# The Royal College of Surgeons of Edinburgh

# Electronic Logbook

# Specialty Administrators Guide

Version 1

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#### Introduction

This guide is intended as an introduction to managing the specialty administration area of the RCSEd electronic logbook / portfolio system. It contains details of how to administer the **operation descriptors**, the **hospitals database** and the **operation stages dictionary** as *specified by the specialties*. In addition, it demonstrates how to issue a new version of operation codes and how to manage the membership of users within the Deaneries and Training programmes.

### Accessing the system

The system is accessed at the following URL <u>https://www.rcsed.ac.uk/logbookadmin</u>. You must use your designated specialty administration username and password to enter this area.

On entering the system you will see the following screen: The specialty which you are administering will be displayed on this page.

**N.B.** if you login and find that you are administering the wrong specialty, please logout immediately and contact the system administrator.



## Accessing Usage Reports

Selecting "Activity Report" on the tree menu will display, after a few seconds, a live report on the current activity of the specialty. Importantly, it displays how many of the specialty users have been identified as SpRs. This is important *as the specialty analysis is only performed on users who have been identified as SpRs*. Users are identified as SpRs by each training Programme Director within the Directors area of the web site. **Please see the guide on using the Directors Administrative area for further details**.



# 7 Day Upload Activity Report

This report indicates the level of activity over the preceding 7 day period and gives an indication of the level of activity for each mode of data entry.

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# **Operation Codes Editor**

The RCSEd logbook operates a system whereby all operation codes are managed *centrally by each Specialty*. Thus the *specialty administrator is responsible* for administering the master list of operation codes for their specialty. When a change has been made to this master list, it is *immediately available* to the web based logbook client but is not available to the remote clients (PC & PDA) until the new version is released. This is discussed later in the guide.



Operation codes are divided into several layers of hierarchy which represent the pick menu lists within the clients. Operations can thus be logically divided up into groups and sub groups. There are three levels of groupings: **Master Groups**, **Body Region Grouping** and **Sub Grouping**. Operation codes can only be added at the Body Region level and sub group level. In addition an **operation link** can be created to an existing operation code from within another group where the specialty wishes to have the same operation appear in more than one part of the menu structure.

#### **Editing an Operation Code**

Once the logbook for a specialty is live, editing an operation code should be undertaken with caution. Codes are stored within the system and records as unique numbers so that a change to an operation name will be reflected in all existing records. Thus an operation name should only be changed if the terminology has changed, not if it is a different operation.

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An operation code can be safely moved between body regions or groups or even placed in a new sub group, as this simply changes its location within the menu system.

"**Multiple Operation Constraints**" is a new feature which allows the situation in which a user may have inadvertently entered duplicate records, to be identified. It allows the administrator to define operations that are unlikely to have been performed

more than once on the same patient on the same day, (eg. an appendectomy) whilst at the same time allowing the administrator to define other operations which may in fact have been performed numerous times on the same patient on the same day (eg. plating).

#### **Deleting Operation Codes**

Until a specialty goes "live" with it logbooks, deleting operation codes is possible. After this, deleting simply hides the code from the menu system but does not remove it from the database. The reason for this is to ensure that operations remain coded correctly within the system.

## **Operation Stages**

Operation stages are defined for the entire specialty and allow **intra operative stages** to be defined for an operation, **as stipulated by that specialty**. *This is particularly useful for recording trainee involvement in complex operations*.



Once the Operation Stage Dictionary is built, these can be assigned to operations as required:

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Select "Add Operation Part" to add an intra-operative stage (this will be renamed!), or "Edit" to change a stage. Use the "up / down" to adjust the order in which the stages appear to the user.

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# Hospital Database Editor

Each specialty is set up with a complete set of Hospitals. However it is often desirable to remove many of the hospitals which are not appropriate for a given specialty. This can be achieved using the "**Hospital Database Editor**". Conversely, new hospitals can be added where necessary. The Hospitals Database is available immediately to users of the Web Client when changes are made, however a new version needs to be created to prompt remote clients to download the new set of codes.

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# Specialty Portfolio Form Templates

Portfolio Form Templates are used to define data entry forms for collecting portfolio information, allowing a user to build a cumulative electronic portfolio. Templates are managed as versions and it is recommended that once released, a template is only re-released as a new version as few times as possible.

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## Form Template Editor

The Form Template Editor is used to manage a form template yet to be published. Text, Date, Number, Pick List, and Text Area fields can be added and edited. In addition, fields can be made compulsory, whilst constraints and validation can also be applied.

Each field can in addition be mapped to one of 10 database parameters (param1 – Param10). Fields that will be important for searching and analysis in the future should be mapped to these parameters. Unmapped fields will be stored in an XML structured repository. This data is still accessible but will require extra processing to be analysed.

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The diagram below demonstrates the editor of the basic text type.

## **Deanery Management**

The Deaneries management page allows users to manage the allocation of trainees between deaneries.



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# Training Programme Administration

When a specialty is set up on the system, the training programmes reflect the deaneries. However in many specialties this is not the case. The Training Programme administration pages allow trainees to be moved between training programmes and the training programme name to be changed. In addition, when a training programme has been emptied of trainees, it can be removed. Thus this facilitates the merging of two or more training programmes.

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-Form Templates		n
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Trainees can be added or removed from training programmes.

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Directors can also be added or removed from training programmes. *N.B. Adding a user to a training programme, as a Director, immediately gives that user access to the Directors' pages for that training programme, with access to trainee reports, etc.* 

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## **Operation and Hospital Codes Version Control**

When Operation Codes are added or changed, Hospital Codes are added or changed, Operation Stages are altered, or Forms Templates are added or altered, then these changes are immediately available to web site users; however they are not available to remote users (PC and PDA) until a new version is issued. Once a new version is issued, the next time a user synchronises to the server, they will be prompted to allow the automatic download of the new set of codes. It is recommended that the release of new versions is kept to a minimum as on slow internet connections, a new set of codes can take some time to download. Under the "Downloads" column, is an indication of the number of downloads since release of the new version.

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# Analysis Groupings

Analysis Operation Groups, allow operations to be aggregated together as groups for the purpose of indicating trainee activity in certain operative areas. Also these groups dictate how the consolidation reports are generated, with user activity listed under each analysis grouping. This is usually setup at the time of setting up the specialty, being rarely changed following this.

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4	Hand - carpal tunnel decompression	<u>Up</u> <u>Down</u>	<u>edit</u>	<u>delete</u>					
5	Hand - Dupuytren's surgery	<u>Up</u> <u>Down</u>	<u>edit</u>	delete					
6	Hand - tendon repair	<u>Up</u> <u>Down</u>	edit.	<u>delete</u>					
7	Hand - tendon transfer	<u>Up</u> <u>Down</u>	<u>edit</u>	delete					
8	Hand - ulna nerve decompression	<u>Up</u> Down	<u>edit</u>	<u>delete</u>					
9	Hand - rheumatoid surgery	<u>Up</u> <u>Down</u>	edit	<u>delete</u>					
10	Trauma - application of external fixator	<u>Up</u> <u>Down</u>	edit	<u>delete</u>					
11	Trauma - hip fractures (intracapsular)	Up Down	edit	<u>delete</u>					
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13	Trauma - femoral nails	Up Down	<u>edit</u>	delete					
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# **Regional Areas Groupings**

Regional Area grouping allows the grouping of training Programmes into Regions to allow regional comparisons of activity to be calculated.

