COG170

COGITO FUNDAMENTALS WITH <TRAINERS>

We'll get started at 8:30 am Central Time.

Agenda

Day 1	Day 2	Day 3	Day 4
• Introduction • Radar Dashboards • SlicerDicer Populations • Data Lineage • Day 1 Lab: Chronicles & the Record Viewer	• Dashboard Metrics • Workbench Reports • Day 2 Lab: Epic-Released Content	• Summaries • Report Requests • Troubleshooting • Analytics Catalog • Cogito Roles • Day 3 Lab: Building Reports	• Security • Cogito Build

- Study Hall

Agenda: Day 1

- **Introduction**
- Radar Dashboards
- SlicerDicer Populations
- Data Lineage
- Day 1 Lab: Chronicles & the Record Viewer

Agenda: Day 1

- Introduction
- **Radar Dashboards**
- SlicerDicer Populations
- Data Lineage
- Day 1 Lab: Chronicles & the Record Viewer

Exercise 1: Radar Exploration

This first exercise is used to give you a tour of a Radar dashboard and familiarize you with the various component types available in Radar.

Dashboard Editor

- Basic Information
  - Layout
  - Content
  - ~~Resource Settings~~
  - Parameters
- Access

Component Editor

Component Editor consists of 3-4 sections:

- ***Basic Information***
- **Data Source**
- **Output Format (for some component types)**
- ***Distribution***

Same for all components, **vary based on component type**

Exercise 2: Build a Dashboard and a Message Board Component

Create a new <your initials> Starter Dashboard and add components to it.

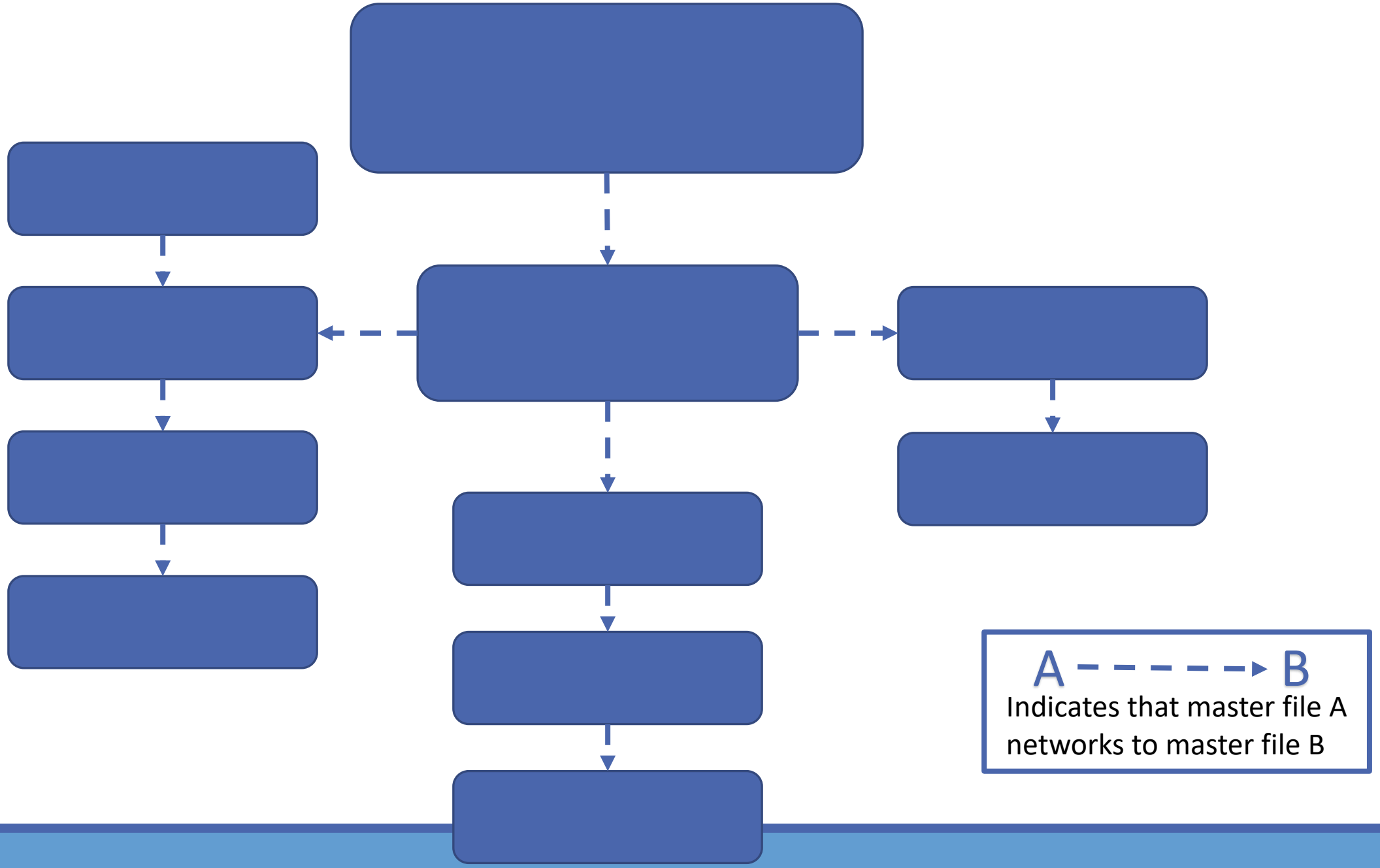
If you finish early… Review the Reference: Activity Links section that follows the exercise

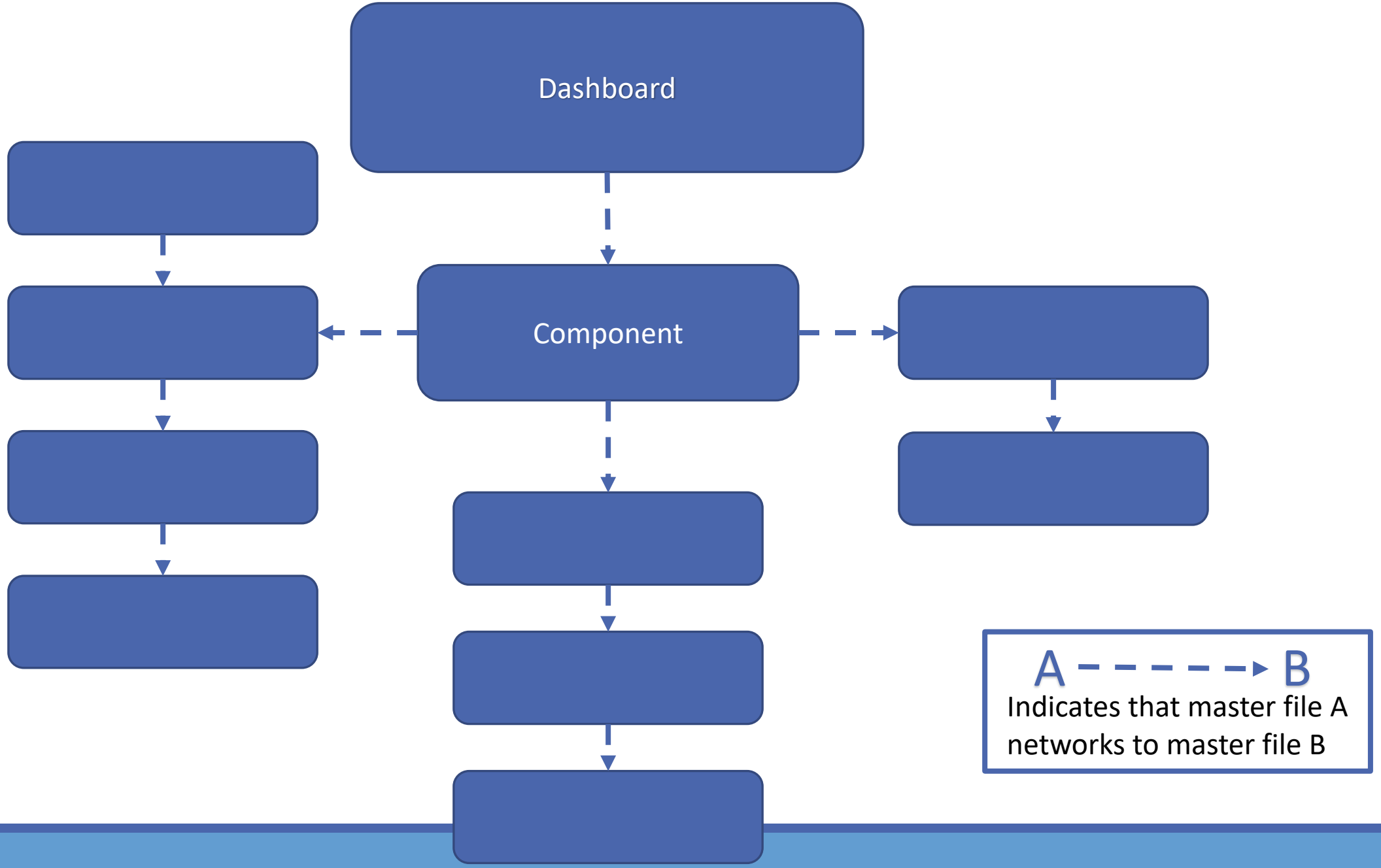
Exercise 3: Document your Findings

You've seen a lot of material about Radar in this lesson. Take this opportunity to challenge your understanding of its major concepts and features.

Exercise 3: Document your Findings

Task	Dashboard View	Component Editor	Dashboard Editor
Change the layout of a dashboard from two columns to three columns			✓
Add a component to a dashboard for all users			✓
Add a component to just your dashboard	✓		
Rearrange components on a dashboard	✓		✓
Change the color of a component	✓	✓	✓
Change the displayed title of a dashboard			✓


A
B
Indicates that master file A networks to master file B


Dashboard
Component
A
B
Indicates that master file A networks to master file B

Agenda: Day 1

- Introduction
- Radar Dashboards
- **SlicerDicer Populations**
- Data Lineage
- Day 1 Lab: Chronicles & the Record Viewer

Exercise 1: SlicerDicer Tutorial

Work through the tutorial. Write down any notes or questions you may have.

What is SlicerDicer?

SlicerDicer is:

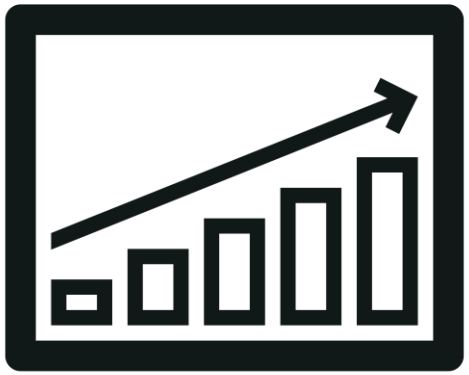
- **A self-service reporting tool**

A pharmacy manager might have a hunch about which non-formulary medications are ordered the most. They could use SlicerDicer to confirm their suspicions instead of submitting a ticket!

What is SlicerDicer?

SlicerDicer is:

- A self-service reporting tool
- **For large data sets**

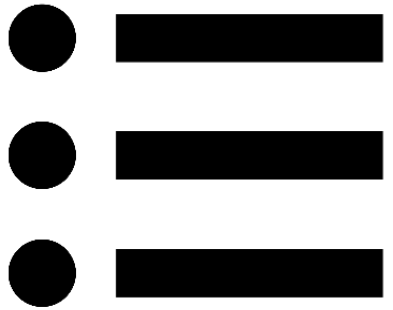


Identify the DRGs (Diagnosis Related Groups) that are most commonly coded on hospital accounts over the last two years. Coding managers can use this information to target coder training efforts on specific common DRGs to have the biggest impact.

What is SlicerDicer?

SlicerDicer is:

- A self-service reporting tool
- For large data sets
- **For small data sets**



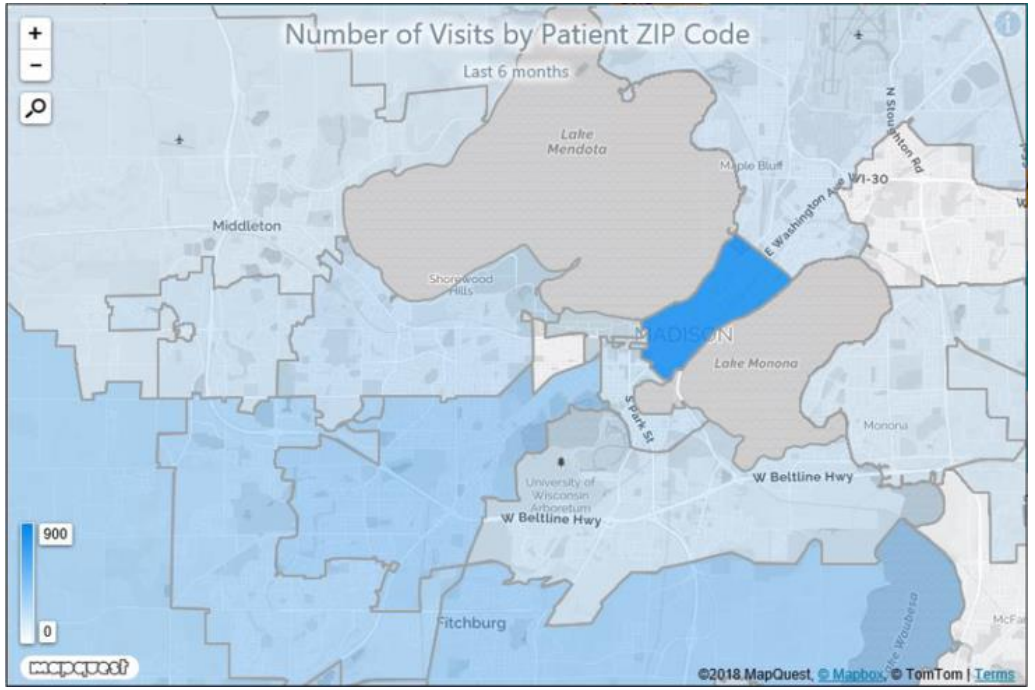
Identify my patients with upcoming appointments who have diabetes and a prescription for brand-name medication. Providers can follow up with these patients and change their prescription to a generic medication, saving money for both the patient and the organization.

What is SlicerDicer?

SlicerDicer is:

- A self-service reporting tool
- For large data sets
- For small data sets
- **For visualizing data**

Use a geographic visualization to break down the number of visits by age, sex or visit type by patient zip code



What is SlicerDicer?

SlicerDicer is:

- A self-service reporting tool
- For large data sets
- For small data sets
- For visualizing data
- **Customizable**

Build your own custom filters and data models. Include non-Epic data from payroll, questionnaires, external claims, and much more…

What isn’t SlicerDicer?

You could not use SlicerDicer to see the current wait times in your Emergency Department or a list of your patients who currently have overdue medications

SlicerDicer is **NOT**:

- **For looking at today’s data**

Write in Workbook

A scheduler wants a population that shows how many appointments there are today with a status of 'Scheduled.' They want to reference this throughout the day to keep track of how many appointments are left to check in. Could this be done in SlicerDicer? Why?

No. A list of scheduled appointments wouldn't change throughout the day.

A user wants a list of surgical cases scheduled in the next week grouped by procedure. They will reference this list at the start of each week to audit room and staff usage. Could SlicerDicer meet this need? Why?

Yes. Even though the list has to include cases scheduled in the future, the cases were scheduled in advance.

What isn’t SlicerDicer?

