

Web
Improvement
Support
for
Healthcare

User Guide

v2.11

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1. Purpose of This Tool

The **Web Improvement Support for Healthcare (WISH)**, formerly the **Web Reporting Tool**) has been developed in collaboration by Imperial College London, and Chelsea and Westminster Hospital. It is designed so that your project(s) can share data with everyone in the team, wherever there is internet access, allowing everyone to know what is going on, and to be able to add their own experiences and comments as the “story” of your improvement initiative develops.

By capturing **Quantitative Data** you have evidence about the effects you are having on your process, whilst the **Qualitative Data** (such as comments and PDSAs) gives potential reasons for those quantitative changes; including how those effects were achieved by everybody’s efforts, or influenced by external events.

This will allow you to tell others about how you achieved successful changes.

Also within the software we are developing method to help teams assess the *Long Term Success* of their project.

Notes:

- **Requires Internet connectivity.** *Some organisations’ firewalls might prevent access – ask your local IT department if at first you cannot connect to the application.*
- **Browsers with confirmed compatibility:**
 - *Internet Explorer 9*
- **Browsers that will work but may have some quirks:**
 - *Internet Explorer 7 and upwards*
 - *Firefox 4 and upwards*
 - *Google Chrome 10 and upwards*
 - *Safari*
- **Recommended minimum screen resolution:** *1024 x 768*
- *Please use the WISH menus to navigate the tool instead of the browser buttons.*

2. Accessing the Web Improvement Support for Healthcare

1. There are several ways to get to the WISH
 - a. Use the link in the welcome email you received
 - b. From the CLAHRC NWL web pages
<http://clahrc-northwestlondon.nihr.ac.uk/resources/wish>
 - c. Alternatively search for “CLAHRC Web Improvement Support for Healthcare” in a search provider¹.

2. You will see the front page of the tool, which contains a login box – Figure 1. Check that you have the right version there are several installations of WISH and the logins do not crossover. In most cases you need the CLAHRC NWL WISH instance

Login to CLAHRC NWL WISH

Please login here

Username

Password

Remember me

Login

If you have forgotten your password please enter your username (i.e

I forgot my password

WISH has been developed by the National Institute for Health Re:

Figure 1

¹ For instance <http://www.google.co.uk>

3. Logging In

1. Enter your username and password into the respective boxes within the panel marked “Login”. Click the button marked “Login” below your password - Figure 2. If you are on a computer that only you use, you can also have the tool remember your username.
2. If you have forgotten your password, enter your username, and press “I forgot my password”, a new random password will be sent to your email address. This can be changed once logged in.

NIHR CLAHRC
for Northwest London

Login

Please login here

Username

Password

Remember me

Login I forgot my password

Figure 2

Login button

I forgot my password button

Remember me toggle

3.1. Change your Password

1. To change your password once you have logged in, go to **Resources, My Account, Change my details** in the menu bar at the top of the Welcome Page (see section 4).
2. Enter a new password, press the “Update” button, and then the “Done” button.

4. The Welcome Page

1. You will now see the Welcome Page – Figure 3 on the next page
 - a. You can select the project with which you want to work (if you are a member of several projects),
 - b. Run reports
 - c. Use administration tools
 - d. Access your account details, the user guide, and report a problem feature
 - e. Log out

Please note the appearance of the Welcome Page and menu items will differ between users, this is because some users have administration rights and programme level access. If you do not have all the features seen in the screen shots do not panic – this is probably right, but do check.

4.1. Send Messages

- a. Send messages to all of the members of your project(s). These messages appear only within the tool itself, they are shown on the Welcome Page, and Project Home Page. To select a project click on the list, to select many projects hold down “control” (on your keyboard) and click on the ones you want to select.
- b. These messages can be “promoted” to comments by admin users. This means if someone says in the messages “The clinic had 20 new staff today”, rather than writing this into the comments as well, simply select the message and hit promote. It keeps copies of both, and both can be independently deleted as well.

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Quick link back to this page

1b Programme wide reports are found here (not all users)

Session will expire unless buttons are clicked

1e Log out

NIHR CLAHRC
for Northwest London

Welcome Page Programme Reports Administrative Resources

Session expires in: 29:41 Signed in as: alan.poots Logout

NHS
National Institute for Health Research

Welcome to CLAHRC NWL WISH You last logged in on: Wednesday, 10 September 2014 16:2

1d Your account details, this user guide, and Report a problem feature

1c See and manage users, projects, and roles

1f You can send a message to a project or to multiple projects from this panel

1a Select the project from here – this takes you to the Project Home Page (figure 4)

1f Any messages from all of your projects will be displayed on this Welcome Page and the Project Home Page

Project Access

Please select a project you'd like to work in from the list below and press the open project button:

- + CLAHRC 2014
- + CLAHRC 2009-2013

Open Project

News feed / alerts

Time	Send
20/12/12 14:22	katie.rand
24/09/12 14:05	tom.proja
18/09/12 13:31	leo.flores

Insight_WMUH

Message

show message

show message

show message

Post a message to your projects

Messages can be sent to all users in a team or teams. Users in selected teams will see the message on the welcome screen next time they log in.

