



TRIM – D16-14084

September 2019

OrgTRx Module User Guide

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Version	Release date	Business area contact
1.0	September, 2015	Communicable Diseases Branch, Prevention Division, Department of Health Email: cdu.online@health.qld.gov.au
1.1	September, 2015	Removal of Queensland Health specific access information L. Davis
1.2	January, 2017	Updated support contact email address L. Davis
1.3	May 2017	Updated formatting & numbering L. Davis
1.4	July 2018	Updated to Necto 16 (DSS)
1.5	September 2019	Updated with HTML5 changes

1. Aim

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

2. Scope

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

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

3. Exclusions

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

Requirements:

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

4. Introduction

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

5. Terms & definitions

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

6. Access & Login

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

Best accessed via Internet Explorer, users will require a

Username: _____

Password: _____

7. Support

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

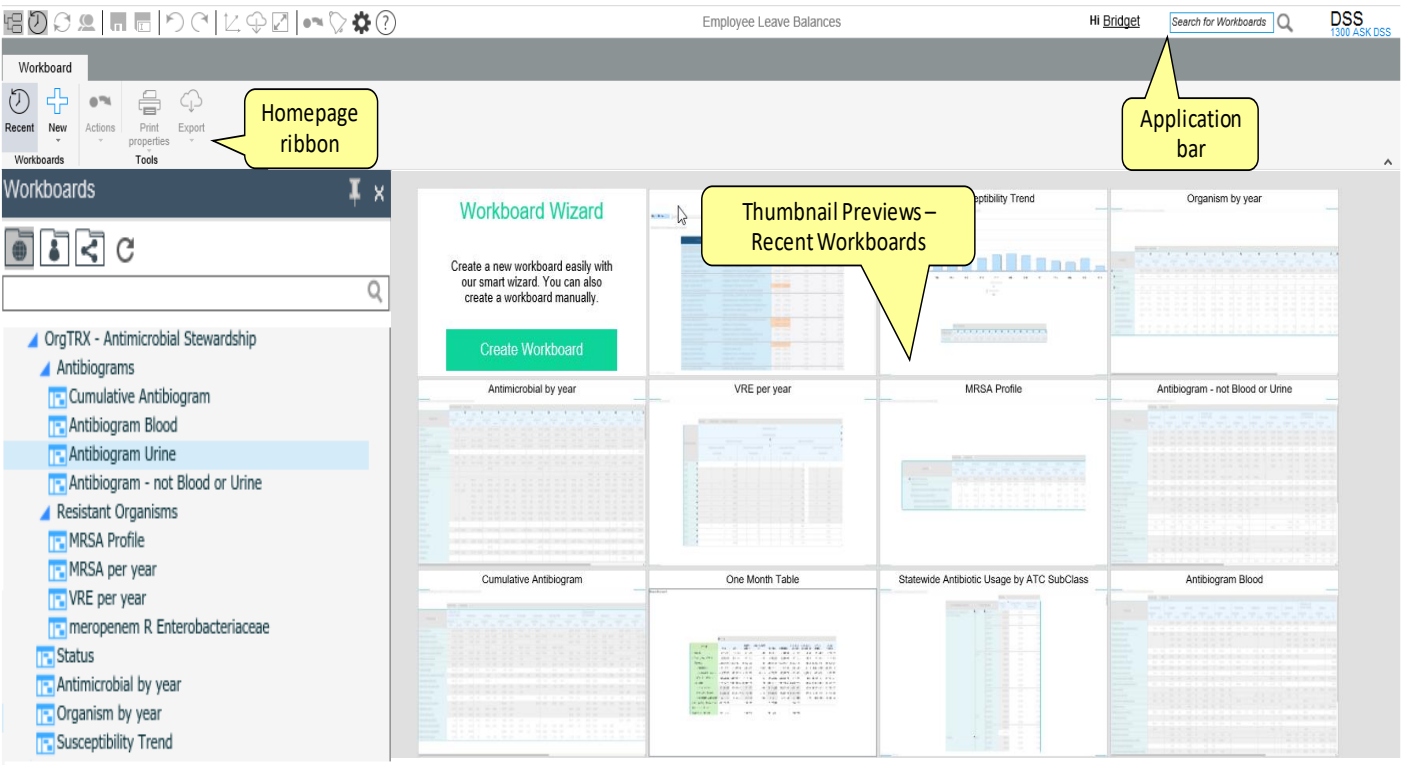
8. General navigation

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

Application bar - The Application Bar is positioned at the top of the workboard on the Necto HTML5 Client page, it contains the options that apply to the entire application.

- **Homepage ribbon**- The Necto ribbon contains workboard link buttons and buttons for changing the thumbnail display layout
- **Thumbnail Previews – Recent Workboards** – when you log into DSS, the workboards you have visited recently display in thumbnail format.

Figure 1 Home page



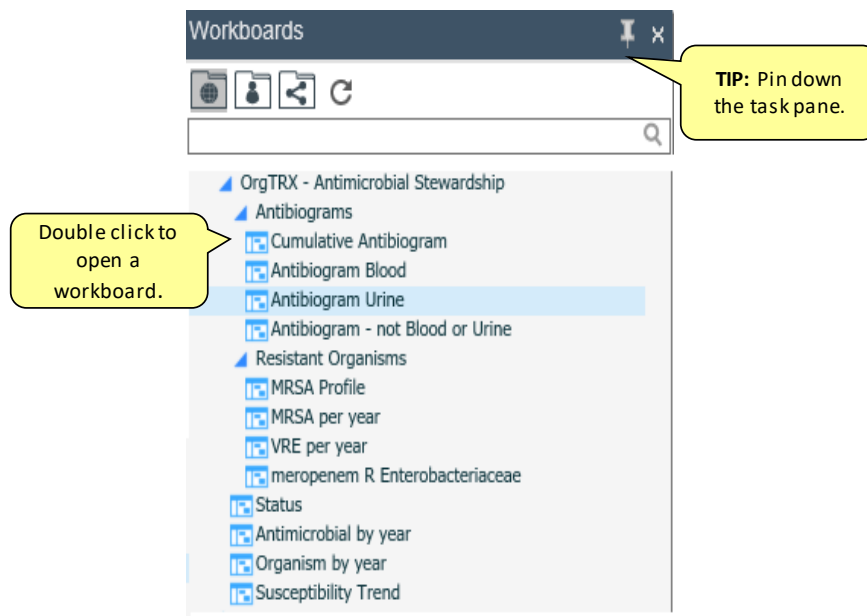
9. Necto work area

Figure 2 Application bar



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

Figure 3 Public Workboards pane



9.1 Table view screen (filtering slicer)

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

Figure 4 Table view screen

Select the View tab to access the buttons available.

Clicking the Show Dimension Selector enables the user to add and replace dimensions in the columns, rows and slicers of the view using drag and drop functionality.

Filter data using the shortcuts based on the current view.

Hover your mouse over the text to make selections from the menu.

