atmolytics

Getting Started

User Guide v2.60

imosphere

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1 Welcome to Atmolytics!

This guide will introduce and explain the many features of Atmolytics v2.60. It's intended to:

- Give you a broad understanding of Atmolytics
- Help you navigate the different areas of the software
- Clearly demonstrate how to carry out many different tasks using Atmolytics
- Introduce you to useful features
- Serve as a reference and reminder as you use Atmolytics day-to-day

You'll find that Atmolytics itself contains a lot of useful, context-specific help, which can be accessed by clicking on the symbol where it appears in various places on screen.

Further User Guides

There are several comprehensive user guides available which give far more detailed information about specific areas of Atmolytics. We recommend you refer to these for anything over and above the information in this guide.

Cohort Discovery Guide

Cohort Insights Guide

General Guide to Reports

Administrative Functions Guide (most useful for Atmolytics System Administrators)

1.1 A note about terminology

Because Atmolytics is fully configurable, different organisations may use different terms to describe the individuals and events they are working with, and these will be reflected in the Atmolytics screens. For example, one organisation's **patients**, **admissions** and **reports** may be another organisation's **service users**, **involvements** and **explorations**. Your organisation might use different terminology in their implementation of Atmolytics.

In this user guide, we've used the terminology **patients**, **admissions/visits** and **reports** throughout.

We refer to the 'start' area of Atmolytics (found by clicking on the icon) as the **Home** area. You might also see this referred to as **My Hub** in other user guides.

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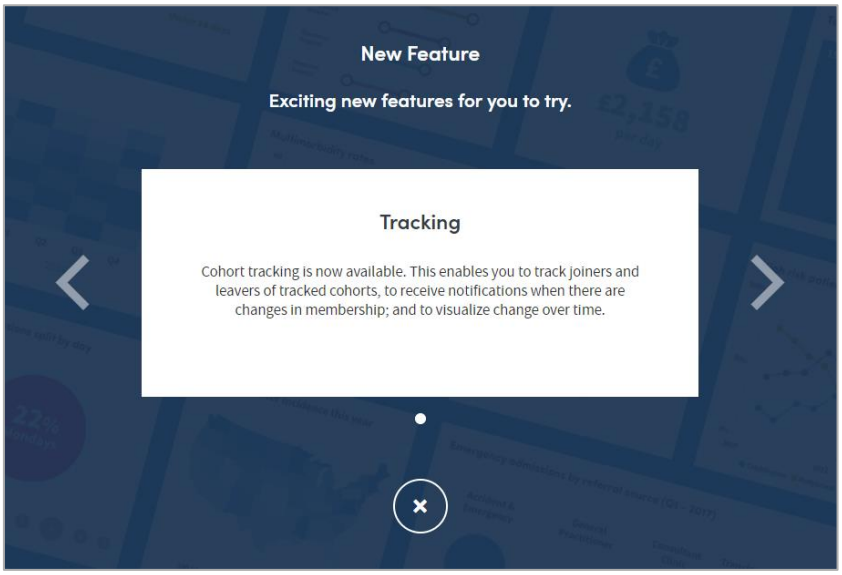
2 How to log in to Atmolytics

The first screen you will see is the log in screen:

At the very top of the login screen you may see the **Announcements** banner. Click the down-arrow to see details of new features or other important news that may be of interest to you:



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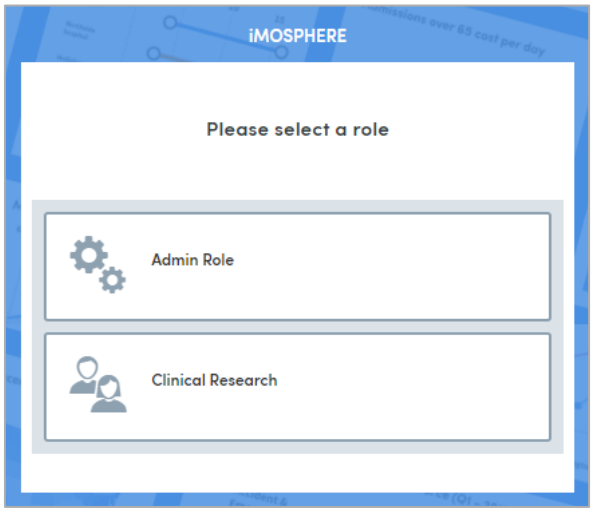
When you're ready, enter your username and password. Your system administrator will provide you with these. Click on **Log in**.

If you have any trouble logging in, or you have forgotten your username or password, either click on the link on screen or contact your system administrator.

After you click on **Log in**, you will either be taken straight to the **Home** area, or you will see the role selection screen:

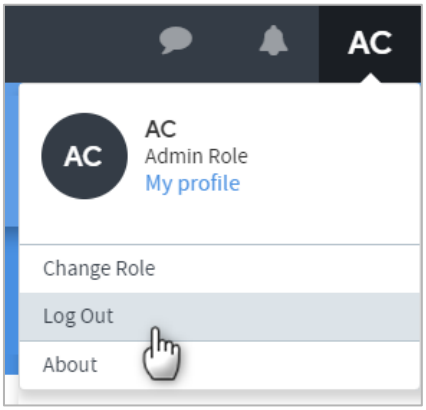


If your system administrator has assigned you more than one role, you will need to select the role you wish to use for this session before you are taken to the **Home** area.

If you've only been assigned one role, you will be taken straight to the **Home** area of Atmolytics.

3 How to log out of Atmolytics

To log out of Atmolytics, click on your name where it appears in the top menu bar, and select **Log Out** from the drop-down list:



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4 What is a Role?

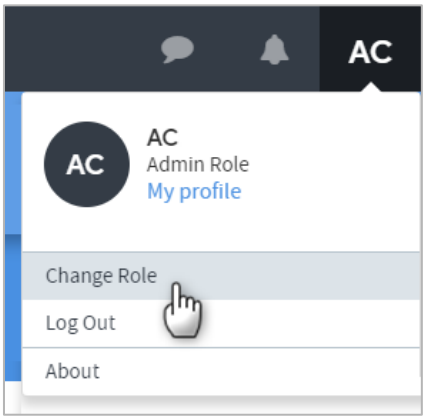
Your system administrator will have assigned you a **role** as a user of the Atmolytics system. This is a kind of profile which sets the type of access permissions you have, and the patient data you can view or report on.

Your user permissions may allow you and fellow users to share **cohorts** and **reports** with each other, but you will not be able see other users' data, and they won't be able to see yours, unless you explicitly choose to share it and have the necessary user permissions to do so.

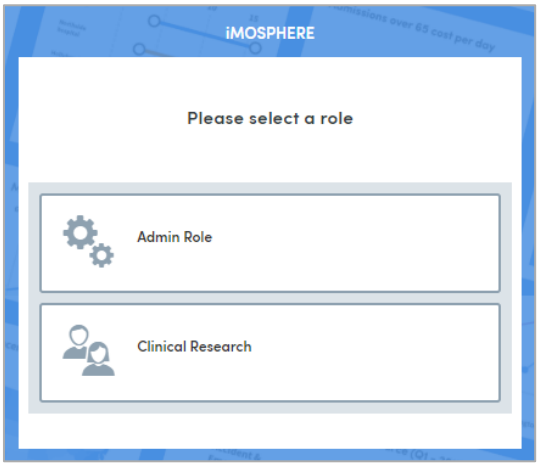
5 How to change role

If your system administrator has assigned you more than one role, you can switch roles without having to log out of your Atmolytics session.

Click on your name where it appears in the top menu bar, and select **Change Role** from the drop-down list:



You will be taken to the role selection screen:



Click on the role you wish to select, and you will be taken to the **Home** area.

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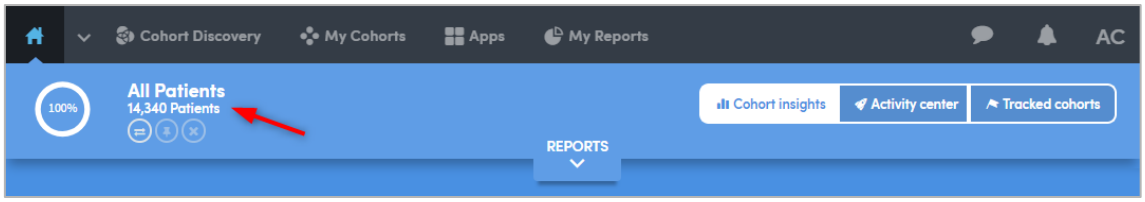
6 What is a Cohort?

Cohorts are the bedrock of Atmolytics. They are groups of patients which are created by filtering the full list of patients available to you, using criteria specified by you, the user. You can then create **reports** about these cohorts using the Atmolytics **Apps**.

Every cohort you create is a subset of your **base cohort**.

6.1 What is a Base Cohort?

Your base cohort is a group which contains all the patients (and their data) made available to you as an Atmolytics user. The number of patients in your base cohort is displayed towards the top of the **Home** area:



Your system administrator will have created your base cohort by selecting the patients whose data you are permitted to access. This base cohort will be assigned to you as part of your **role**. Any cohorts you create yourself will only include patients who are also included in your base cohort. If you share any information with other users, they will only be able to see the information you share which relates to the patients who are also in their own base cohort (they must also have permission to access the type of patient data you are sharing).

Nobody can view, report on, or share any data belonging to any patient who is not included in their own base cohort of patients. This is one of the ways in which Atmolytics protects sensitive data.

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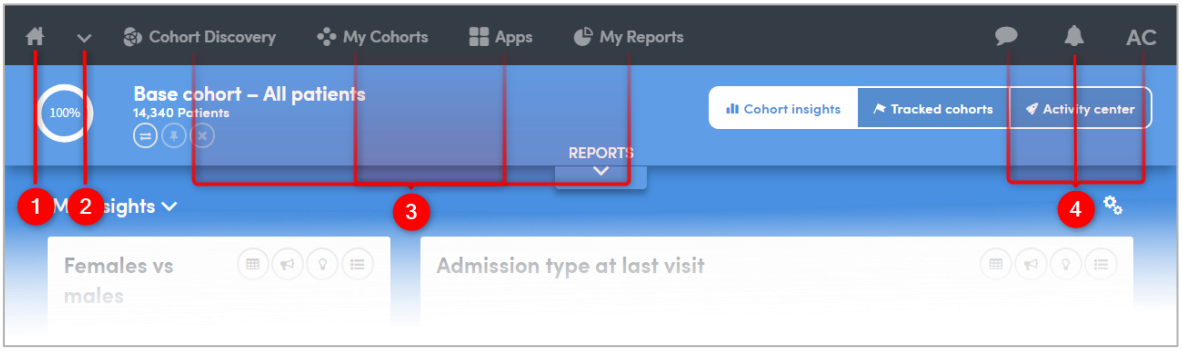
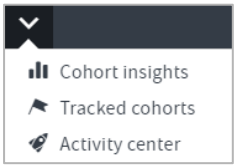
7 Finding your way around

Your Atmolytics screen is divided into 2 main sections, the **top menu bar** and your **work area**. The top menu bar does not change and is always accessible as a quick navigation tool. The work area changes as you move around Atmolytics, tailoring the available options and features to focus on the task at hand.

7.1 The top menu bar



1 Click on the icon on the very top left of your screen to go to the **Home** area. This contains the **Cohort Insights**, **Activity Centre** and **Tracked Cohorts** areas.

2 

Click this small arrow to move to the **Cohort Insights**, **Activity Centre** or **Tracked Cohorts** areas from anywhere within Atmolytics.

3 **Cohort Discovery**: This is where new cohorts are created. Cohorts are lists of patients which you create by filtering the full list of patients available to you, using criteria specified by you. You can explore these cohorts in the **Cohort Insights** area, or create reports about them using the **Apps**.

My Cohorts: This is where you view and organize cohorts.

Apps: This is the starting point for building a report. Each report is built using one of the Atmolytics Apps. Apps can be used to build new reports or re-run and update existing reports.

My Reports: This allows you to see and open reports that have already been created by you or shared with you by another user.

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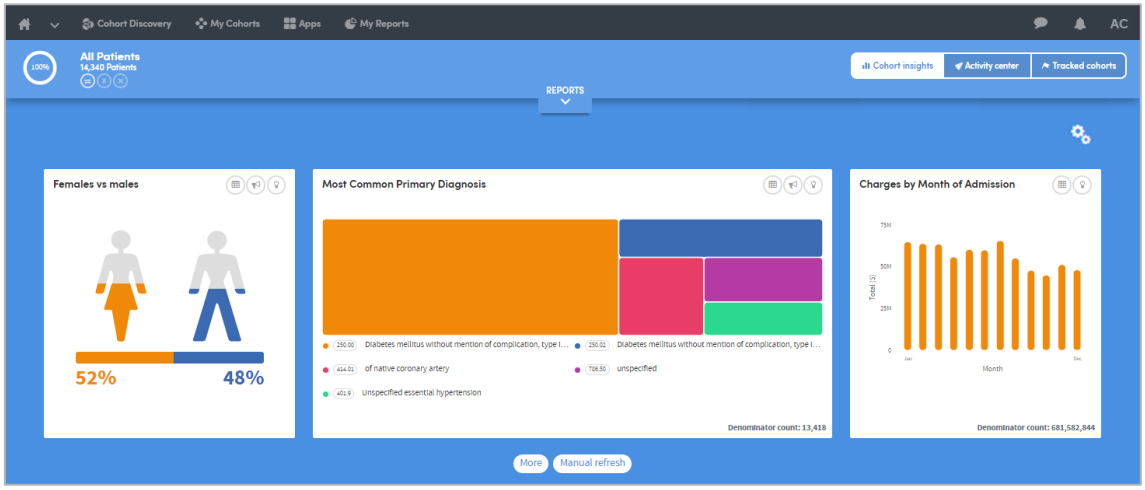
4 **Feedback**: Click this icon to tell us about your experience of using Atmolytics, and any issues or suggestions for improvement. Feedback about our user guides is also welcome!

/ **Notifications**: The bell will turn orange to let you know of any events requiring your attention: for example, reports which are ready for you to view, or cohorts that have been shared with you by a colleague.

AC **User Menu**: click here to access your user profile, change your role (if applicable), and log out of Atmolytics.

8 Home

After you log in to Atmolytics, you will be taken to the **Home** area, where you can quickly and easily see data relating to your own cohorts and reports and access relevant Apps:



The **Home** area contains the **Cohort Insights**, **Activity Centre** and **Tracked Cohorts** areas. Each of these areas is introduced and explained in the following chapters.

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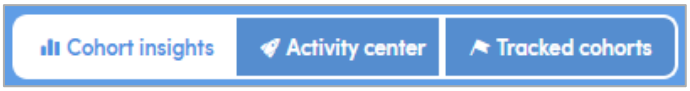
9 Cohort Insights

The Home area of Atmolytics can be accessed by clicking on the icon on the very top left of your screen. It comprises the **Cohort Insights**, **Activity Centre** and **Tracked Cohorts** areas. Click the buttons on the top right of the screen to move between them:

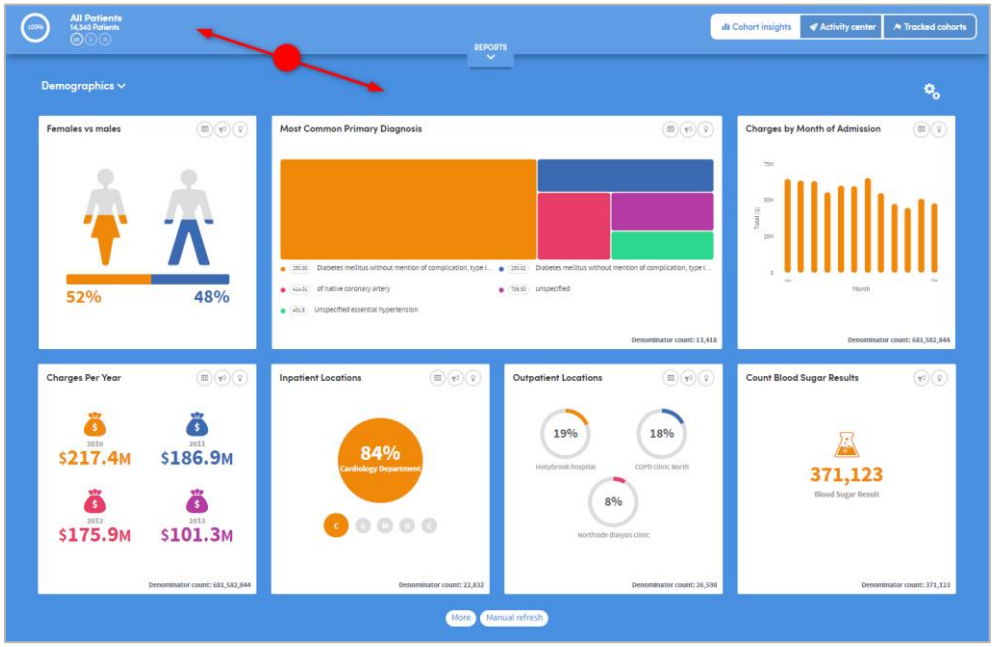


The Cohort Insights area enables in-depth exploration of any cohort you have access to. By default, it will display your **base cohort**, but you can select any of the cohorts available to you. You can then view and explore graphical representations of many different aspects of the cohort you select.

If you're new to Atmolytics, you may not have many (or any) cohorts to explore, other than your base cohort. Once you start using Atmolytics to create and possibly share more cohorts, you'll be able to view any of them in Cohort Insights.

As well as seeing insights that have been built into Atmolytics for you to view straight away, you can create your own custom cohort insights with just a few clicks, following a simple step-by-step process. You can select the cohort insight you wish to create, the data you wish to use and how the results should be visualized. You can also choose which insights to display, regardless of whether the cohort insight is an inbuilt system insight or an insight you have created yourself. See our separate **Cohort Insights User Guide** for full details of these features.

The Cohort Insights screen has two main areas: the menu bar and the exploration area.



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9.1 The Cohort Insights menu bar

The top part of the Cohort Insights screen contains the following features:

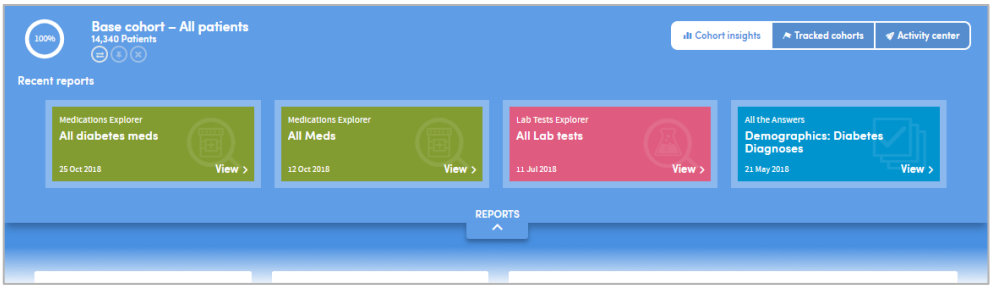
1 Here you can see the name of the cohort you are working with, and the number of patients it contains. Below this there are three buttons:

Change cohort: Click this button to explore a different cohort. You'll see a list of all the cohorts available to you. Click on the name of one to select it and display it on screen. The circular percentage image to the left of the cohort name will show what percentage of the patients in your base cohort are included in the selected cohort.

Pin cohort: Click this button to 'pin' the selected cohort to Cohort Insights. If you move to another area of Atmolytics and then return to this screen, the cohort will still be displayed. If you don't pin a cohort, then the Cohort Insights screen will always revert to its default view, which is to show your base cohort.