Select project(s):

- Ambulatory Care WMUH
- Pulmonary Rehab.
- Adult Congenital Heart Disease
- Ambulatory Care THH
- Ambulatory Care CW
- COPD Care Bundle THH

Enter text:

Send Clear

Imperial College London

Chelsea and Westminster Hospital NHS
NHS Foundation Trust

Figure 3

5. The Project Home Page

1. Once you have selected a project to work in you will see your “Project Home Page”– Figure 4 on the next page
 - a. Add new data – of various types.
 - b. View your own data entries (and those of others if you are an admin)
 - c. Run reports (so you can see all the project data)
 - d. Use various administration tools
 - e. Access the user guide, and report a problem feature
 - f. Log out
 - g. Send message to the project
 - h. Admin features buttons (some users only)

Please note the appearance of the Project Home Page screen and menu items will differ between users, this is because some users have administration rights and programme level access. If you do not have all the features seen in the screen shots do not panic – this is probably right, but do feel free to check!

5.1. Send Messages

- a. Send messages to all of the members of this specific project. These messages appear only within the tool itself, and are found on the Welcome Page and the Project Home Page. On this page, only the current project will be sent messages.
- b. These messages can be “promoted” to comments by admin users. This means if someone says in the messages “The clinic had 20 new staff today”, rather than writing this into the comments as well, simply select the message and hit promote. It keeps copies of both, and both can be independently deleted as well.

The screenshot shows the NIHR CLAHRC for Northwest London web application interface. At the top, there is a navigation bar with links: Welcome Page, Project Home, Project Data, Reports, and Resources. The right side of the navigation bar shows the user's session status: "Session expires in: 29:50", "Signed in as: alan.poots", and a "Logout" link. The main content area is titled "Welcome to the Example-Project-COPD home page" and is divided into several sections:

- Active project and role:** Displays "Project: Example-Project-COPD", "Alan Poots", and "Role: programme_administrator".
- News feed / alerts:** Shows a table with columns for "Time" and "to". A row is visible with "24/09/12 14:05".
- Post a message to Example-Project-COPD:** Includes a text input field labeled "Enter text:" and "Send" and "Clear" buttons.
- Admin features (some users only):** Located at the bottom, it includes buttons for "Add existing user", "Add new user", "Create data collection for this project", "Add PDSA cycle", "Add LTSuccessTool ent", and "Add Comment".

Callout boxes provide further details:

- Go back to the Welcome Page:** Points to the "Welcome Page" link in the navigation bar.
- 1b View Project Data (as well as being able to add data):** Points to the "Project Data" link in the navigation bar.
- 1f Log out:** Points to the "Logout" link in the navigation bar.
- 1c Run project specific reports (including some admin only reports 1e):** Points to the "Reports" link in the navigation bar.
- 1e Your account details, this user guide, and Report a problem feature:** Points to the "Active project and role" section.
- 1g Sends a message that ALL members of this specific project will see on their Project Home Page and their Welcome Page:** Points to the "Post a message to Example-Project-COPD" section.
- 1a Add Data Quick Buttons:** Points to the "Add existing user", "Add new user", and "Create data collection for this project" buttons.
- 1h Admin features (some users only):** Points to the "Add existing user", "Add new user", and "Create data collection for this project" buttons.

At the bottom of the page, there is a footer with the Imperial College London logo on the left and the Chelsea and Westminster Hospital NHS Foundation Trust logo on the right.

Figure 4

6. Entering Data

1. First you need to select what project for which you wish to add data – this is done from the Welcome Page – see Section 4
2. Once you have selected the desired project you will be taken to the Project Home Page – see section 5
3. There are several types of data that can be added:
 - a. **Improvement Data** (bespoke to each project)
 - b. **Plan-Do-Study-Act (PDSA) cycles** (for planned rapid tests of change)
 - c. **Long Term Success** entries
 - d. **Comments** (for contextual factors impacting on your project; e.g. staff illness; new trainee starts; bank holiday; or we have now got the data collection right)
4. The easiest way to enter data is to use the quick link buttons at the bottom of that home page – see Figures 4 & 5.
 - a. Clicking on the appropriate button will take you directly to the data entry page for the respective data type - the click to select drop down is for the improvement data



Figure 5

- b. In the data entry pages, you will notice a new option in the top bar to return to the project home page – figure 6

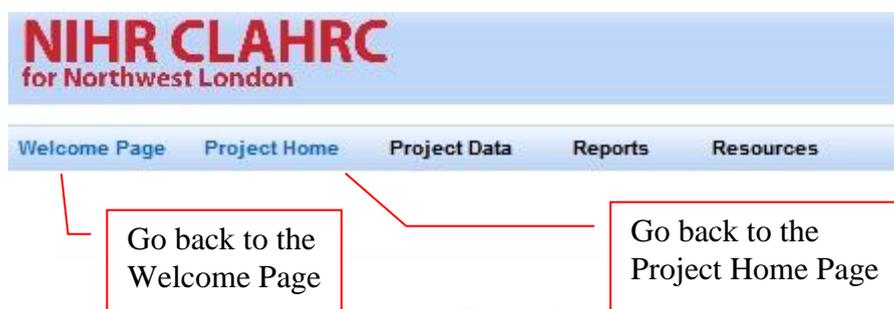


Figure 6

7. The Data Entry Pages

1. Each data type has its own data entry page and all are different.
2. Each has a record details page from where you can delete records.

7.1. Entering Improvement Data

1. Every project has its own bespoke improvement data and measures; as such, each will look different, but all share a common data entry procedure. Here we use a data entry page for a bundle of care example project.
2. From the Project Home Page click the Add Improvement Data button – see figures 4 and 5.
3. You will now see the data entry page for your improvement data. It will have a data entry box that looks something like figure 7.
 - a. Fill in any Dates as dd/mm/yyyy (i.e. 31/09/2012) – or use the calendar icon to the right of the box to bring up a selection box.
 - b. Select drop downs as appropriate
 - c. Type in any free text
 - d. Note some fields will be required, others will not.