Organism	2006		2007		2008		2009		2010		2011		2012		2013		2014		2015		2016	
	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count
All Organisms	85.43	871,224	85.29	1,246,276	85.09	1,352,404	85.67	1,488,863	85.99	1,529,184	86.14	1,603,207	85.59	1,590,393	85.39	1,571,865	85.37	1,566,685	85.37	1,668,244	85.36	
Anaerobes	75.73	511	76.89	740	76.38	796	75.88	879	74.70	988	72.09	996	73.03	990	73.25	587	69.27	384	74.95	487	72.57	
Gram negative bacilli	86.90	547,805	86.66	784,045	86.66	840,894	87.04	903,663	86.94	938,657	86.84	974,243	85.93	965,558	85.52	949,907	85.43	964,794	85.29	1,045,030	85.14	
Gram negative cocci	74.81	2,017	75.55	2,446	76.61	2,591	77.04	3,140	77.21	3,172	77.39	3,216	75.32	2,658	74.15	2,089	72.48	2,464	72.51	2,565	74.08	

9.2 Dimension Selector

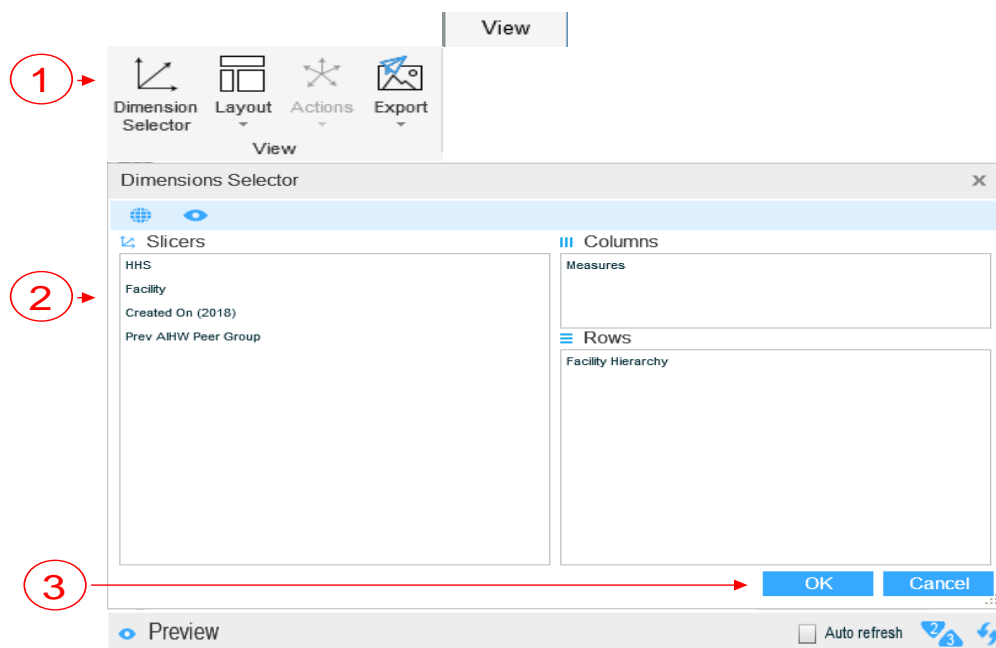
The Dimension Selector allows the user to add and replace dimensions in the columns, rows and slicers of the view using drag and drop functionality. It can also be used to select and filter members (Figure 5).

9.2.1 Add additional slicers - Dimension Selector

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

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

Figure 5 Using the Dimension Selector



9.3 Search and filter a slicer

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

To search within a slicer:


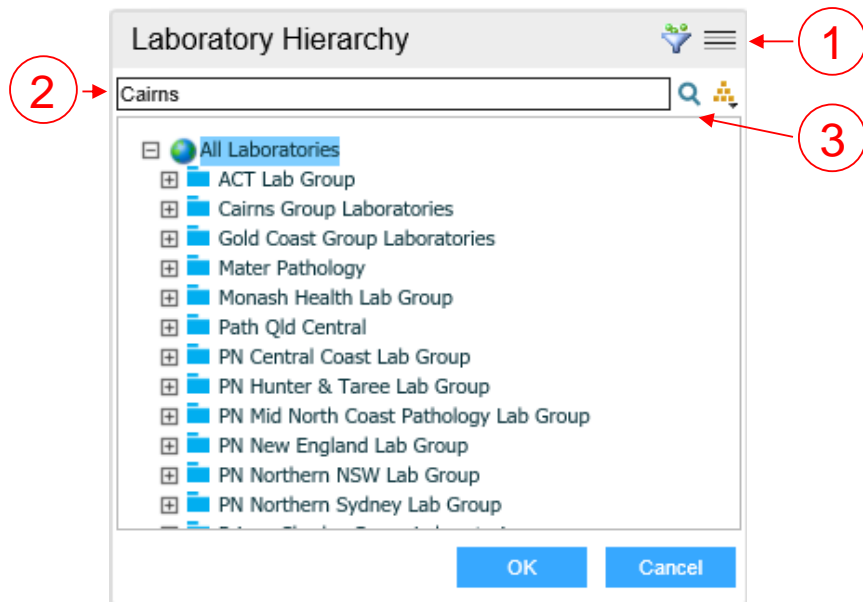
1. Click the slicer you wish to search
2. Type the description/code you are searching for
3. Click the  *Filter* to search

Figure 6 Search option within slicer



9.4 Drill down and Drill up

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



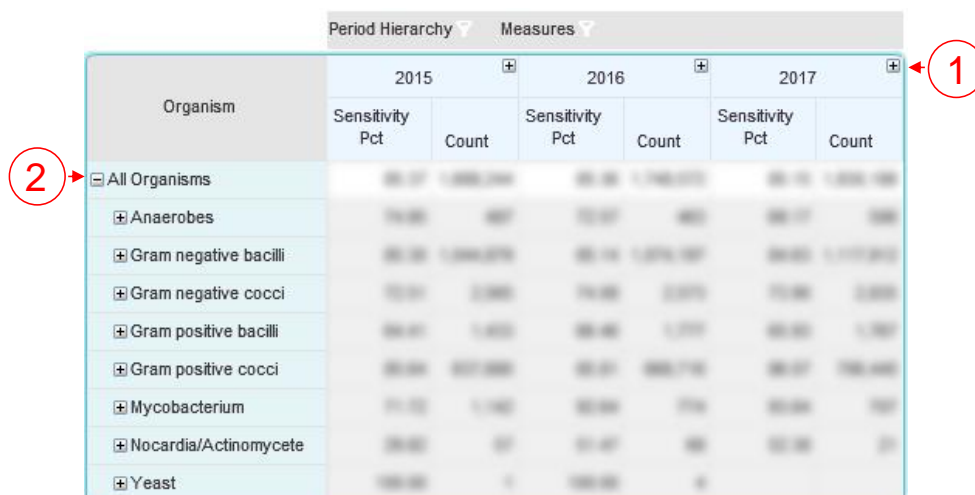
1. Click the  *plus* to expand to lower levels
2. Click the  *minus* to collapse the levels

Figure 7 Drill down and Drill up



The screenshot shows a table titled 'Period Hierarchy' with columns for 'Organism', '2015', '2016', and '2017'. Each year column has sub-columns for 'Sensitivity Pct' and 'Count'. The 'Organism' column is expanded, showing a list of organisms. A red circle with the number 1 points to the '2017' column header, and a red circle with the number 2 points to the 'All Organisms' row in the 'Organism' column.