Unpin cohort: Click this button to unpin your pinned cohort. Once you unpin it, the Cohort Insights screen will revert to its default view, and display your base cohort.

2 This is the Reports pulldown menu. Click the down-arrow to expand the view:



You'll see a simple view of the most recent reports you have created. Click on one to quickly navigate straight to that report.

3 Click these buttons to toggle between the **Cohort Insights**, **Activity Centre**, and **Tracked Cohorts** areas.

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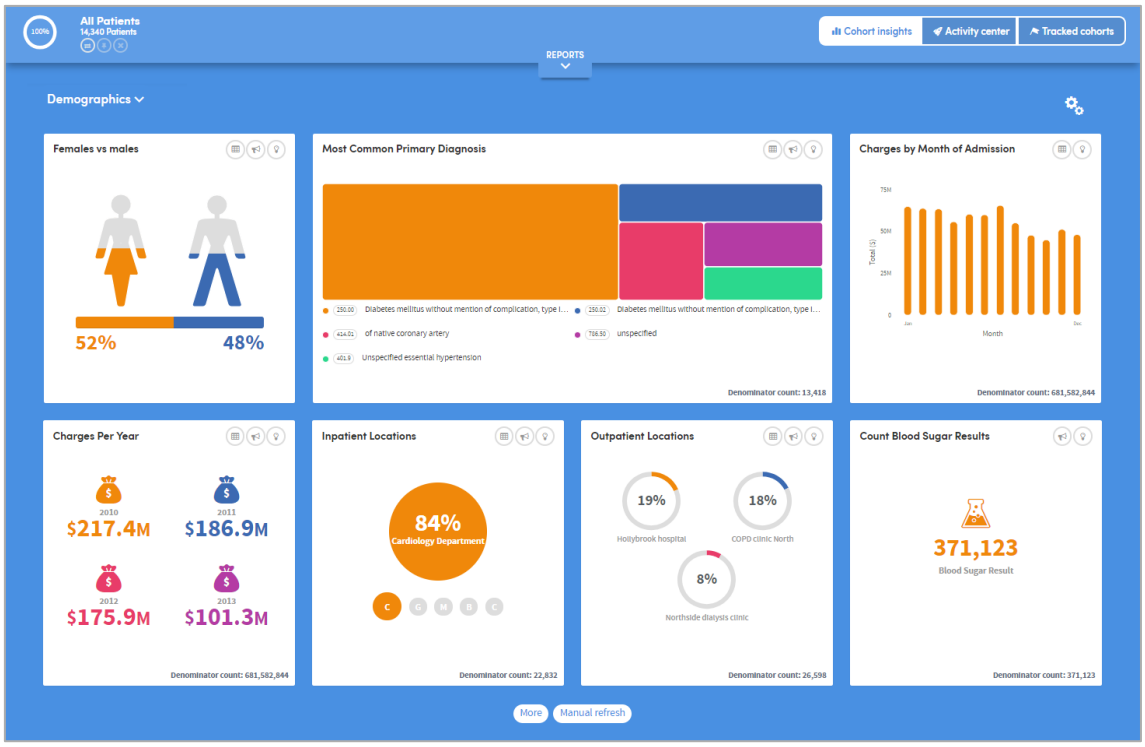
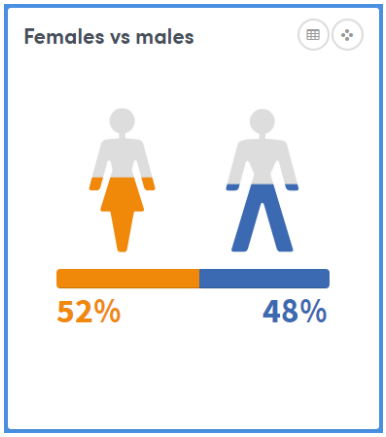
9.2 Exploring Cohort Insights

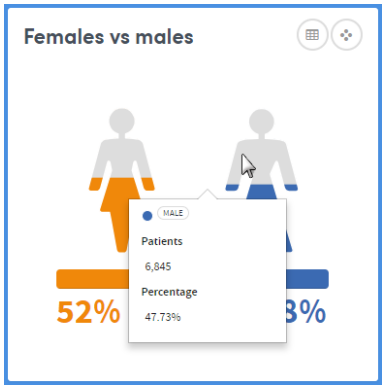
The bottom part of the Cohort Insights screen displays the data for you to explore:



Depending on the data available to you, this section might show representations of demographic information, details of diagnoses, test results, costs, charges, or locations where patient interactions took place:



Hover the mouse over the images to see this information in greater detail:



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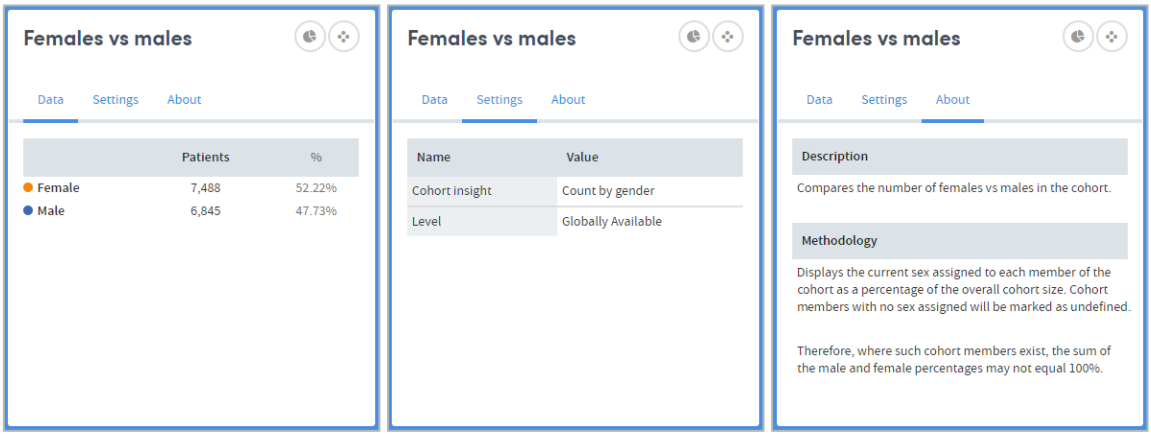
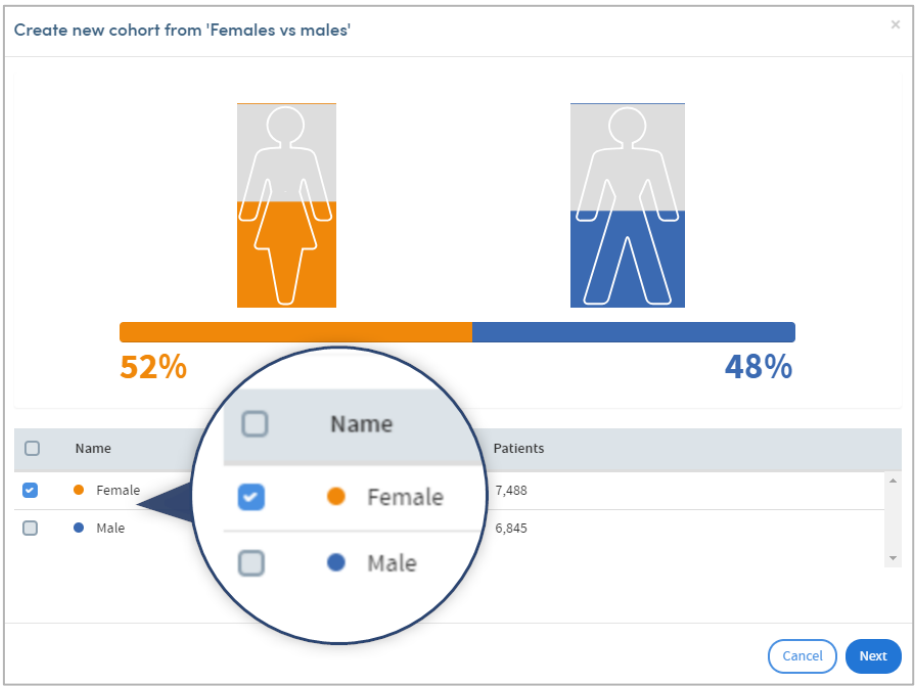
Click the symbol on the top right of each insight to see the **Data**, **Settings** and **About** tabs. These give you more information about the data and methodology used to generate the insight:



You can also create a new cohort based on the data in the cohort insight.

Click the symbol, and select one or more check boxes to create a new cohort containing those individuals:



Click **Next**. The new cohort will be given a name and a description which you can change if you wish:

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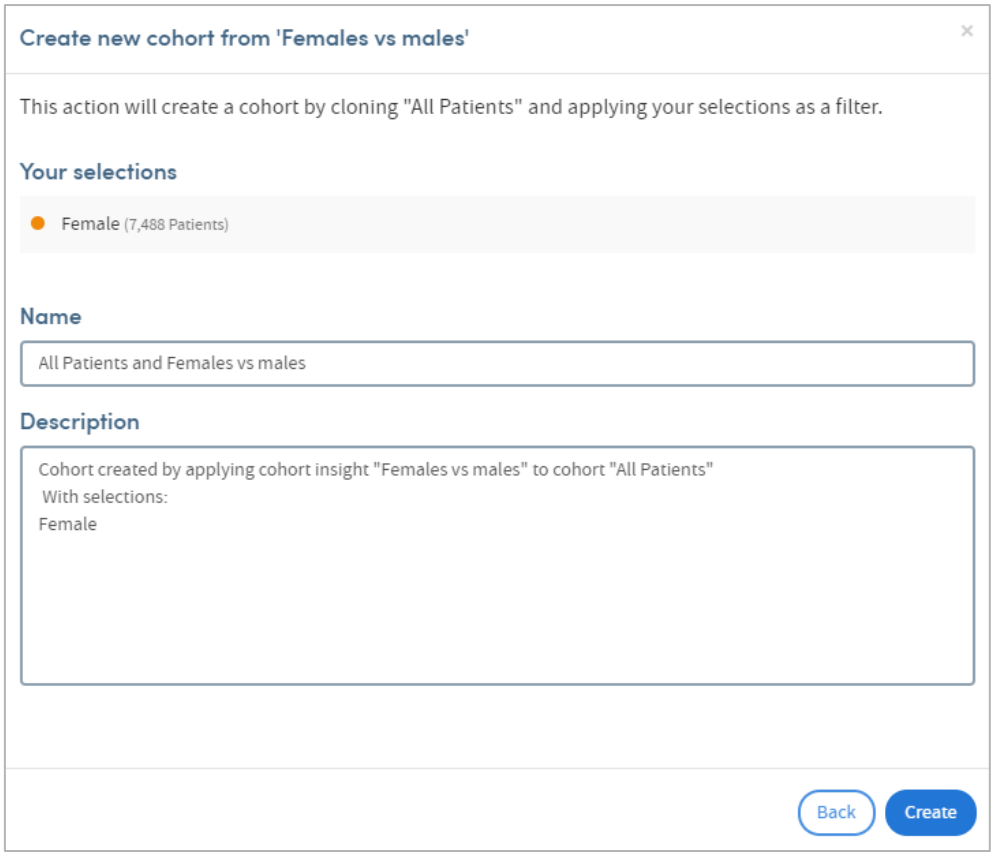
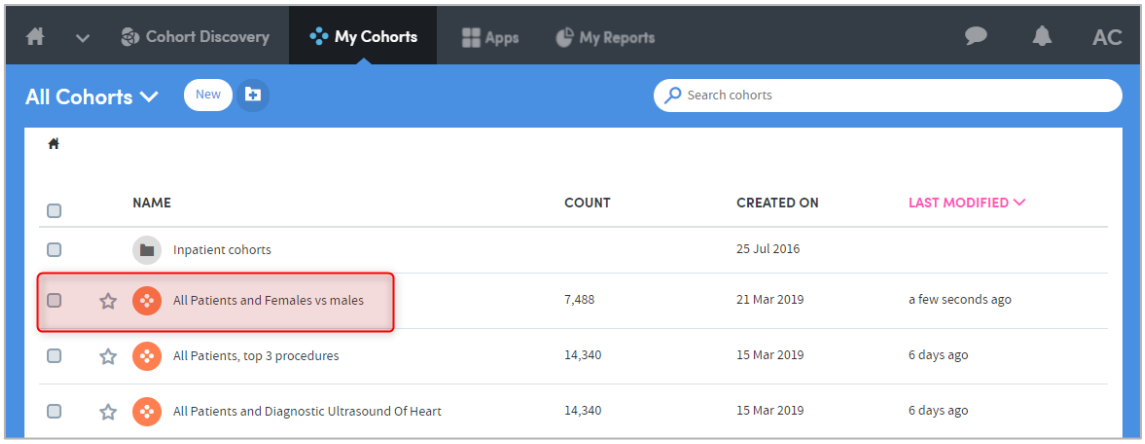


Click **Create** when you're ready. The new cohort will be created, and visible on the **My Cohorts** page:



You can also create your own insights, and organise your insights into sets. See our separate **Cohort Insights User Guide** for full details of these features.

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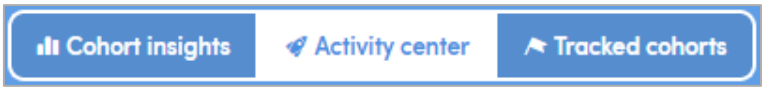
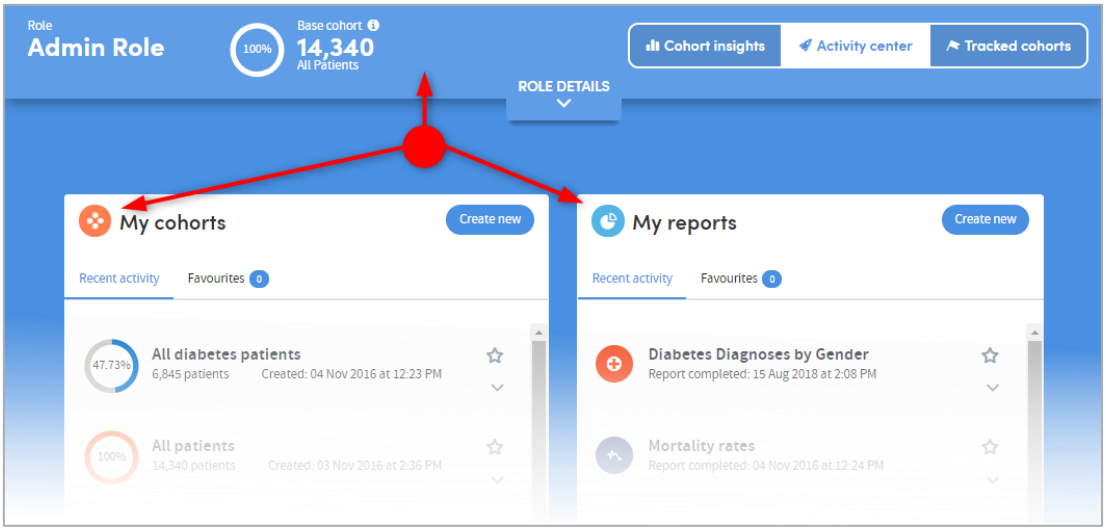
10 The Activity Centre

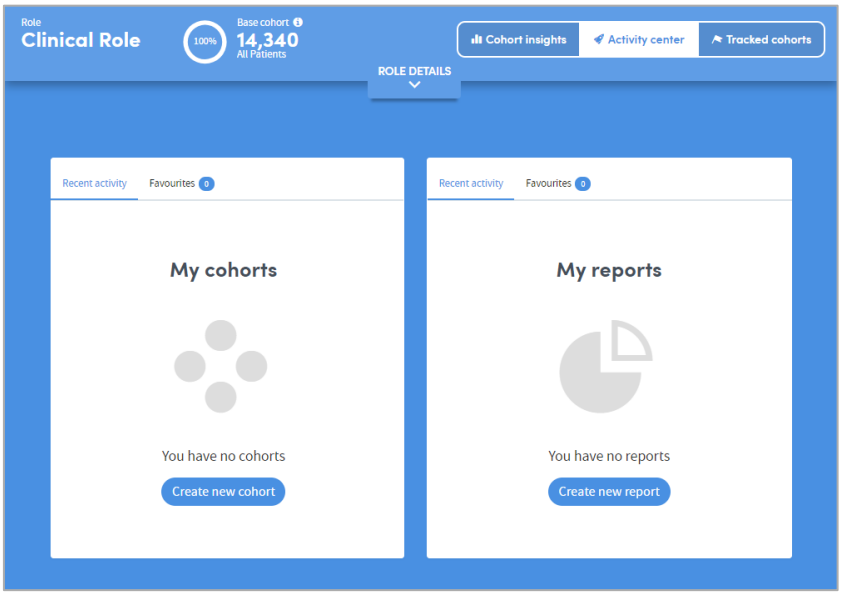
The Home area of Atmolytics can be accessed by clicking on the icon on the very top left of your screen. It comprises the **Cohort Insights**, **Activity Centre** and **Tracked Cohorts** areas. Click the buttons on the top right of the screen to move between them:



The Activity Centre is divided into three main areas, **My cohorts**, **My reports**, and **Role Details**:



If you are logging in to Atmolytics for the first time, your Activity Centre may look quite empty:



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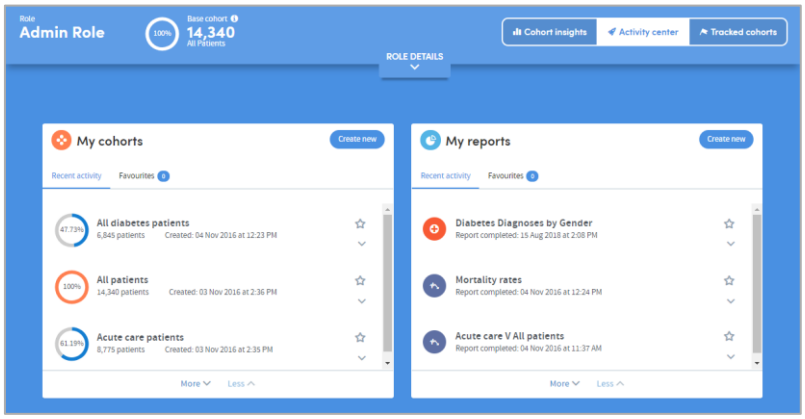
Once you have been using Atmolytics for a while, your Activity Centre will fill up to show you details of the reports and cohorts you have created, shared or viewed:



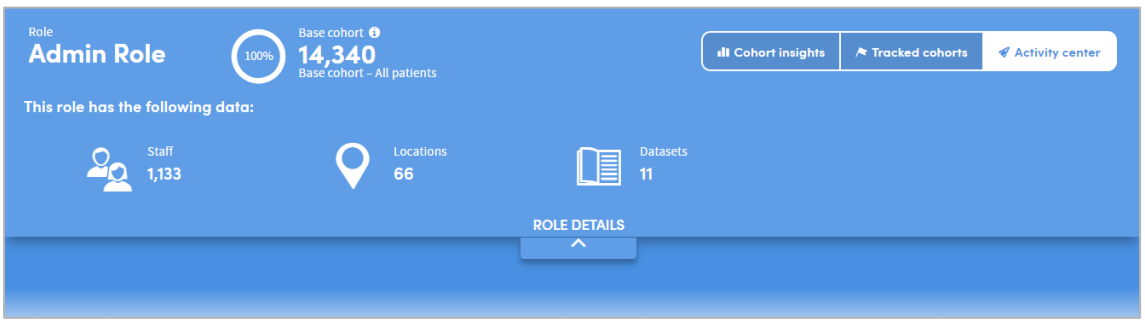
10.1 The Role Details section of the Activity Centre

As well as the usual buttons to toggle between the **Cohort Insights**, **Activity Centre** and **Tracked Cohorts** areas 4 this section of the screen displays:

1 Your current Role.

2 The total number of patients in your base cohort. The circular percentage image shows the **% of all the patients in your organisation's Atmolytics system** which your own base cohort contains. So, in the image above, this user's base cohort consists of 100% of the total number of patients in the system.