Two users want to find out how many times patients canceled appointments in the last month:

- George finds a list of all appointments in the last month with a status of ‘Canceled’
- Mildred finds a list of all appointments in the last month with a status of ‘Canceled’ and a cancel initiator of ‘Patient’

SlicerDicer is **NOT**:

- For looking at today’s data
- **For building a static, publicly available shared report.**

SlicerDicer Vocabulary

- Population:
  - Base with Criteria applied

- Filter:
  - A data point used for defining the search, grouping the results, aggregating, or display
  - Usually corresponds to a single column in the Caboodle database

- To Slice:
  - To visually break up one population into many “slices” using a single filter

Exercise 2: Build a Session

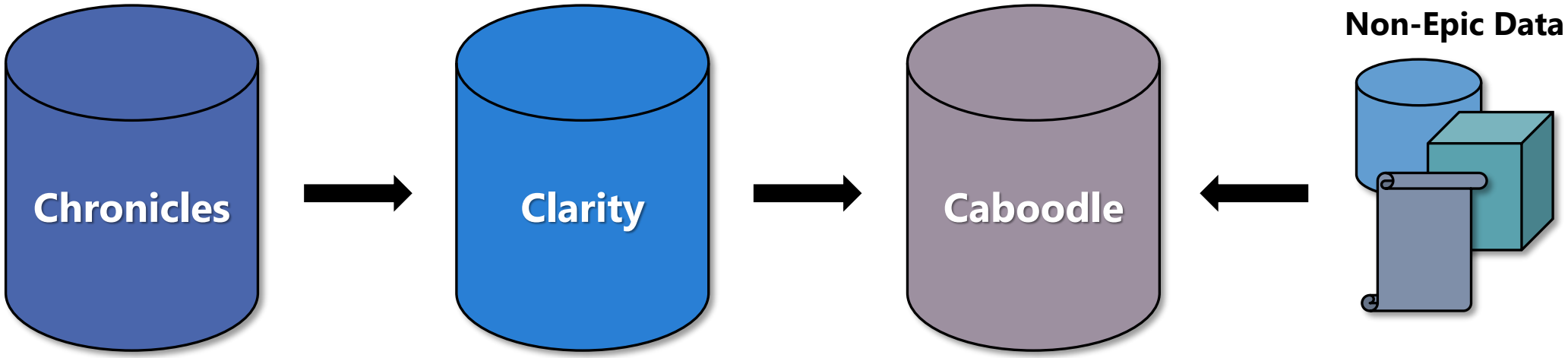
Build a new SlicerDicer session

If you finish early… If You Have Time – Exercise 3: Explore a Session

Agenda: Day 1

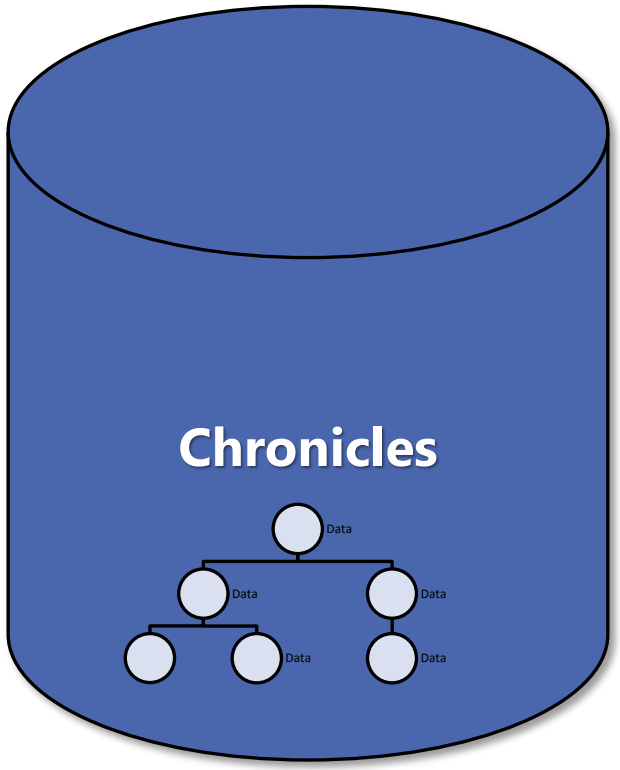
- Introduction
- Radar Dashboards
- SlicerDicer Populations
- **Data Lineage**
- Day 1 Lab: Chronicles & the Record Viewer

Databases



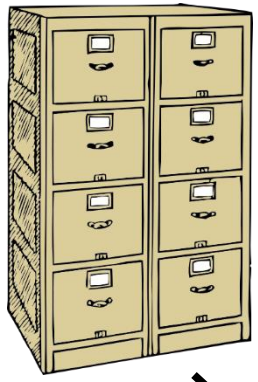
Chronicles

- Hierarchical database (“tree like”)
- Real-time
- Daily operations



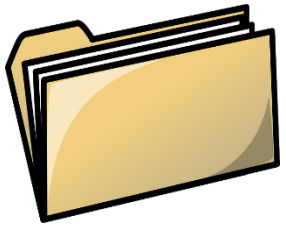
Chronicles Structure

Storage
(Chronicles)



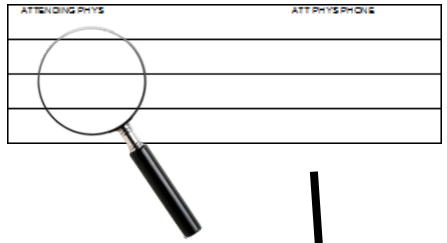
Patient Records
(Master File)

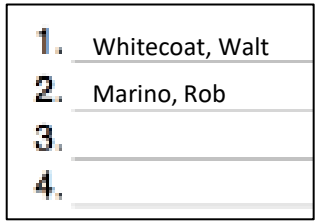
Aubrey's Folder
(Record)



12/28/2016
Admission
(Contact)

Attending
Providers
(Item)

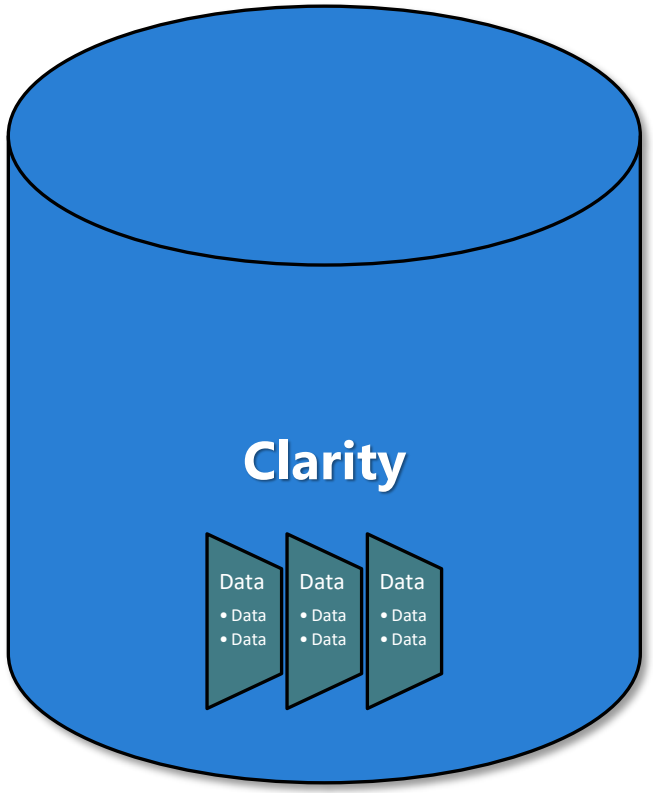




First Attending Provider
(Line)

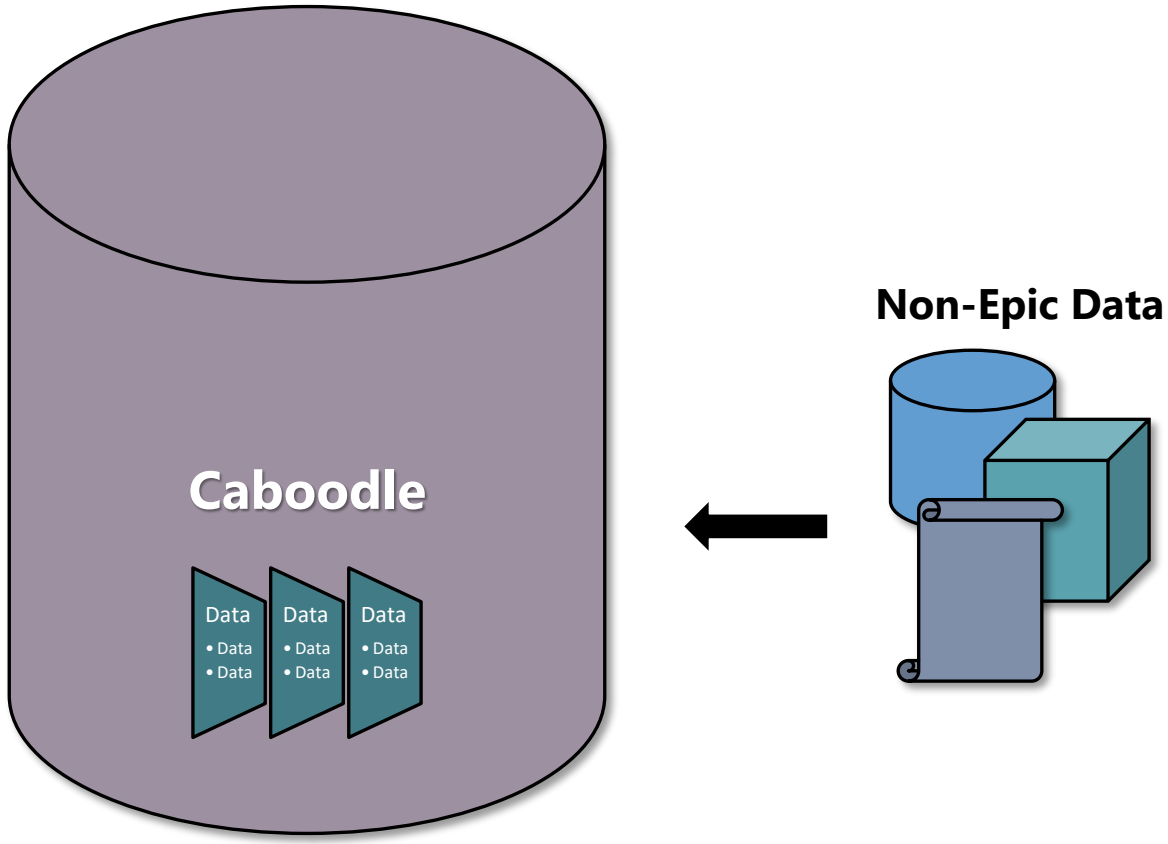
Clarity

- Relational database
- For reporting
- Normalized



Caboodle

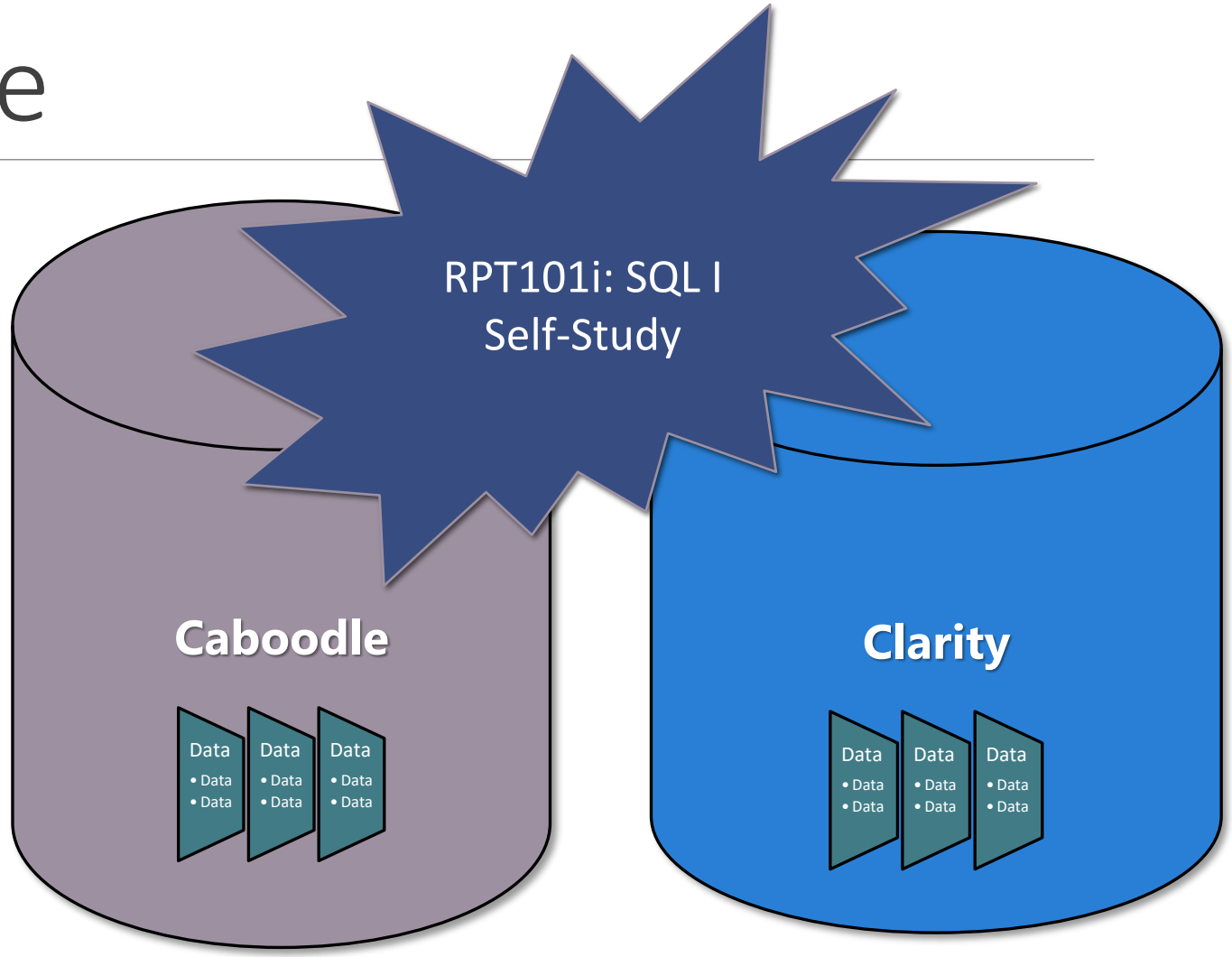
- Relational database
- Optimized for reporting and data exploration
- Dimensional
- Includes non-Epic data



Clarity & Caboodle

- Accessed using SQL

```
SELECT
FROM
WHERE
GROUP BY
HAVING
ORDER BY
```

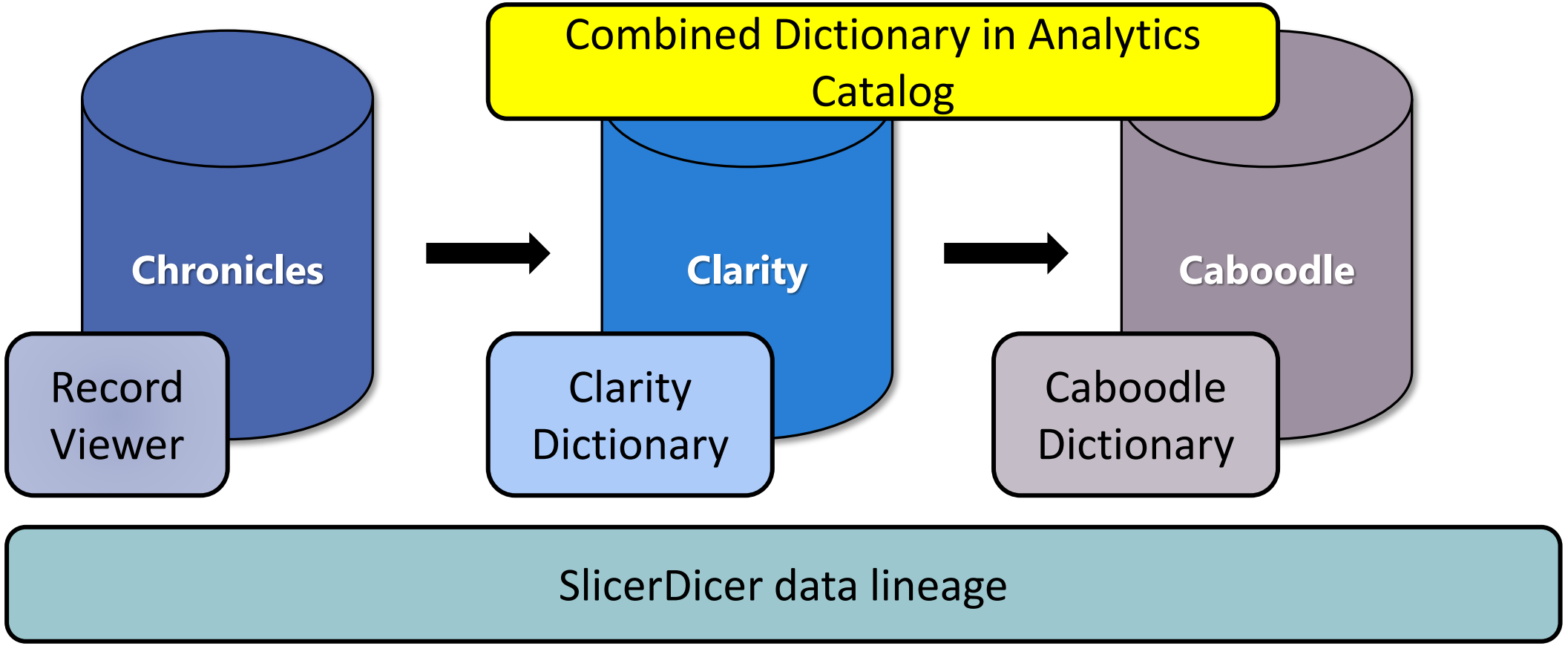


Write in Workbook

When you can, write reports using Caboodle rather than Clarity.

Use Clarity if the information you're looking for is not in Caboodle.

Investigating Data



Write in Workbook

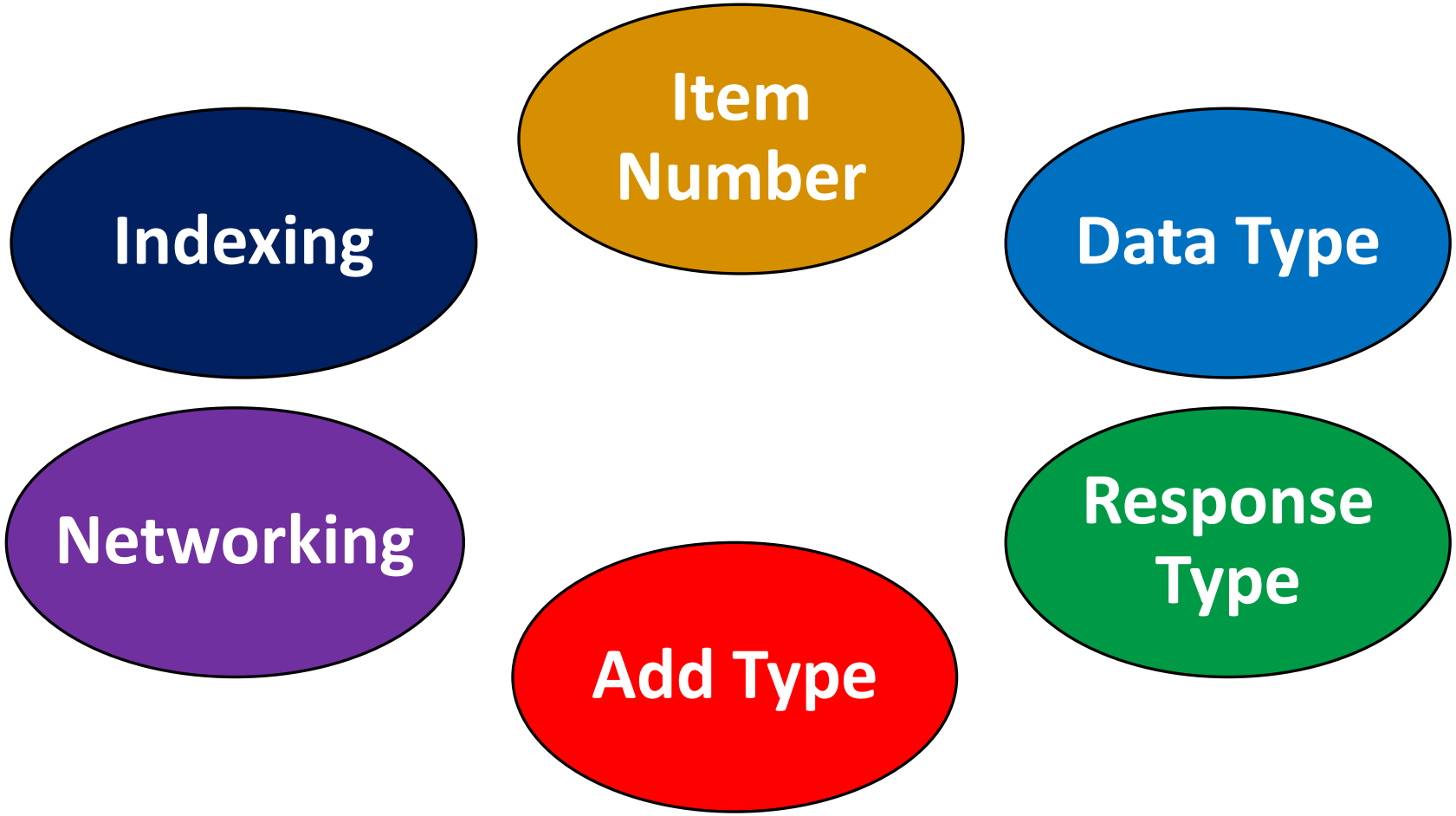
What department was Ruth's visit at?