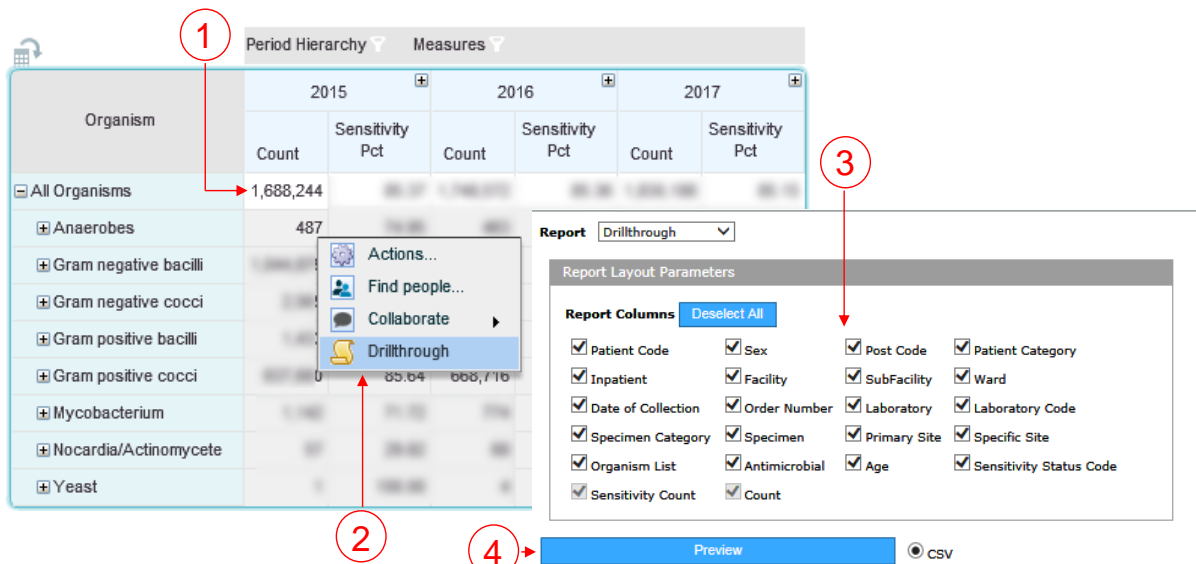
Organism	2015		2016		2017	
	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count
All Organisms	85.17	1,088,248	85.38	1,148,072	85.15	1,088,248
Anaerobes	75.85	487	75.87	487	75.87	488
Gram negative bacilli	85.38	1,088,248	85.14	1,074,187	85.02	1,117,812
Gram negative cocci	75.87	1,088,248	75.87	1,074,187	75.87	1,088,248
Gram positive bacilli	85.17	1,088,248	85.38	1,148,072	85.15	1,088,248
Gram positive cocci	85.17	1,088,248	85.38	1,148,072	85.15	1,088,248
Mycobacterium	75.87	1,088,248	75.87	1,074,187	75.87	1,088,248
Nocardia/Actinomycete	85.17	1,088,248	85.38	1,148,072	85.15	1,088,248
Yeast	85.17	1,088,248	85.38	1,148,072	85.15	1,088,248

9.5 Drill through

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

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

Figure 8 Drill through



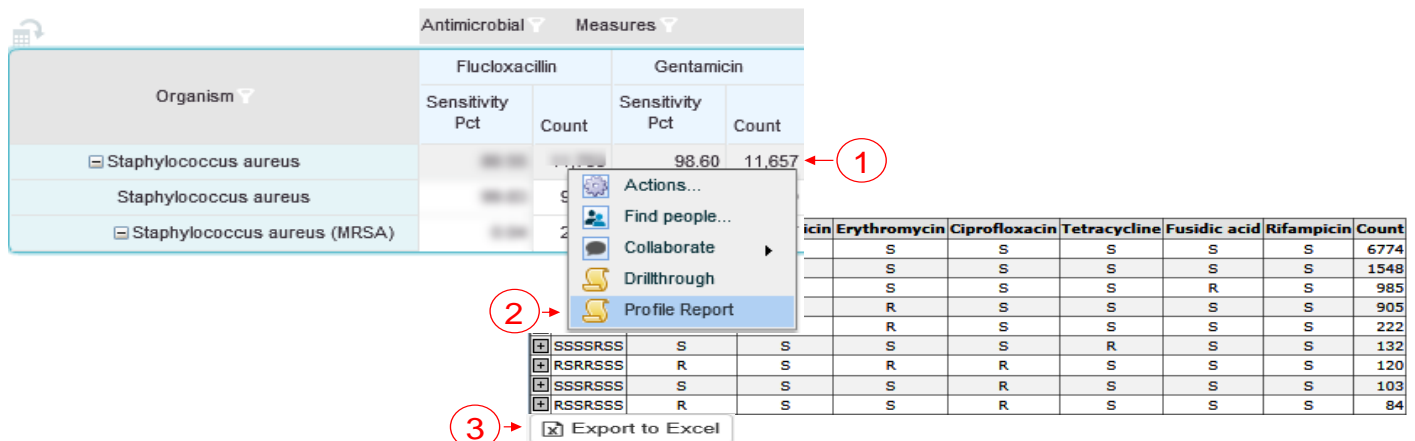
9.5.1 Profile report - check

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

Access a Profile Report (Figure 9):


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

Figure 9 Profile report



9.5.2 Profile report drill down - check

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

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






Once expanded, click on the  symbol to drill up.

Figure 10 Expanded profile report

	RSSSSRR	R	S	S	S	S	R	R	1
	RRRRRSR	S	R	R	R	R	S	R	1
Detail									
									

DrillThroughGridView - Internet Explorer									
	SSSSSRS	S	S	S	S	S	R	S	985
Detail									
Patient_Code	Order_Number	Specimen_Category				Organism			
AT00000001	PL00000001	Tissue / Fluid / Pus / Prosthesis				Staphylococcus aureus			
AT00000002	PL00000002	Tissue / Fluid / Pus / Prosthesis				Staphylococcus aureus			
AT00000003	PL00000003	Tissue / Fluid / Pus / Prosthesis				Staphylococcus aureus			
AT00000004	PL00000004	Tissue / Fluid / Pus / Prosthesis				Staphylococcus aureus			
AT00000005	PL00000005	Tissue / Fluid / Pus / Prosthesis				Staphylococcus aureus			
AT00000006	PL00000006	Tissue / Fluid / Pus / Prosthesis				Staphylococcus aureus			

9.6 Select members

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

To select members (Figure 11):