3 The **ROLE DETAILS** pulldown tab. Click this to see the types of data (numbers of staff, locations and datasets) that you have access to under this role:



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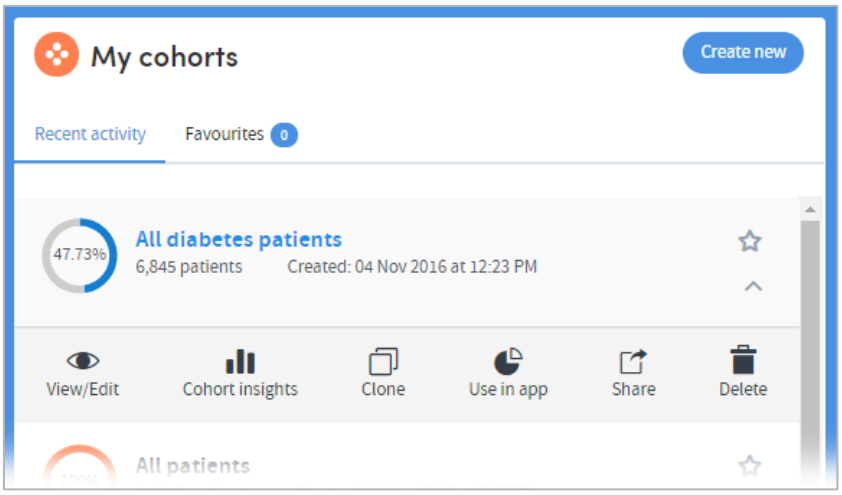
10.2 The My Cohorts section of the Activity Centre

This section of the **Activity Centre** displays basic details of the cohorts available to you.

The circular percentage image on the left of each cohort shows **the % of your base cohort** which is included within that cohort. So, in the image below, the **All diabetes patients** cohort consists of 47.73% of this user's base cohort.

By clicking on a cohort, you can access a drop-down list of actions:



Depending on the permissions you have been given, you can jump from here to several different areas of Atmolytics:

- **View/edit the cohort**
- **See graphical representations of cohort data in the Cohort Insights section of the Home area**
- **Clone, share or delete the cohort**
- **Use this cohort in an App**

You'll learn more about each of these functions and features later in this user guide.

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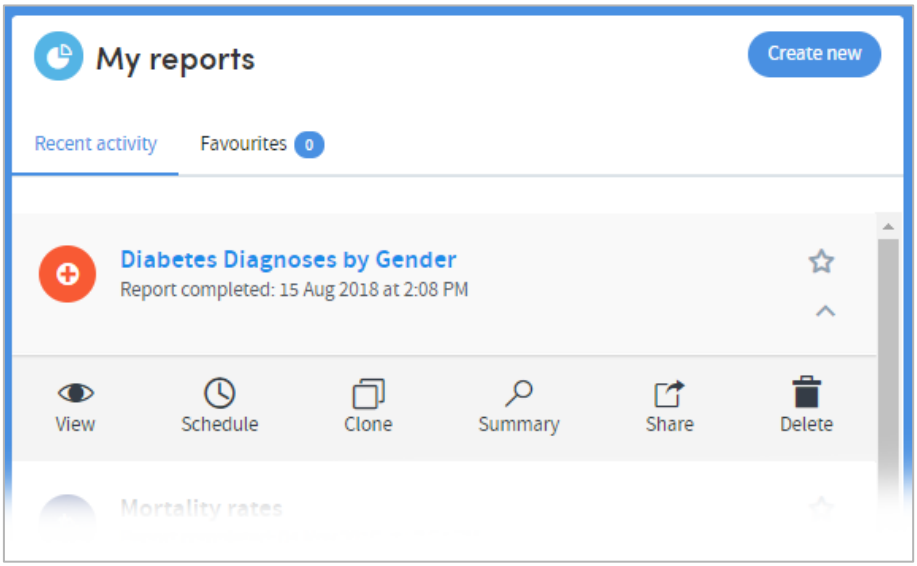
10.3 The My Reports section of the Activity Centre

This section of the **Activity Centre** displays basic details of the reports available to you.

By clicking on a report, you can access a drop-down list of actions:



Depending on the permissions you have been given, you can jump from here to several different areas of Atmolytics:

- **View the report in detail**
- **Set a schedule to run the report on a regular basis**
- **Clone, share or delete the report**
- **View a report summary**

You'll learn more about each of these functions and features later in this user guide.

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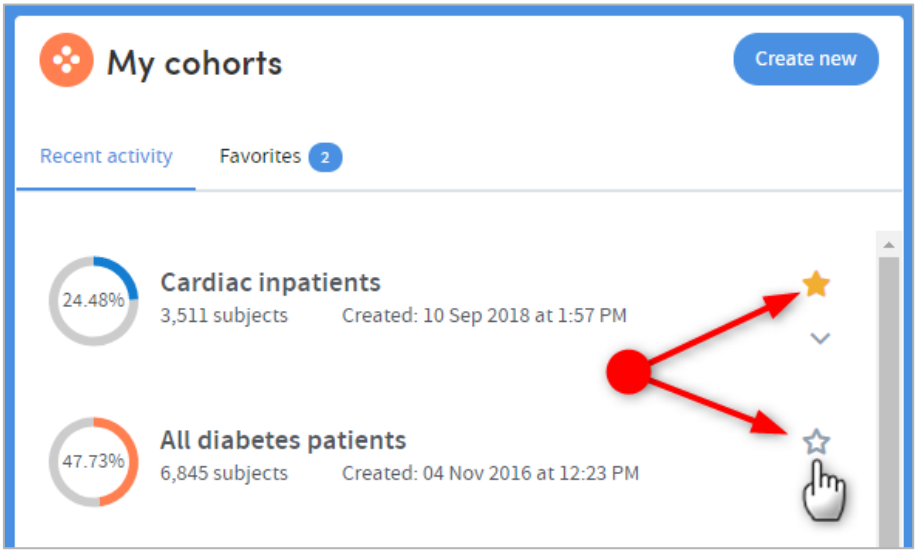
10.4 Favourites

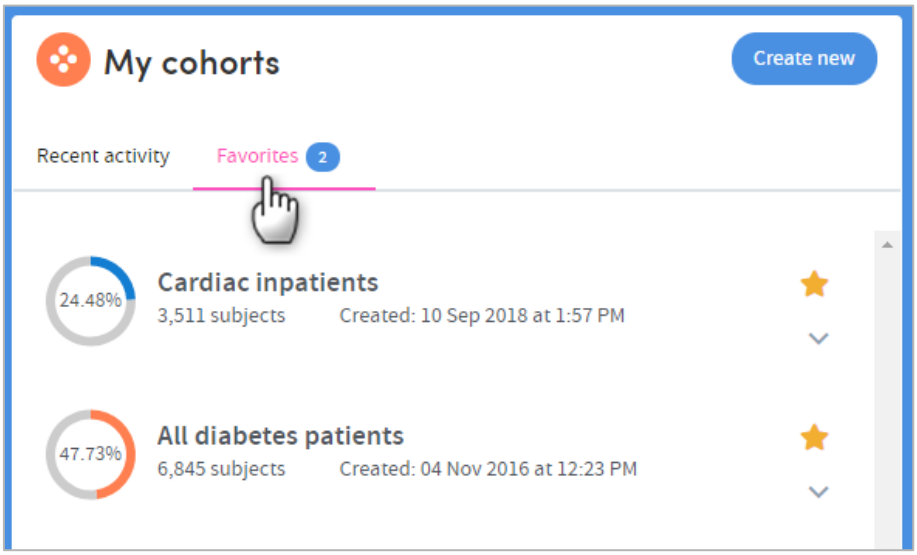
The Activity Centre is where you can tag cohorts and reports as favourites. This allows you to keep track of the cohorts and reports that you use most often.

You'll find a star icon against each of your cohorts and reports:



Clicking the star marks the item as a favourite so that it can easily be identified in future. You can untag the item by clicking the star again.

Click on the **Favourites** tab to see your list of favourite cohorts or reports:



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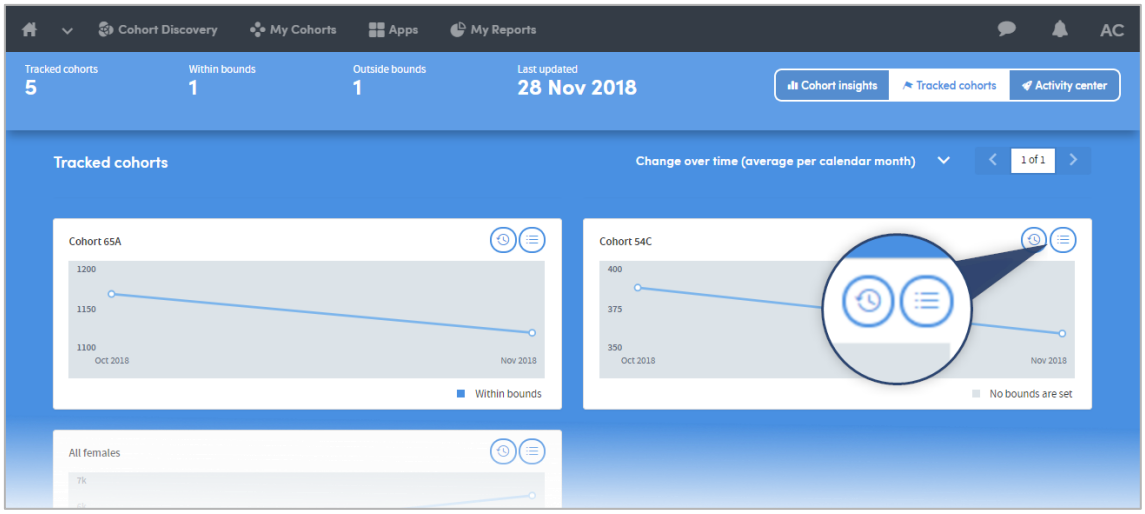
11 Tracked Cohorts

The Home area of Atmolytics can be accessed by clicking on the icon on the very top left of your screen. It comprises the **Cohort Insights**, **Activity Centre** and **Tracked Cohorts** areas. Click the buttons on the top-right of the screen to move between them:

The **Tracked Cohorts** tab of the **Home** area is a useful place to see an overview of activity relating to any cohorts you have chosen to track.

The cohorts you create and work with can change over time. For example, you may create a cohort containing all the patients from your base cohort who were admitted to hospital in the last 3 months. As time passes, patients will join, and others will leave this cohort, as they are admitted and discharged from hospital. This means that the number of patients in the cohort will change.

Once you have created and saved a cohort, you can choose to track it and be notified when patients join or leave, or when the number of patients in a cohort falls above or below a range (set by you). Chapter 14 of this user guide explains how to track a cohort, and our **Cohort Discovery Guide** contains fuller details of all these functions.



The **Tracked Cohorts** screen shows you a summary graph of each cohort you have chosen to track. Click the icons on the right of each graph to see more information about a cohort:

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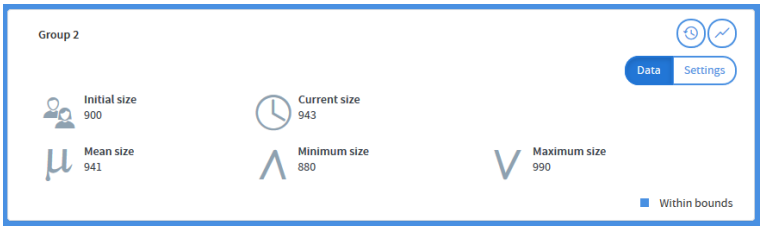
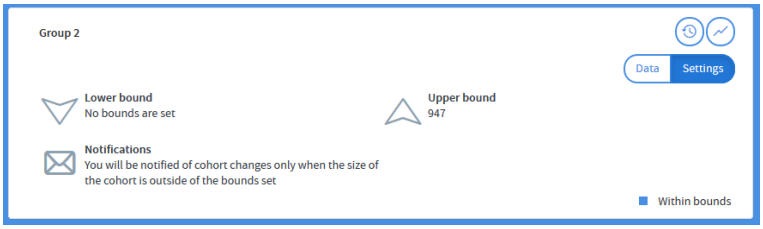
11.1 Summary

Click **Data** to see details of the cohort:

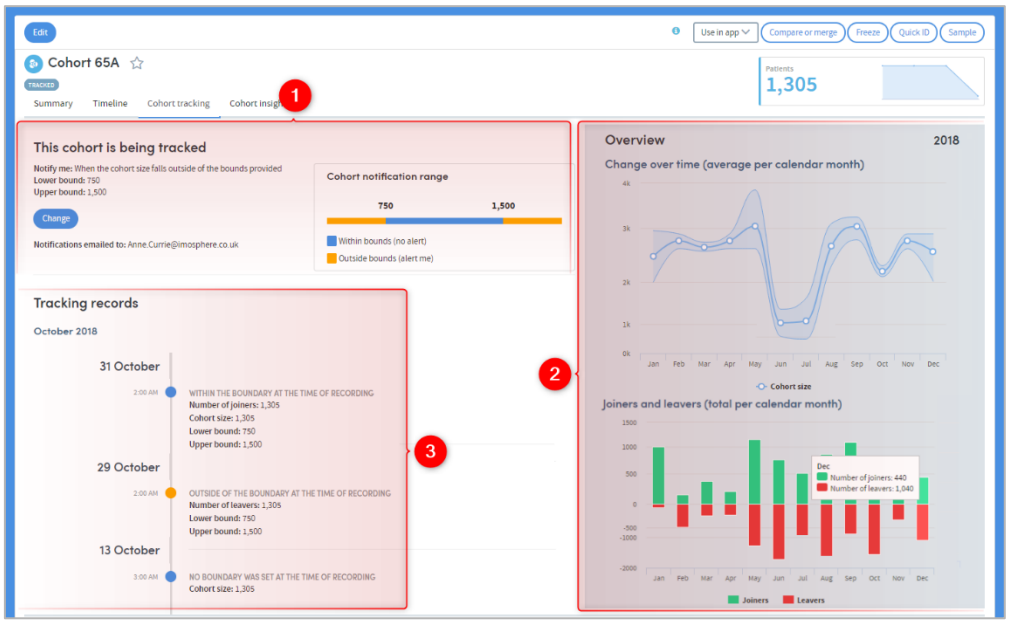


Click **Settings** to see details of the tracking bounds and notifications you've selected:



11.2 View History

Click here to be taken to the Cohort Tracking tab of the Cohort Summary screen:



1 This section gives details of the notifications you've requested, and the bounds (if any) you have set. You can also **Change** the setting here by clicking the blue button.

2 These two charts visualise the cohort changes. The first chart shows the population size for a given year, along with an area range showing how many joined and left the cohort. The second chart tracks the joiners and leavers over time in more detail.

3 This section shows a timeline of the cohort's changes. You can see the cohort size, the numbers of leavers and joiners and the boundary settings, at every point of change.

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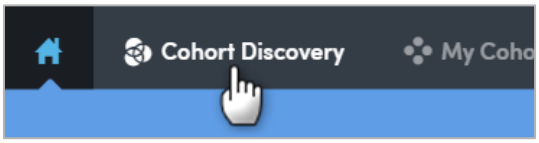
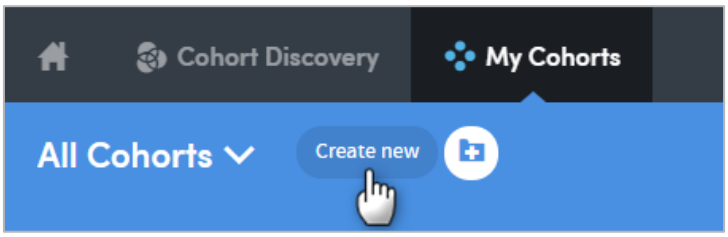
12 How to create a cohort

The Cohort Discovery area, where you create and edit cohorts, can be accessed either by clicking on **Cohort Discovery** on the top navigation bar:

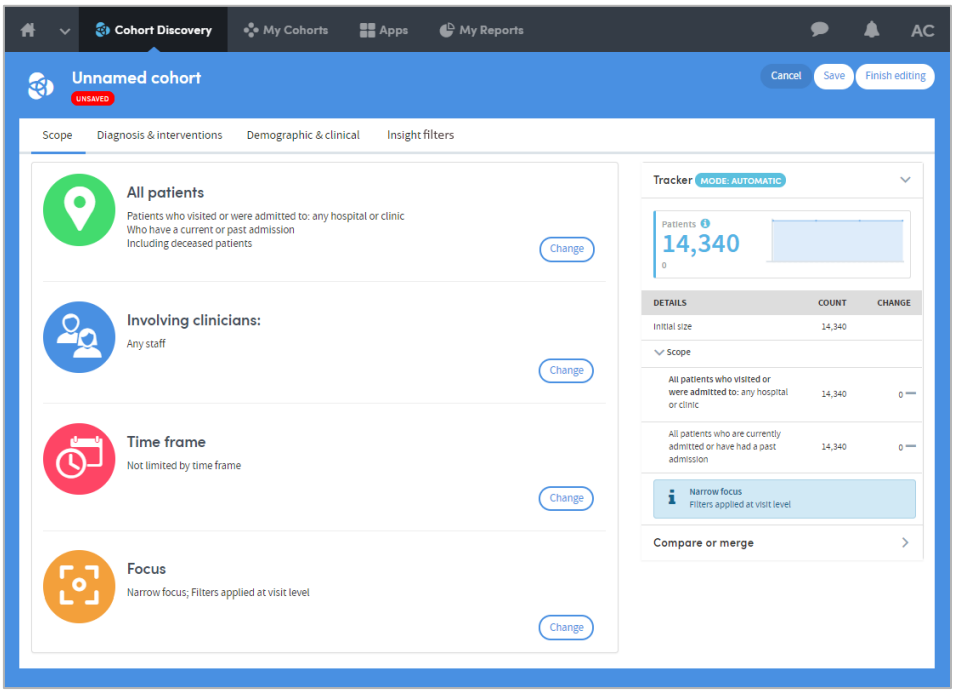


…by clicking on **Create new** within the **My Cohorts** area:



…or by clicking the **Create new** button in the My Cohorts section of the Activity Centre:

Whichever way, you will be taken to the Cohort Discovery screen:



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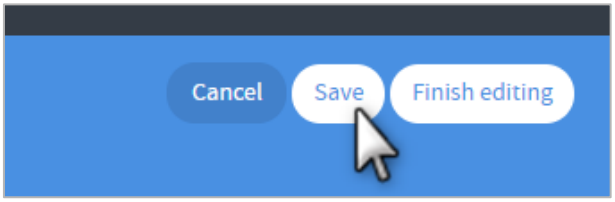
From here you can set the criteria that will be used to select the individuals in your cohort. See our comprehensive **Cohort Discovery Guide** for detailed information about applying the various filters available to you.

The cohort you create will be given the default name **Unnamed cohort**. You can edit the name to something more appropriate at any time. Just click on the **Unnamed cohort** text on screen and you will be presented with the option of changing it and adding in a detailed description of the cohort.