EMC Family Medicine

Exercise 1: Investigate a Record in Chronicles

In this exercise, you will investigate a record in Chronicles using the Record Viewer activity.

Item Characteristics



Item Numbers

- Item numbers **do not** hold meaning across master files
  - For example, EPT 50 is the patient's address but SER 50 is provider subgroup
- There are two exceptions
  - Item .1 (read "Dot 1") stores the record's **unique ID**
  - Item .2 (read "Dot 2") stores the record's **name**
    - Not every master file has a .2 item

Data Types

String	Number	Date
Free-text	Integer or decimal	Number of days since 12/31/1840

Time	Instant	Category
Number of seconds since midnight	Number of seconds since midnight on 12/31/1840	Limited list of choices

Add Types

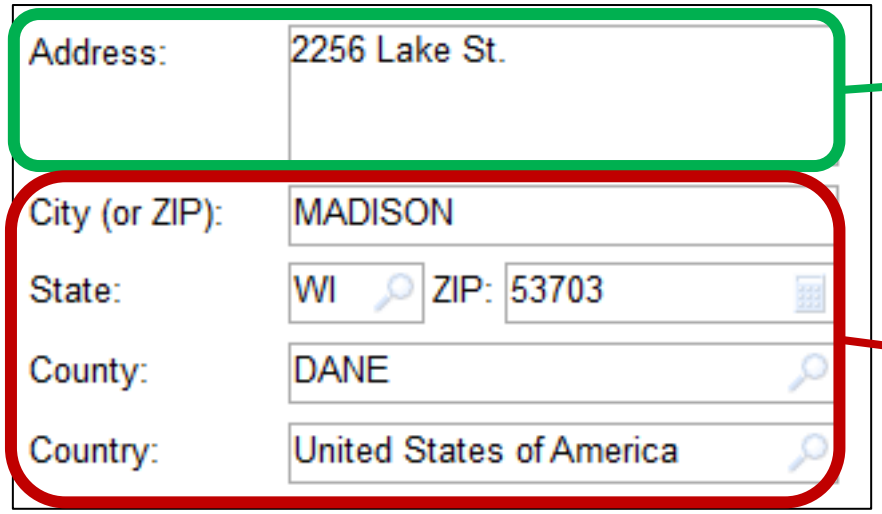
- No-Add
  - Data is valid across all contacts in a record
  - Example: SSN
- Response Each Time
  - Data must be entered for each contact
  - Example: Blood Pressure
- Lookback
  - If data isn't entered for a contact, the most recent value is recorded
  - Example: OB/GYN Status

Overtime

Response Types

- Single
  - One line of data
- Multiple
  - More than one line of data
- Related
  - Two or more items linked together
  - More than one line of data

Response Types – Examples



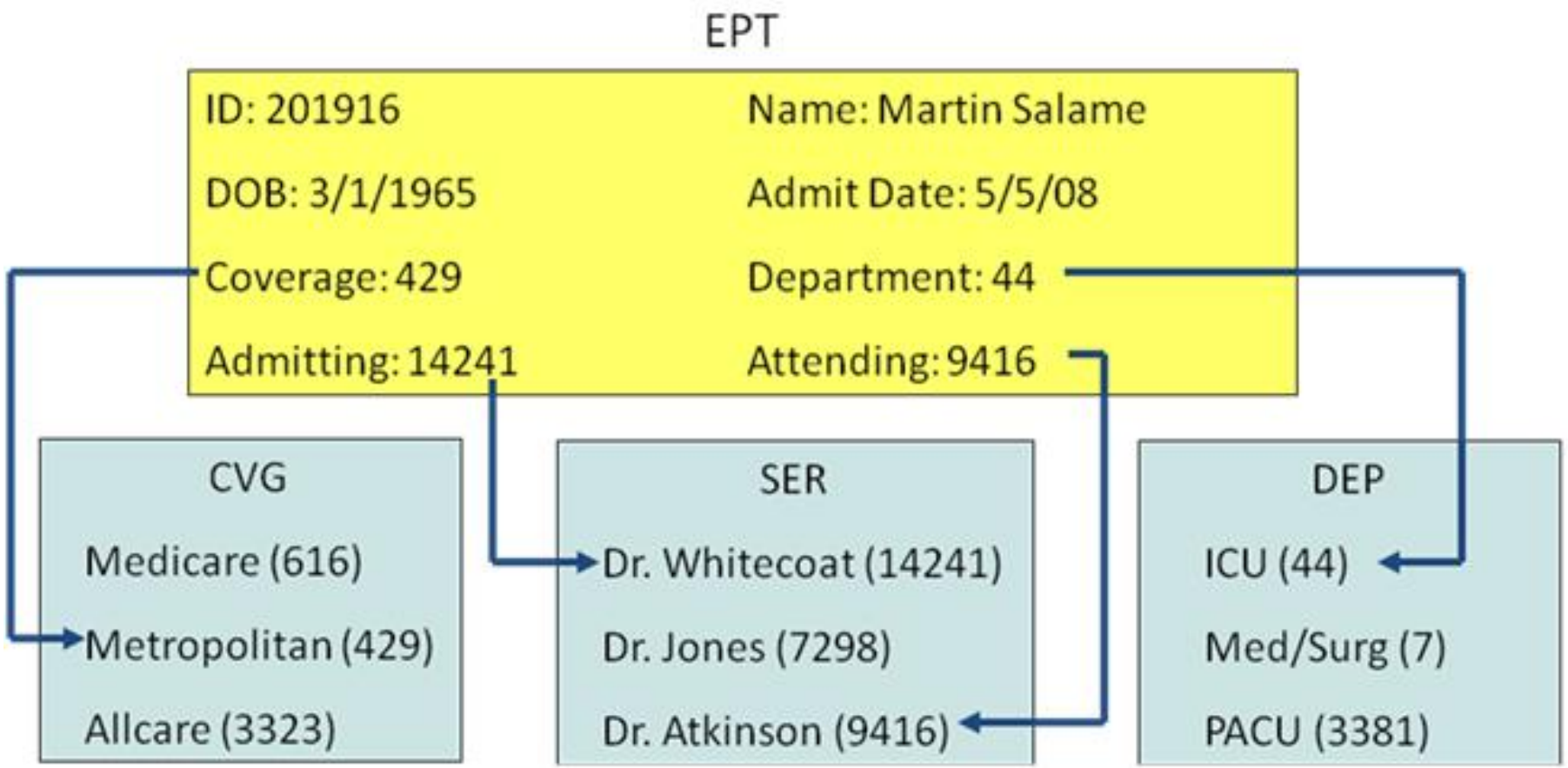
Multiple

Single

	Attending Provider	From Date	From Time	To Date	To Time
1	WHITECOAT, WALT [99080]	9/14/2013	0941	9/20/2013	1200
2	MARINO, ROB [99146]	9/20/2013	1200	10/14/2013	0833
3					

Related

Networking


EPT
ID: 201916
Name: Martin Salame
DOB: 3/1/1965
Admit Date: 5/5/08
Coverage: 429
Department: 44
Admitting: 14241
Attending: 9416
CVG
Medicare (616)
Metropolitan (429)
Allcare (3323)
SER
Dr. Whitecoat (14241)
Dr. Jones (7298)
Dr. Atkinson (9416)
DEP
ICU (44)
Med/Surg (7)
PACU (3381)

Indexing

Patient	Current General PCP
Amy Green	Dr. Whitecoat
Kristi Schuler	Dr. Silver
Martin Salame	Dr. Whitecoat
Adam Carey	Dr. Johnson
Melissa Ebhart	Dr. Chen
…	…

Current General PCP	Patient
Dr. Johnson	Adam Carey
Dr. Whitecoat	Amy Green
Dr. Whitecoat	Martin Salame
Dr. Silver	Kristi Schuler
Dr. Chen	Melissa Ebhart
…	…

Agenda: Day 1

- Introduction
- Radar Dashboards
- SlicerDicer Populations
- Data Lineage
- **Day 1 Lab: Chronicles & the Record Viewer**

Lab Time

Take this time to review the day's content, or complete the **Day 1 Lab**. In this lab, you will learn the structure of Chronicles and how to use the Record Viewer to investigate data in Chronicles.

If you do not yet feel completely confident in today's chapters, you should take this time to:

- Flag down a trainer for some 1-1 review
- Complete any exercises you did not have time for or still have questions on
- Read through the chapter review questions and Study Checklists to test your understanding

Trainers will be available to help and answer questions until 5pm.

We'll see you tomorrow at 8:30! Enjoy your evening!

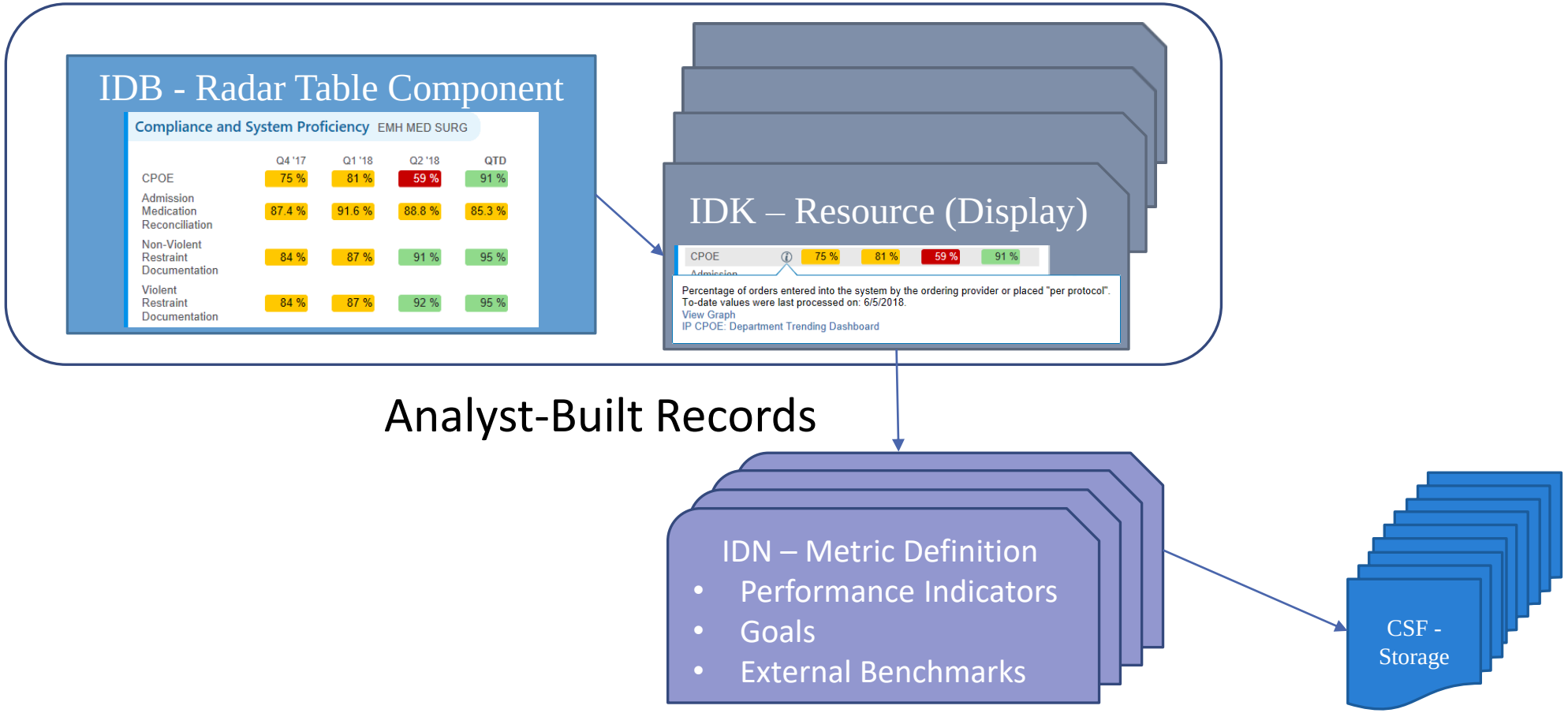
Agenda: Day 2

- **Dashboard Metrics**
- Workbench Reports
- Day 2 Lab: Epic-Released Content

Metrics Definitions

- IDM – Dashboards
- IDB – Components
- IDK – Dashboard Resources
- IDN – Metric Definitions
- CSF – Cogito Summarized Facts (The actual data)

Metrics Definitions



Exercise 1: Explore a Metrics Dashboard

In this exercise, you will explore how users can interact with metric-based dashboards.

Where do Metrics get their data?

- Chronicles
- Registries
- Clarity
- Caboodle
- Datalink
- Scheduled batch jobs
- Manual data import
- And much, much more…

Exercise 2: Build a Metric-Based Component

- Create an IP CPOE dashboard resource. This resource should use the COG170 00 IP CPOE metric (IDN record).
- Create a table component of a type of Historical Trending that allows multiple resources.

It should display data from your IP CPOE resource as well as the IP Clarity Admission Medication Reconciliation [11054] resource.

The component should display department-level data and should determine potential summary targets by login user and department.

Present the data as a table and display four months of data.

Add this component your Starter Dashboard.

Allow Multiple: Resources vs Targets

Resources

Compliance and System Proficiency EMC FAMILY MEDICINE

	Q2 '17	Q3 '17	Q4 '17	QTD
CPOE	85 %	75 %	84 %	89 %
Admission Medication Reconciliation	89.5 %	94.0 %	92.7 %	93.5 %
Non-Violent Restraint Documentation	59 %	72 %	84 %	92 %
Violent Restraint Documentation	85 %	80 %	100 %	100 %

Targets

CPOE Compliance by Department

	Dec 17	Jan	Feb	Mar	MTD
EMH MED SURG	76 %	78 %	79 %	81 %	84 %
EMH MAIN OR	77 %	78 %	81 %	83 %	83 %
EMH CARDIAC ICU	76 %	78 %	81 %	83 %	85 %
EMH EMERGENCY	74 %	80 %	76 %	80 %	86 %

Write in Workbook

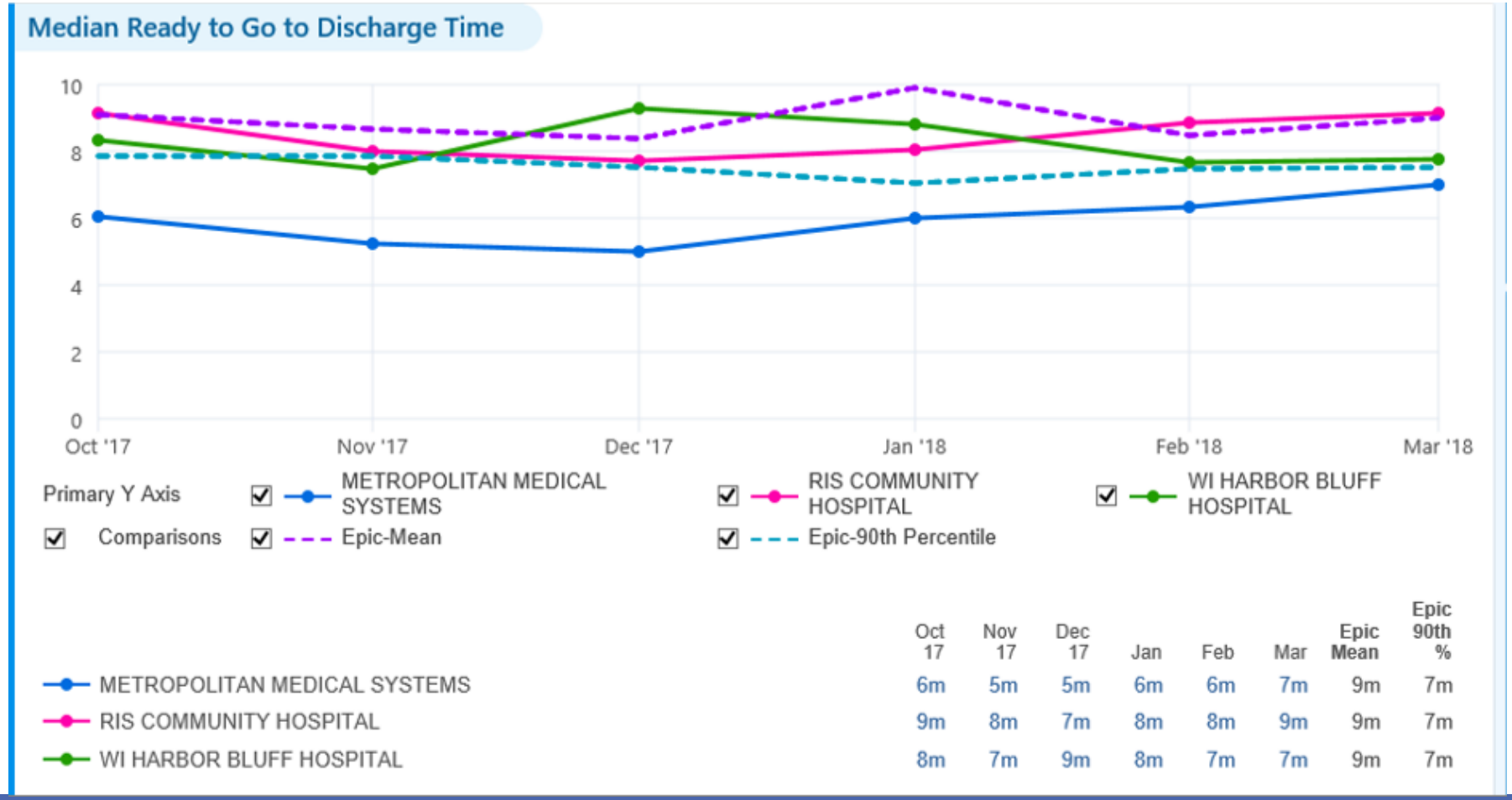
When you allow multiple summary locations in a metric-based component, how many resources (IDK) can be added to the component? How can you tell from the Data Source form in Component Editor?