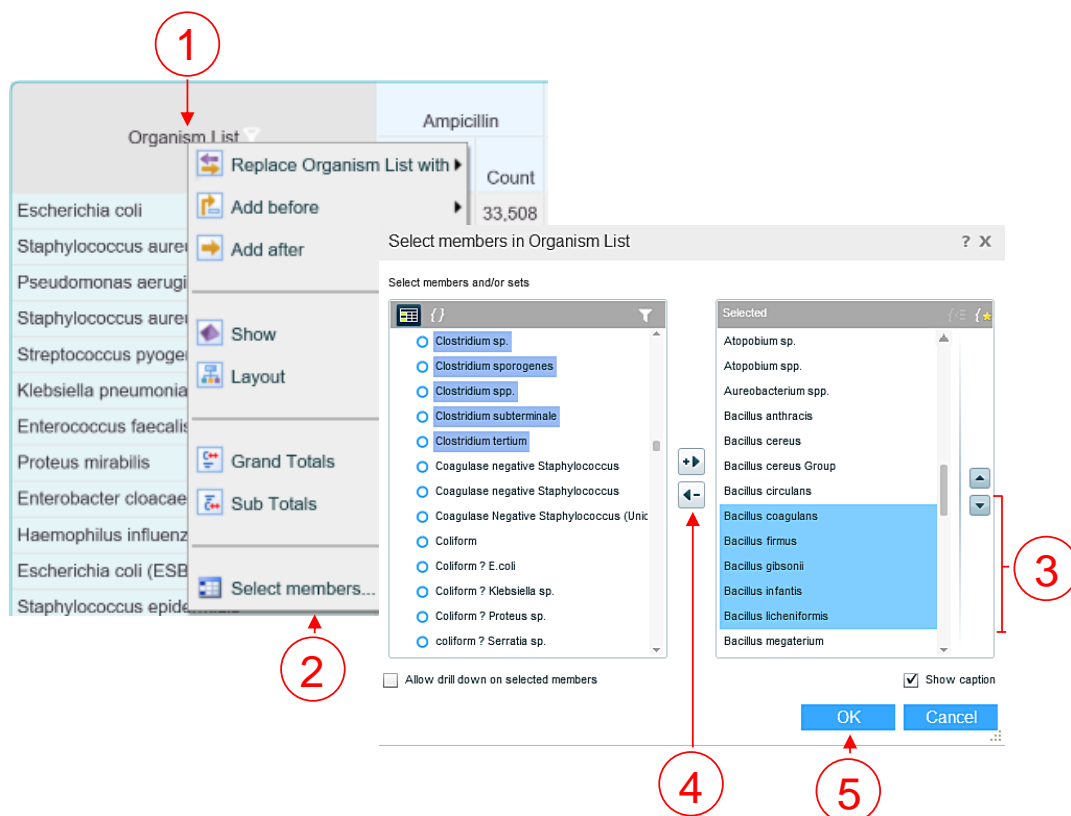
1. Click on the member to display the options for example *Organism List*
2. Click *Select Members*, this will open the Select Members in Measures Panel
3. Select the Members you would like to add from the list on the left or remove from the list on the right
4. Click  Arrow to move the *Members* you have selected to the left or click  to remove from the list on the right
5. Click  OK once you are happy with your selection

Figure 11 Select members



9.7 Select highlighted members

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

To select highlighted members (Figure 12):

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

Figure 12 Select highlighted members

The screenshot shows a data grid with a table header and a list of antimicrobial agents. A right-click context menu is open over the 'Sensitivity Pct' column for the year 2006. The menu includes options like 'Sort by Sensitivity Pct', 'Hide', 'Value Filter', 'Formulas', 'Actions...', 'Expand Sensitivity Pct to', 'Select highlighted members', 'Create Set from highlighted members', and 'Reorder'. The 'Select highlighted members' option is highlighted with a red arrow and a red circle labeled '3'. Red circles labeled '1' and '2' point to the 'Sensitivity Pct' header and the right-click action respectively.

Antimicrobial	2006		2007		2008	
	Sensitivity Pct	Count	Sensitivity Pct	Count	Sensitivity Pct	Count
Amikacin					7.78	47,552
Aminosalicilic acid						
Amoxicillin and enzyme inhibitor					5.12	45,831
Amphotericin B						
Ampicillin					0.04	54,957
Ampicillin and enzyme inhibitor						
Azithromycin						
Aztreonam					1.63	1,517
Benzylpenicillin					1.93	42,514
Capreomycin	1				0.00	9
Cefaclor					1.50	16
Cefalexin					5.51	49,254

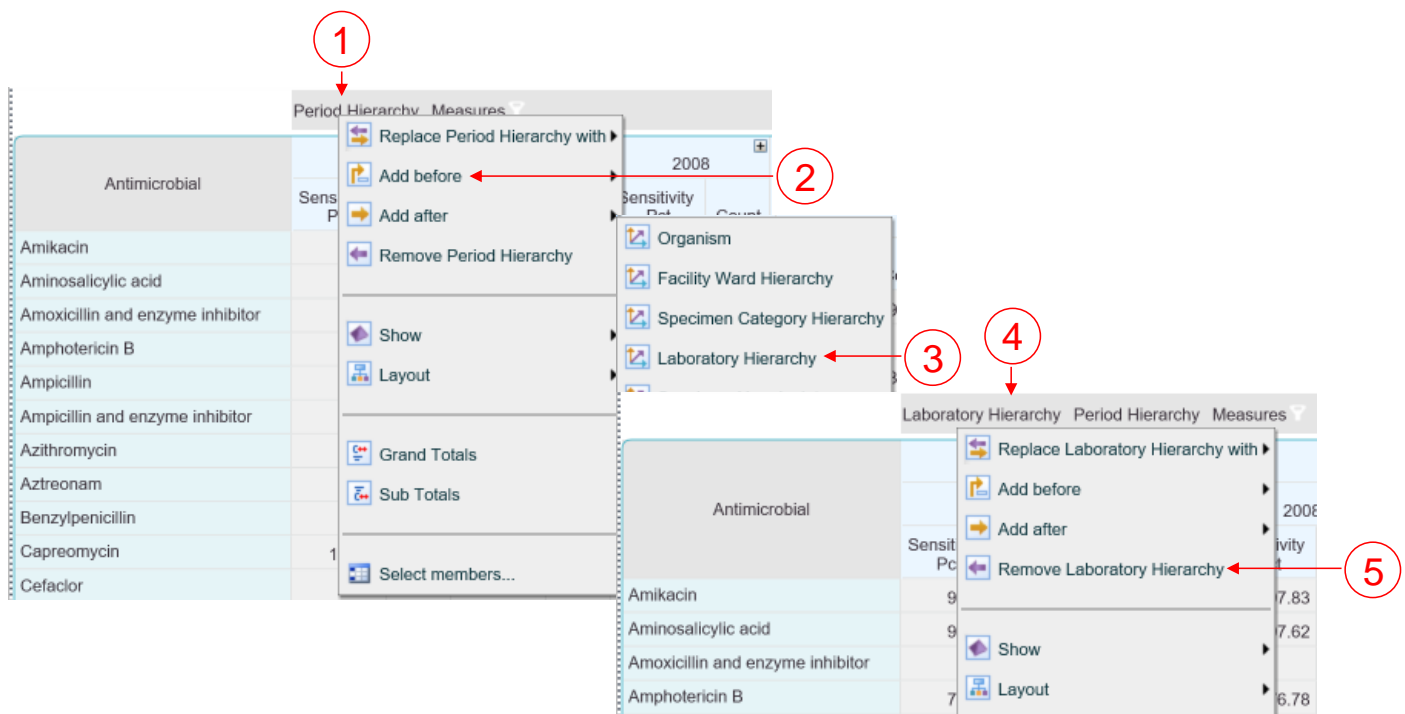
9.8 Add and remove dimensions

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

To Add and Remove dimensions (Figure 13):