Add COPD_EXAMPLE record

Admission date

Discharge date*

Select ward ▼

Was the patient identified as a smoker at admission clerking ▼

If yes, was the patient referred to smoking cessation service ▼

Is the patient suitable for pulmonary rehab ▼

If yes, was the patient referred for pulmonary rehab ▼

Was the patient (or carer) given the COPD Patient Information Pack ▼

Satisfactory use of inhalers demonstrated and understood ▼

An outpatient appointment within 30 days of discharge should be arranged via ward clerk and patient informed. Please indicate whether this was done before discharge

* required fields

Figure 7

4. When you are finished hit the “Save” button – this brings up the record details page – Figure 8. “Cancel” button stops entry and removes this record. **If you do not see “successfully created” in the top left of the screen after pressing save then there is a problem and the entry has not been saved.**
5. On this record details page you can review your data entry for any errors, and using the “Edit” button you can amend them – putting you on the “amend page”, as well as giving you the option to “Delete” a record. Or you can simply hit “Done” to return to the project home page.

COPD_EXAMPLE record details	
Admission date	20/08/12
Discharge date	21/08/12
Ward	Roundwood
Was the patient identified as a smoker at admission clerking	Y
If yes, was the patient referred to smoking cessation service	Y
Is the patient suitable for pulmonary rehab	Y
If yes, was the patient referred for pulmonary rehab	Y
Was the patient (or carer) given the COPD Patient Information Pack	Y
Satisfactory use of inhalers demonstrated and understood	Y
An outpatient appointment within 30 days of discharge should be arranged via ward clerk and patient informed. Please indicate whether this was done before discharge	Declined
Date Entry Made	

Figure 8

7.2. Entering Plan-Do-Study-Act (PDSA) cycles

1. These are used for planned tests of change – for more guidance ask your project manager, get in touch with CLAHRC NWL, or use the resources on the CLARHC NWL website
2. From the Project Home Page click the “Add PDSA cycle” button – see figures 4 and 5.
3. You will now see the data entry page for PDSA cycles.
4. Give the new cycle a title, enter the information about your PDSA cycle in the appropriate boxes provided, then click “Save”, and then after reviewing the record hit “Done”.

- a. Be sure to check that you see “Successfully Created” – this is a large entry page if there is an error it may be further down the page.
- 5.
6. To update a PDSA as you carry it out, select the PDSA from the data tables (see section 8) use the “Edit” function to enter the new parts.

7.3. Entering Long Term Success Tool entries

1. From the Project Home Page click the “Add LTSuccessTool Entry” button – see figures 4 and 5.
2. Work your way through the questions, and press save.
3. Be sure to check that you see “Successfully Created” – this is a large entry page if there is an error it may be further down the page.

7.4. Entering Comments

1. From the Project Home Page click the Add Improvement Data button – see figures 4 and 5.
2. You will now see the data entry page for your Comments. Enter your comment then click on “Save” and then “Done”.

8. Using your data for Quality Improvement

Having spent time putting data into WISH you and your team will want to use the data for Quality Improvement, this is best done with the Reporting functions, but sometimes you will want to get behind the scenes with the data.

8.1. Using Data Tables

1. From your Project Home page, you can view all your entries (all the project entries if an admin account holder) for each of the data types. You do this from the Project Data menu.
2. Taking Improvement Data as an example – this will be called something like “*ProjectName Measures Data*”, within the Project Data Menu. Clicking on this takes you to the data table.
3. You can manipulate the table, view, amend and delete records (depending on your access rights), and add new records as well. You can also search the data tables. Only a few columns of data are shown as a summary - Figure 9.

Action	Entry ID	User	Admission date	Discharge date	Ward	Identified smoker	Smoking cessation	Date Entry Made
View Edit	10817	alan.pools	20/08/12	21/08/12	Roundwood	Y	Y	21/08/12 12:32:02
View Edit	10513	thomas.woodcock		25/05/11	Dryden	N	N	17/08/12 13:03:00
View Edit	10495	thomas.woodcock		11/01/11	Roundwood	N	N	17/08/12 13:03:00

Figure 9

4. The grey bar at the top can be clicked to bring out the **search** function. Each of the **table headings can be clicked to reorder the table** by ascending and descending order based on that column.
5. If you click View next to the record the record summary page is brought up; whilst “Edit” takes you directly into the amend page, from where updates can be made or records deleted, depending on your access rights.

8.2. Using Reports

1. On the Project Home Page, along the top bar you will see links to Reports including your project’s Improvement Data reports, as well as the Sustainability Score Average, PDSA reports and Comments reports that are common to all projects.
2. Reports also allow you to view all the PDSAs and Comments made by everyone else.

3. Taking Improvement data as an example, click Reports and select Improvement data. This takes you to the report parameter page, and asks you to specify the time period required for the report – in this case on an event-by-event, but other reports can be specified by exact date range. Each parameter box differs – and the Improvement Data parameter boxes are made specifically for your project.
4. Once the date range is set, the report is generated by clicking OK and the report can be viewed, exported, and printed, as per Figure 10. The tool tips only occur after the parameter box has been run. If you are unsure how to use these reports, please contact your project manager
 - a. Second icon in allows you to reset the parameters; fourth to export the report, fifth to print it directly from the page.