12.1 How to save a cohort

The cohort you create is labelled **UNSAVED**. It is not saved until you explicitly choose to do so by clicking either the **Save** button or the **Finish editing** button, located at the top right of the screen:



If you click **Save**, your cohort will be saved, and you will remain within the Cohort Discovery area and will be able to continue editing your cohort. If you move away from the Cohort Discovery area, your new cohort will appear in your list of cohorts in the **My Cohorts** area.

If you click **Finish editing**, your cohort will also be saved, and you will also be prompted to edit its name and add a description. You will then be taken to the **Cohort Summary** screen which shows the full details of your new cohort.

Important: If you move away from the Cohort Discovery area while creating a cohort and then return to it, your work will be lost if you have not previously saved it.

If you click **Cancel**, you will be returned to the **My Cohorts** area and your work will not be saved.

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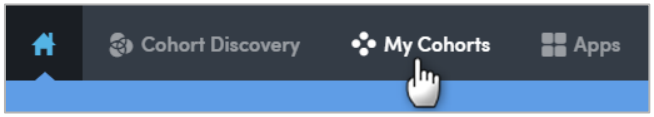
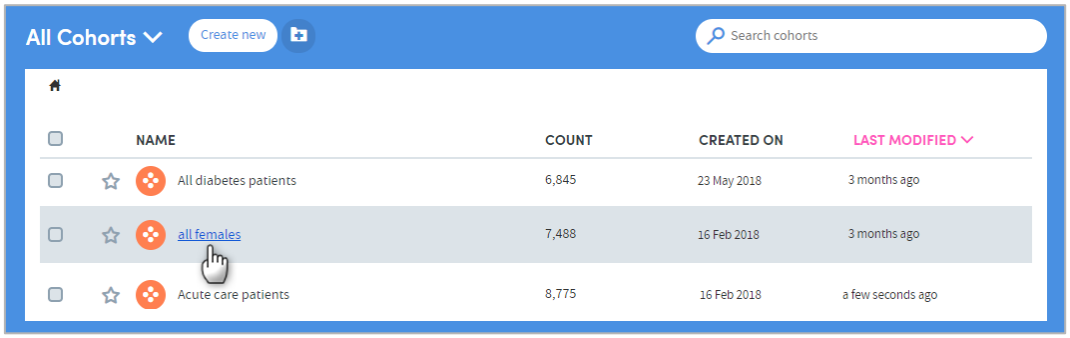
13 How to view a cohort

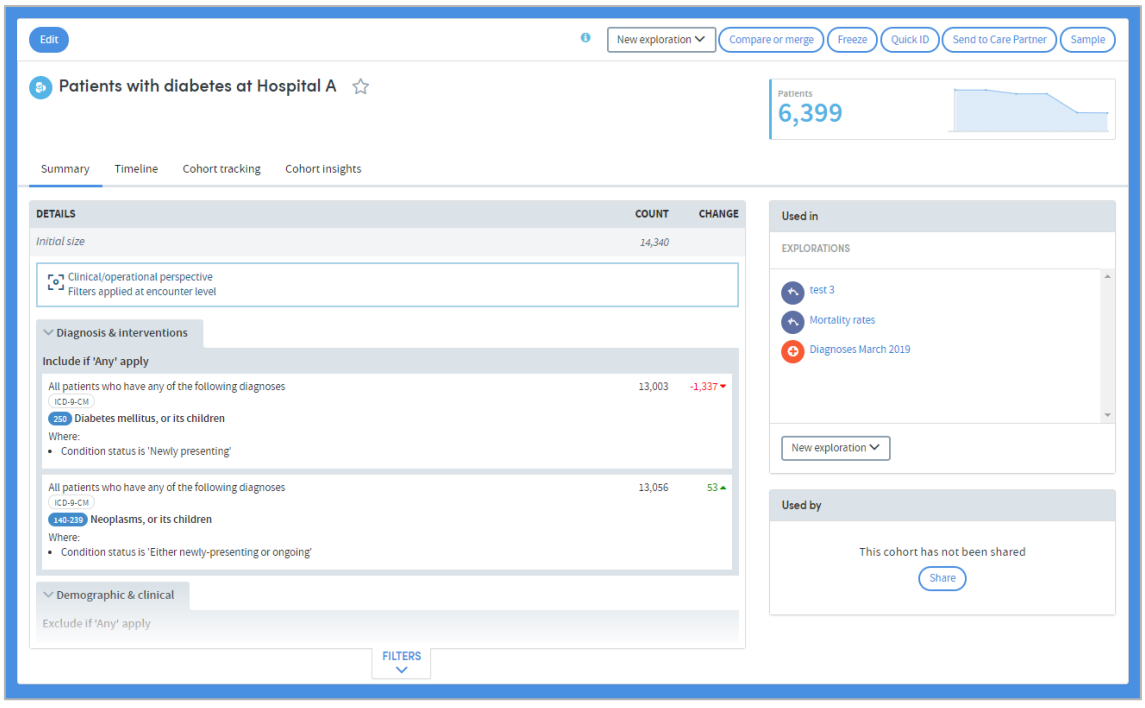
Click on **My cohorts** on the top menu bar:



You'll see a list of all the cohorts you've created, or that other users have shared with you:



Click on the name of a cohort to view its details:



As well as seeing details of the data it contains, you can choose to perform several different functions upon the cohort. These are listed on the top right of the screen. Clicking on the symbol will give you more information about these functions.

If you click on **Edit** on the top left, you will be taken to the Cohort Discovery page and can edit, add or remove criteria to define your cohort.

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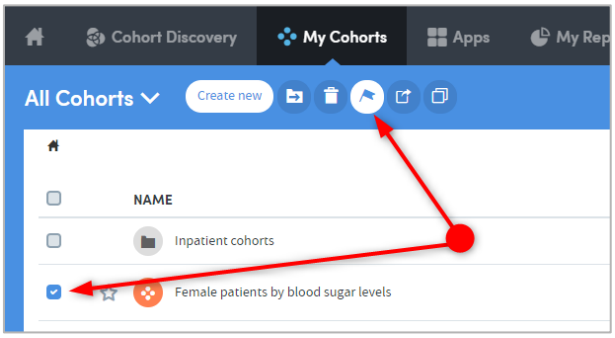
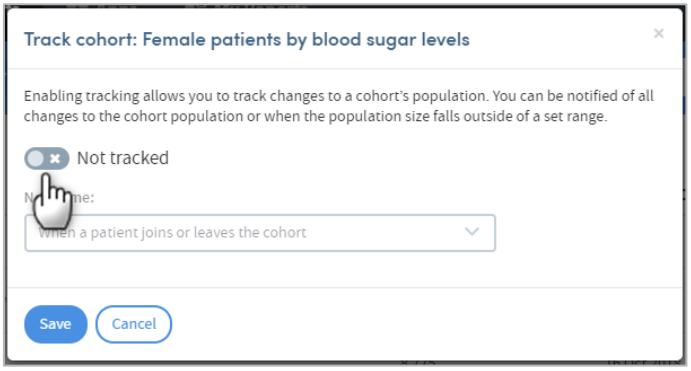
14 How to track a cohort

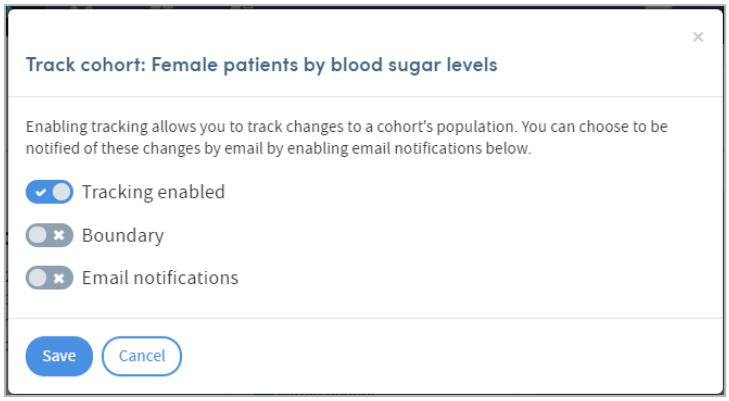
To track a cohort, go to **My cohorts**, select the cohort you want to track by clicking the check box, and click the **Track cohort** button:



The following panel will appear:



Click on the button to enable tracking:



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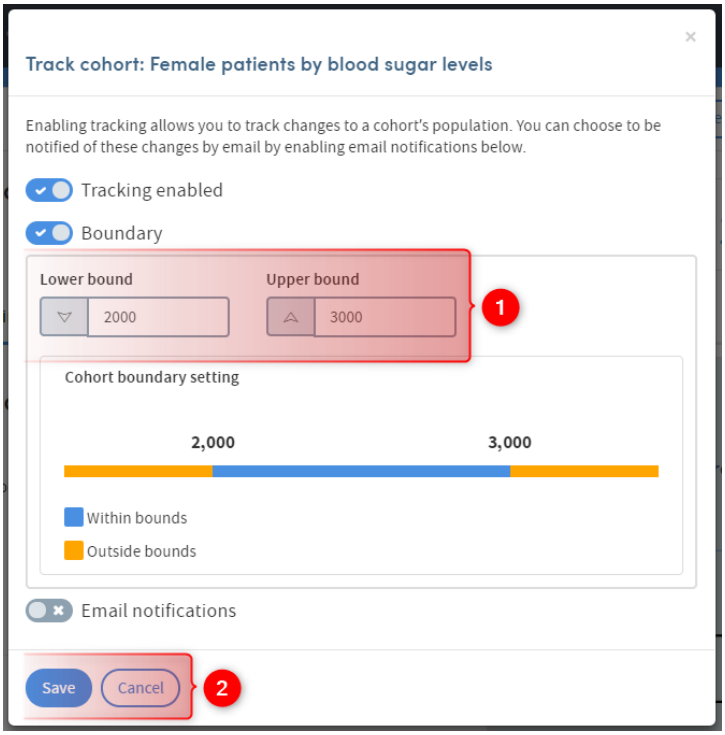
Boundary

If you want to be notified when the cohort size falls outside a set of bounds, click the **Boundary** button. The following panel will appear:



1 Set your required upper and lower bounds by typing in the fields.

Update **Email notifications** (see below) or:

2 Click on **Save**. You'll be taken to the **My cohorts** page, and you'll see that the cohort is now tagged as **Tracked**:

Email notifications

If you want to receive an email when the cohort size falls outside a set of bounds, or a patient joins or leave the cohort, click this button. You'll be able to access a drop-down list:

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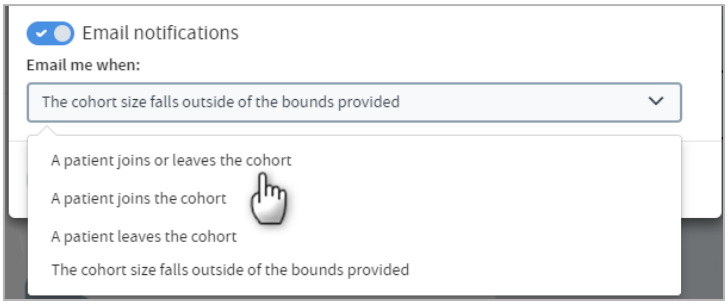
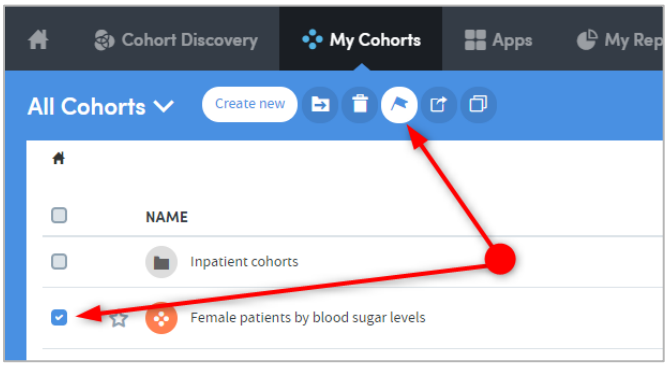


Choose from the list and click on **Save**. You'll be taken to the **My cohorts** page, and you'll see that the cohort is now tagged as **Tracked**:

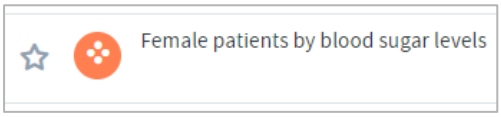
14.1 Cancel cohort tracking

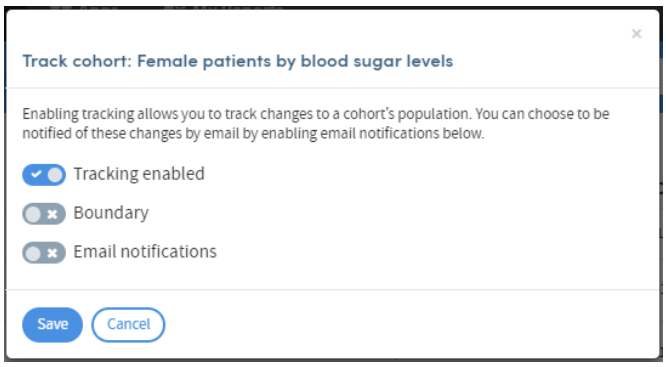


To stop tracking a cohort, go to **My cohorts**, select the cohort you want to track by clicking the check box, and click the **Track cohort** button.

The panel below will appear:

Click on **Tracking enabled** to cancel this feature, and click on **Save**. You'll be taken to the **My cohorts** page, and you'll see that the cohort is no longer tagged as **Tracked**:





14.1.1 Another way to track a cohort

You can access the Cohort tracking feature from any Cohort summary. Cohort summaries are accessed either by clicking on the name of any cohort listed in your **My Cohorts** area or by clicking **Finish editing** when creating or editing a cohort.

Click on the **Cohort tracking** tab on the **Cohort summary** page:

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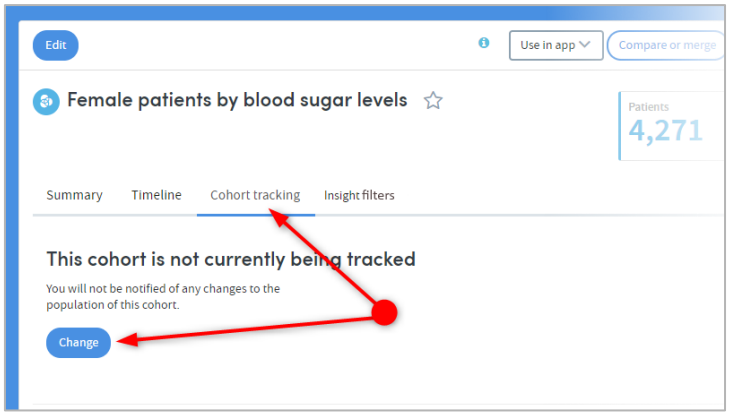

If your cohort is not currently being tracked, click on **Change** and follow the same steps described above.

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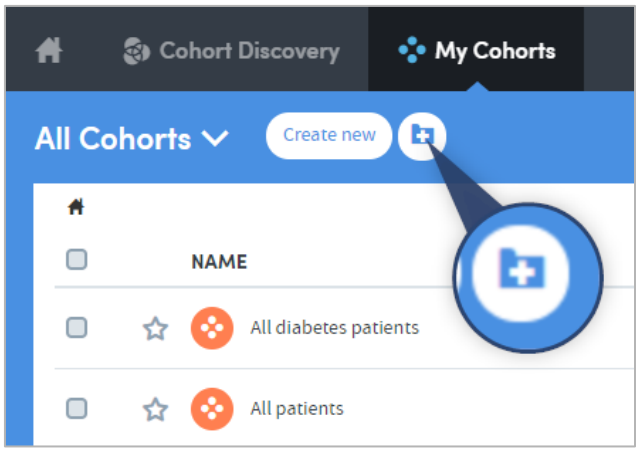
15 Organising cohorts into folders

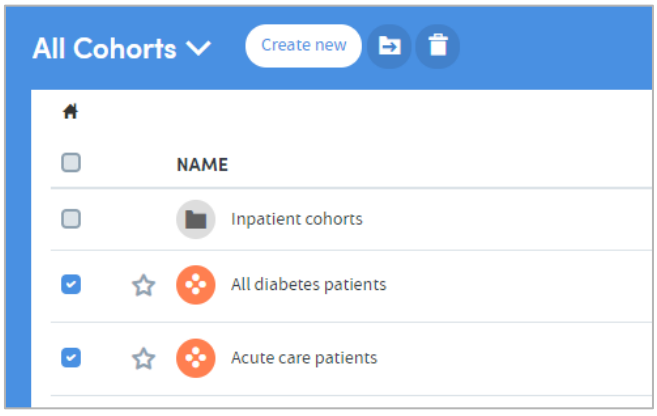
You can create your own folder structure to organize your cohorts, including subfolders within folders. It is important to consider how to organize your cohorts; otherwise, after a while you may accumulate a very long list of cohorts with unintelligible names, which will ultimately make using the system awkward.

15.1 How to create a new folder

To create a new folder, go to the **My Cohorts** page (accessed via the top menu bar) and click on the **New folder** icon:



NOTE: If you can't see this icon, you have probably selected one or more of the cohorts in the list by clicking in the check boxes on the left, as can be seen with two of the cohorts in the image below:



The **New folder** option is only available when none of the cohorts in the list have been selected using the check boxes. Make sure they are all unchecked, and then click on the **New folder** icon.

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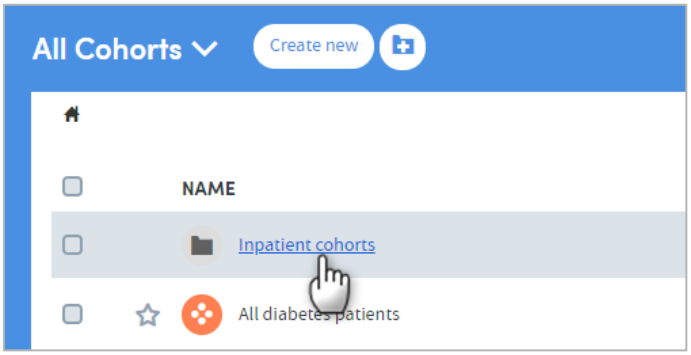
A pop-up box will appear:

Type in the name you've chosen for your folder and a description if you wish to include one. Click on **Save** when you have finished.

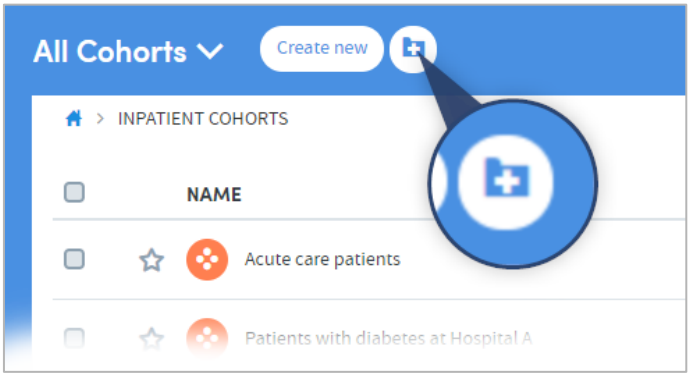
Your new folder will appear in the list on the **My Cohorts** page.