One, the resource field becomes single response.

How could you add more summary targets to the component? What did this button control before?

Clicking the Add button. This used to be how you added multiple resources to the component.

Benchmarking



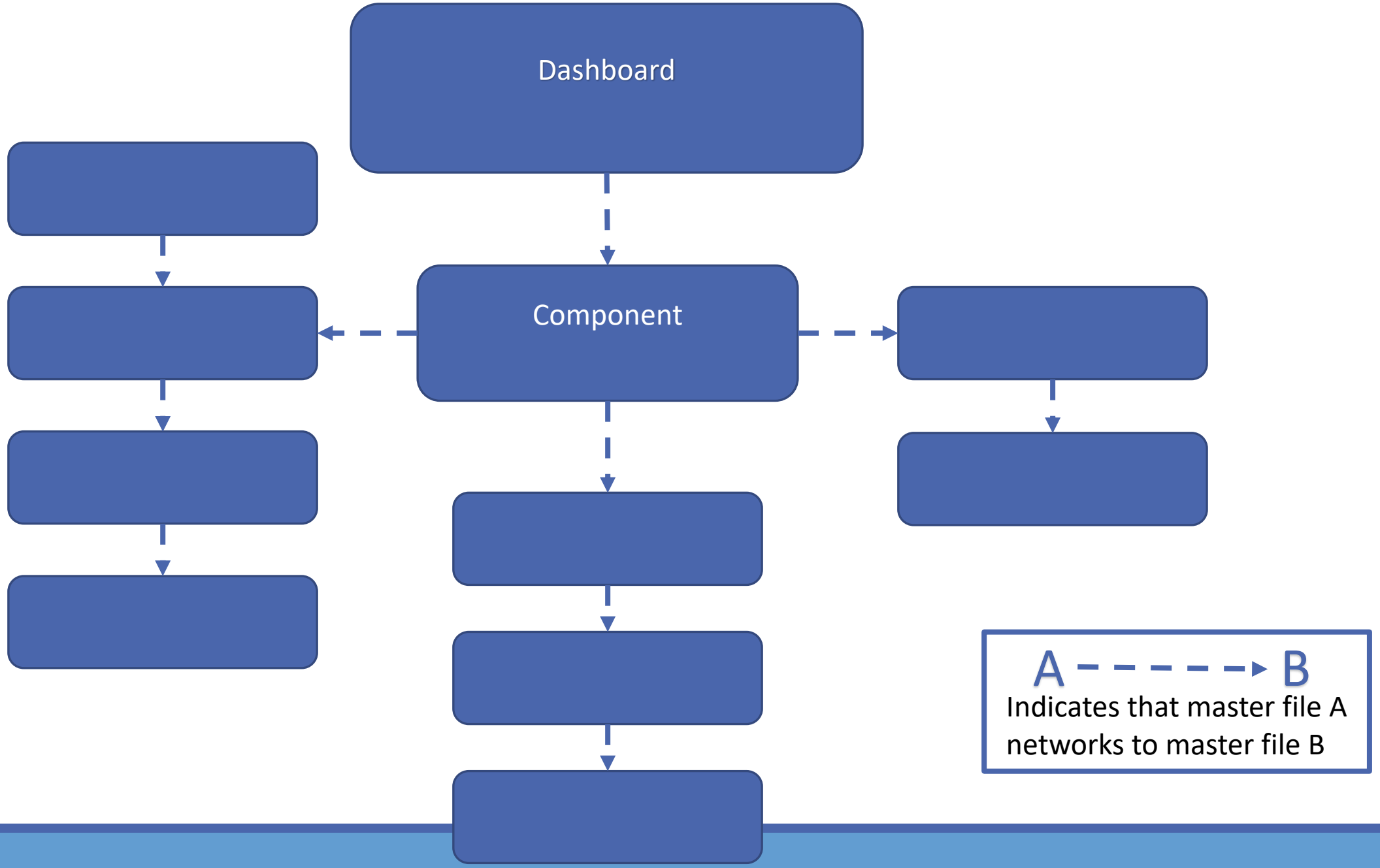
	Oct 17	Nov 17	Dec 17	Jan	Feb	Mar	Epic Mean	Epic 90th %
METROPOLITAN MEDICAL SYSTEMS	6m	5m	5m	6m	6m	7m	9m	7m
RIS COMMUNITY HOSPITAL	9m	8m	7m	8m	8m	9m	9m	7m
WI HARBOR BLUFF HOSPITAL	8m	7m	9m	8m	7m	7m	9m	7m

Exercise 3: Build a Resource-Based Component on Multiple Summary Targets

In this exercise, you will build a component in which each row represents a different summary target's data for a given resource.

If You Have Time – Exercise 4: Define Report Links on a Resource

In this exercise, you will incorporate SlicerDicer and Report links into your COG170 ## IP CPOE resource.


Dashboard
Component
A - - - - - - B
Indicates that master file A networks to master file B

Agenda: Day 2

- Dashboard Metrics
- **Workbench Reports**
- Day 2 Lab: Epic-Released Content

Resources

- Reporting Workbench Setup and Support Guide
- Reporting Workbench Report Design Specification
- Report Testing Forms
- Cogito Strategy Handbook

Workbench Framework

A template is a record in:

HGR

A report is a record in:

HRX

A set of results is a record in:

HRN

Exercise 1: Viewing and Sorting a Report

In this exercise, you will practice working with report results as a point-and-click user.

Write in Workbook

A patient, Jackson Shehulk, has had 5 office visits in the last year. Three of these office visits were with Dr. Marino, and two were with Dr. Whitecoat.

A user builds the following report:
Find all patients with an office visit in the last year where the visit provider was Dr. Marino.

How many rows would Jackson have in the results if this report were record-based?

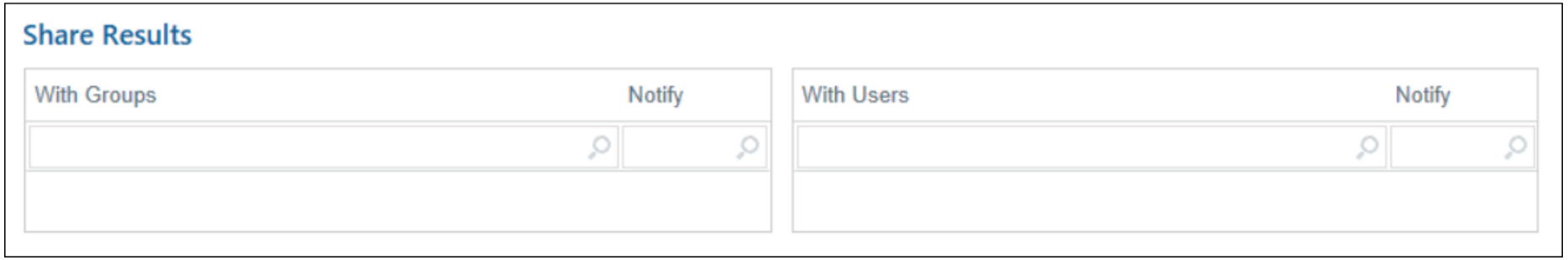
1

How many if it were contact-based?

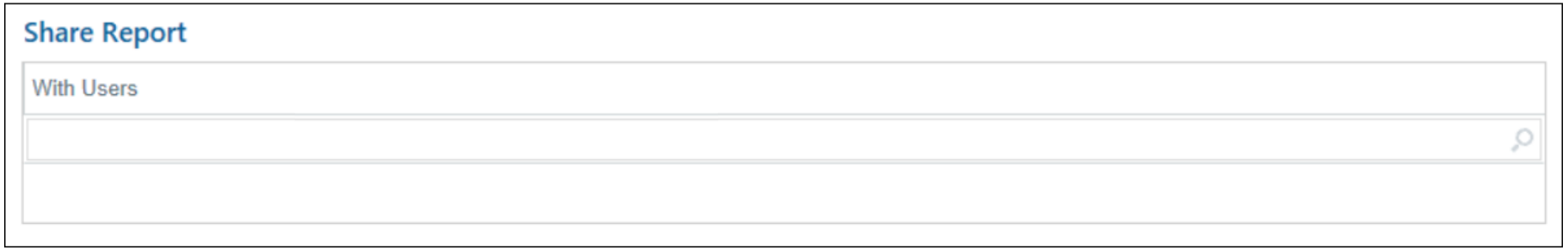
3

Report Sharing

PUBLIC REPORT



PRIVATE REPORT

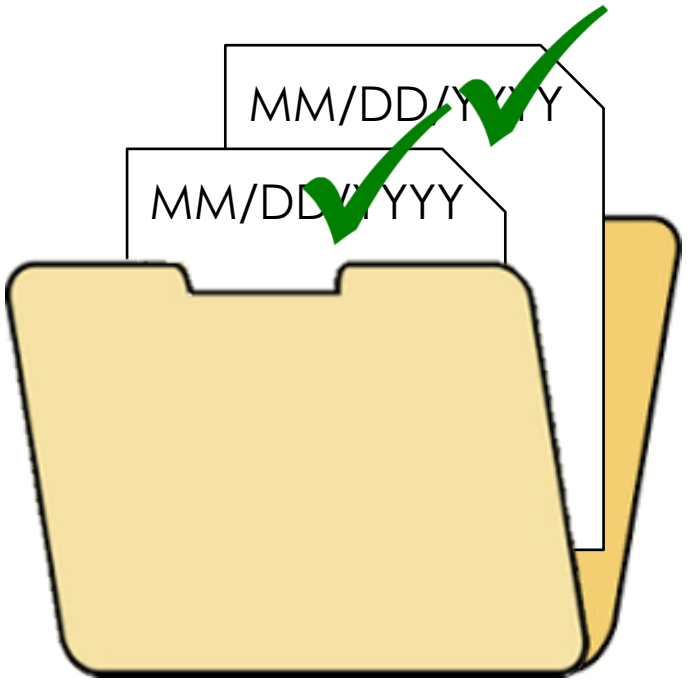


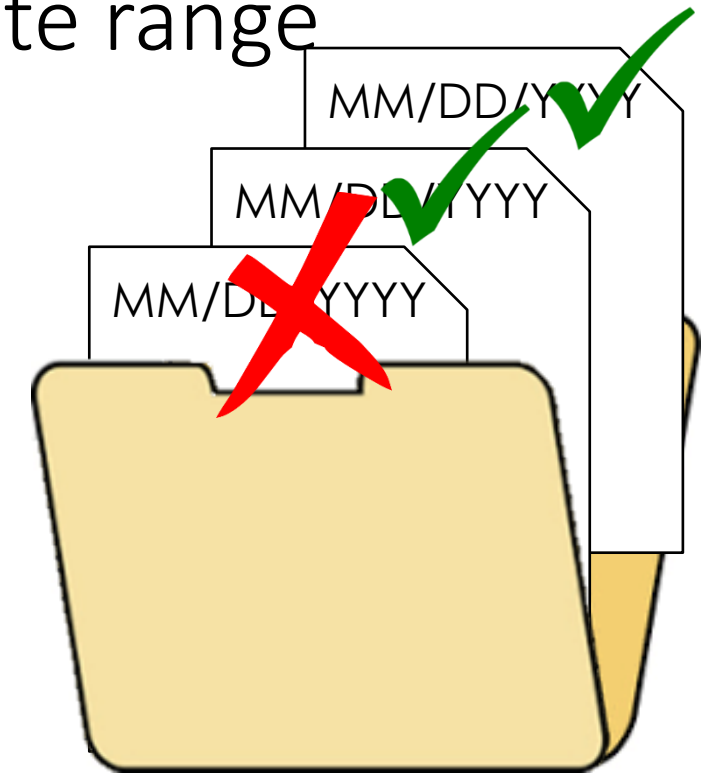
Date Range: Step 1

Filter on record-level items

Date Range: Step 2

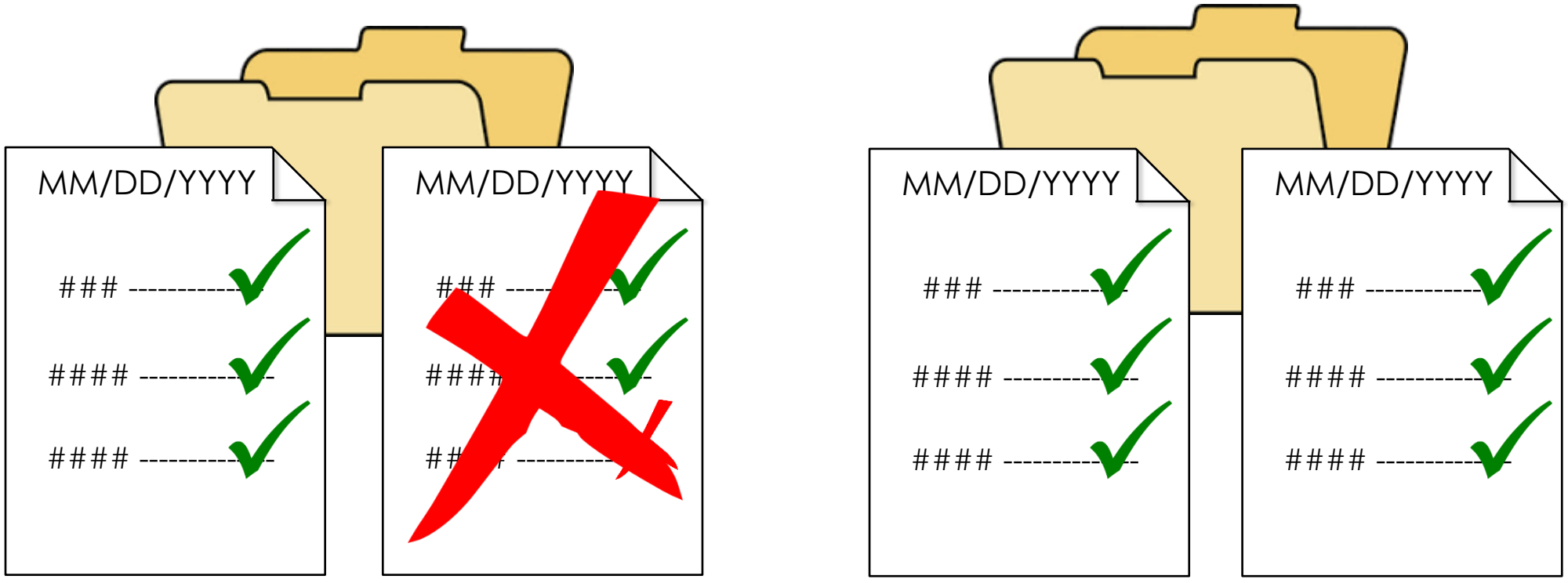
Select contacts within the date range





Date Range: Step 3

Filter on contact-level items



Exercise 2: Date Range in Workbench Reports

In this exercise, you will investigate when the date range in the Report Settings window applies to criteria.

Exercise 3: Build and Modify a Report

In this exercise you will create a report from an existing template in the Analytics Catalog.

Physicians at your clinic want to keep track of patients with a high BMI. You have a request to build a report that displays all patients in the city of Madison who have had a high BMI recorded at a recent visit.

Write in Workbook

What would be a good reason to build a summary in Reporting Workbench instead of using SlicerDicer?