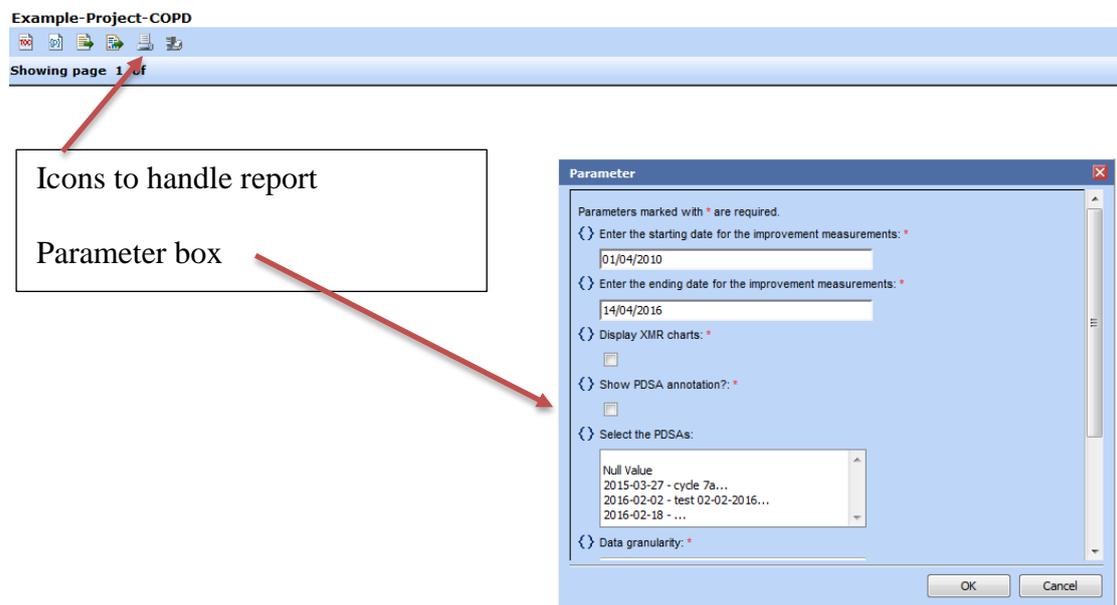


Figure 10

8.3. Improvement Data Reports and PDSA Cycles and Comments annotations

1. Click “Reports” located along the top bar; and select Improvement data report, which will automatically detect and calculate process changes. This takes you to the report page, and asks you to specify several different parameters - Figure 11.
2. If you select “Display XmR charts”, the WISH automatically generates a Statistical Process Control (SPC) Analysis, which can be used to identify changes in your process. Linking this with PDSAs and Comments is a powerful

way to bring all your data together to drive Quality Improvement. See our eLearning resources if SPC is not something with which you are familiar.

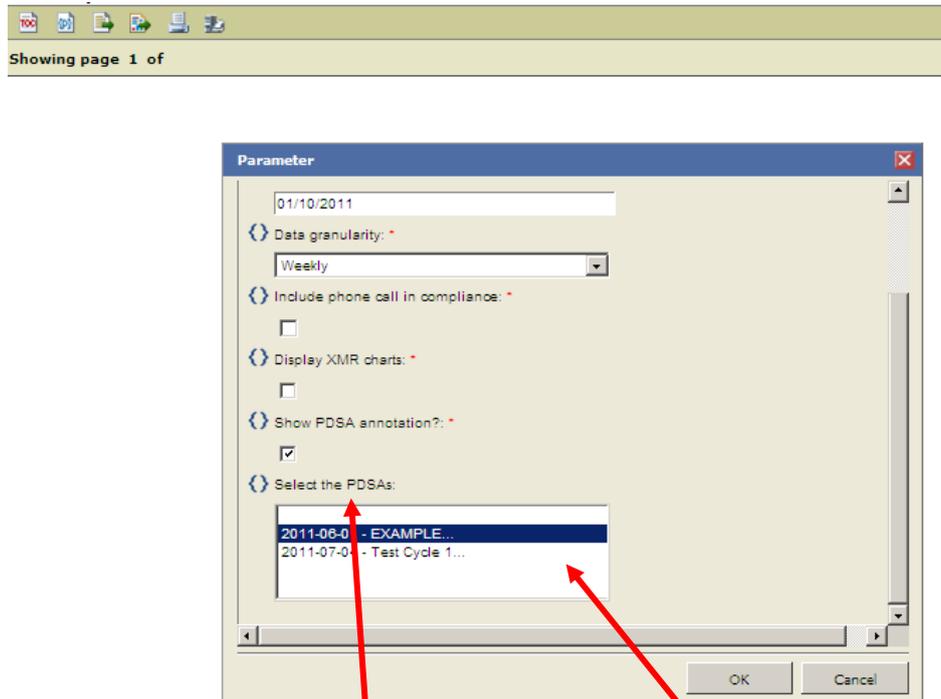


Figure 11

3. Scroll down and select **Show PDSA annotation**. Next **select the PDSAs** that you wish to include in the box below. To select more than one, hold 'Control' and click the individual PDSA cycles. Next, click OK.
4. The PDSA cycles selected will now be annotated in your report. The report is paginated by measure name – click on that name to be taken to the appropriate run chart.
5. Each Plan, Do, Study and Act are displayed by their date (if there is no date specified they will not be displayed), and the cycle is shown as linked by a line. When you hover the cursor over the PDSA, the plan text is shown, and clicking on it will take you through to the full text. See Figure 12.

