. Click Show private content
- 2. Right mouse click on the symbol beside the Workboard you would like to share
- 3. Select Share from the options menu
- 4. Click Add Necto users... Add Necto users, wait for the user names to load
- 5. Click into the search pane and type in the person's name
- 6. Click on the name and move to the Selected users/roles pane
- 7. Click OK
- 8. Click OK

Figure 22. Sharing a workboard

-	Workboards	;	∓ ×	
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	Workbo		Share with	<u>ــــــــــــــــــــــــــــــــــــ</u>
Select users/roles Available Users Josh Josh Sond Mann Josh Pourdrinier Josh Pourdrinier Josh Viles Joshua Richardson Joshva Richardson J		elected users/roles	Josh Mann Sharing message (sent only to newly Frould like to share a Necto Workbo	Can read
	5 (6 7	4	(8)

Note: The user you are sharing a workboard with will not receive any notification, you must notify them.

To delete a sharing arrangement, click the trash can (Figure 22).

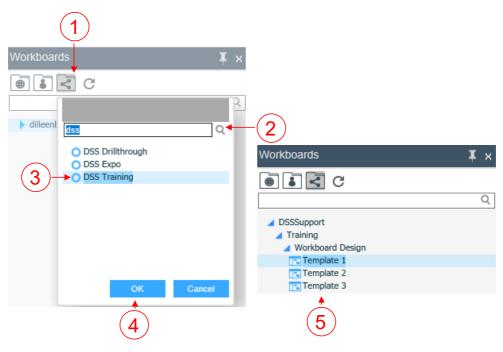
11.2 Open a shared workboard

Once a user has shared a workboard with other users it can be accessed via the Shared content folder.

To open a shared workboard (Figure 23):

- 1. Click Shared Content
- 2. Click into the search field and enter the name of the user who has shared report
- 3. Click on the user name to highlight
- 4. Click OK
- 5. Open the folder, locate the view and double click

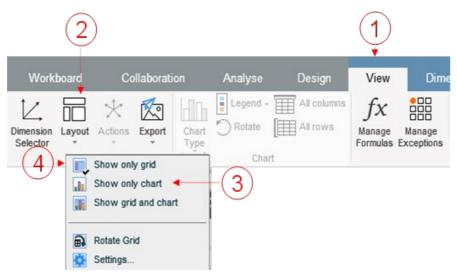
Figure 23. Open a shared workboard



12. Chart functionality – change

Charts can be added to or replace a workboard (Figure 24):

- 1. Click the View View tab
- 2. Select the E Layout button
- 3. Select Show only chart
- 4. Select Show only grid to remove chart
- Figure 24. Add/remove a chart

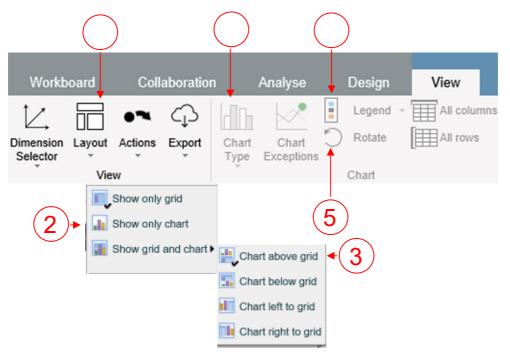


12.1 Modify a chart – change

To modify a chart type via the View tab (Figure 25):

- 1. Select Layout from View in the ribbon
- 2. Choose an option; Show Chart or Show Grid and Chart
- 3. Select where to place the chart e.g. Chart above grid
- 4. Click the Chart Type to select a default chart from the menu
- 5. Click) Rotate to rotate the Axis on your Chart
- 6. Click Legend
- 7. Select the position of the Legend

Figure 25. Modify a chart



Tip: additional formatting for charting can be found via the Format tab within View Tools. Click on Chart and deselect Inherit.