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

Figure 13 Add and remove dimensions



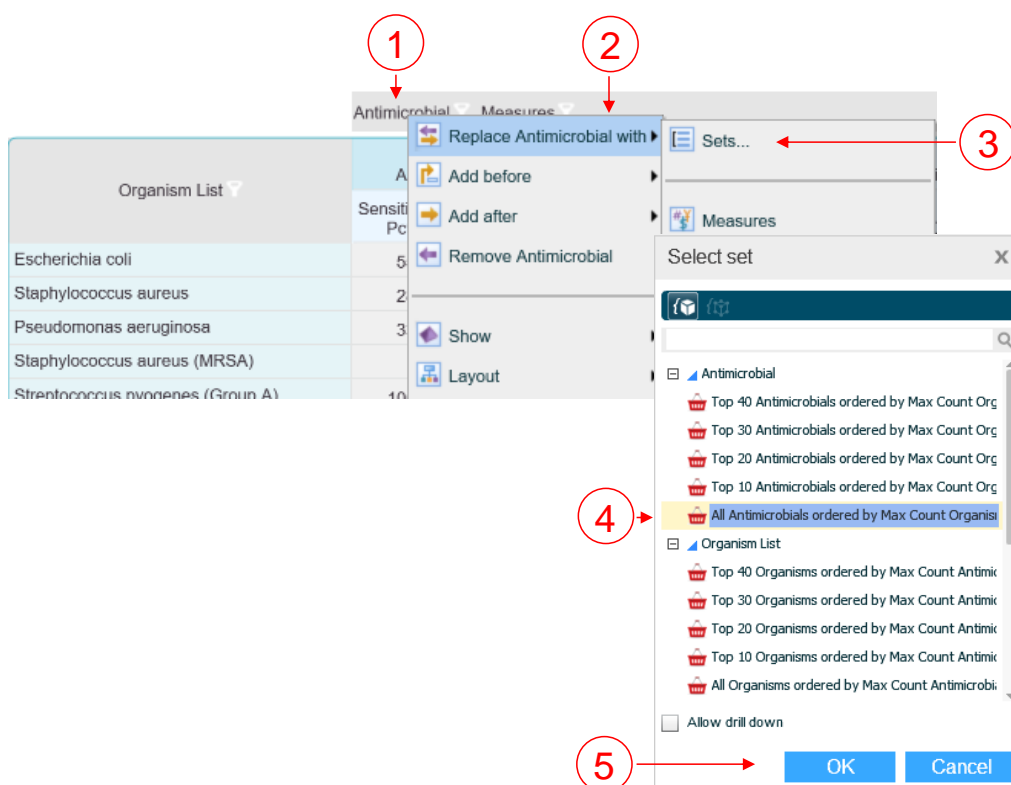
9.9 Replacing sets

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

To change the Sets (Figure 14):

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

Figure 14 Replacing sets



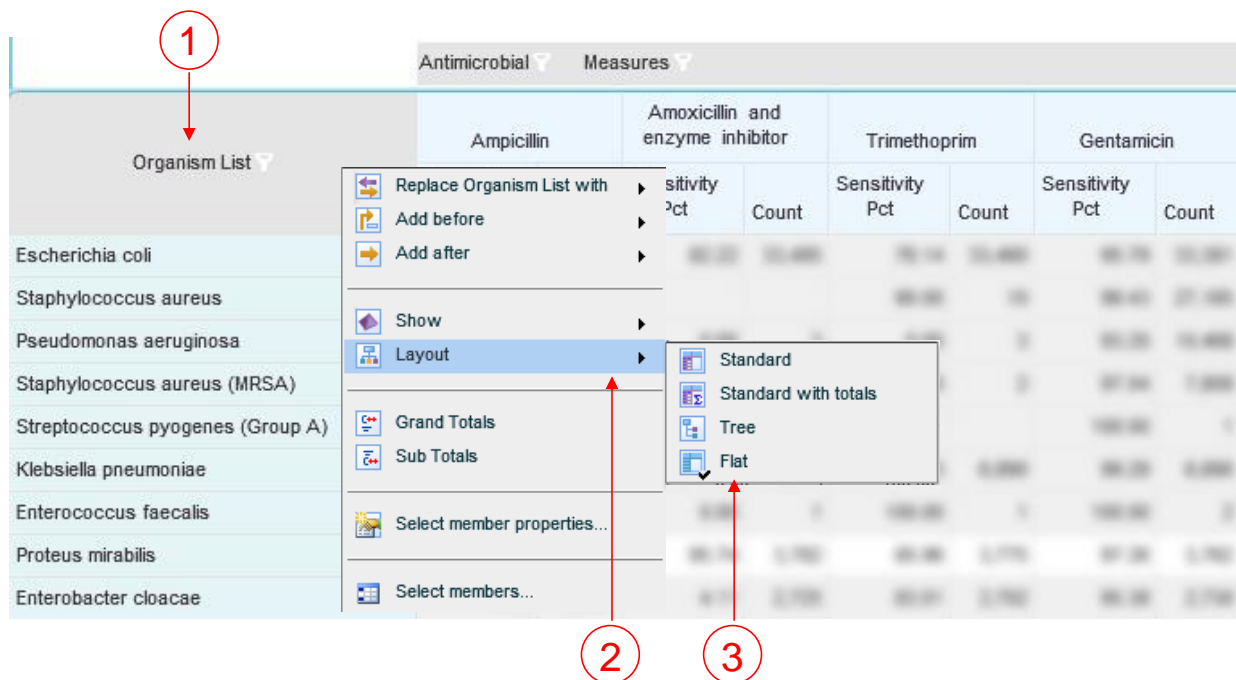
9.10 Change grid layout

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

To change the grid layout (Figure 15):

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

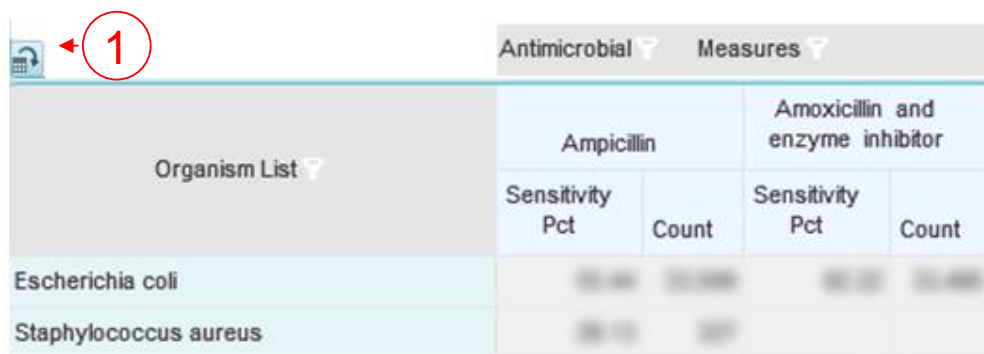
Figure 15 Change grid layout



9.11 Rotate grid

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

Figure 16 Rotate grid



1. Click on the  *Rotate Grid* button to rotate the grid

10 Saving workboards

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



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



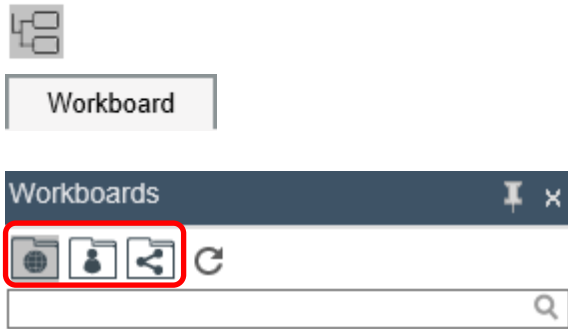
Show private content - contains saved private workboards which can be edited and re saved.