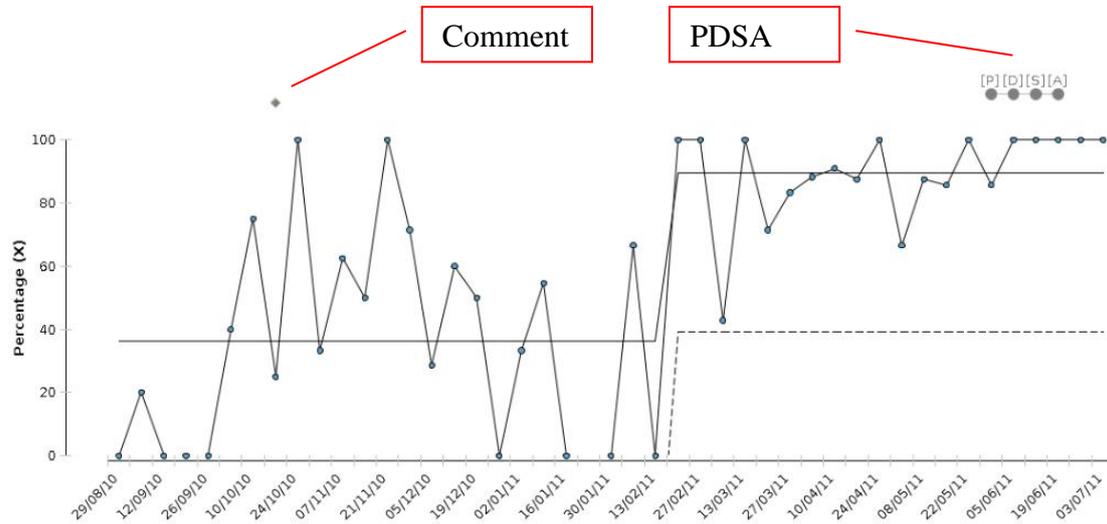


Figure 12

- Comments are annotated by **toggling the Comments parameter item** with a click. This item is **below the PDSA selection box** , and you might have to scroll down the parameter list using the bar on the right.
- Comments are shown in reports as diamonds corresponding to the week they were made. Hover your cursor over the diamond to display the number of comments made in that week, and clicking on it opens the full text for the comments in that week.

8.4. Programme Reports

- Some users will have access to Programme level reports. These are typically a one-stop access points for the Project level reports. There is also an “All Users” report that lists all usernames; and an Overall Activity Report – an overarching report that draws together a lot of project information in one place.
- These reports are available from the Welcome Page.

8.5. Seeing all the project data easily

- On the Welcome Page go into Administrative menu – Projects – List own projects.
- Scroll down to the project you want hit “view” on the right hand side. **Click Project Entries to expand/ collapse** (at the bottom of page)
- Click each tab to move between data types, and use select to view the record.

8.6. Exporting Improvement Data and Reports

Export raw data

Needs Internet Explorer 9 or above

1. Go to the project, then in use the menu *Project Data – [Improvement Data]*
2. In the Improvement Data table page, underneath the clickable grey search bar, on the right there is a download as CSV link.
3. Click this to open or save the data table

Export Data from the reports & Exporting the Report

This provides processed data as per measures definition for your project. The exports can take a few minutes to render in the background

1. Export the report to get processed data – the data are at the end of the report.
2. Go to the Improvement data report Reports – Data Reports – improvement data report
3. Run the report with parameters desired
4. Use Export report – 4th icon in on the top left – and export as excel
5. Select open file
6. Ignore the warning about formatting to open the file
7. Save from Excel
8. Instead of selecting Excel – you can also export to use with PowerPoint but instead export as OpenPresentation format – this is readable in PowerPoint but usually renders better
9. Alternative export as pdf

Export the data behind the report

This provides raw and processed data

1. Use the third icon in “Export Data”, and then select export table
2. **Select** the columns you want to put into the report from the left side box and use icons in the centre to move them to the right side box
3. **Export** as csv, comma separated

9. Requesting to join a project

1. As a current account holder on the WISH application, you might join in the work on another project and need access. An admin user from that project might simply add you to that project by “assigning a new role” – an email should be sent to notify you of this. But want you can also request to join a project if you are interested in participating.
2. On the welcome page (once logged in) go through the menu: Administrative - Project Roles - Role Requests - Request Project Role
3. Then select the project, and press request (Figure 13). By design, the role you request has the lowest access rights, but an admin user can change this if they approve your request.

1. Select the Project you want access to:

User *	Project *	Role *

There is no project associated with this Project Role Request.

[Select project](#)

2. Review your Project access request:

Add Project Role Request detail

User *

Project *

Role *

* required fields

[Request](#) [Cancel](#)

Figure 13

10. Reporting a problem

1. If you encounter a problem with WISH then please do let us know, it is the only way we know that something is wrong. Try to note down as much as possible about what you were trying to do, when, where, and any technical information (such as type of computer and internet browser). If there is an error code, it is useful for us to have that as well.
2. In order to get in touch you can talk with your project manager; talk to us; emails us; or use the Report a Problem feature. This is found in the Resources menu from either the Welcome Page or the Project Home Page.
3. Select the area of the tool you were having problem with – either Data Entry or Reporting or Other. Give a short summary title. Then please provide as much detail as you can in the detailed description box. A screen shot can be attached as well to show us the problem. Finally, press “Submit bug”.