15.2 How to create a sub-folder

To create a sub-folder within an existing folder, go to the **My Cohorts** page (accessed via the top menu bar) and click on the name of the existing folder:



You will see a list of the contents of the folder. Click on the **New folder** icon:



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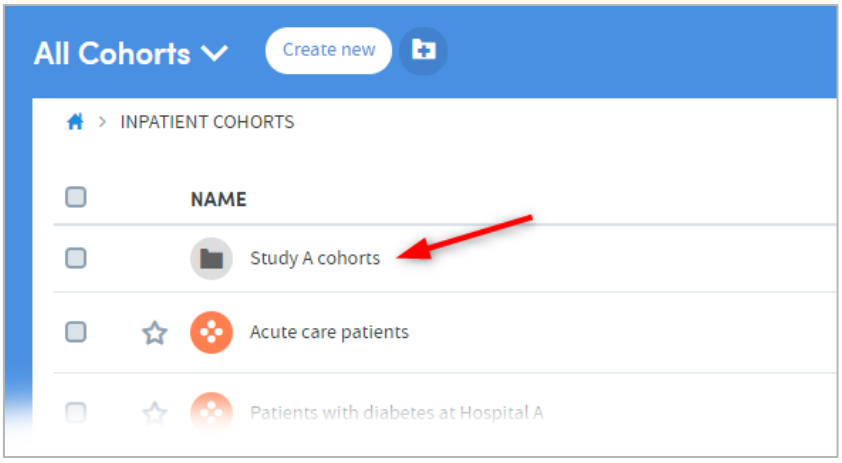
A pop-up box will appear:

Type in the name you've chosen for your folder and a description if you wish to include one. Click on **Save** when you have finished.

Your new folder will appear in the existing folder's list of contents:



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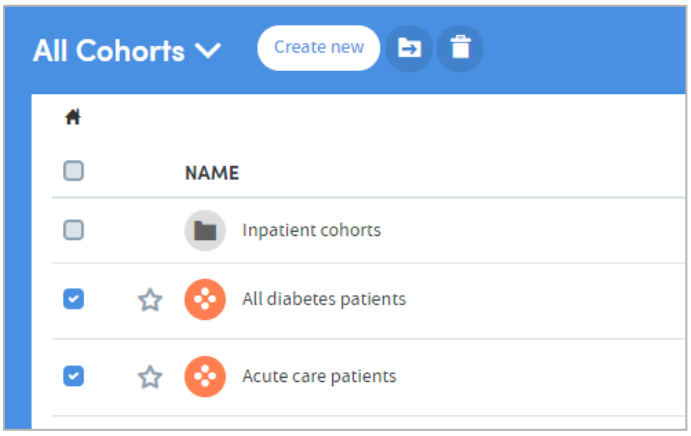
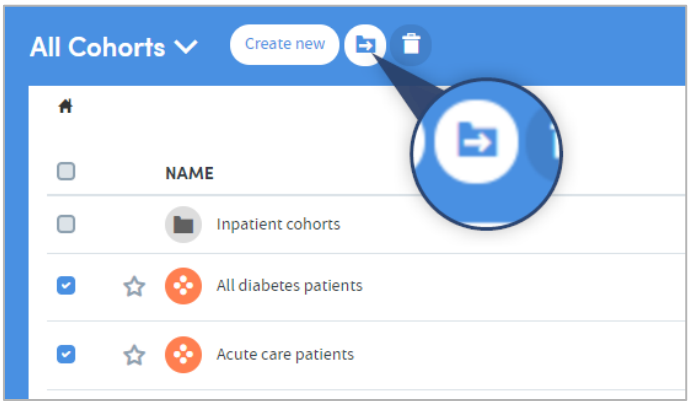
15.3 How to add cohorts to folders

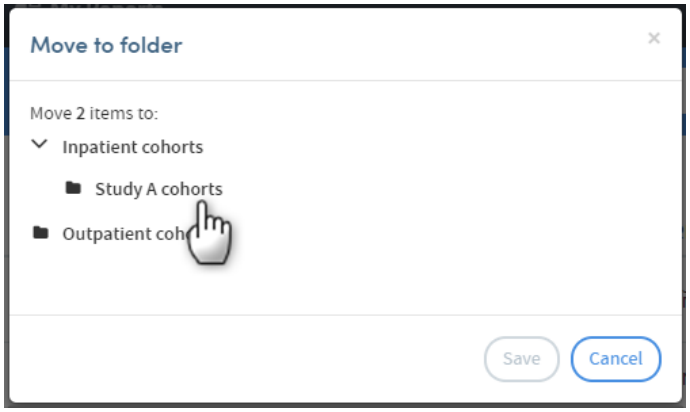
Go to the **My Cohorts** page (accessed via the top menu bar) and click the checkboxes to the left of the cohort names to select the cohorts you wish to add to the folder:



Click on the **Move to folder** icon:



A pop-up box will appear:



In this example, there are two main folders (**Inpatient cohorts** and **Outpatient cohorts**). **Inpatient cohorts** contains a sub-folder, **Study A cohorts**. We've navigated to this by clicking on the small arrow to the left of the parent folder's name.

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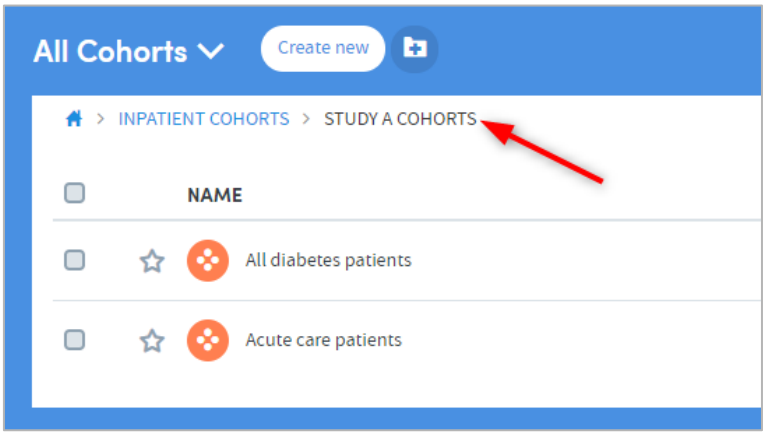
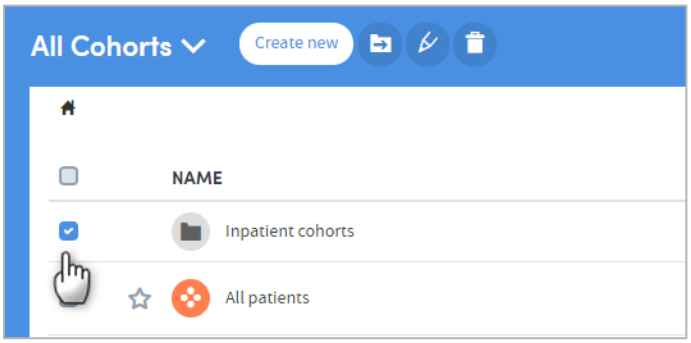
Click on the name of the folder to select it as the destination for the cohorts you wish to move, then click on **Save**. The cohorts will now appear in the destination folder:

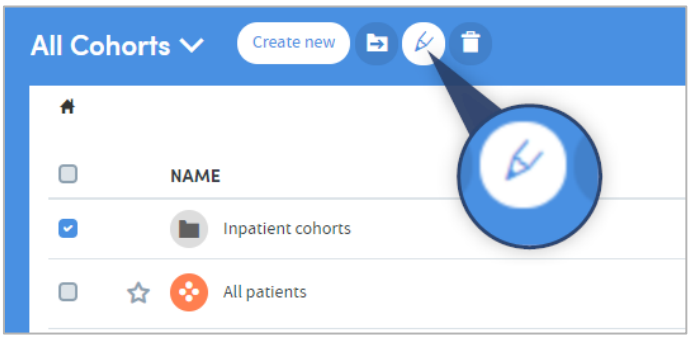


15.4 How to rename a folder

Go to the **My Cohorts** page (accessed via the top menu bar) and click the checkbox to select the folder you wish to rename (**Inpatient cohorts** has been selected here):



Click the **Rename folder** icon:



A pop-up box will appear. Edit the folder name and description as necessary and click on **Save** when you have finished.

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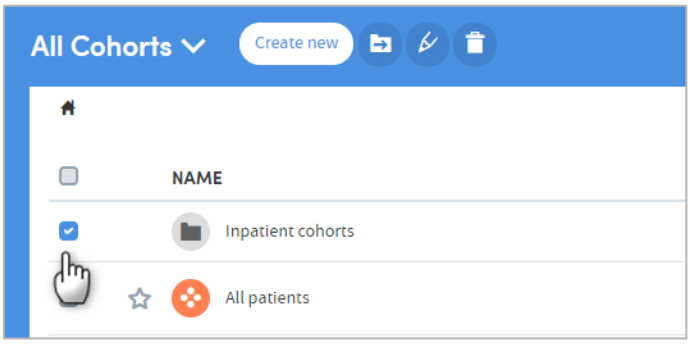
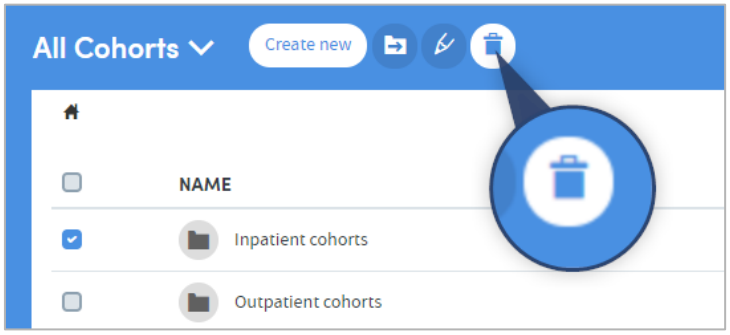
15.5 How to delete a folder

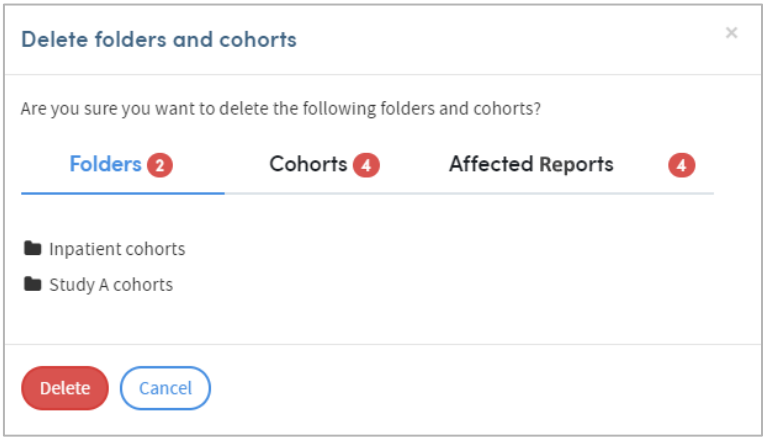
Go to the **My Cohorts** page (accessed via the top menu bar) and click the checkbox to select the folder you wish to delete (**Inpatient cohorts** has been selected here):



Select the **Delete folder** icon:



A pop-up box will appear:



This will remind you of the contents of the folder (sub-folders and cohorts), and the reports that will be affected if you confirm the deletion. If you are sure you wish to delete the folder ***and all its contents***, click on **Delete**.

If you want to delete the folder, but not its contents, you will need to move the sub-folders or cohorts out of the folder, before selecting the **Delete folder** icon.

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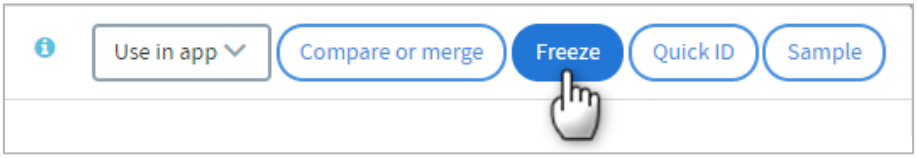
16 Freezing cohorts

If you wish, you may freeze a cohort. This locks the patients within the cohort at the current moment in time. As such, the same set of patients will be used each time a report is run using this frozen cohort.

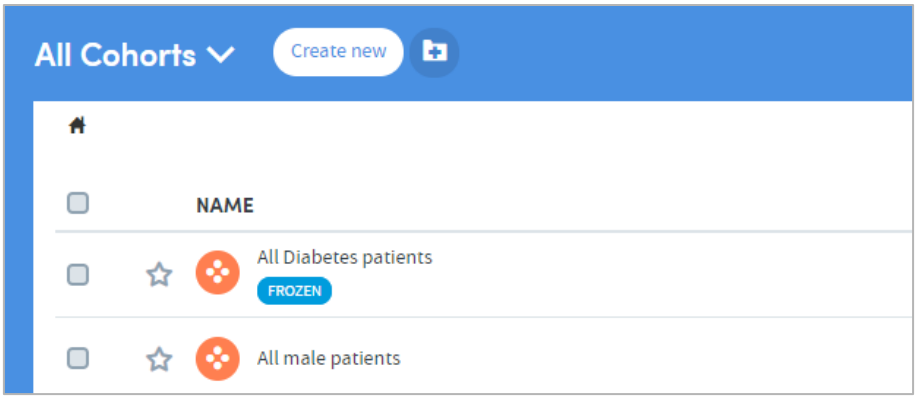
You cannot edit any of the selection criteria for a cohort once it is frozen. You can unfreeze a cohort at any time.

16.1 How to freeze a cohort

Click on the name of a cohort on the **My Cohorts** screen. This will take you to the cohort details section of **Cohort Discovery**. Click on the **Freeze** button in the menu bar on the top right:



You will be asked to confirm that you wish to freeze the cohort. Once you have confirmed this, the name of the cohort on the **My Cohorts** screen will be tagged as **FROZEN**:



16.2 How to unfreeze a cohort

You can unfreeze the cohort at any time by clicking on its name again and clicking on the **Unfreeze** button, which will now be visible in the menu bar on the top right:

You will be asked to confirm that you wish to unfreeze the cohort. Once you have confirmed this, the **FROZEN** tag will be removed from the name of the cohort on the **My Cohorts** screen.

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17 Sharing cohorts

If you have the relevant permissions as part of your role, you can choose to **share cohorts** with other users. This sharing feature removes the need for users to accurately recreate all the cohort definition criteria themselves if they wish to report on patients meeting similar criteria to those set by a colleague.

17.1 Some important points about sharing cohorts

The Principles of Sharing Data within Atmolytics

Users should be able to freely share information with other users who need to see it. In doing so, they should not be able to:

- Expose other users to information that they should not have access to.
- Make hidden modifications to other users' content.

Sharing a cohort means that you share the **definition** of the cohort with the recipient, and not the patients contained within the cohort. If the recipient's **base cohort** is different from yours, their version of the shared cohort may contain different patients from yours, but they will be selected using the same criteria.

For example:

Your base cohort consists of all the inpatients in Hospital A and Hospital B. You create a cohort of all the male patients in your base cohort. You then share this cohort with a colleague. Their base cohort only consists of all the inpatients in Hospital A, so their version of your shared cohort will only contain the male patients from Hospital A.

You can continue to edit a cohort once you've shared it, but any changes you make will not be carried over to the recipient unless you choose to share it again.

The recipient of a shared cohort cannot make any changes to the shared cohort. They can, however (assuming they have the necessary user permissions) **clone** the cohort and edit the clone.

Frozen cohorts and **subgroups** cannot be shared with other users. This is because they consist of lists of individuals rather than just a definition of a cohort. Sharing them risks another user being able to view data about individuals that they should not be permitted to see.

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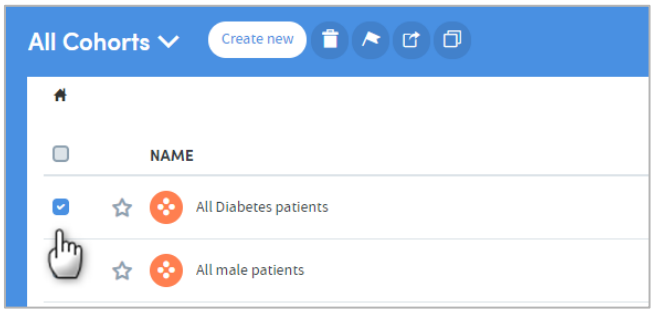
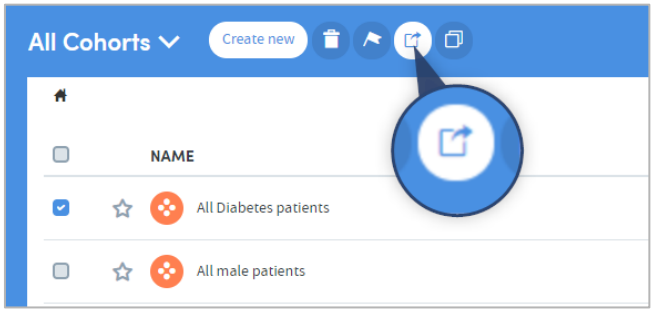
17.2 How to share a cohort

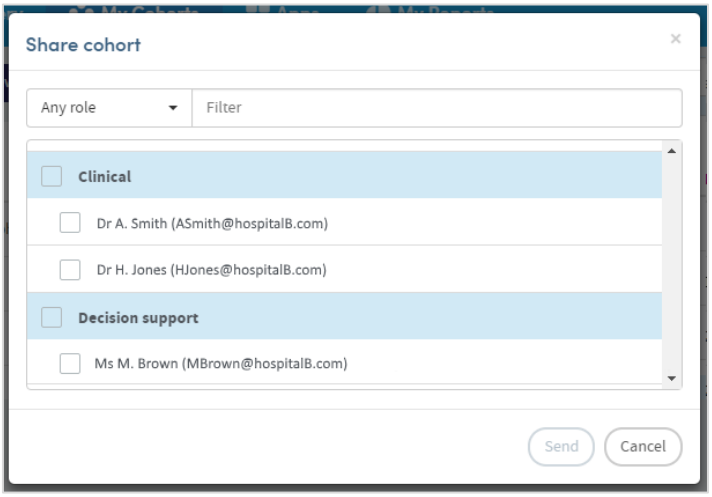
Go to the **My Cohorts** page (accessed via the top menu bar) and click the checkbox to the left of the cohort you wish to share:



Click on the **Share cohort** icon:



A pop-up box will appear:



If you click on the small down-arrow to the right of **Any role,** you can select a specific role to narrow down the list of possible recipients. Alternatively, if you know their name, type this into the **Filter** space at the top, and the list below will display matching names for you to select from.

Click in the checkbox to the left of your chosen recipient and click on **Send**.