The summary must include data from today

The data you're reporting on is not extracted to Caboodle

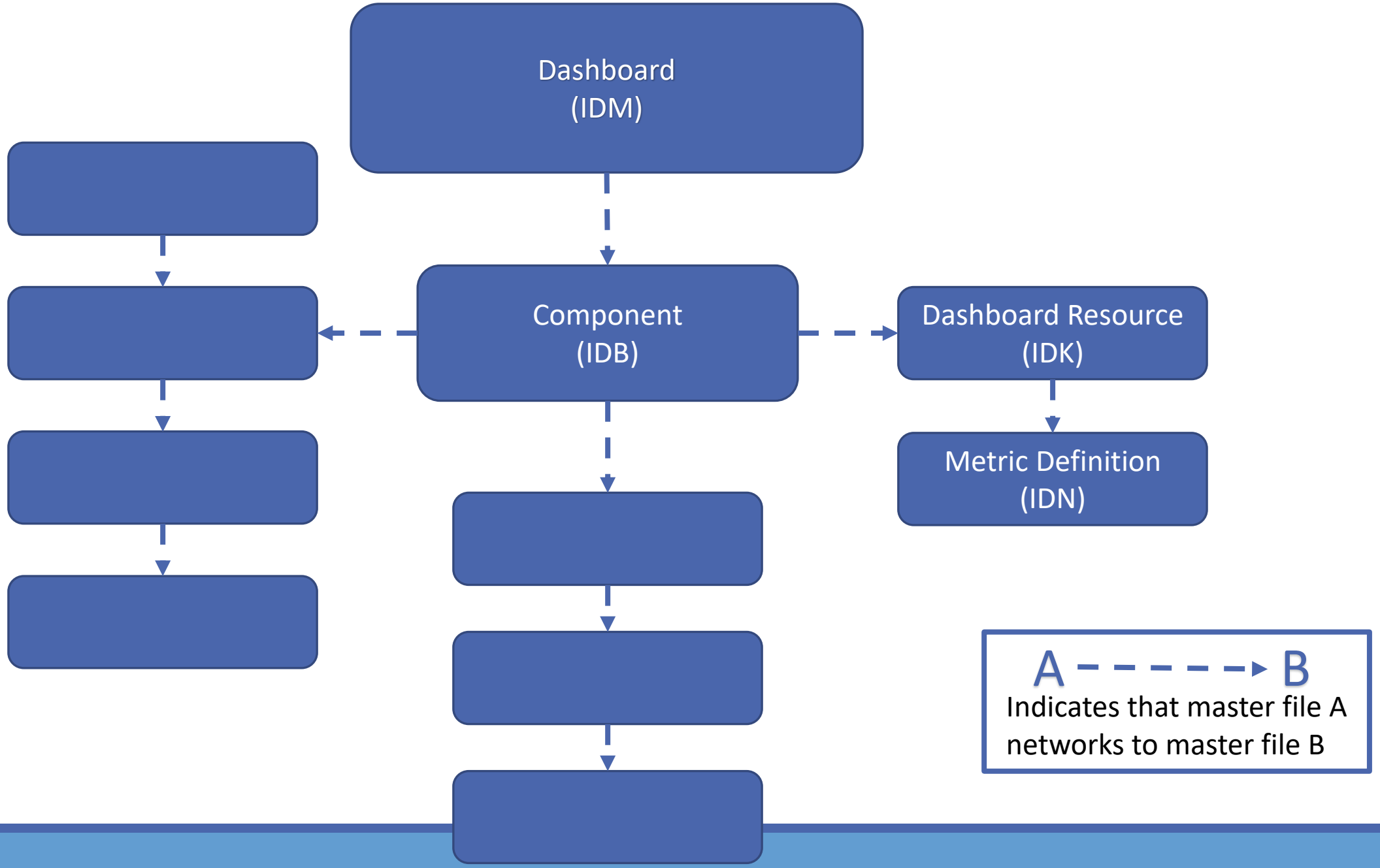
Write in Workbook

In which master file is each report model a record?

HSQ

Exercise 4: Distributing Reports on a Dashboard

- Build a link and report listing component


Dashboard
(IDM)
Component
(IDB)
Dashboard Resource
(IDK)
Metric Definition
(IDN)
A
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Indicates that master file A networks to master file B

Agenda: Day 2

- Dashboard Metrics
- Workbench Reports
- **Day 2 Lab: Epic-Released Content**

Lab Time

Take this time to review the day's content, or complete the **Day 2 Lab**. In this lab, you will learn how to use Epic's online documentation to research what content is available, how to leverage the content, and how to tweak it to suit your needs.

If you do not yet feel completely confident in today's chapters, you should take this time to:

- Flag down a trainer for some 1-1 review
- Complete any exercises you did not have time for or still have questions on
- Read through the chapter review questions and Study Checklists to test your understanding

Trainers will be available to help and answer questions until 5pm.

We'll see you tomorrow at 8:30! Enjoy your evening!

Agenda: Day 3

- **Summaries**
- Report Requests
- Troubleshooting
- Analytics Catalog
- Cogito Roles
- Day 3 Lab: Building Reports

Grouping

Patient Name	Patient MRN	Encounter Date	Department	Total charges
Anna Allen	111	1/1/2011	AA Clinic	$100
Barry Brown	222	1/1/2011	BB Clinic	$100
Barry Brown	222	1/14/2011	BB Clinic	NULL
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Denise Drake	444	2/2/2011	CC Clinic	$300
Eli Emery	555	3/3/2011	BB Clinic	$0
Frank Ford	666	4/4/2011	NULL	$400
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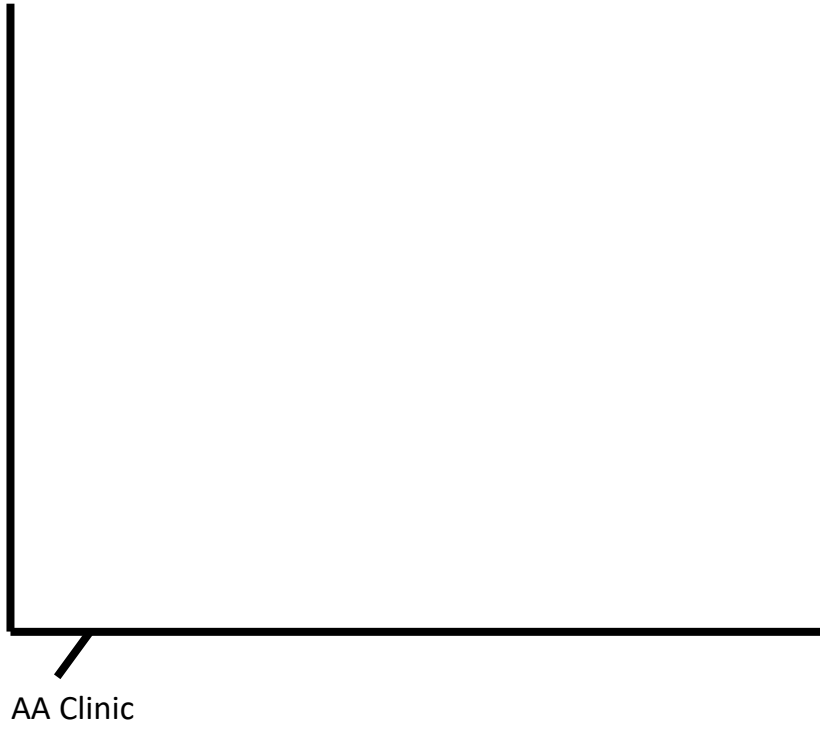
Haleem Hadi	999	NULL	NULL	NULL
Iago Ingersoll	101	1/10/2012	BB Clinic	$700
Anna Allen	111	2/10/2012	AA Clinic	$100

Grouping (by Department)



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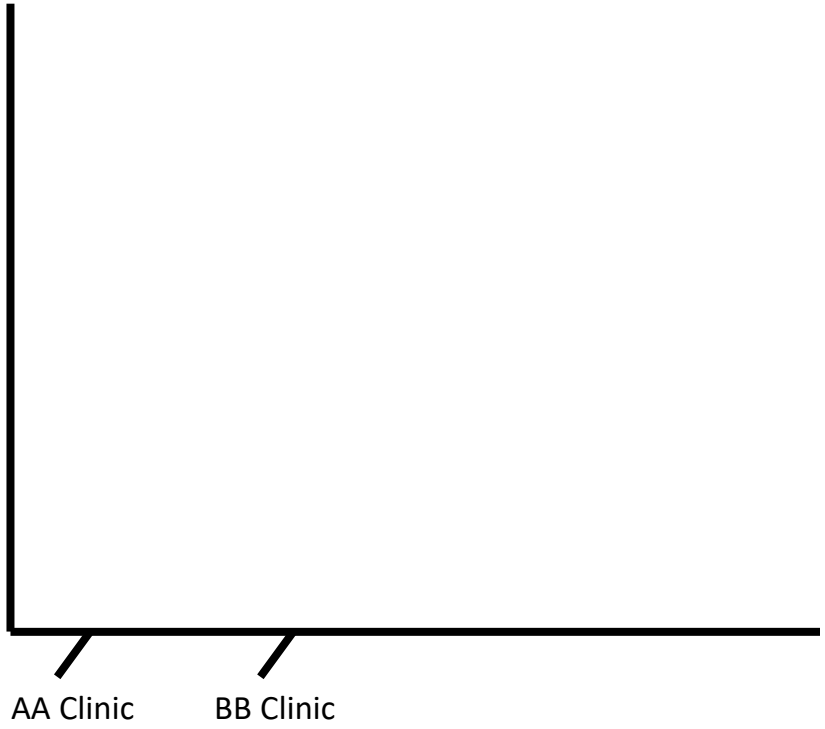
Anna Allen	111	2/10/2012	AA Clinic	$100

Grouping (by Department)



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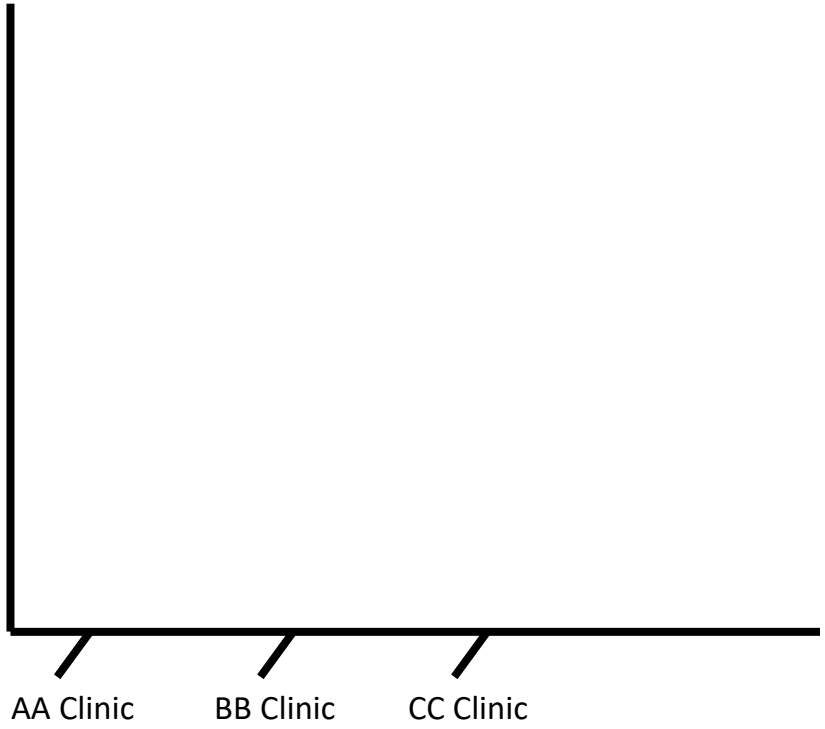
Grouping (by Department)



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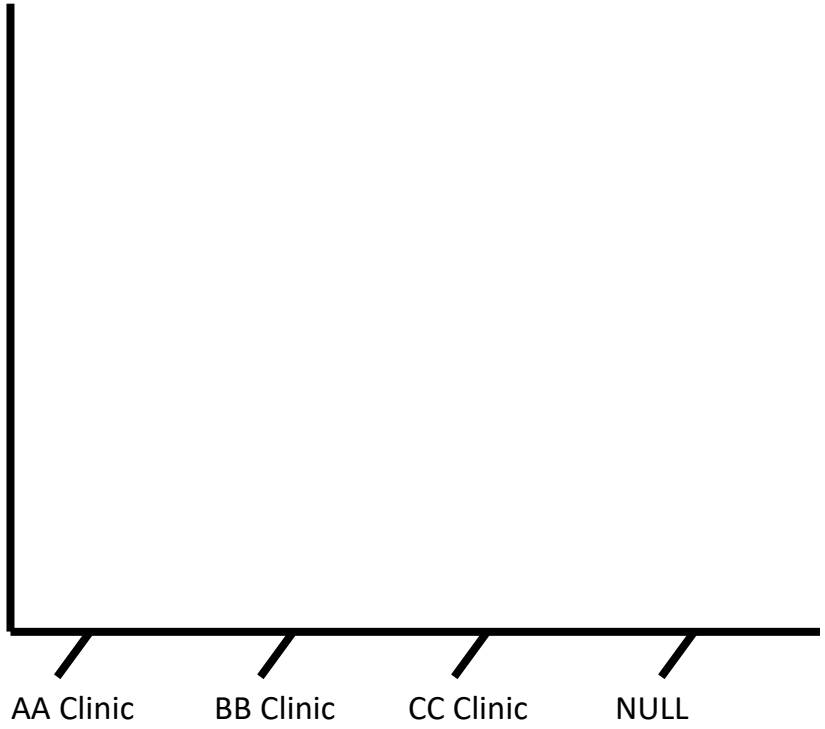
Grouping (by Department)



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Grouping (Patient Name)

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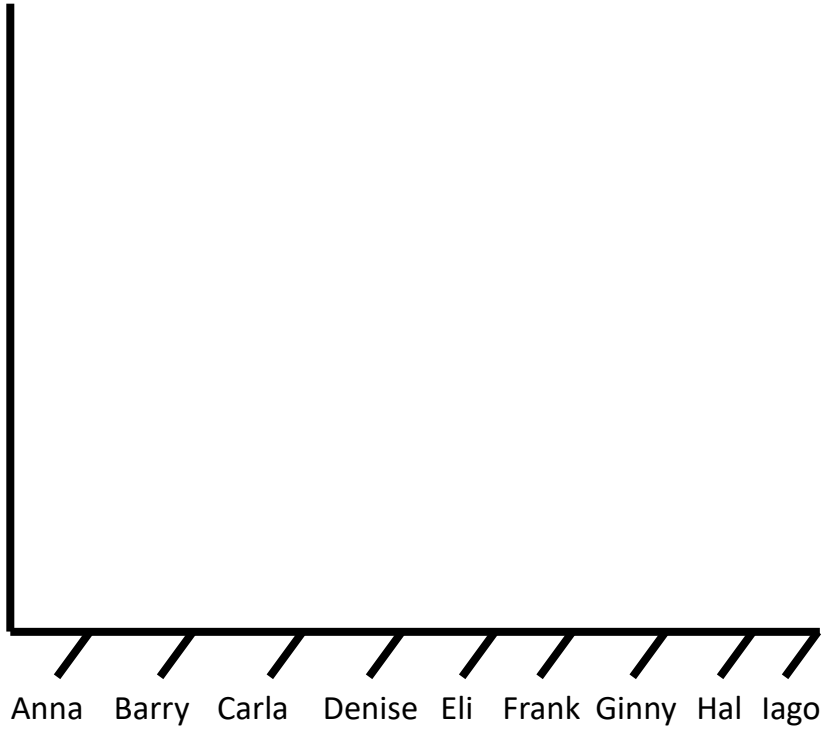
Grouping (Patient Name)



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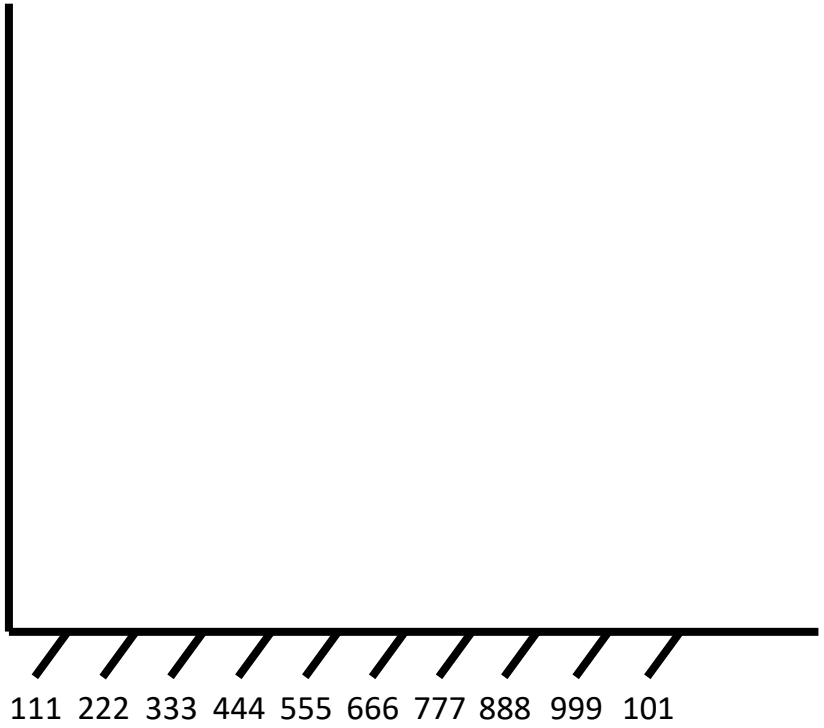
Grouping (Patient MRN)



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Write in Workbook

How many groups would the summary have if it was grouped by Patient Name?

9

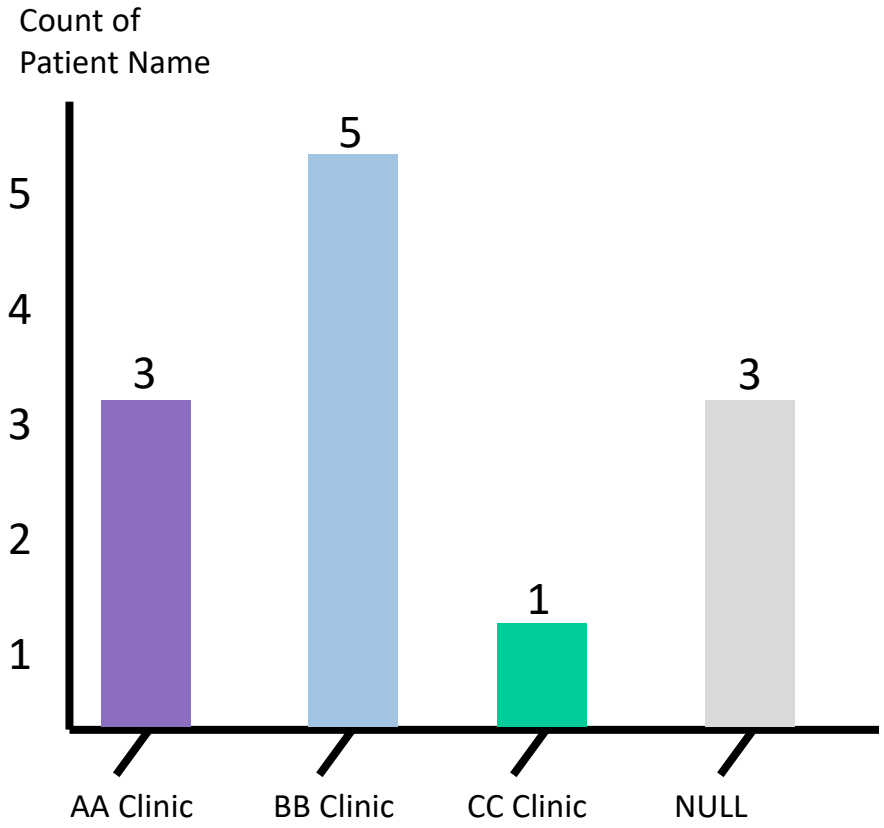
How many if it was grouped by Patient MRN?