11. Logging Out

1. If you have been entering data, ensure that you have clicked on the save and done buttons, and are returned to the Welcome Page or the Project Home Page before logging out – this is to ensure that you do not lose any data by accident.
2. It is important to log out of the tool when you have finished. To log out, simply click on the word “Logout” just below the NIHR logo in the top right-hand corner of the page.

12. Managing Users and Roles (Admins Only).

1. **This section of WISH and thus the user guide is still being upgraded – there will be changes!** As an advanced feature allowing creation and customisation of users and access roles.
2. At the time of writing: To create a new user you will need to be an administrative account holder. If you think you should be an “*admin user*” then contact your project manager, or us.
3. There are two cases in user management: A brand new user of WISH or a current user of WISH, who may or may not be part of your project (give a new role or deny access)

12.1. Adding a brand new user

1. For admins only; on the welcome page use the menu “Administrative - Users - Create user account”. This brings up the add user account menu (Figure 14). Several new roles and projects can be assigned at once (depending on your own access rights). Roles are shown in Figure 15.
2. Please make sure to “look up name” to check whether the user really is “brand new”. If they already have an account, a different approach is needed see deleting and updating section later.

Add User account

NOTE to Administrators: Please make sure the user, you are about to create an account for, does Not already have one!

First name*

Last name*

Registration date*

Active*

Login name*

Password* generate random

Email*

Project*

Role*

* required fields

Save Cancel

Annotations:

- Type in the name
- Name look up
- Date of joining or current date
- Set password or generate random
- Auto generated
- Type in the email
- Activate the login (click)
- Add project and role one at a time, one role per project only. Select the drop down on right and “remove” to undo an error

Figure 14

12.2. Roles available in WISH

1. Several roles are available – not all will be displayed to you, as it will depend on your own role as to what roles can be assigned, see Figure 15.
2. Most users will need “project member” access.
3. Someone responsible for managing data would suit an “information lead” role.
4. Those of you managing team composition, or with a project, manager or senior role would need “project administrator” – giving control over all project data (including user management).
5. People working across a programme of work might want to consolidate their access as “programme lead” – this gives access to additional programme wide summary reports and data control.
6. Programme evaluator is for people who are looking across many projects but do not need to add data at all.
7. Project Viewer is to allow others to look at the reports and some data but with no ability to edit or add data.
8. Programme administrator is an advanced role with audit features, and other high controls, only a few users would need this. There is also a WISH developer’s role.

Name	Description
programme_administrator	WRT admin role superseding project_admin role.
programme_lead	Programme user role for users responsible for those coordinating a number of projects. Higher access rights than project admin.
project_administrator	Project admin role superseding project_member role.
information_lead	Project user role for the local information lead. Higher access rights for managing project data.
project_member	Project user role for regular users.
programme_evaluator	Programme user role for users only entitled to view data and reports.
project_viewer	Project user role for users only entitled to view data and reports.

Figure 15

12.3. A current user of WISH

1. For a current user of WISH you might want to assign them a new role to give them access to your project or modify their current role (by deleting their current role).
2. Project level admins have rights for particular projects, whilst programme level admins have rights across all projects.
3. As an admin user, you can either assign a new role and approve or deny a requested role, or **add directly from the project home page to ASSIGN NEW ROLE as below**
4. Alternatively, **assign a new role** by using the menu path “Administrative – Project Roles – Assign a new role” – a screen similar to Figure 16 will be shown.
5. Select user, project and role by working your way through the tabs, and select. Each of these can be changed if you make a mistake, using the “change X” button in the appropriate tab. Once you are done hit save.

1. Select User, Project and Role you want to assign:

User *	Project *	Role *

Name	Start date	Implementation start date
ExampleProjectCOPD	01/04/10	03/10/10

Change project

Use the tabs to navigate

If nothing is selected this will instead be “select” X” and take you through to selection screens, where you need to click “select” next to appropriate entry. This button allows you to change that.

2. Review and Save your selection of User, Project

Review and Save Project Role

User *

Project *

Role *

* required fields

Save Cancel

Review panel

Figure 16

6. Alternatively, when on the Project Home page: Click the “Add user to this project” button in the bottom left of the screen, this preselects the “project” in Figure 16.
7. Or use the “Administrative – Users - list users”, and “edit”
8. You can also **Approve or Deny a requests** that other current users have made.
9. As an admin user make sure you navigate to through the menu “Administrative – Project Roles – Role Request page” regularly. This will bring up the roles request page (either at a programme or project level, depending on your rights).
10. Anything in here can be approved or denied; you can also increase the user role (which by default is set to the lowest level), up to your own maximum rights.

12.4. Deleting and Updating roles.

1. If you try to assign a new role to someone who already has a role in the project, or some programme wide roles, an error message will display.
2. For the programme wide roles this is not a problem – they have access to all projects. But perhaps you are trying to change the rights of a project role.
3. Or maybe someone has left altogether and you want to prevent they access (you can also more simply make the account inactive, by going into the “Administrative – Users - list users, and editing the entry to “active” toggle is not ticked Figure 17. That way should they return you can reinstate them easily by making the account active again)

Edit User account

First name*

Last name*

Registration date*

Active*

Login name*

Password* generate random

Email*

* required fields

User information panel

Figure 17

4. You can also delete the roles they have. To delete a role “Administrative – Users - list users”; edit. Then looking at the User Roles underneath the user information, click update next to the appropriate role, and delete will be an option. Figures 18 and 19.