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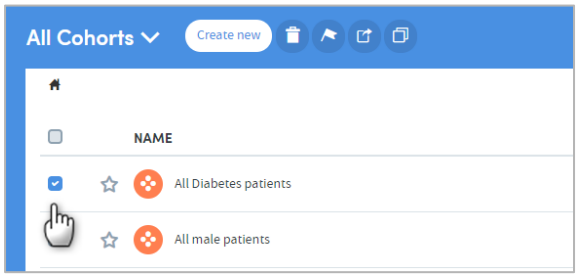
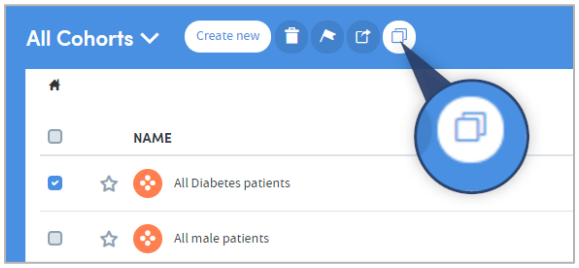
18 How to clone a cohort

It is possible to create an exact copy of an existing cohort and then edit the selection criteria. This is especially useful if you wish to create a variation of a complex cohort. The easiest way to do this is to clone the complex cohort and then alter the filters, rather than recreating the whole cohort again. To do this:

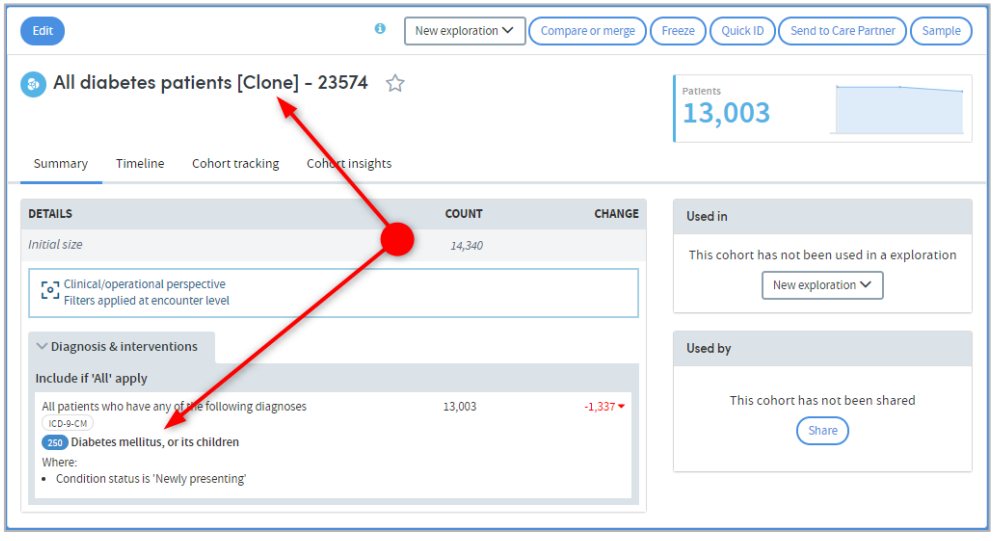


Go to the **My Cohorts** page (accessed via the top menu bar) and click the checkbox to the left of the cohort you wish to clone



Click on the **Clone cohort** icon

You will be taken straight to the Cohort Discovery screen where the clone of your cohort will be displayed:



Here you can see that the cohort name is that of the original cohort with **[Clone]** added. You can also see that the filter criteria are set to **Diabetes** as per the original cohort.

From this point on you can edit the name, description, and filtering criteria of the cohort as you would any other, and save the changes in the usual way.

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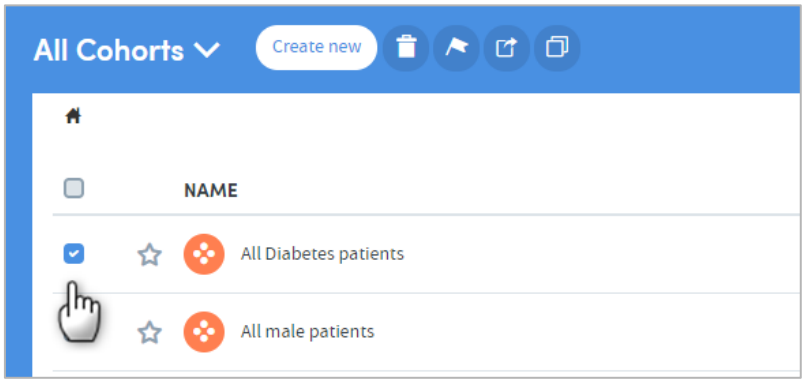
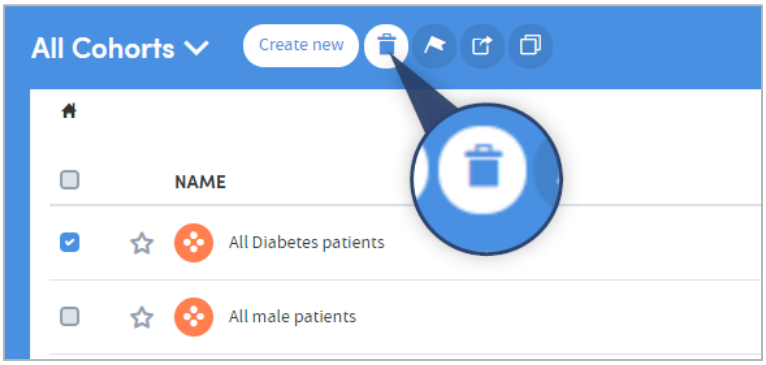
19 How to delete a cohort

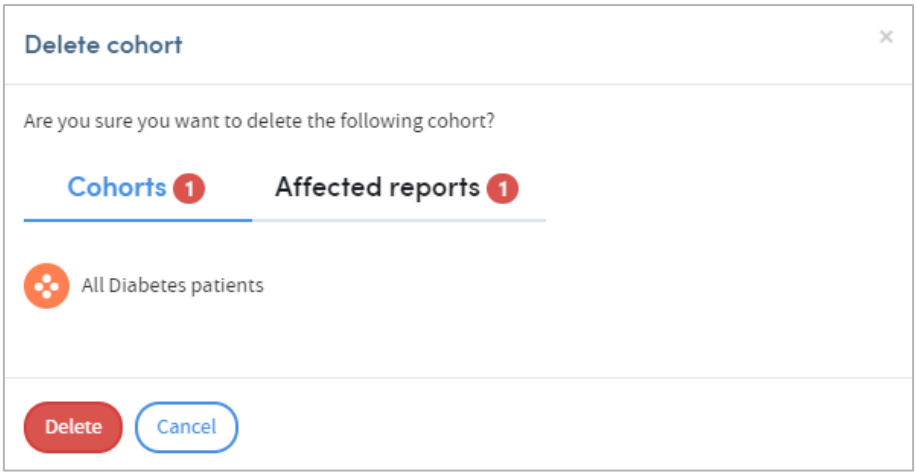
Go to the **My Cohorts** page (accessed via the top menu bar) and click the checkbox to the left of the cohort(s) you wish to delete:



Click on the **Delete cohort** icon:



A pop-up box will appear, listing the cohort(s) you wish to delete and any reports that will be affected by the deletion:



Click on **Delete** once you're sure you want to proceed.

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20 Comparing or merging cohorts

20.1 Why compare or merge cohorts?

The **Compare or merge** function allows you to compare a cohort with any other cohort which is available in your **My Cohorts** area. It enables you to explore the relationship between different cohorts of patients without having to produce formal reports.

A dynamic output shows you the number of patients who are in both cohorts, and the number in one cohort but not the other. If you are especially interested in one of these groups of patients, you can save it as a special type of cohort: a **subgroup**. You can then run reports on this subgroup if you wish to.

You can choose to create a subgroup of:

- Patients in your first cohort who are **not** in your second.
- Patients in your first cohort who are **also** in your second.
- Patients in your second cohort who are **not** in your first.
- Patients who are in **either** your first **or** your second cohort (or both).

For example, having compared two cohorts, if you create a subgroup by selecting all three overlap options, you will create a subgroup that merges the two cohorts compared. This effectively enables you to use the operator OR in combining two cohort definitions to produce a cohort of a complexity not otherwise producible.

The **Compare or merge** feature enables you to define subgroups of patients that it would be difficult or impossible to do using a single set of filtering criteria. It enables you to 'place brackets' around one or more set of criteria used to define a cohort and then combine them with another bracketed set of criteria.

> It's important to note that, unlike other cohorts you may create, once you have created a **subgroup**, you cannot make any more changes to that subgroup's cohort definition criteria.

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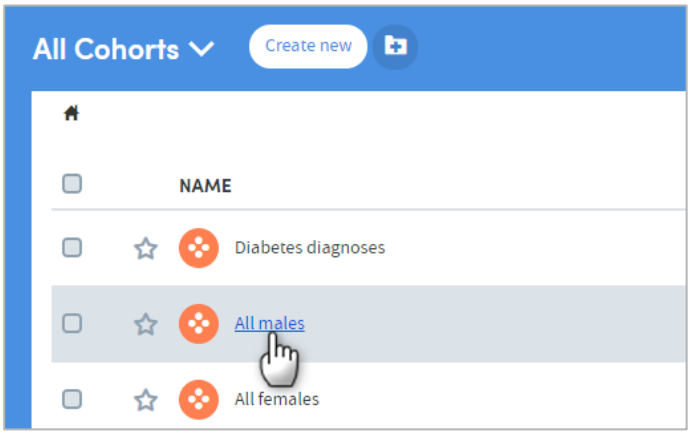
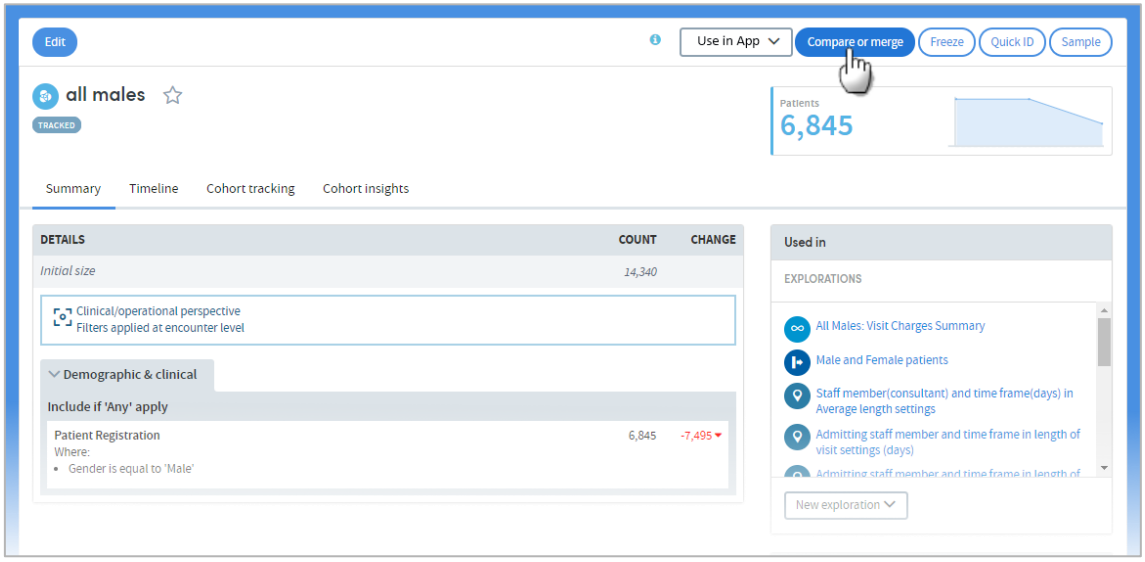
20.2 How to compare or merge two existing cohorts

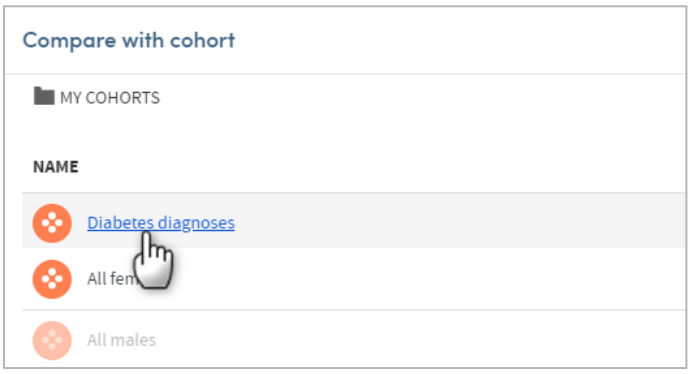
Go to the **My Cohorts** page (accessed via the top menu bar) and click on the name of one of the cohorts you wish to compare. Here, we are selecting a cohort consisting of all male patients:



You'll be taken to the cohort details screen. Click **Compare or merge** at the top of the screen:



Select the cohort you want to compare:



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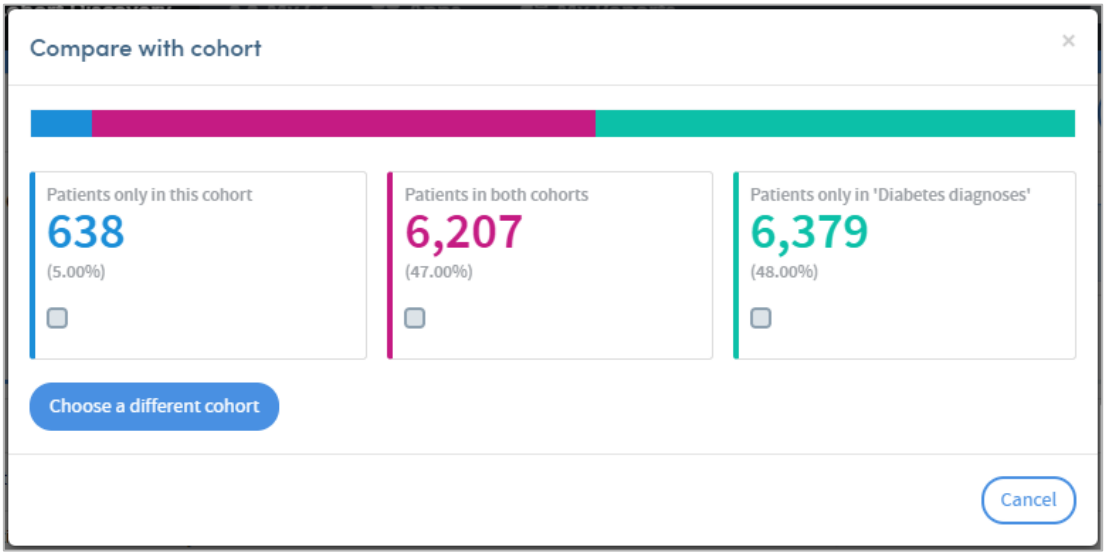
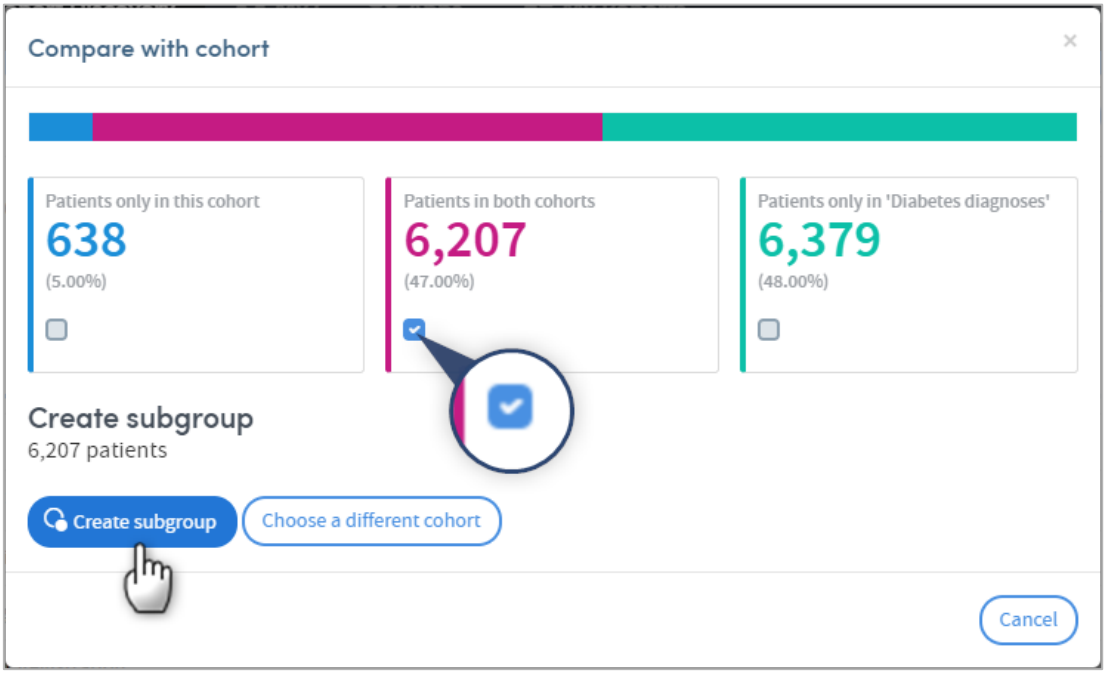
A pop-up box will appear, showing you the comparison between the two cohorts:



Here, for example, we can see that 638 patients are only in the first cohort (i.e. are male and **DO NOT** have a diabetes diagnosis), 6,207 patients are in both cohorts (i.e. are male **AND** have a Diabetes diagnosis), and 6,379 patients are in the Diabetes diagnosis cohort but are not in the Male cohort (i.e. are **NOT** male but **DO** have a diabetes diagnosis).

If we wanted to create a subgroup of all the patients who are male **AND** have a diabetes diagnosis (i.e. the 6,207 patients in the pink cohort), we can do so by clicking the checkbox and clicking on the **Create subgroup** button which will appear:



A pop-up box will appear. A name and description are provided automatically, but you can edit these if you wish:

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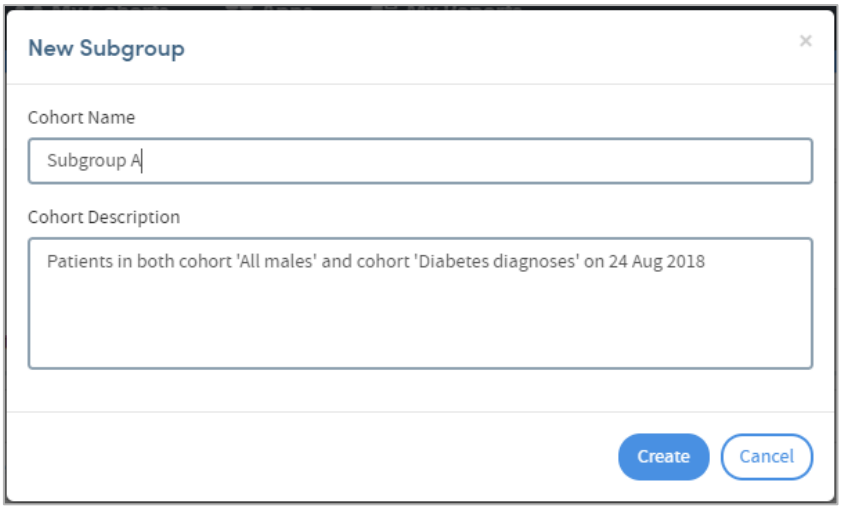
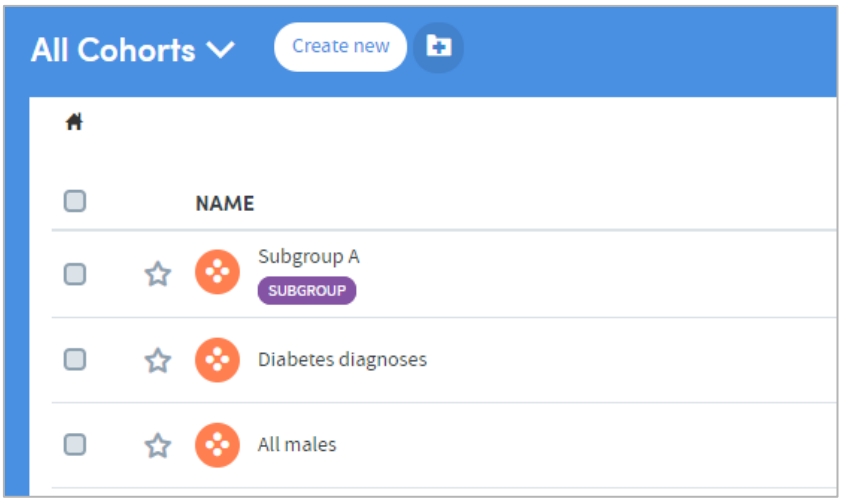


Click on **Create** to save your new subgroup. If you then go back to the **My cohorts** area, you will see that the new subgroup has been added to the list:



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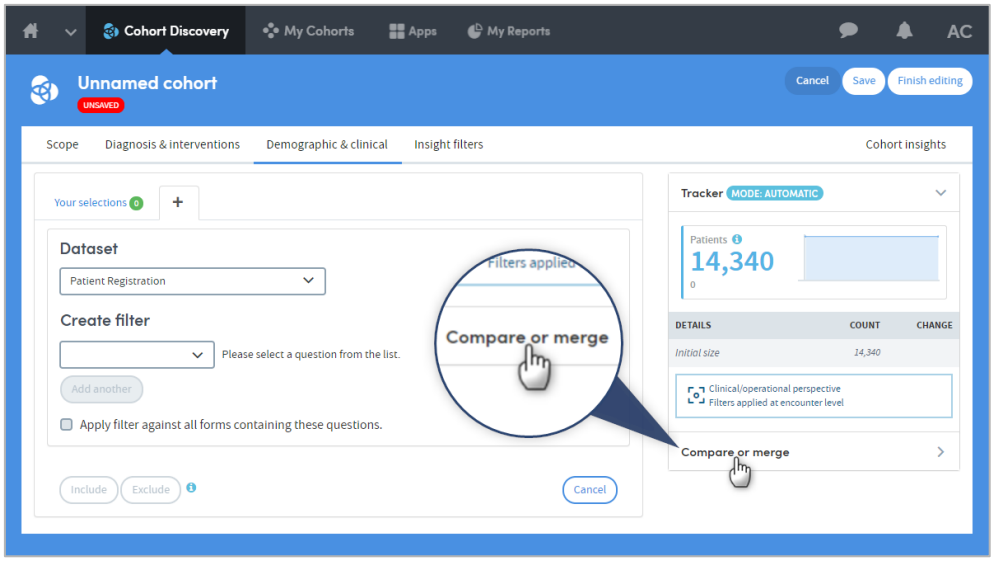
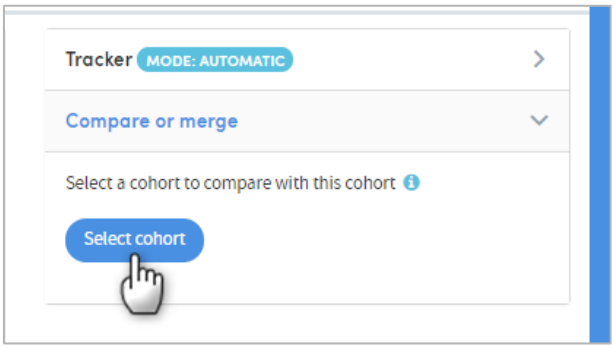
20.3 How to compare or merge a new cohort with an existing one

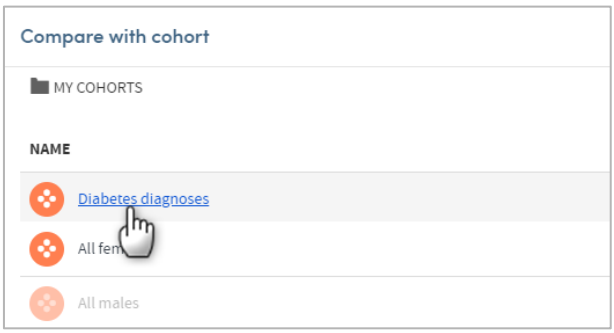
When working in **Cohort Discovery** you have the option to compare the cohort you are working on with an existing cohort in your **My Cohorts** list. The **Compare or merge** feature can be found on the right of the screen, below the **Tracker**:



Click on **Compare or merge**, and the Tracker feature will be hidden. You will be prompted to click on the **Select cohort** button:



Click this, and then select the cohort you wish to compare:



The right-hand side of the Cohort Discovery screen will show the comparison data:

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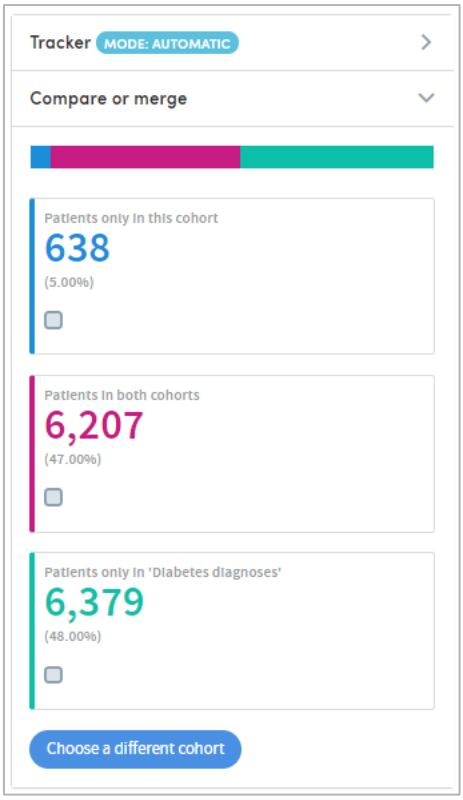
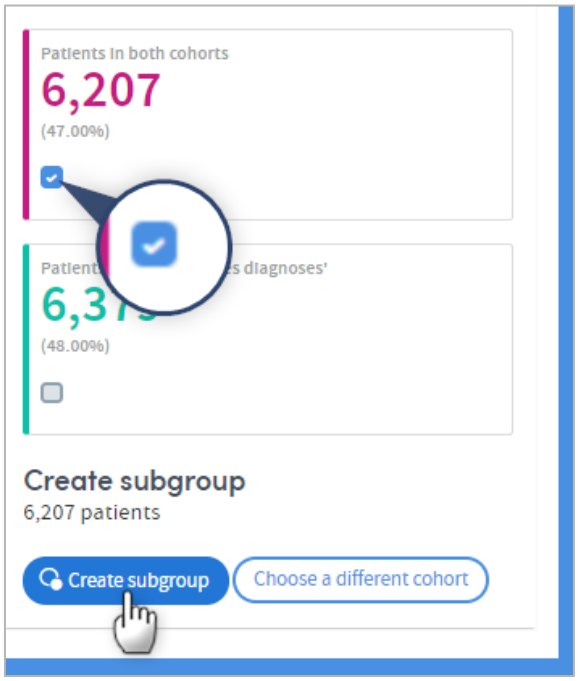


Here, for example, we can see that 6,207 patients are in both cohorts.

If we wanted to create a subgroup of all the patients who are in both cohorts, we can do so by clicking the checkbox, and clicking on the **Create subgroup** button which will appear:



A pop-up box will appear, prompting you to type in a name for the new subgroup. A description is provided automatically, but you can also edit this if you wish:

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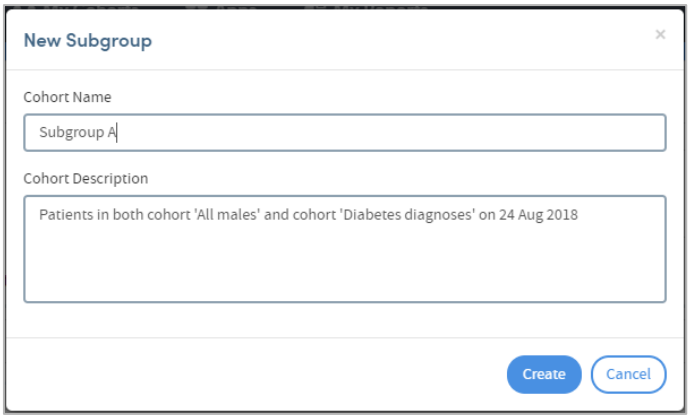
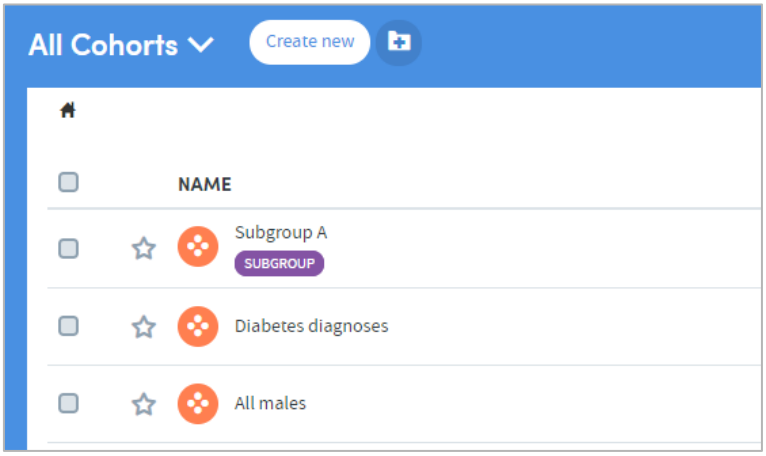


Click on **Create** to save your new subgroup.

If you then go back to the **My cohorts** area, you will see that the new subgroup has been added to the list:



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21 Using Apps

Reports are created within Atmolytics using a simple, intuitive, step-by-step process which begins once you select the **App** you wish to use:

Step 1: Who	Which patients do you want to report on?
Step 2: Which selections?	What settings do you wish to use to produce your report?
Step 3: Which data sources?	Which sources or locations do you want the report data to be drawn from?
Step 4: Which timeframe?	Do you want to report on data from a particular period of time?

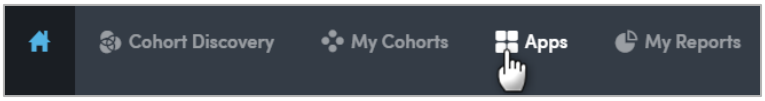
Steps 1, **3** and **4** are similar for every App, and are explained in detail in the **Atmolytics General Guide to Report Definitions and Outputs**.

Step 2 enables you to select the specific report settings you wish to use in creating an output with the App you have selected. In contrast with the other steps, **Step 2** differs from App to App.

There are several ways of accessing and selecting Apps in Atmolytics:

21.1 Accessing Apps via the top menu bar

The simplest way to access Apps from anywhere in Atmolytics is to click **Apps** in the top menu bar:



You will be taken to the **App selection** screen:

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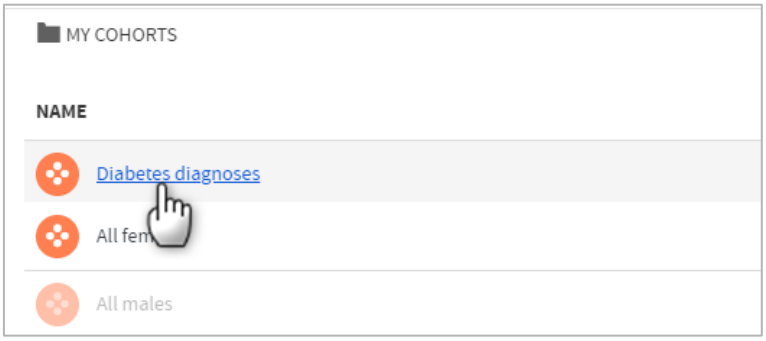
If you click the grey symbol on the top right of each App name, you can see a summary of the features and uses of that App. Click any App to open it and go to the first step of the report creation process.

21.2 Accessing Apps via My Cohorts

If you are working with cohorts, you can select a cohort and jump straight to the App you want to use.

On the **My cohorts** screen, click the name of a cohort:



You will be taken to the **Cohort details** screen. Click the **Use in app** button on the top right:

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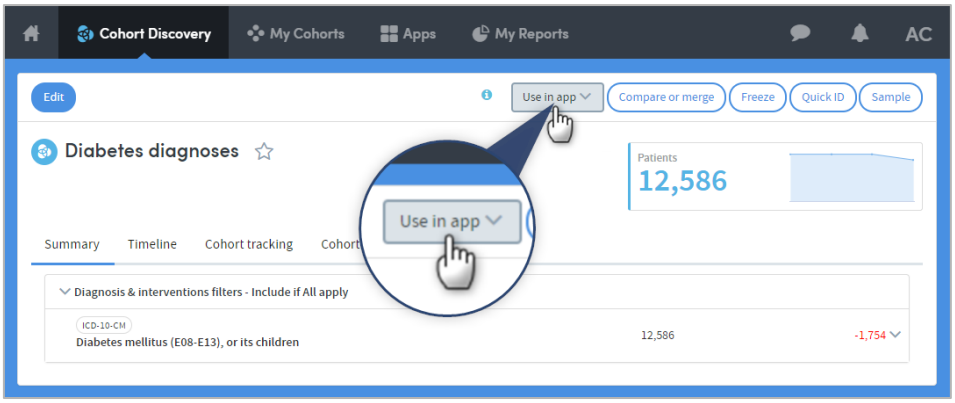
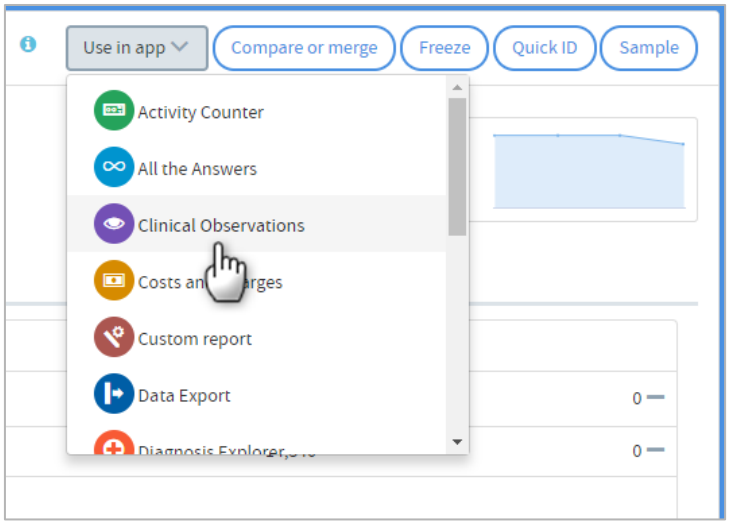
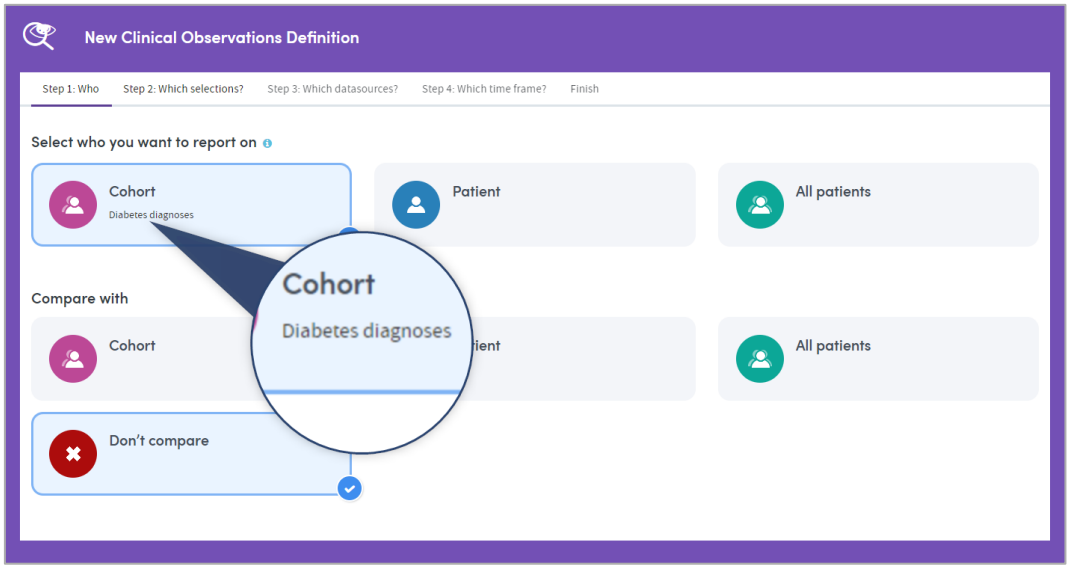


Choose the App you want to use from the drop-down list:



You will be taken straight to the first step of the report creation process for the App you have selected. Your cohort will already be included as part of the report:



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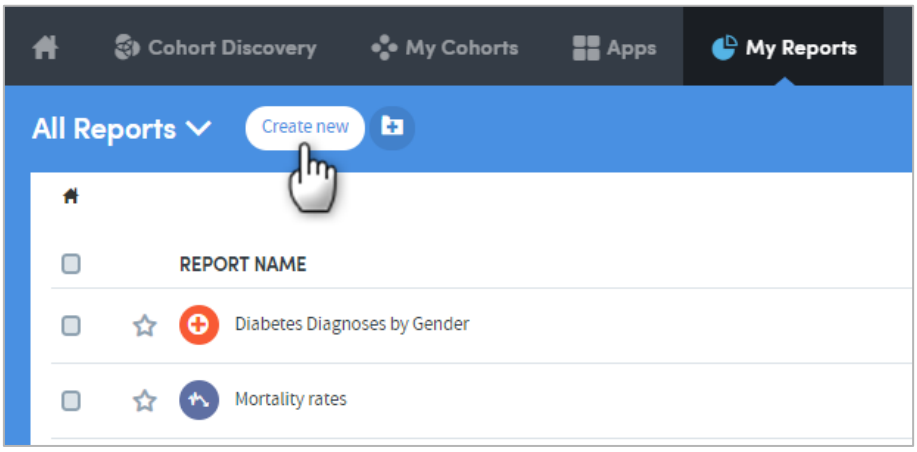
21.3 Accessing Apps via My Reports

If you are viewing or working with existing reports in the **My Reports** area, you can access the Apps by clicking on **Create new** on the top left of the page:



You will be taken to the **App selection** screen:

If you click the grey symbol on the top right of each App name, you can see a useful summary of the features and uses of that App. Click any App to open it and go to the first step of the report creation process.

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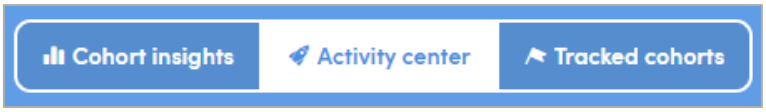
22 How to view a report

You can select a report and view it via either the **Home** area or the **My Reports** area:

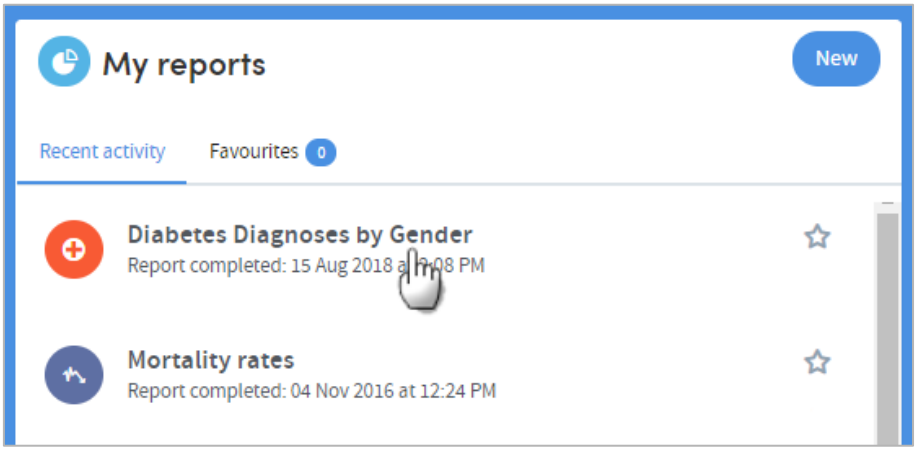
22.1 Via Home

From anywhere in Atmolytics, click on the **Home** icon in the top menu bar.