10

Summarization Functions

- Count
- Count Unique
- Sum
- Average
- Percentage

Count (by Department)



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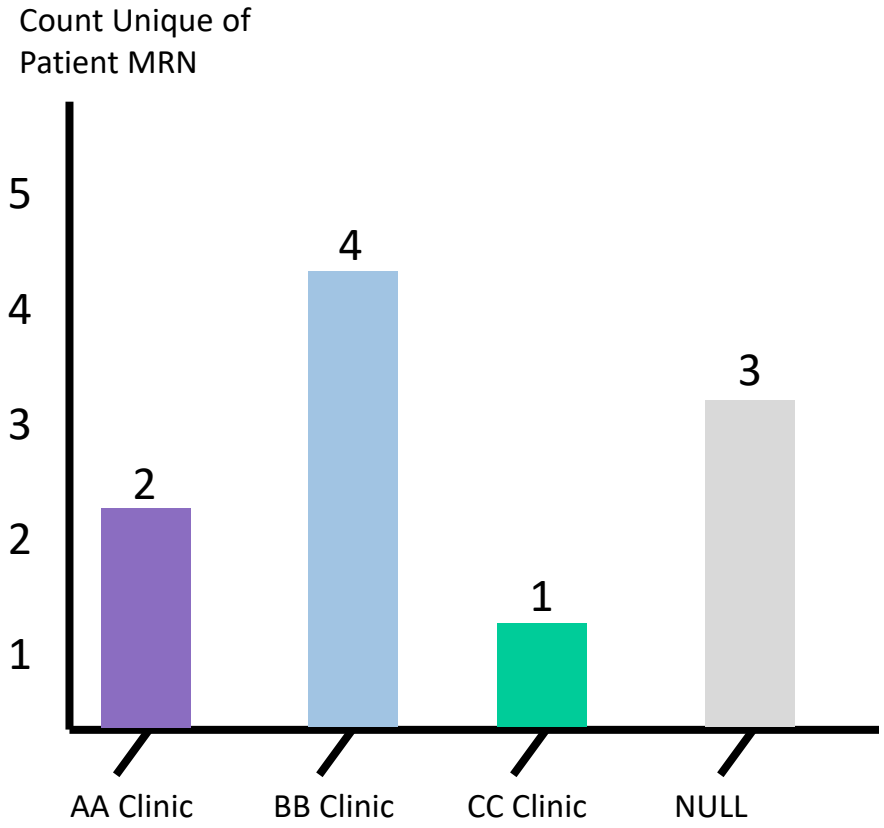
Count Unique (by Department)



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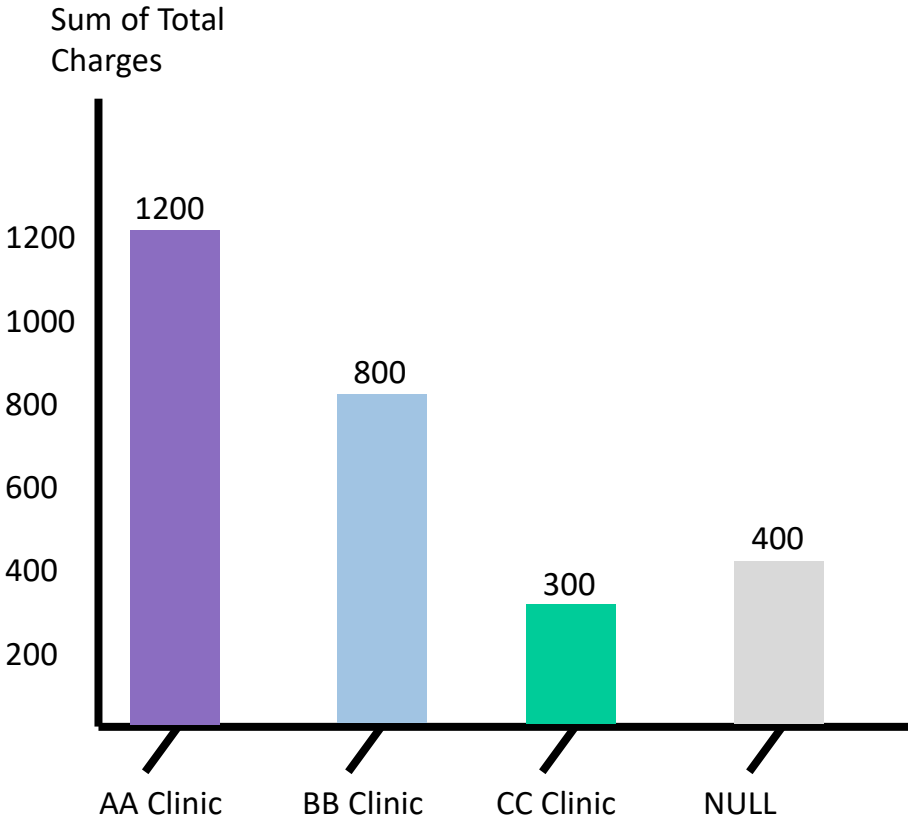
Sum (by Department)



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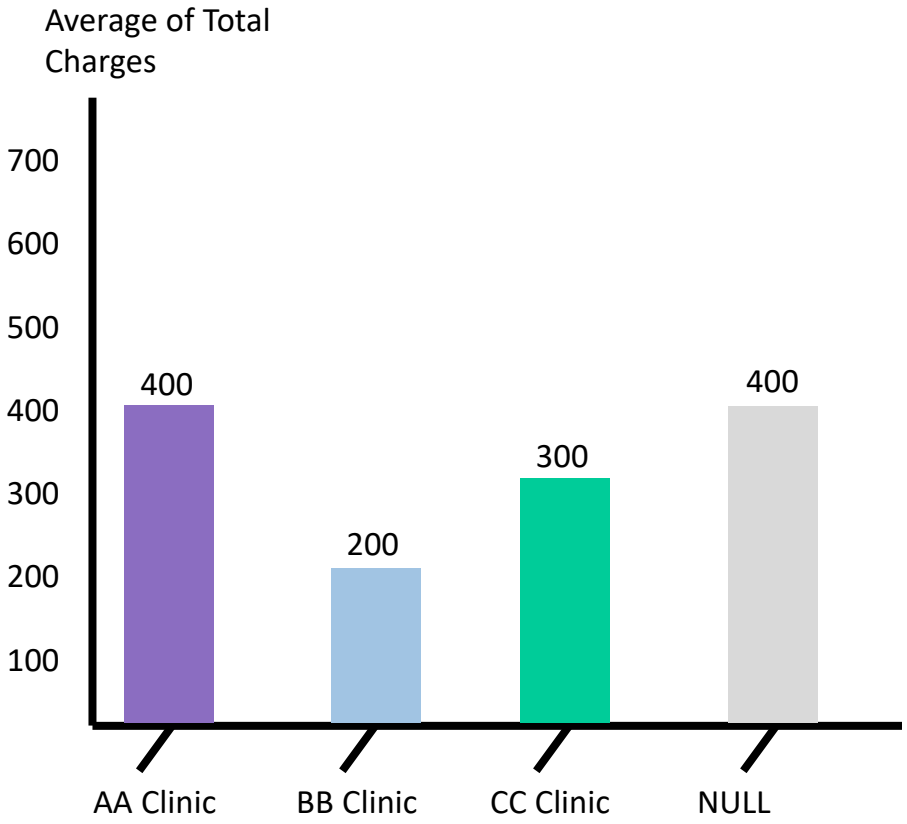
Average (by Department)



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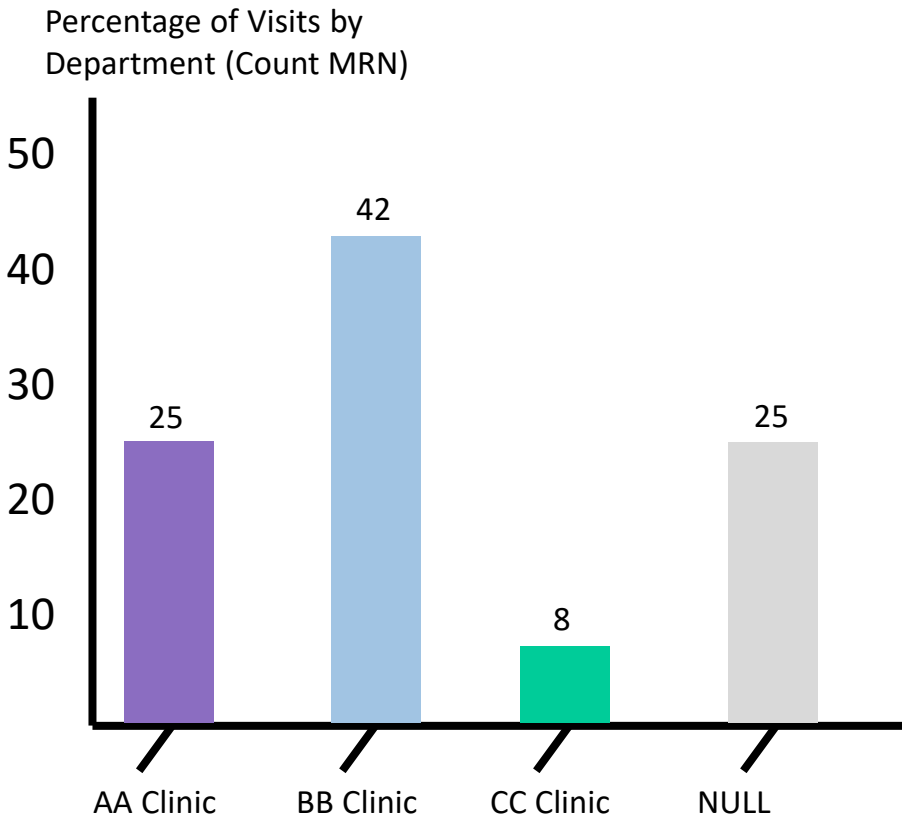
Percentage (by Department)



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Exercise 1: Which Function?

For each example, choose the correct summarization function(s) you might need.

Exercise 1: Which Function?

For each example, choose the correct summarization function(s) you might need.

1. How much money did we charge in 2011?

   Sum

2. How many patients were seen in each clinic?

   Count Unique

3. How much money do we usually receive from Medicare for each knee replacement procedure?

   Average

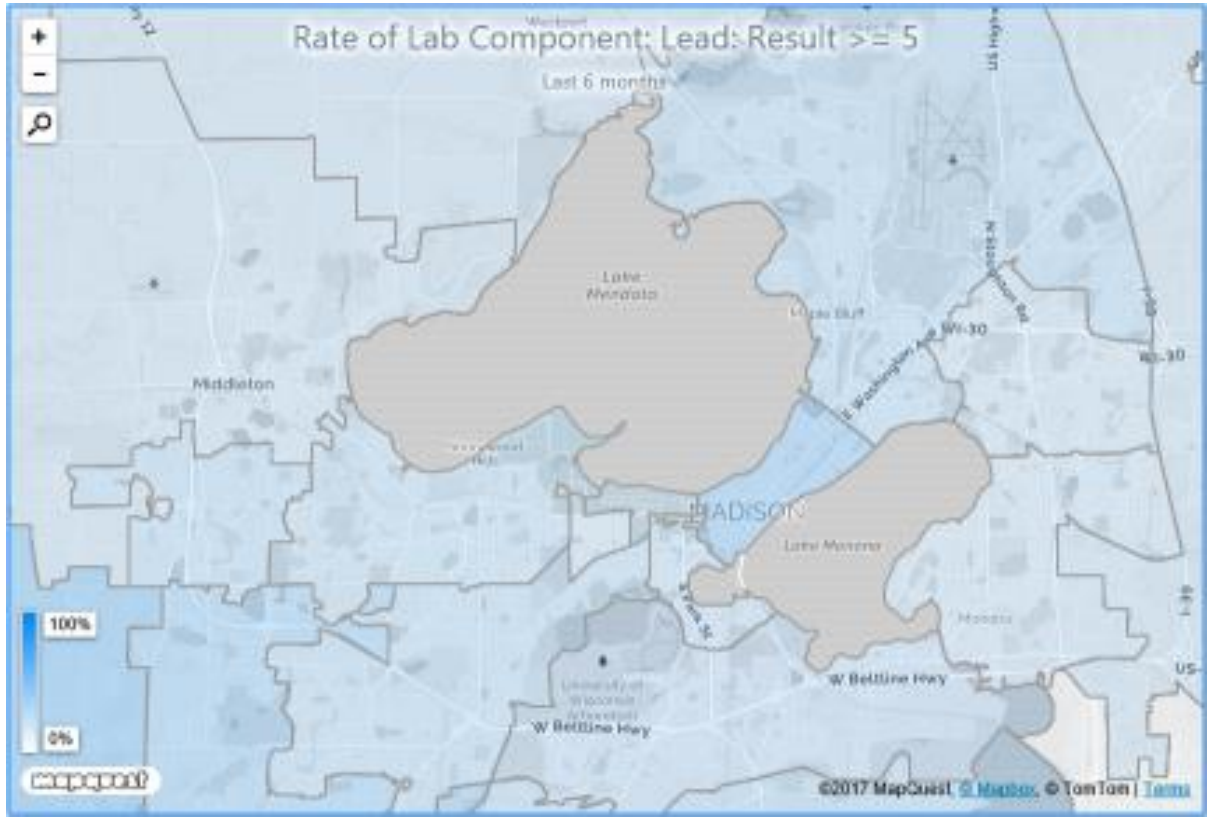
4. For each provider, how often are they prescribing drugs from the Statins grouper?

