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PURPOSE/PRINCIPLE

Visiun Performance Insight™ (PI) is a data analytics application used to produce a variety of reports using data extracts from Cerner and Haemonetics laboratory information systems. The application can query data extracted up to the previous 24 hour period. Some of the types of reports produced by PI are turnaround time, workflow & staffing, test utilization, and quality. PI has the ability to automatically run standard reports and email them to individuals on a predefined schedule. The report information can be used for a variety of functions such as monitoring key performance metrics, identification of workload leveling opportunities, and benchmarking.

SCOPE

This process applies to the use of Visiun Performance Insight™ in the Department of Pathology at St Jude Children's Research Hospital.

RECORDS/FORMS/COMPUTER PROGRAMS

Visiun Performance Insight™

PROCESS

IMPORTANT! Always open PI before opening any Excel workbooks. If an Excel workbook is already open, save your work, close the workbook and open PI. Then reopen the Excel workbook. Opening PI while another Excel workbook is open may cause the application to crash.

1. **END-USER FUNCTIONS**

   a. **Create an Ad Hoc Report**

      i. Select the PI icon to open the application.
      ii. Select the Performance Insight™ tab at the top left of the screen. Note that PI is an add-on application to Excel, so the PI Dashboard opens in an occurrence of Excel.
      iii. Select Ad Hoc Report from the ribbon menu.
      iv. Select the Module button that contains the desired report.
      v. Select the desired Report from the drop-down menu.
      vi. PI will open to the Filters 1 tab. Use this tab to filter data by Test Information, Patient Information, Testing Location & Results. Enter

information in any of the fields that will be used to filter the data according to the requirements for the report. Note that fields will be available or not available (dithered) according to the report type that was chosen in the previous step.

vii. Click the Filters 2 tab to filter data by Staff, Physician Information , Days of the Week to Include & Hours of the Day to include or restrict.

viii. Click the Report Settings tab to complete the Chart Settings. The Chart Settings dialog box information entry will change according the the report that has been selected. A description of the parameters and appropriate values for each report type is displayed in the About this Report dialog box to the right. Note the following regarding choosing dates.

   I. The date selected will be contained in the timeframe selected underneath the date. So if Daily is selected, only the date entered will be included in the report. If Weekly or Monthly is selected, the entire week (Sunday through Saturday) or month (1st of the month through the end of the month) containing the date selected will be included in the report.

   II. The Custom Date selection allows selection of a timeframe between any two dates entered.

ix. If Add-on tests will skew the data, check the Exclude Add-on Tests box.

x. If a detailed list of outliers is desired, check the Generate List of Outliers box.

xi. Click the Run Report button to execute the report.

xii. The report will appear in the Excel Dashboard as a worksheet with an auto-labeled tab at the bottom of the workbook. It is okay to rename the tab if needed.

xiii. To run additional reports, repeat process beginning at step 3. Additional reports will create individual worksheets each with their own worksheet tab at the bottom of the page.

b. Save an Ad Hoc Report

i. Select More Report Functions from the ribbon menu.

ii. Select Save or Email Sheets from the dropdown menu.

iii. Select the pages listed (worksheet names) in the dialog box to save and/or send by placing a checkmark next to them.

iv. If the sheets are needed on the Dashboard for further investigation, deselect Remove sheets when done.

v. Click the button to the right of the Directory dialog box to navigate to the desired location to store the reports.

vi. If the report is to be emailed, select the emails from the Pick List or type in an email address.

vii. Choose the Format to which in save the report (PDF or Excel (xlsx).

viii. Click Go to save/send the report.

c. Add to a Report Set

A Report Set is a set of standard reports that are run repeatedly, but instead of running the reports one at a time, they are all run together after entering minimal information. The Report Set must initially set up by PI administrators in Pathology. Once the Report Set is built, it is easy to add individual Ad Hoc reports to the Report Set.

i. Follow the instructions as outlined in the section 'Creat an Ad Hoc Report'.

ii. Once all of the filters and chart settings are correct, click Add to Report Set at the bottom of the Ad Hoc Reporting window.

iii. Select the Report Set from the drop-down menu to which to add the new Ad Hoc Report.

iv. Enter a specific name for the new Ad Hoc report. This name will appear on the reports when they are run.

v. Click OK to save the new report in the Report Set.

d. Run a Report Set

i. Select Single Report Set from the ribbon menu.

ii. Select the desired Report Set.

iii. Select the desired format to receive the report set in the Action section. Note that the Print option sends the report directly to the default printer for the computer workstation.

iv. Select the Date parameter for the reports. Note that if a report is set to produce weekly or monthly data, the report will display the week or month in which the chosen date occurs.

v. It is possible to only send a link to the reports by checking Only Send Link.
vi. Click the button to the right of the Directory dialog box to navigate to the location to store the reports.
vii. If the report is to be emailed, select the emails from the Pick List'or type in an email address.
viii. Select Run to run and send the report set.

2. ADMINISTRATOR FUNCTIONS

a. Import Data

i. Select Data Import from the ribbon menu.
ii. Select the files to import from the file window. All files can be chosen by clicking on the first one, then holding the shift key and selecting the last file.
iii. Click Open.

b. Install Performance Insight

NOTE: You must be an administrator on your computer in order to install software. If you are not an administrator, please call the Information Sciences Helpdesk at 2000 for assistance.

i. Click on the executable link provided by Visiun. The link should end with .exe.
ii. When asked whether to Run or Save the program, click Run.
iii. Click Next when prompted.
iv. Choose to accept the terms in the license agreement and click next.
v. When the Destination Folder window pops up, click Next.
vi. Click Install.
vii. If prompted with the question, 'Do you want to allow the following program to install software on this computer?', click Yes.
viii. When the installation is complete, 'Launch the program' will have a checkmark next to it. If you want to open Performance Insight, just click Finish. If you do not want to open PI, remove the checkmark from the box and click Finish.

c. Connecting to the Database

NOTE: The connection to the database needs to be established the first time PI is used. After the first use, the connection will not have to be re-established unless a computer is re-imaged by Information Services.

i. Choose the Settings Icon, then User from the drop-down menu.
ii. On the Database tab within the User Settings window, enter the following address into the Main Database File Being Used Now box: file://gsn.stjude.org/Pathology/common/Visiun/database/PI-1360_SJCRH.MI.
iii. Enter the following address into the Long Term Database File Being Used Now box: file://gsn.stjude.org/Pathology/common/Visiun/database/PI-1360_SJCRH.MI-LT-LT.
iv. Click on the Misc. tab in the User Settings window.
v. Enter the following address into the box below Read Files From: file://gsn.stjude.org/Pathology/common/Visiun/extracts
vi. Enter the following address into the box below After import, move files to (optional): \\gsn.stjude.org\Pathology\common\Visiun\extracts-imported
vii. Click Save to close the window.
viii. PI is ready to use.

d. Help

There are several ways to get help with PI.

i. Report Samples gives examples of the layout of reports and the information that can be gained from them.
   I. Select Report Samples from the ribbon menu.
   II. Click on the Module containing the report of interest.
   III. Click the name of the report of interest in the drop-down menu.
ii. PI Administrators within the Department of Pathology.
iii. Contact Us allows submission of report information directly to Visiun PI developers.
   I. Select Contact Us from the ribbon menu.
   II. Click Submit Suport Data or call Visiun using the telephone numbers listed.

REFERENCES

Visiun Performance Insight™ User Guide, April 2017

References

Reference Type	Title	Notes	
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