									Viev	v Tools					
Workt	oard	Collaboration	A	Analyse	Design	View	Dim	ension	Me	embers	Visuals	Format			
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🖽 Grid	Inherit		1	12 T A A	ΒI	Chart	Chart	Data	Shadow		Format:		Scaling		Line Width: 2 -
						Туре	Colors	Labels			Labels rotati	on: o 🔻 🖬			Only data points
	Grid	/ Chart			Font			Ch	art			Axes		9	Series

12.2 Select data to display in the chart change

You can choose data to display data in the chart by selecting data in the grid. You can only select data from members of the same level.

- 1. In the grid, click and drag the selection rectangle across a column to display that column in the chart
- 2. In the grid, click and drag the selection rectangle across a row to display that row in the chart
- 3. In the grid, click and drag the selection rectangle from the member level and drag from left to right and down

- 4. To capture multiple rows or columns make the first select and then hold down the ctrl key and make further selections
- 5. To remove a row or column hold down the Ctrl key and drag the selection triangle over that row or column

Below is the "Organism	by Year"	Dashboard
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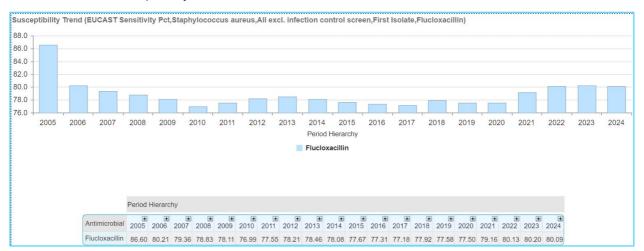
Ð	Period Hierarchy 🍸 Measures 🍸			
Organism	2022	2023 +	± 2024	
organion	Count	Count	Count	
⊟ All Organisms	7,314,738	7,827,172	4,951,425	
Anaerobes	4,777	5,890	3,635	
Anaerobic Organism		2		
■ Fungi	159	269	158	
Gram negative bacilli	4,087,766	4,238,302	2,676,850	
	13,804	15,424	8,142	
Gram positive bacilli	21,457	22,563	14,555	
Gram positive cocci	3,170,393	3,529,696	2,239,299	
Mycobacterium	4,250	4,634	2,179	
Nocardia/Actinomycete	3,525	3,086	2,096	
Interpretation → Yeast	8,607	7,306	4,511	

₽	Period Hierarchy 7 Measures 7			
Organism	2022 +	2023 🛨	± 2024	
organism	Count	Count	Count	
⊟ All Organisms	7,314,738	7,827,172	4,951,425	
	4,777	5,890	3,635	
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	4,087,766	4,238,302	2,676,850	
Gram negative cocci	13,804	15,424	8,142	
	21,457	22,563	14,555	
Gram positive cocci Gram positive cocci	3,170,393	3,529,696	2,239,299	
	4,250	4,634	2,179	
	3,525	3,086	2,096	
 Yeast	8,607	7,3	4,511	
		(3	5) —	

₽ P	Period Hierarchy 🍸 Measures 🍸			
Organism	2022	2023 🛨	1 2024	
organion	Count	Count	Count	
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Nocardia/Actinomycete	3,525	3,086	2,096	
	8,607	7,306	4,511	
	((2)		

₽ ₽	Period Hierarchy 🍸 Measures 🍸			
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Gram negative cocci	13,804	15,424	8,142	
	21,457	22,563	14,555	
	3,170,393	3,529,696	2,239,299	
Mycobacterium	4,250	4,634	2,179	
Nocardia/Actinomycete	3,525	3,086	2,096	
	8,607	7,306	4,511	

12.3 Creating a Line Chart for the Second Y axis example



REPORT: Susceptibility Trend

YEAR: Left click on column "2023", then right click and click on "Select Highlighted Members"

				Sort by 2023
			×	Hide 🕨
			1	Value Filter
	0000	_	fx i	Formulas
Pe	2023 eriod Hierarchy	,		Actions
Flu	ucloxacillin			
			🍨 E	Expand 2023 to
			:::::::::::::::::::::::::::::::::::::::	Select highlighted members
			s (Create Set from highlighted members
	Period Hierard	chy	JI F	Reorder
Antimicrobial	2023	(
Flucloxacillin		80.2	2	Find people
			1	/isuals