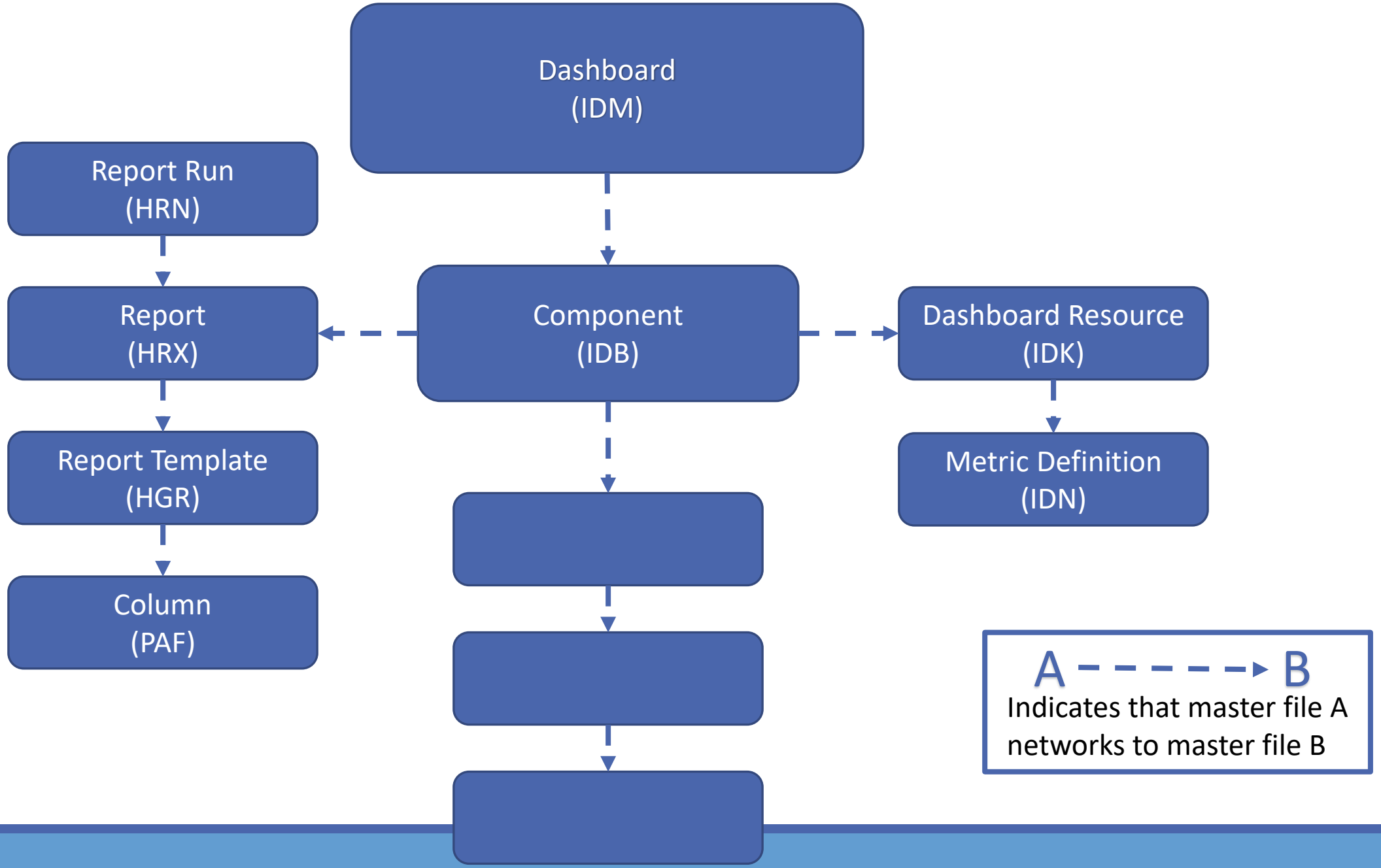
   Count

5. How many different procedures have each of our clinics performed this month?

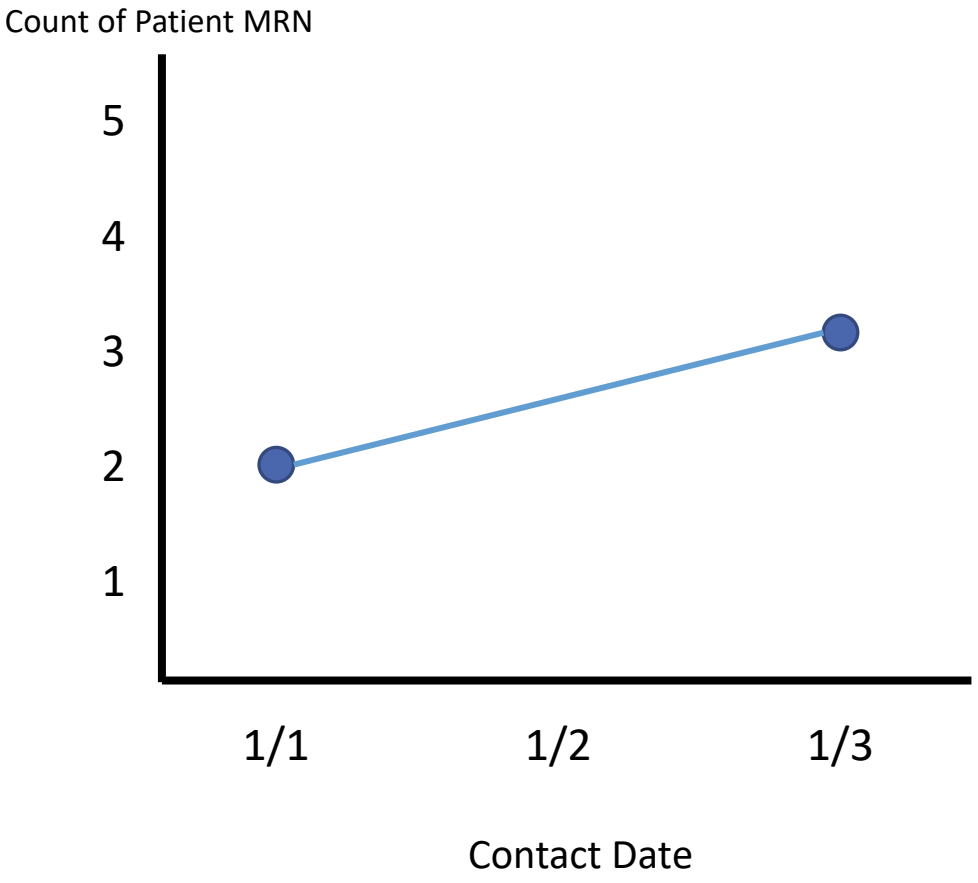
   Count Unique

SlicerDicer: Map Visualization



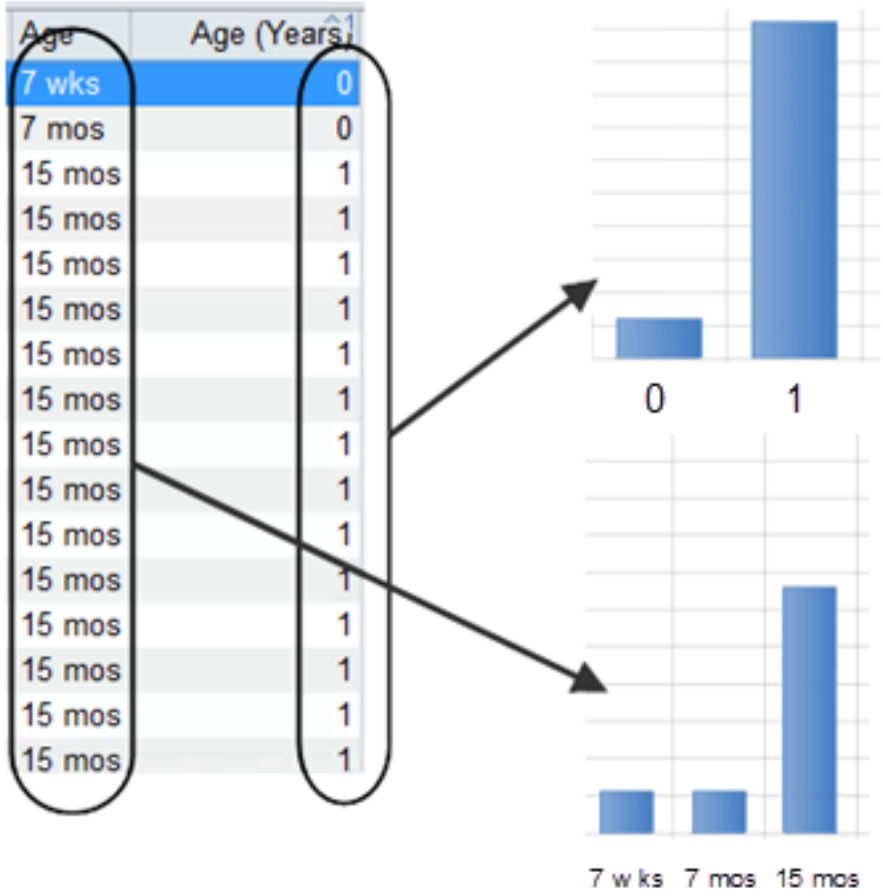

Dashboard
(IDM)
Report Run
(HRN)
Report
(HRX)
Report Template
(HGR)
Column
(PAF)
Component
(IDB)
Dashboard Resource
(IDK)
Metric Definition
(IDN)
A
B
Indicates that master file A networks to master file B

Workbench Summaries: Line Graph



Patient Name	Patient MRN	Contact Date
Anna Allen	111	1/1/2018
Barry Brown	222	1/1/2018
Anna Allen	111	1/3/2018
Anna Allen	111	1/3/2018
Barry Brown	222	1/3/2018

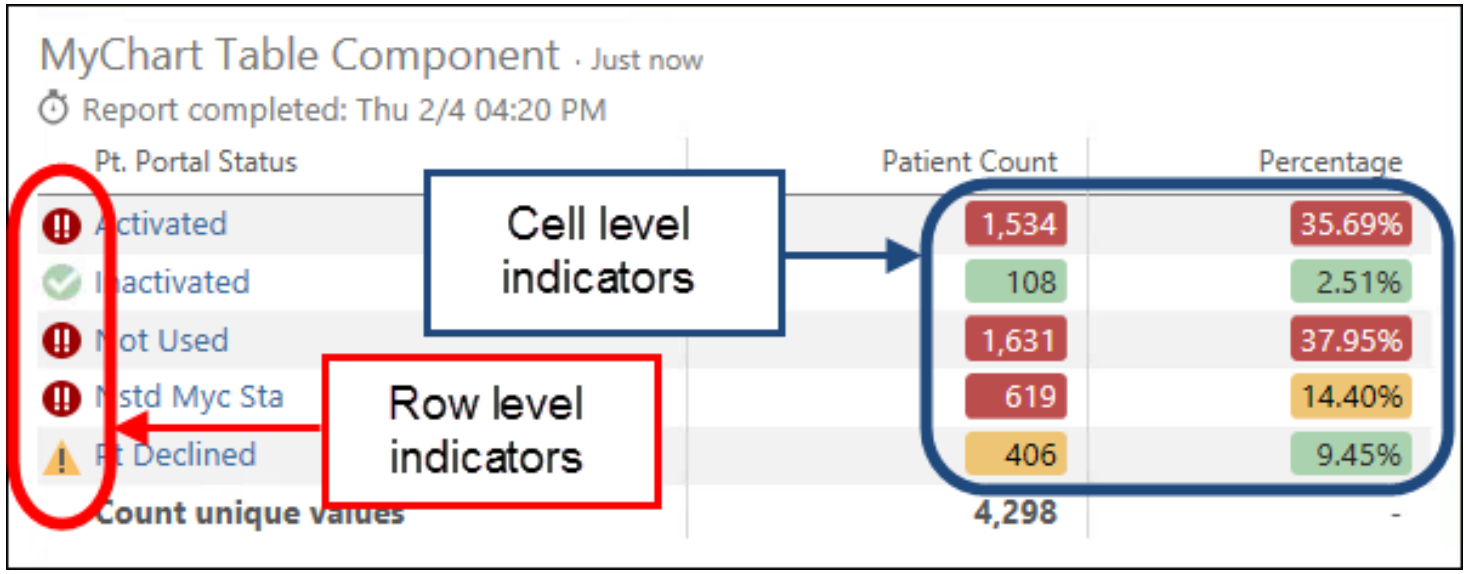
Workbench Summaries: PAF



Exercise 2: Build a Workbench Summary

In this exercise you will create a report that finds a list visits across ifferent locations in your organization. You will add a bar graph to the report that shows the number of visits for each location.

Thresholds


MyChart Table Component · Just now
Report completed: Thu 2/4 04:20 PM
Pt. Portal Status
Patient Count
Percentage
ctivated
1,534
35.69%
nactivated
108
2.51%
ot Used
1,631
37.95%
std Myc Sta
619
14.40%
t Declined
406
9.45%
Count unique values
4,298
-
Cell level indicators
Row level indicators

Exercise 3: Put a Summary on a Dashboard

In this exercise, you will create a table component based off the Workbench report you built in **Exercise 2: Build a Workbench Summary** and add that component to your dashboard.

Exercise 4: Which Tool Can Do It?

Fill in the table with a check mark for each tool that can summarize data in the proposed way.

SlicerDicer on a Dashboard

- Administrators can create a SlicerDicer component for a user
  - Creates a **Graph** type component
  - Data Source of **SlicerDicer**

- Users can add SlicerDicer components to their own view as well
  - Dashboard Options > Create Component

Exercise 4: Creating a new SlicerDicer component

Add the **Exercise 2: Build a Session** SlicerDicer session to your dashboard and answer a number of questions about it.

Agenda: Day 3

- Summaries
- **Report Requests**
- Troubleshooting
- Analytics Catalog
- Cogito Roles
- Day 3 Lab: Building Reports

Steve and Mona’s meeting

Resources

- Clarity Report Design Specification
- Workbench Report Design Specification
- Radar Dashboard Design Specification

Questions to ask

What should one row in the results represent?

What will you do with these results?

What do you expect to see in the results?

Exercise 1: Discuss the Report Request Process

Every organization has a different request process, and it can be helpful to compare your processes with other organizations' processes to hear about new ways to innovate or solutions to old problems.

Share your report request process with those around you. If you do not have a process yet, or do not know what it is, you can use the following questions to guide the discussion.

Agenda: Day 3

- Summaries
- Report Requests
- **Troubleshooting**
- Analytics Catalog
- Cogito Roles
- Day 3 Lab: Building Reports

Troubleshooting Workbench Reports

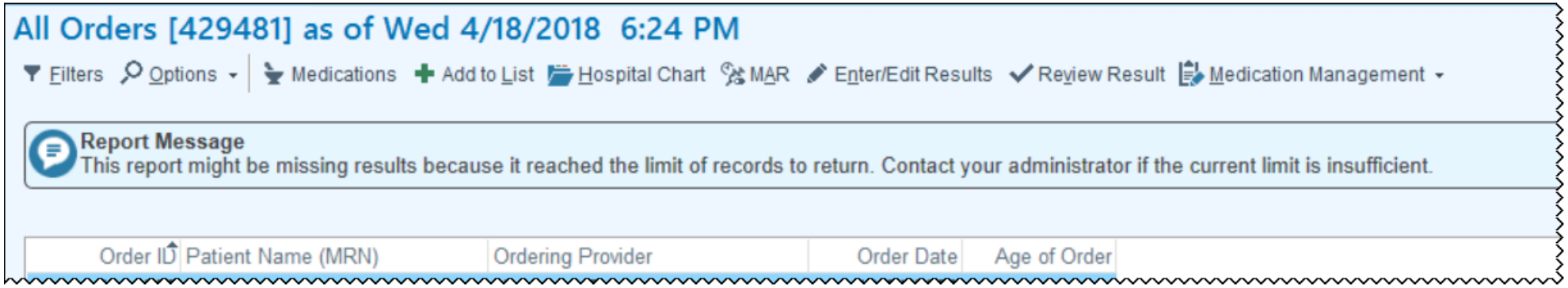
“Why is this report returning these results?”

- Issue with report search criteria
- False positives
- False negatives

Solution:

Run a trace

Interpreting Error Messages



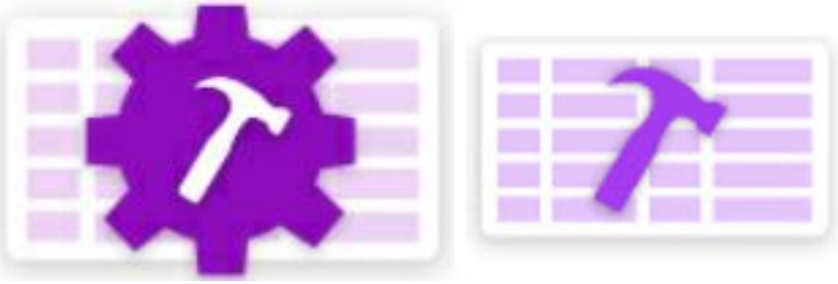
Agenda: Day 3

- Summaries
- Report Requests
- Troubleshooting
- **Analytics Catalog**
- Cogito Roles
- Day 3 Lab: Building Reports

Analytics Catalog: Content

Dashboards

Components



Workbench Templates/Reports

Crystal and
WebI Reports

SlicerDicer Data
Models

Links
(to external or 3rd party content)

Exercise 1: Tags and Descriptions

In previous lessons, you built a number of reports and dashboard components.

Try to find them in the Analytics Catalog!

Agenda: Day 3

- Summaries
- Report Requests
- Troubleshooting
- Analytics Catalog
- **Cogito Roles**
- Day 3 Lab: Building Reports

Database Administrator

Chronicles Administrator

- Oversees daily functioning and troubleshooting of Chronicles

Clarity Administrator

- Oversees and troubleshoots nightly and ad-hoc Clarity ETL executions that move data from Chronicles to Clarity

Caboodle Administrator

- Oversees and troubleshoots nightly and ad-hoc Caboodle ETL executions that move data from Clarity to Caboodle

BOE Administrator

- Oversees the BOE server and its communication with Epic's databases

Cogito Project Manager

- Responsible for the success of the Cogito team
- Oversees processes and policies that govern the reporting and analytics goals of the organization

Business Intelligence Developer

- Broadest set of day-to-day responsibilities. Build, maintain, troubleshoot reports in Chronicles, Clarity, and Caboodle.
- Some may specialize in certain tools, all get training in Workbench, Radar, SlicerDicer, and SQL.

Application Analyst

- Responsibilities depend on which application they specialize in
- Work with the Cogito team as Subject Matter Experts (SMEs)

Caboodle Developer

- Responsible for building the packages to bring data into Caboodle from Clarity and other non-Epic data sources.

Other Roles

COGITO TOOLS ADMINISTRATOR

- Responsible for building and maintaining Workbench and Epic-Crystal templates, as well as overseeing distribution of dashboards for the Cogito team

COGITO PRINCIPAL TRAINER

- Responsible for customizing and delivering reporting training to end users at each organization

Agenda: Day 3

- Summaries
- Report Requests
- Analytics Catalog
- Cogito Roles
- **Day 3 Lab: Building Reports**

Lab Time

Take this time to review the day's content, or complete the **Day 3 Lab**. In this lab, take some time to practice building workbench reports, summaries, and dashboard components to distribute them. The following report request contains some contextual information that would usually be provided by application subject matter experts (SMEs) to help understand the data being retrieved.

If you do not yet feel completely confident in today's chapters, you should take this time to:

- Flag down a trainer for some 1-1 review
- Complete any exercises you did not have time for or still have questions on
- Read through the chapter review questions and Study Checklists to test your understanding

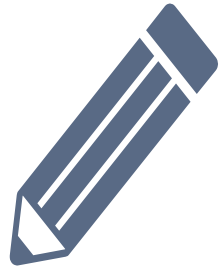
Trainers will be available to help and answer questions until 5pm.

We'll see you tomorrow at 8:30! Enjoy your evening!

Agenda: Day 4

- **Security**
- Cogito Build

Who needs a Provider (SER) record?