Figure 18

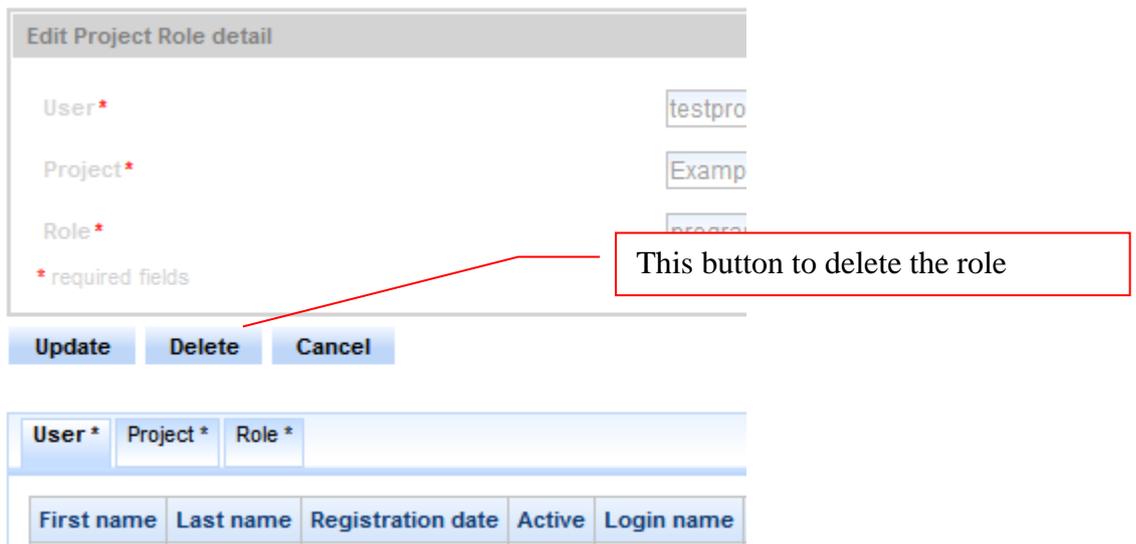


Figure 19

5. To update a user role to a new level of access, follow the steps above instead of using delete, use the tabs to select role. Once the new role has been selected use the “update” button to save the new role – Figure 20

Once a new role is selected, use this button

This tab to navigate

This tab to select

Name	Description
project_member	Project user role for regular users.

Figure 20

Data Collection Creation

A feature for high level users only

Purpose

The GUI can create or edit XML code for measure collection creation.

NOTE 2016-09-21

Available only to Programme Administration level access.

Once completed need to email developers to have code base “hooked up” to live site.

How to create or edit

Menu:

Administrative – Data Collections – TemporaryDataCollections page

NOTE: occasionally this temporary page will hang, to resolve press welcome page button, and then reload this menu path.

To create new

Select project in top panel, then hit create data collection button in the top panel

Alternative path is to use “Add data collection” button from within a project.

Note there are dependencies throughout, such that modifying DATA ITEMS impacts on ALL else; AGGREGATIONS impacts METRICS. CHECK YOUR WORKINGS!

Setting up the collection

Data Collection Info panel:

This is where you provide meta-data.

- Give the Collection a system facing NAME and a user facing LABEL
- Provide a brief DESCRIPTION
- REVISION NUMBER auto-advances
- REVISION COMMENT is needed every time. Note SYS-tag on editing needs to be changed.

Data Items panel

This is where you define the fields that will be used for data entry

- DATA ITEM IDENTIFIER auto advances
- DATA ITEM NAME is system facing; DATA ITEM ENTRY LABEL forms the question on the entry page; DATA ITEM COLUMN LABEL is used to label exported data
- DATA ITEM DATA TYPE (SIZE) specifies the type of data being captured (size is currently system assigned)
 - Int – is integers
 - Int unsigned – is positive integers
 - Boolean – for true and false
 - Float – is for decimal values
 - Varchar -

- is used to set up a predefined items list: Defined in the bottom part of the panel, which allows selection of drop down and radio button display. Selection of data type wipes out any predefinition.
 - If left without predefined list it becomes a short text entry
 - Date – is for dates. Note at least one date needs to be set as “aggregate” – this is the data that will be used to assign the data to particular weeks (often the admission date). Note – sometimes you will need to add this data then edit it and re add so that it is relabelled as “Entry_Date” for the system to pick it up.
 - Timestamp – for time stamp data and time. Long number entry
 - Text – open text box
 - Post code – post code entry
- DATA ITEM IS REQUIRED – tick box yes or no
- DATA ITEM DESCRIPTION – is required

Add, edit and remove each data item as it pleases you. Note REMOVE will remove any aggregations and metrics that include that data item.

Order in which entered here is the display order.

Currently cannot limit integers to a specified range

Aggregations panel:

This is where you define how the data are handled for the system to build measures.

- AGGREGATION IDENTIFIER auto advances
- DATA ITEM REFERENCE(s) – contains the defined data items. Pick the one that you wish to build an aggregation from. Sometimes you may actually need to use entry date, especially for complex filter expressions.
- AGGREGATION LABEL is user facing in that it labels the columns of table at end of reports.
- AGGREGATION DATA TYPE
 - Int
 - Int Unsigned
 - Float
- AGGREGATION TYPE
 - Count – count number of times something has happened
 - Sum – total up the individual numbers
 - i.e. number of pills taken as a data item can be COUNTED for the number of people taking pills; and SUMMED for total number of pills being taken.
- FILTER EXPRESSION (CLICK INSIDE THE FIELD) pops up a new box to filter your expression as required. E.g. you might only want it when a data item is above a certain value. If running OR expressions, might be filtering on several things at once. This assembles data items in to summaries for each reporting period.