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



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

Figure 17 Folder structure



10.1 Create a folder structure

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




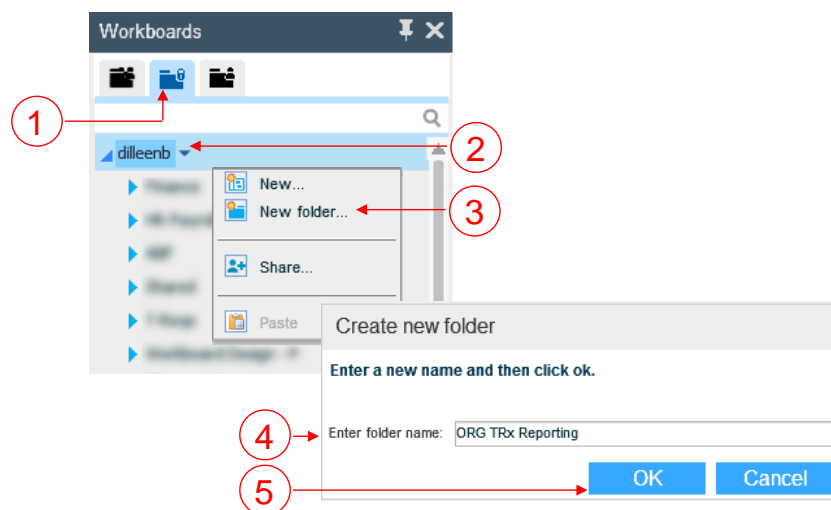
1. Click  *Show private content*
2. Right mouse click on the  symbol beside your username
3. Click *New folder*
4. Click in the *Enter folder name* pane and type in a name for your folder
5. Click  *OK*

Figure 18 Create a new folder



10.2 Save a workboard to your private content folder

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

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




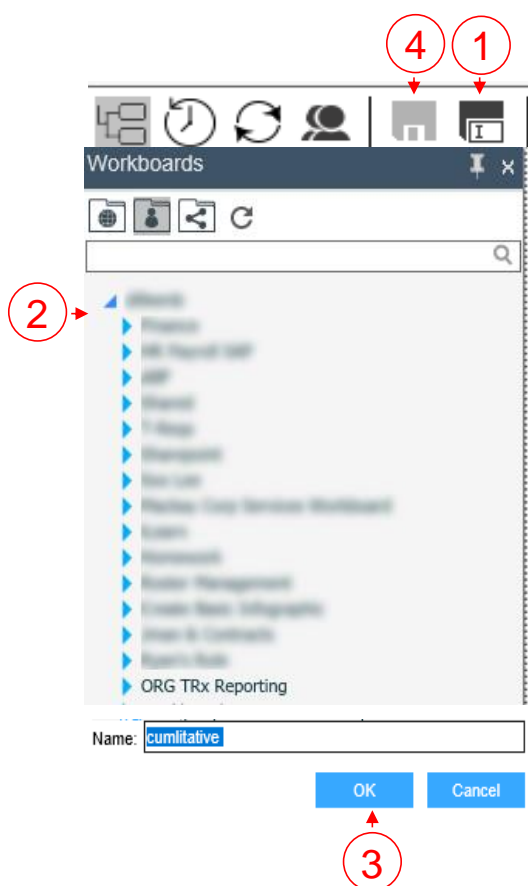
1. Click  *Save as* in the application bar
2. Enter the report name in the Name field
3. Click  *OK*
4. Once the workboard is saved, click  *Save* to save changes over a pre-existing workboard

Figure 19 **Save as**

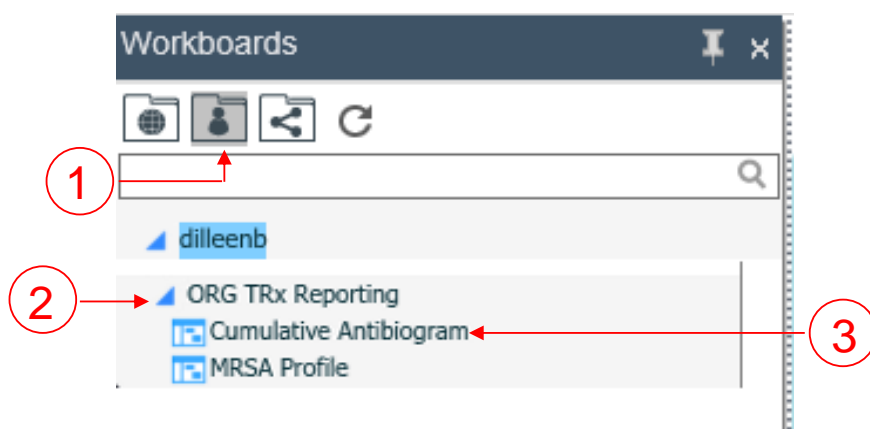


10.3 Open a private workboard

To open a private workboard (Figure 20):

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

Figure 20 **Open a private workboard**



10.4 Export

Data can be exported in multiple formats.

To export data (Figure 21):


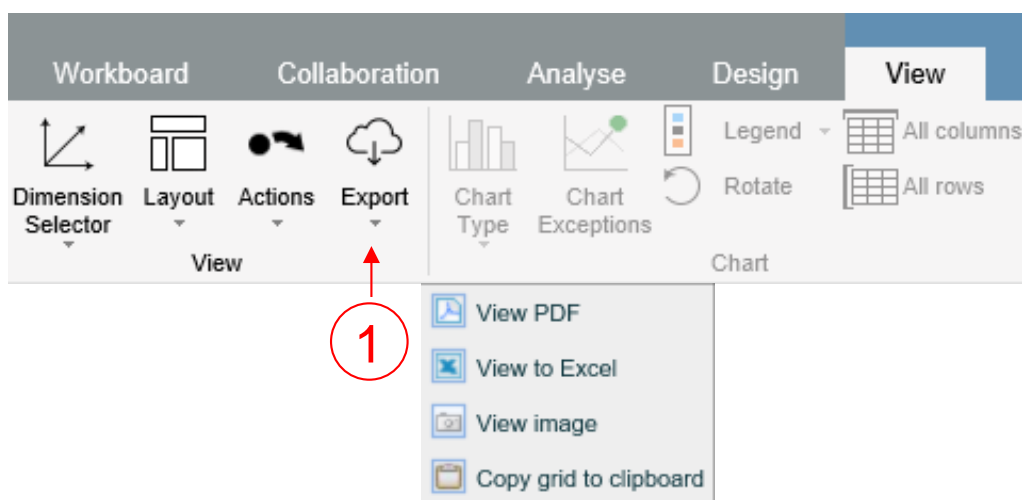
1. Click  **Export** button to view and select from the following options:
 - **View to PDF** – a PDF document will be generated
 - **View to Excel** – data will be exported in a formatted Excel format (.xls)
 - **View image** – an image of the workboard is created. The image can be saved to your computer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