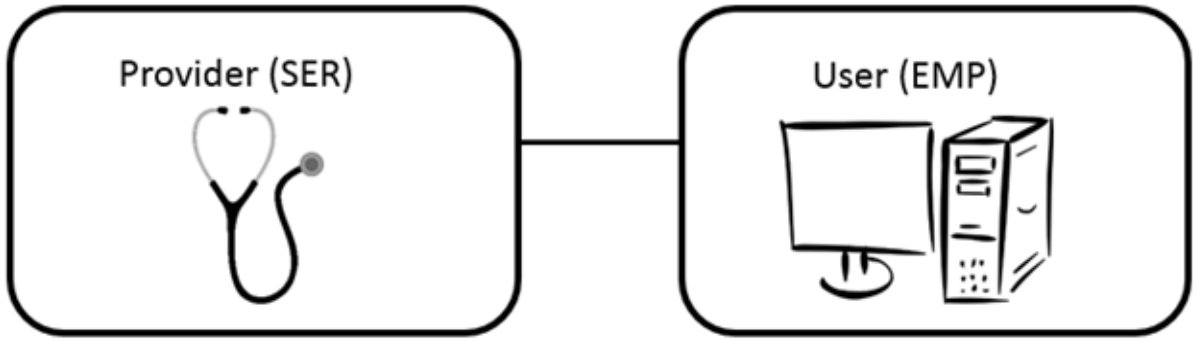


C – Has Credentials

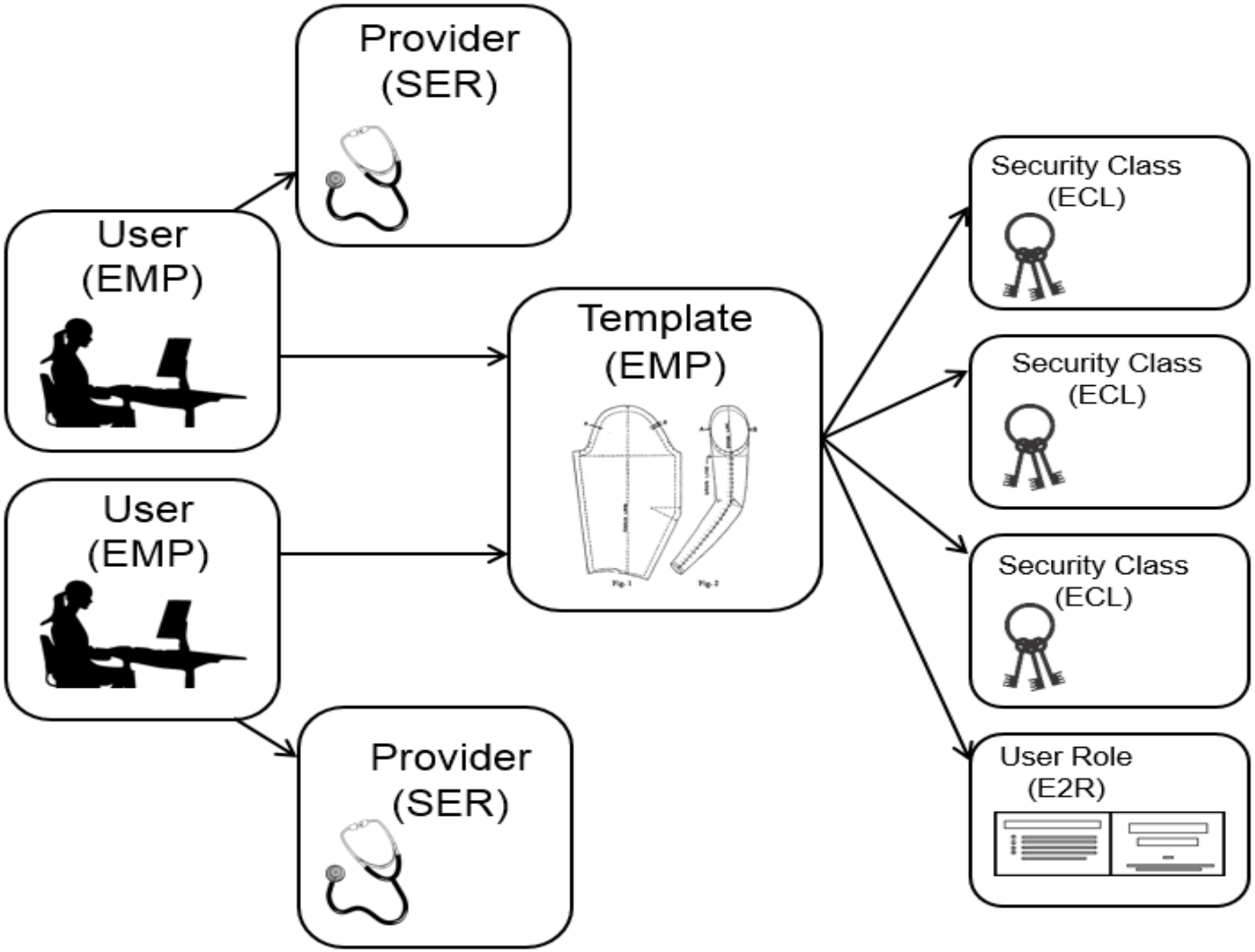
A – Authorizes orders

R – Can be Referred to or send referrals

S – Can be Scheduled



Dr. Walt Whitecoat *(Employed family practitioner)*	✓	✓
Deb Gurney, RN *(ED nurse)*	✓	✓
Elma Yorkstein *(Unit clerk)*		✓
Dr. Ila Nevalogin *(Referring cardiologist)*	✓	
Open MRI Machine *(a specific imaging device)*	✓	


Provider
(SER)
User
(EMP)
User
(EMP)
Provider
(SER)
Template
(EMP)
Security Class
(ECL)
Security Class
(ECL)
Security Class
(ECL)
User Role
(E2R)

Security Class

A security class is made up of security points.

Security **Points** = Access to functionality

Run Reports

Edit Criteria

Create Public Report Columns

Edit Query Template

Actions

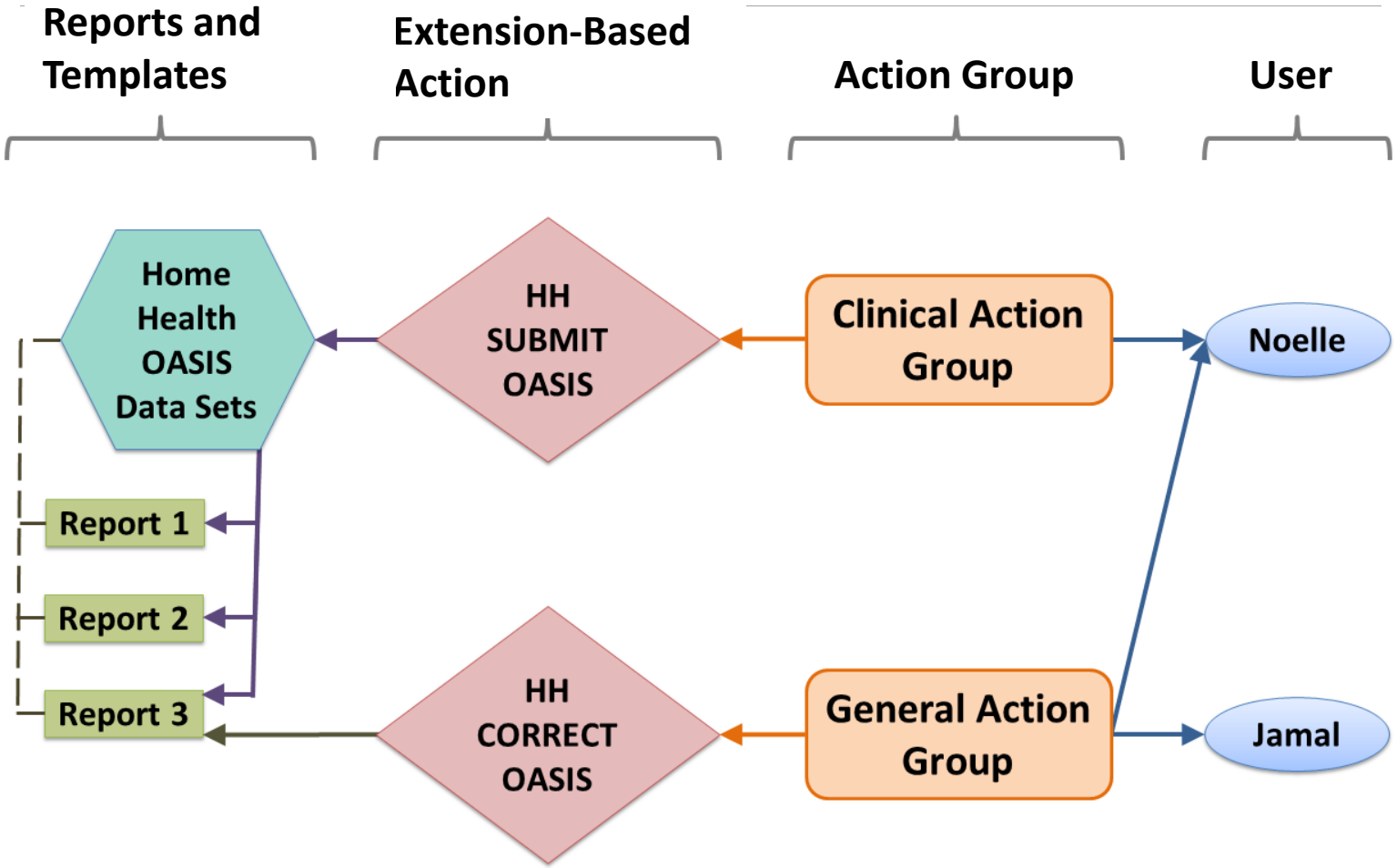
EXTENSION-BASED ACTION

- Button that executes M code

ACTION GROUP

- Controls what extension-based actions users can use
- Standard action groups:
  - General
  - Clinical
  - Financial
  - And more…

Report Action Security



Exercise 1: What a User Can Do

In this exercise, you will explore how the security class assigned to a user affects what functionality the user has available. You will observe how a user acquires the ability to do certain things in Reporting Workbench that they couldn't do before when their Reporting Workbench security class changes.

When you are done with Exercise 1:

Report Group / User Type

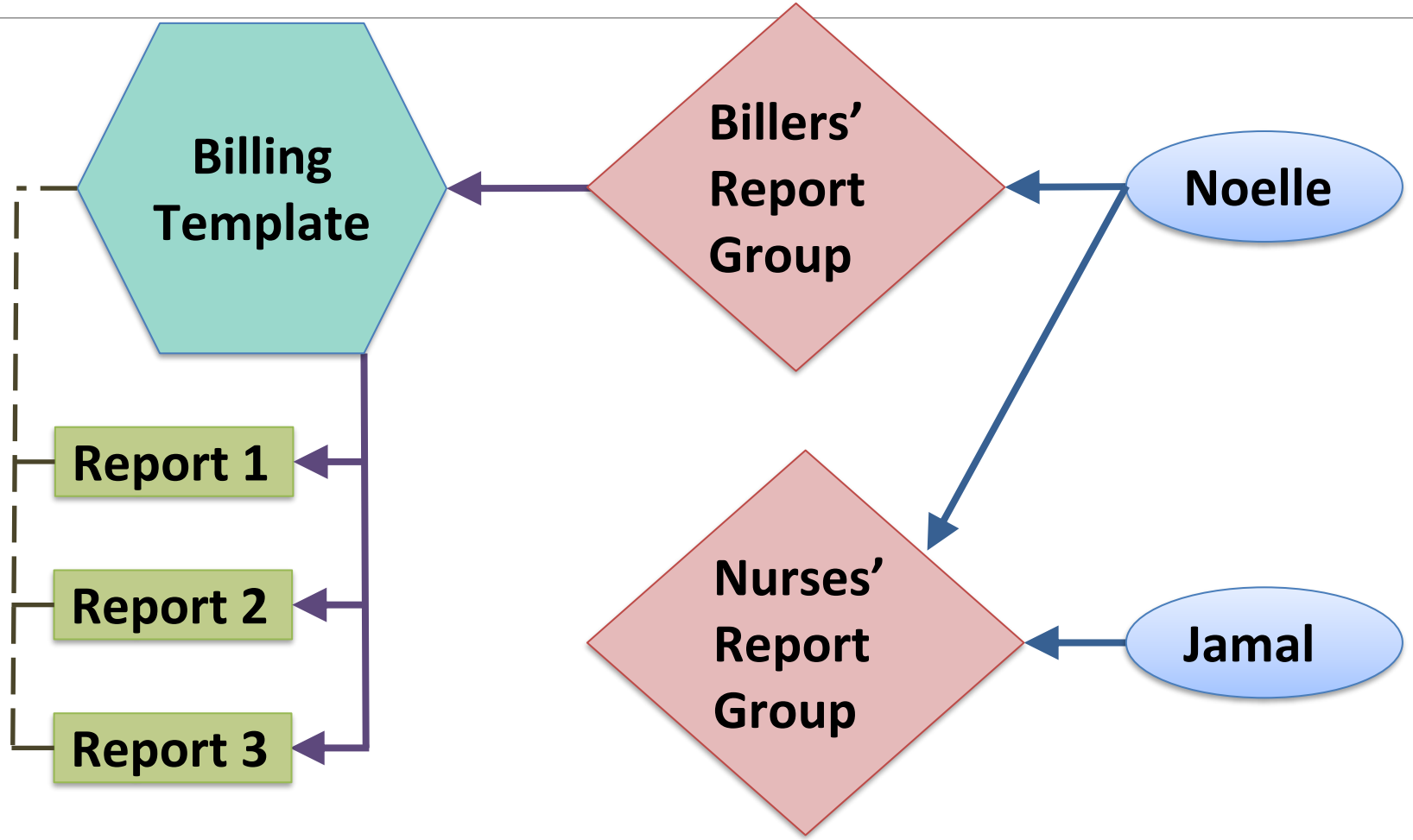
REPORT GROUP

- The primary means of distributing Cogito content
- A user is granted access to content if the user and the content share at least one report group

USER TYPE

- Epic automatically assigns user types to user records when a user logs in
- If a user and a dashboard or SlicerDicer data model share a user type, the user can access the dashboard or SlicerDicer data model

Report Access



Exercise 2: Report Groups

In this exercise, you will explore how report groups assigned to a user, template, report and component affect what reports and templates a user can see and what components a user can add to a dashboard through personalization.

Exercise 2: Report Groups

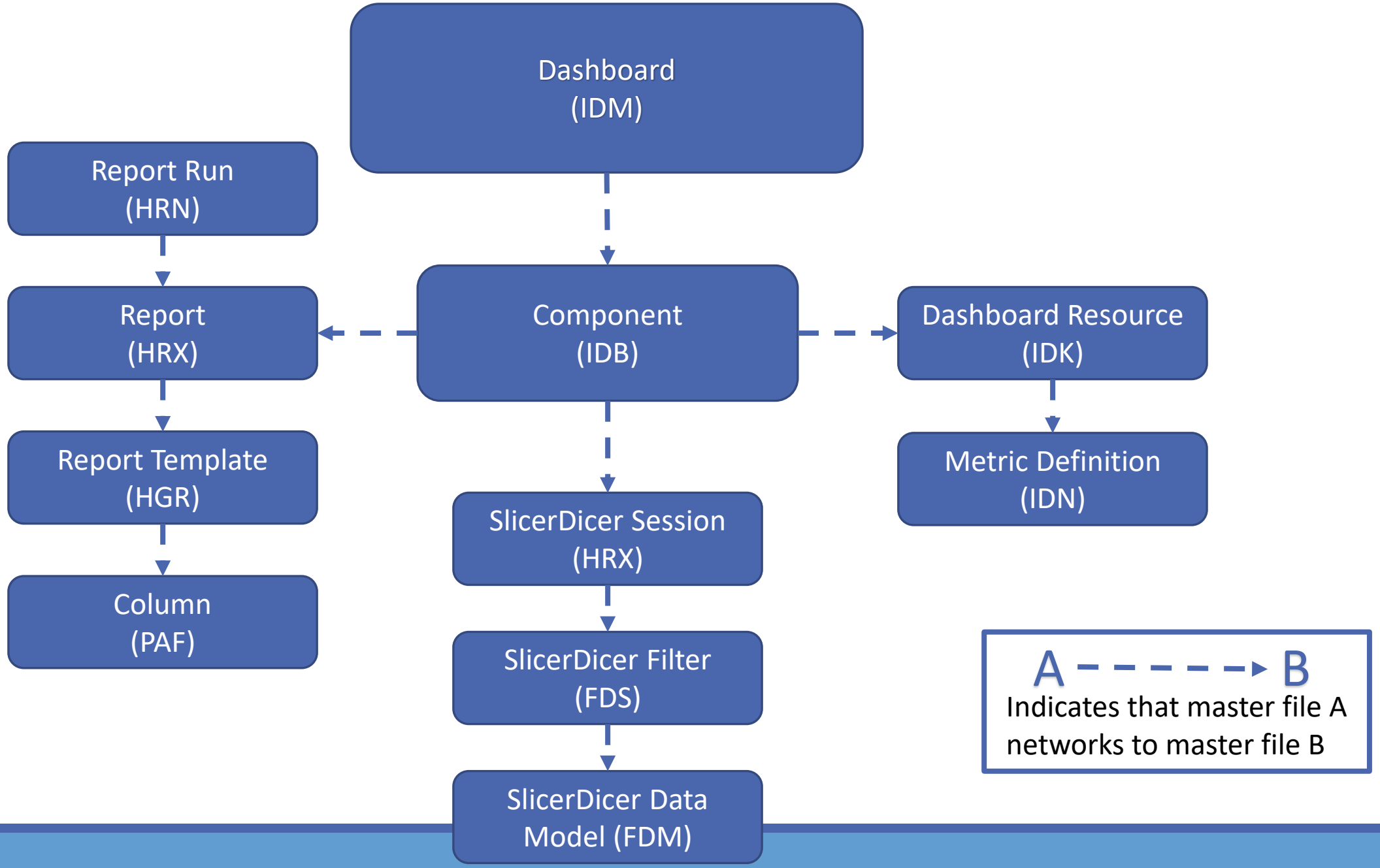
Template	In Clinician's Library?
OR Case Report	✓
Guarantor Account Search	✗
OR RW Turnovers	✓

Report	In Clinician's Library?
Anesthesia Professional Billing	✓
HIM Idle Deficiencies	✓

Component	Clinician Can Add (through personalization)?
COG170 ## Sample Links and Reports	✓
TRN HP Care Gap Maintenance Report Links	✓
MR NSR RW Upcoming Cases – Next 3 Days	✗

Agenda: Day 4

- Security
- **Cogito Build**


Dashboard
(IDM)
Report Run
(HRN)
Report
(HRX)
Report Template
(HGR)
Column
(PAF)
Component
(IDB)
SlicerDicer Session
(HRX)
SlicerDicer Filter
(FDS)
SlicerDicer Data
Model (FDM)
Dashboard Resource
(IDK)
Metric Definition
(IDN)
A
B
Indicates that master file A
networks to master file B

Write in Workbook

If you want to build a dashboard containing a metric-based component, what records do you need, and in what order should they be built?

IDN, then IDK, then IDB, then IDM

Dashboards

IDM

Dashboards

Points to a list of components

IDB

Components

Can reference many other records including:

- Dashboard resources
- Workbench reports

Dashboards: Metric Framework

IDK

Dashboard Resources

Points to metric definition

Can also link to Workbench reports

IDN

Metric Definitions

Workbench

HRN

Report Runs

Set of results can reference:

- Report which generated it
- Template used to build the report
- Columns displayed in the results

HRX

Reports

Reports reference the templates from which they were built and the columns to be displayed in the results

PAF

Columns

HGR

Report Templates

Points to all of the available and default columns

Does not contain a list of all the reports or runs generated from it

SlicerDicer

HRX

SlicerDicer Sessions

Lists all the filers used in generating the population

FDS

SlicerDicer Filters

Lists the different SlicerDicer data models in which they can be used

FDM

SlicerDicer Data Models

Does not list available filters