Add, edit and remove each aggregation item as it pleases you. Note REMOVE will remove any metrics that include that aggregation.

Aggregation syntax for filter expression:

Syntax based on java

equal - ==
not equal - !=
less than - <
greater than - >
less than or equal - <=
greater than or equal - >=
logical OR - ||
logical AND - &&

- Character values on the right of the signs need to be in single quotes; numbers don't.
- Use parentheses to ensure expression is correct.
- Spaces between are needed.
- Each open '(' must be matched with a close ')' - i.e. the number of '(' must be the same as the number of ')'.
e.g. filter entry date on: ((D2 >= 50) && (D3 == 'Yes')) || (D3 == 'No')

would find instances where either d2 is over 50 and d3 is yes, or where d3 is a no.

Metrics Panel

- METRIC IDENTIFIER auto advances
- METRIC LABEL is user facing on the reports
- METRIC DATA TYPE
 - Int
 - Int unsigned
 - Float
- METRIC FORMAT is used to scale the graphs for numbers or percentages
- METRIC IS CUMULATIVE is used as a toggle (not usually needed)
- SPC toggle for whether auto-anaysise required (hint usually)
- METRIC EXPRESSION (CLICK INSIDE THE FIELD) pops up a new box in which you assemble aggregations into measures.

Metric Expression syntax:

Similar idea as aggregation with a few differences.

When creating percentage measures be sure to check whether denominator exists with if statement being used to handle cases where not. e.g. if (A1 > 0) ((100 * A2) /A1); else null

Whilst you can call an aggregation in a metric expression, it will not necessarily work as expected, instead build a more comprehensive aggregation in which the operation is completed before

This, for example, will not behave as expected:

```
if (A1 > 0) (100 * (A14 || A13))/A1; else null
```

Because the expression (A14 || A13) will return binary 'true' or 'false' - i.e. the condition is met - not a number of times that the condition is met. Actually, the representation of 'true' and 'false' is usually through '1' or '-1', which means an error might not be thrown but the result for the metric will definitely be wrong.

Parameters Panel

This is where you can set the report up with other filters – i.e. to display results for only one site, ward, postcode district. This relies on at least one of the DATA ITEMS to be VAR CHAR or other predefined limits.

- PARAMETER IDENTIFIER auto-advances
- DATA ITEM REFERENCE(s) – pick the data item you wish to use as a selection
- PARAMATER LABEL is user facing as the question on the parameter box
- MULTIPLE VALUES ALLOWED – a tick box for that, you might want to select combinations of wards
- OPTION KEY and OPTION VALUE and OPTION IS DEFAULT are place holders that are replaced with the filter values and a default “ALL”
- Add, edit and remove as it pleases you.

Save

Once all populated as required hit SAVE button. CANCEL will destroy all that you have done, returning to *status quo ante bellum*.

If you've pressed save then you have the review panel open, so press EDIT if you've noticed a mistake or DONE if you are.

NOTE: SAVE will be replaced by UPDATE if you are EDITING.

Beware the DELETE button, which is similar to the CANCEL button.

To edit existing

Once project is selected existing collections are displayed in second panel. Select view to look at it (scroll to right hand side of panel), or edit to change.

To edit a DATA ITEM, AGGREGATION, METRIC, or PARAMETER click on it and hit EDIT.

Note there are dependencies throughout, such that modifying DATA ITEMS impacts on ALL else; AGGREGATIONS impacts METRICS. CHECK YOUR WORKINGS!

When done, use UPDATE button to do so. Or CANCEL button to negate your changes. DELETE will return your works to the void whence they came.

Data Uploader

A feature for high level users only, available for those projects with metrics defined using the GUI, as this defines XML code used for validation in this upload.

Purpose

Upload data directly into WISH from excel spreadsheets saved as CSV

How to upload

1. Ensure file is restricted to only the time period you wish to upload, i.e. if you previously uploaded January data, and march data was manually entered to WISH, restrict this upload to February only.
2. Ensure all columns in excel or similar are correctly formatted for the system... i.e. Yes not yes; only numbers in numeric columns, etc.
3. Save file as csv
4. Navigate to associated project within the WISH system
5. Click CSV imports in button right of page
6. Using top panel – select file to upload, and upload it.
7. A preview will be displayed.
8. In second panel match the columns from the file to the appropriate fields in the data fields. Match the aggregating date with “entry_date” – this used to total up the reports. i.e. if date of admission is to be used for this select that, or date of consultation.
9. Submit header match, if fail try pressing button again. Still fail go back a step.
10. Select format for date and time fields. Typically dd/mm/yyyy
11. Submit format match, if fail try pressing button again. Still fail go back a step.
12. Validate the match in lower panel.
13. Any errors will be displayed.
 - a. Fix those errors in other software and restart at step 1.
14. Press SAVE

An audit feature to remove spurious uploads is currently being investigated.

Contact Us

WISH is designed to be easy to use and to provide you with useful feedback to drive your improvement initiative.

If you have any comments or suggestions, we would be very pleased to hear them.

You can contact us via email:

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WISH built in collaboration with:

Imperial College London
-Dept. Medicine
-Dept. Computing
-Dept. Primary Care and Public Health

King's College London
-Dept. Informatics

Chelsea and Westminster Hospital

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