Figure 21 Export



11 Sharing workboards

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

11.1 Sharing a workboard with another user

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




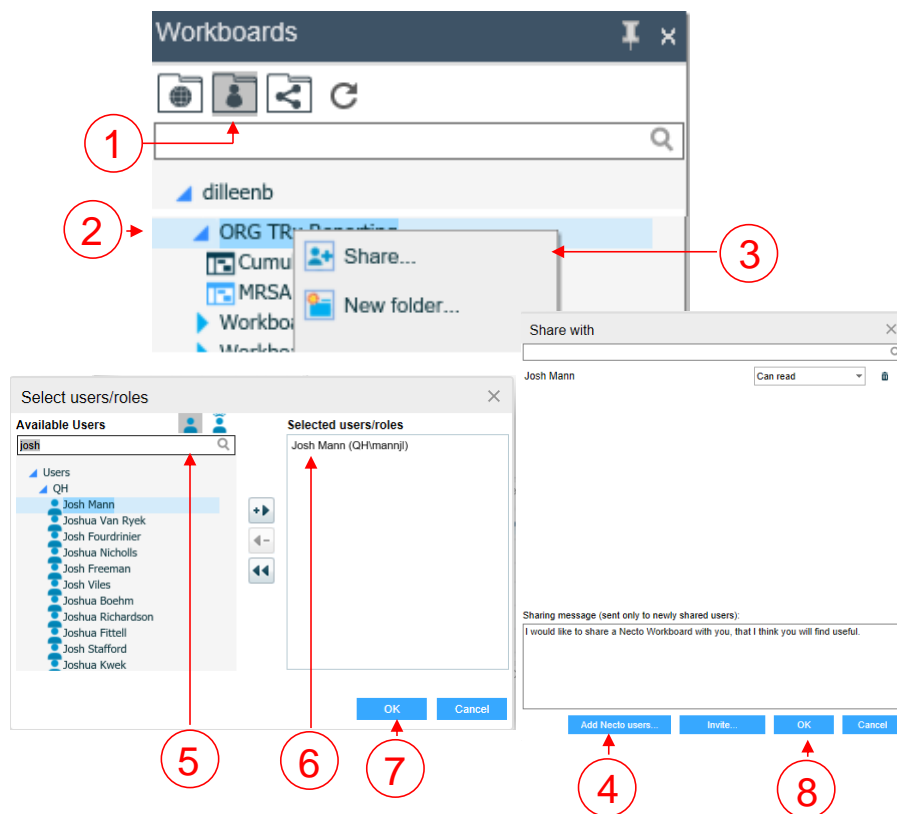
1. Click  *Show private content*
2. Right mouse click  on the symbol beside the Workboard you would like to share
3. Select *Share* from the options menu
4. Click  *Add Necto users*, wait for the user names to load
5. Click into the search pane and type in the person's name
6. Click on the name and move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

Figure 22 **Sharing a workboard**



Note: The user you are sharing a workboard with will not receive any notification, you must notify them.
To delete a sharing arrangement, click the trash can (Figure 22).

11.2 Open a shared workboard

Once a user has shared a workboard with other users it can be accessed via the Shared content folder.
To open a shared workboard (Figure 23):


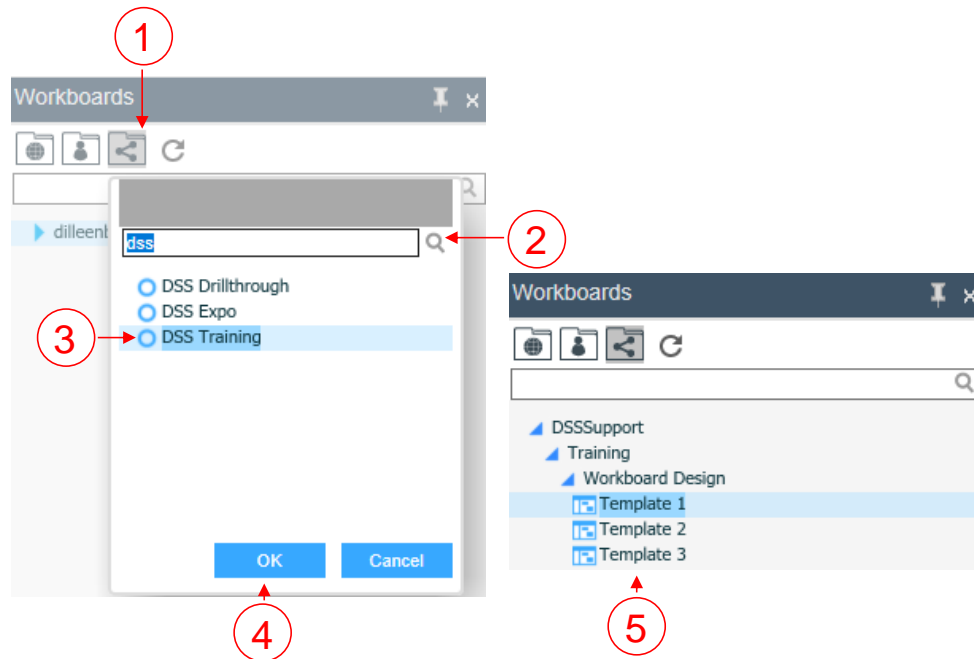
1. Click  *Shared Content*
2. Click into the search field and enter the name of the user who has shared report
3. Click on the user name to highlight
4. Click *OK*
5. Open the folder, locate the view and double click

Figure 23 **Open a Shared workboard**

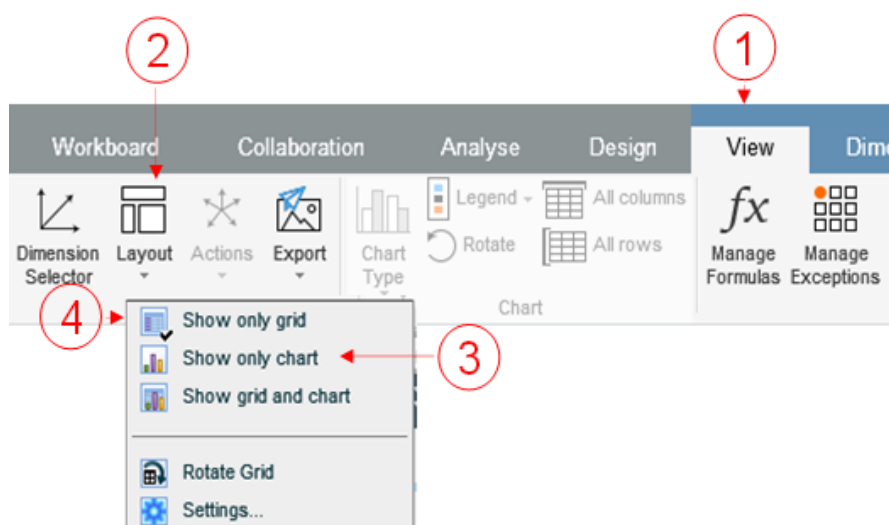


12 Chart functionality - change

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

1. Click the **View** View tab
2. Select the **Layout** Layout button
3. Select *Show only chart*
4. Select *Show only grid* to remove chart