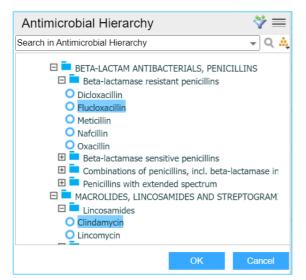
Click on the + sign on the 2023 column to expand out to the months of 2023

	Period Hierarchy		
Antimicrobial	2023	Ð	Click on + sign to expand
Flucloxacillin	80.2	0	

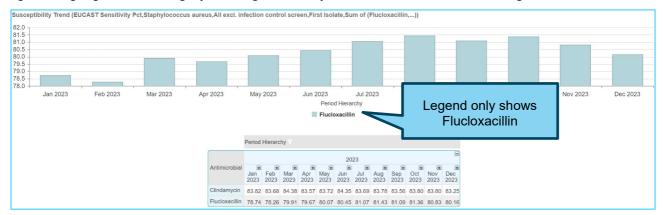
Click on the "Antimicrobial Hierarchy.



Hold Ctrl button and select Clindamycin and Flucloxacillin so now you have two selections being "Flucloxacillin and Clindamycin" as below, then select OK.

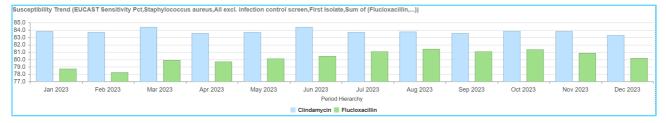


You will see in the chart below, it will only show data for Flucloxacillin which is identified by the figures highlighted darker grey in the grid. It only shows Flucloxacillin in the legend as well.



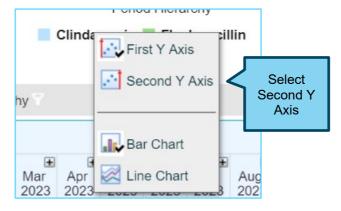
To include Clindamycin in the chart, in the grid, click and drag the selection rectangle across a row to display that row in the chart. See item 12.2 and dot point 2 and image number 2.

The chart will now change to show both data for Flucloxacillin and Clindamycin.

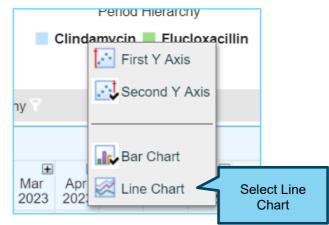


Now we want to add a Line Chart for Clindamycin.

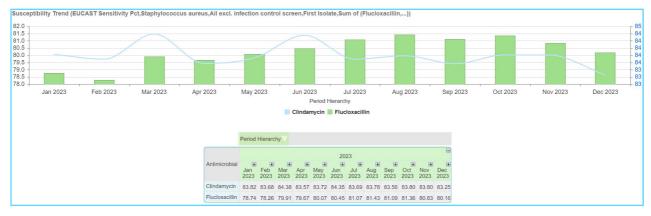
Right click on Clindamycin in the "Legend" and select 2nd Y axis.



Right click on Clindamycin and select Line Chart.



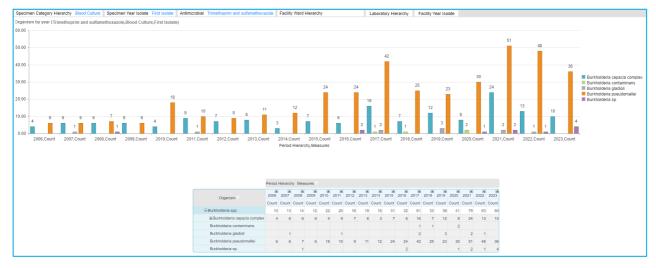
Customised final report below:



Following the logic above, other graphics which may be of interest are shown below: Isolations of *Aeromonas spp*. over time.



Isolations and breakdown of Burkholderia sp. in blood cultures over time.



safetyandquality.gov.au



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