Figure 24 **Add/remove a chart**



12.1 Modify a chart - change

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





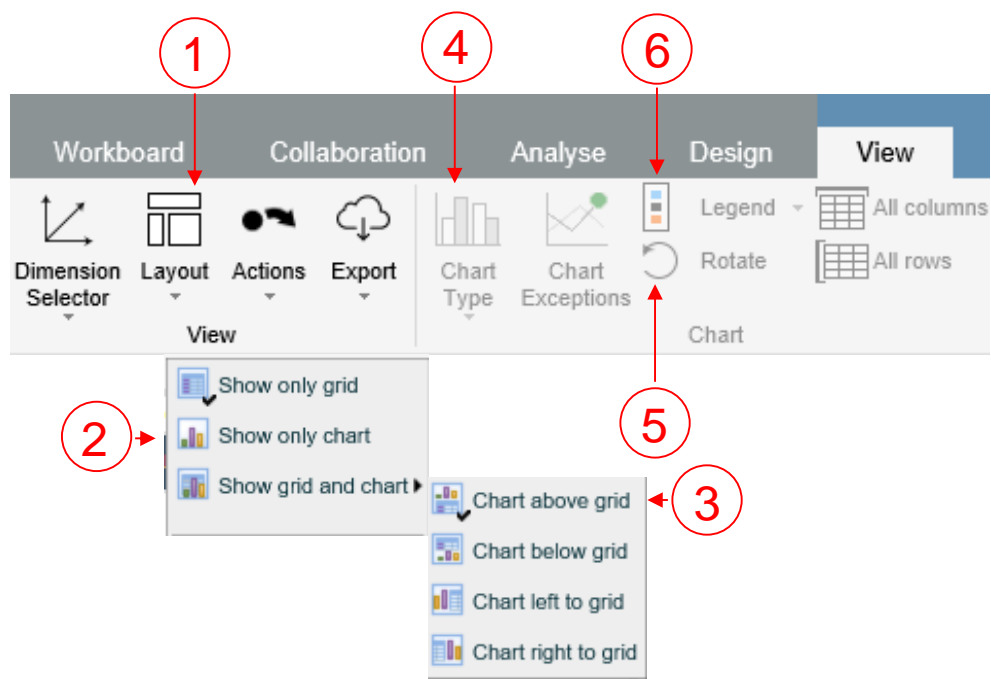
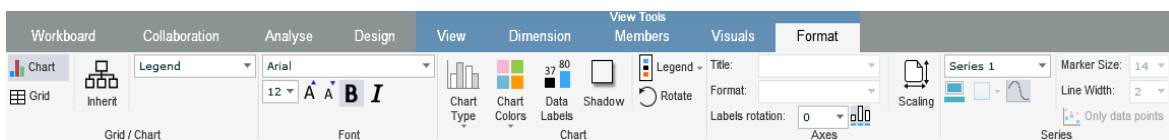
1. Select  *Layout* from *View* in the ribbon
2. Choose an option; *Show Chart* or *Show Grid and Chart*
3. Select where to place the chart e.g. *Chart above grid*
4. Click the  *Chart Type* to select a default chart from the menu
5. Click  *Rotate* to rotate the *Axis* on your *Chart*
6. Click  *Legend*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

Figure 25 **Modify a Chart**



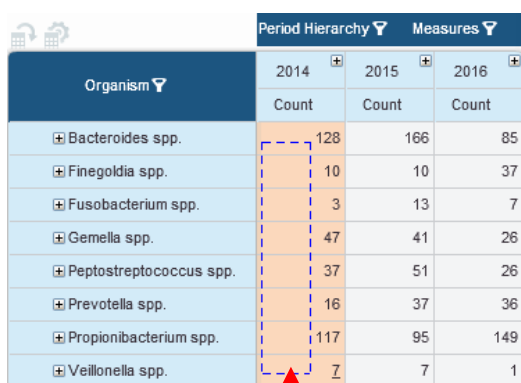
Tip: additional formatting for charting can be found via the Format tab within View Tools. Click on Chart and deselect Inherit.



12.2 Select data to display in the chart change

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

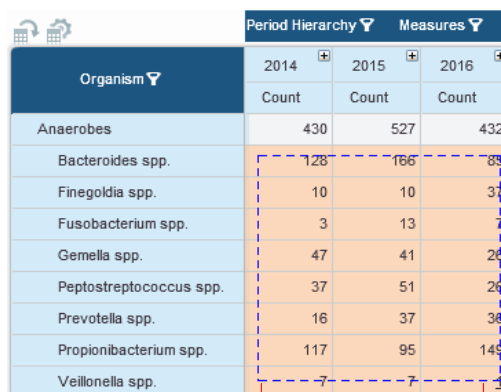
1. In the grid, click and drag the selection rectangle across a column to display that column in the chart
2. In the grid, click and drag the selection rectangle across a row to display that row in the chart
3. In the grid, click and drag the selection rectangle from the member level and drag from left to right and down
4. To capture multiple rows or columns make the first select and then hold down the ctrl key and make further selections
5. To remove a row or column hold down the Ctrl key and drag the selection triangle over that row or column



Period Hierarchy ▾ Measures ▾

Organism ▾	2014 +	2015 +	2016 +
	Count	Count	Count
Bacteroides spp.	128	166	85
Finegoldia spp.	10	10	37
Fusobacterium spp.	3	13	7
Gemella spp.	47	41	26
Peptostreptococcus spp.	37	51	26
Prevotella spp.	16	37	36
Propionibacterium spp.	117	95	149
Veillonella spp.	7	7	1

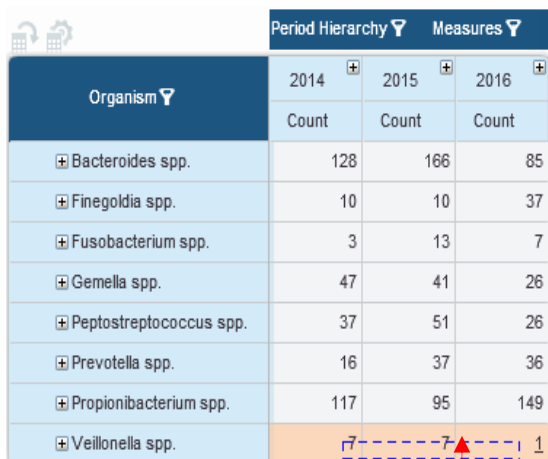
1



Period Hierarchy ▾ Measures ▾

Organism ▾	2014 +	2015 +	2016 +
	Count	Count	Count
Anaerobes	430	527	432
Bacteroides spp.	128	166	85
Finegoldia spp.	10	10	37
Fusobacterium spp.	3	13	7
Gemella spp.	47	41	26
Peptostreptococcus spp.	37	51	26
Prevotella spp.	16	37	36
Propionibacterium spp.	117	95	149
Veillonella spp.	7	7	1

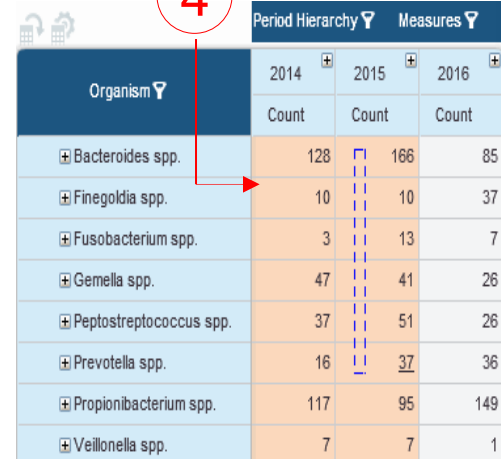
3



Period Hierarchy ▾ Measures ▾

Organism ▾	2014 +	2015 +	2016 +
	Count	Count	Count
Bacteroides spp.	128	166	85
Finegoldia spp.	10	10	37
Fusobacterium spp.	3	13	7
Gemella spp.	47	41	26
Peptostreptococcus spp.	37	51	26
Prevotella spp.	16	37	36
Propionibacterium spp.	117	95	149
Veillonella spp.	7	7	1

2



Period Hierarchy ▾ Measures ▾

Organism ▾	2014 +	2015 +	2016 +
	Count	Count	Count
Bacteroides spp.	128	166	85
Finegoldia spp.	10	10	37
Fusobacterium spp.	3	13	7
Gemella spp.	47	41	26
Peptostreptococcus spp.	37	51	26
Prevotella spp.	16	37	36
Propionibacterium spp.	117	95	149
Veillonella spp.	7	7	1

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