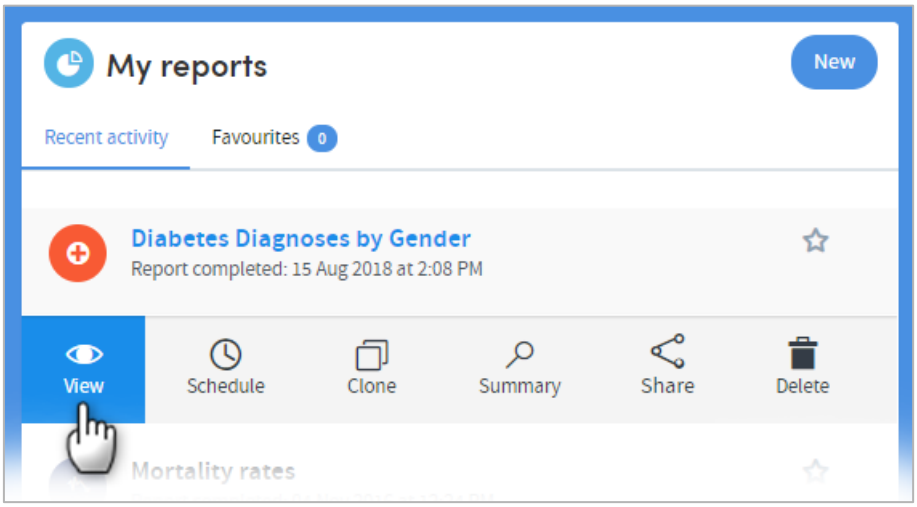
In the **Home** area, click on the **Activity Centre** button:



You can view any report available to you by clicking the report name in the **My Reports** section of the **Activity Centre**:



Click on **View** to see the full report:



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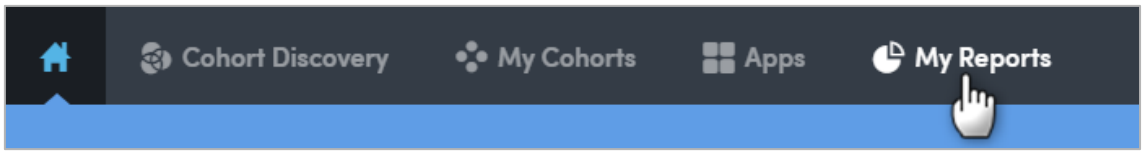
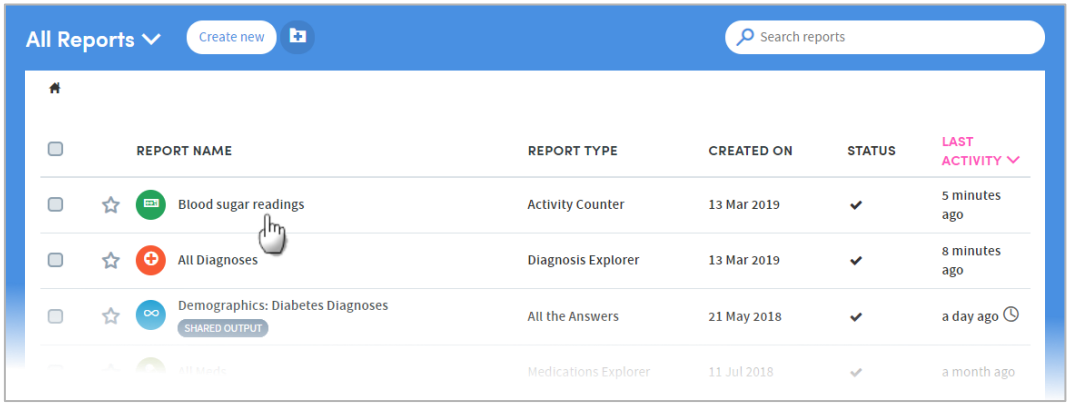
22.2 Via the My Reports area

From anywhere in Atmolytics, click on **My Reports** in the top menu bar:



You will be taken to the **My Reports** area, where you can see all the reports available to you. The most recent reports will be at the top of the list. Click the name of a report to view it:



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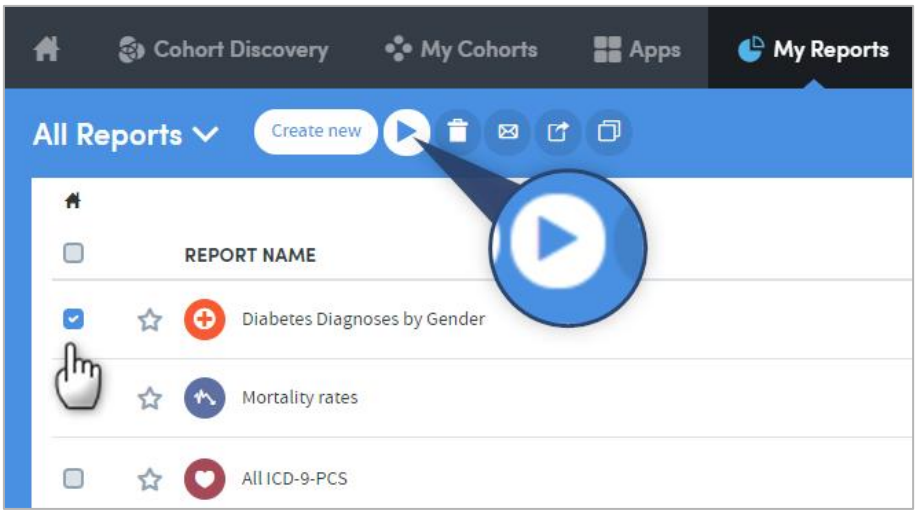
23 How to run a report

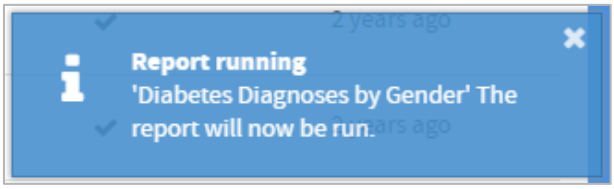
As well as running a report when you first create it (full details of this can be found in the **Atmolytics General Guide to Report Definitions and Outputs**), you can choose to run a report again at any time, to create an up-to-date version. This can be done via the **My Reports** area, or the report itself:

23.1 Via the My Reports area

Go to the **My Reports** area (accessed via the top menu bar) and click the checkbox on the left of the report you want to run. Click on the **Run report** icon:



You will see a message at the bottom of the screen:



When the report is ready, the notification bell on the top right of your screen will turn orange:

Click on the bell and select the new report from the drop-down list.

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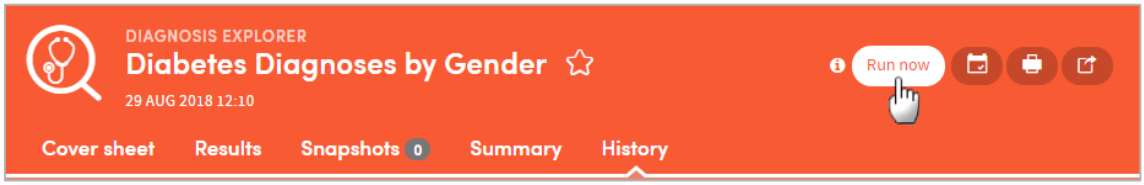
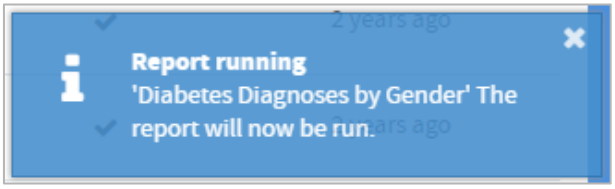
23.2 Via the report itself

Open the report you wish to run again (you can do this by clicking on the report name in the **Home** area or in the **My Reports** area). On the top right of the report is a small menu bar. Click on **Run now** to re-run the report:



You will see a message at the bottom of the screen:



When the report is ready, the notification bell on the top right of your screen will turn orange:

Click on the bell and select the new report from the drop-down list.

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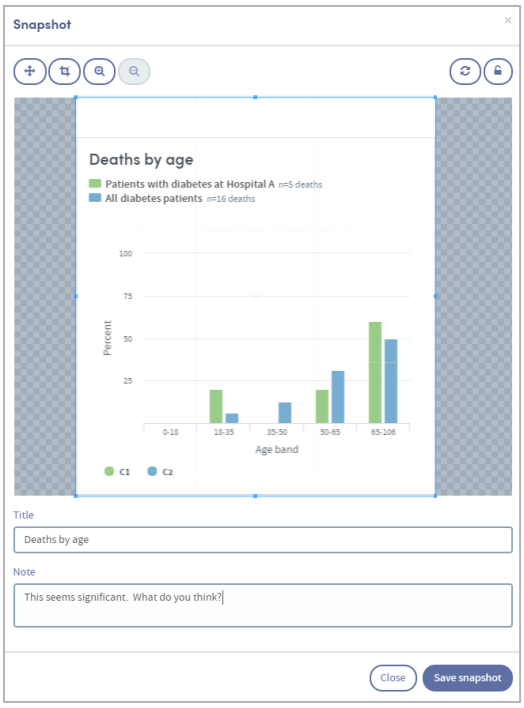
24 Snapshots

You can take, share, and discuss 'snapshots' of your Atmolytics reports with other users, using a built-in chat room facility.

On the **Cover sheet** and **Results** tabs of your report, you'll see the snapshot icon:

Click the icon to take a snapshot of that area of the report:



Add a title and an optional note, and click **Save snapshot**. Once the snapshot is saved, the image and comment are saved under the report's snapshot tab:

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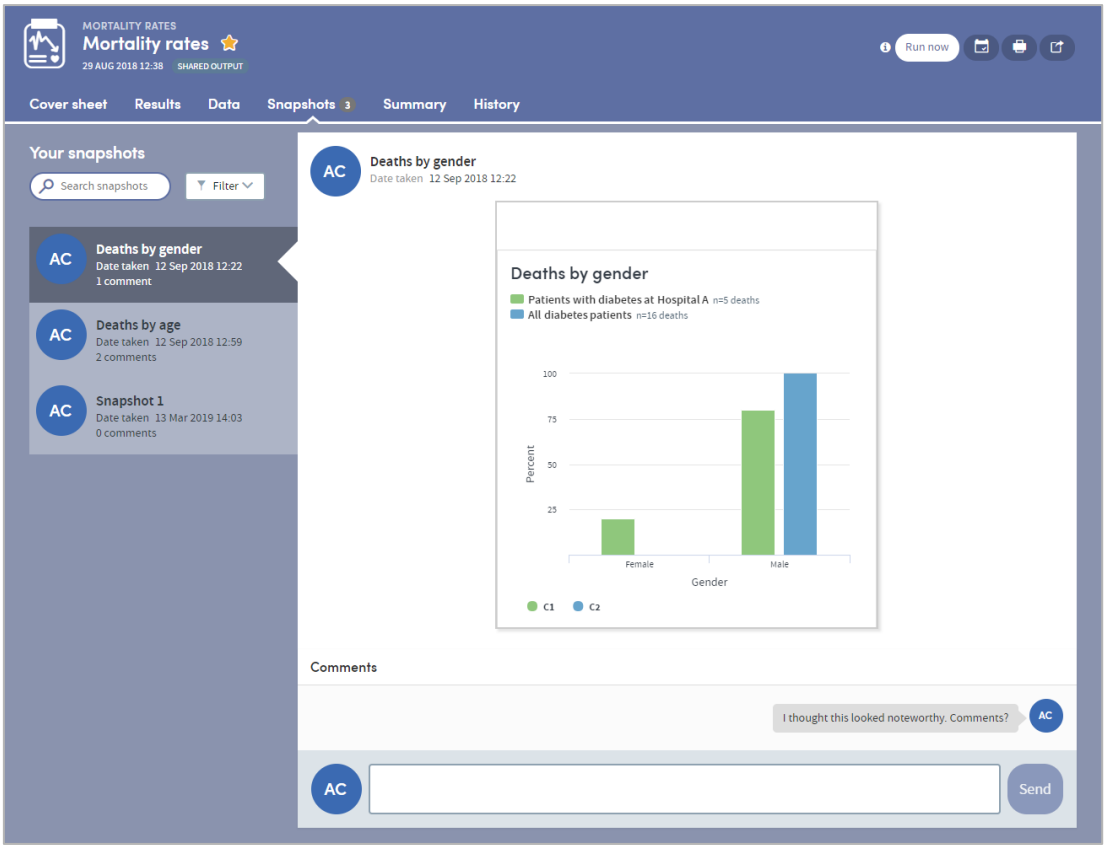
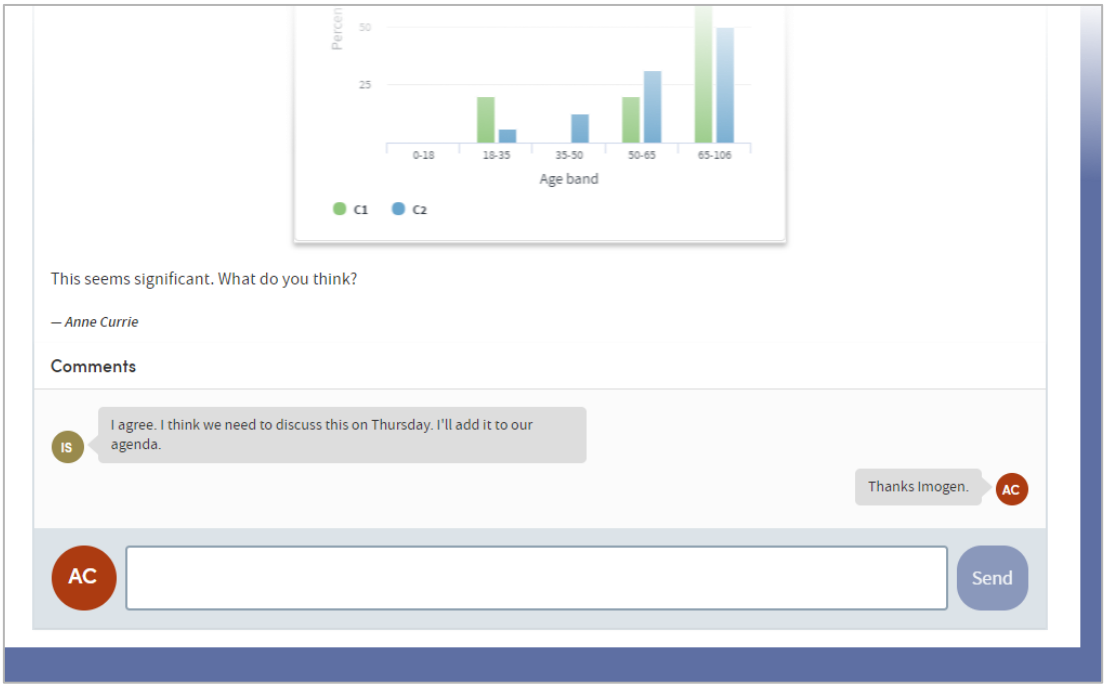


Every user who shares the report output will be sent a notification, letting them know that a new snapshot has been created. Everyone can add comments and discuss the snapshot in real time, enabling easy collaboration with your colleagues:



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25 Report sharing

The principles of sharing data within Atmolytics

Users should be able to freely share information with other users who need to see it. In doing so, they should not be able to:

- Expose other users to information that they should not have access to.
- Make hidden modifications to other users' content.

There are two forms of report sharing: sharing **outputs** and sharing **definitions**.

A report definition is different from a report output. When you share a report output, you are also sharing the generated information which that specific instance of that report contains. When you share a report definition, you are in effect sharing the 'framework' of a report; the choices and decisions you made along the way about, for example, which cohorts, which datasets, or which period of time to include.

There are some specific rules which Atmolytics applies when reports and report definitions are shared. Every user of the system is assigned a **Role** by their system administrator (in some cases a user may have multiple roles assigned to them). This role defines the type and level of permissions the user has when using Atmolytics.

Depending on the role they have, some users may not be permitted to share reports or report definitions. Some users may not be able to create their own reports or report definitions, but may be able to see reports that other users have created and shared with them, or generate reports from definitions that other users have created and shared with them.

These permissions can be set on an app-by-app basis, so a role may allow a user to create and share reports using one app, but in the case of another app, prevent them from creating or sharing reports, or viewing reports that another user tries to share with them.

This ensures that the sharing of data does not allow the recipient to view sensitive information that they would otherwise not be permitted to view.

When you share a report definition, you also share the definitions of the cohorts included within the report. These will appear on the recipient's **My cohorts** list.

However, if the recipient has different permissions, or access to different data from you, the patients in their data who satisfy the cohort definition may differ from the patients that you can report upon. Hence, when a recipient runs a report using a definition that you have shared with them, they may generate different results from you.

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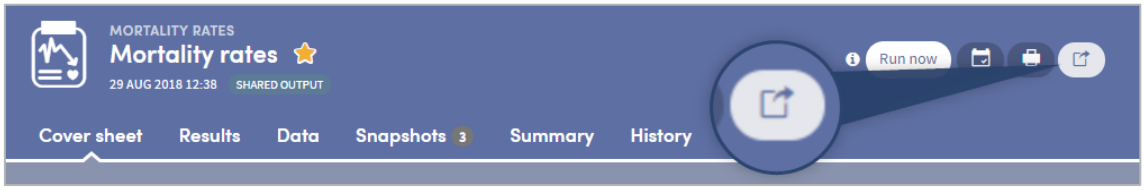
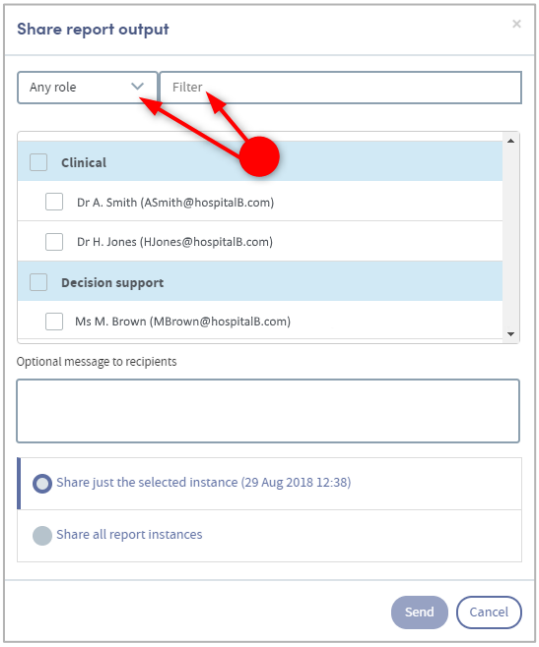
25.1 How to share a report output

To share a report output, first open the report you wish to share (you can do this by clicking on the report name in the **Home** area or in the **My Reports** area). On the top right of the report is a small menu bar. Click the **Share** icon:



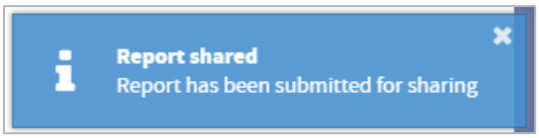
A pop-up box will appear:



If you click the small down-arrow to the right of **Any role** you can select a specific role to narrow down the list of possible recipients. Alternatively, if you know their name, type this into the **Filter** space at the top, and the list below will display matching names for you to select from.

Click in the checkbox to the left of your chosen recipient(s). If you wish, you can add a message.

You can also choose whether to share all instances of this report or just the one that is open. When you have made all your choices, click **Send**. You will see a message at the bottom of the screen:



If you now go to your list of reports in the **My Reports** area, you will see that the report you shared has been tagged as **SHARED OUTPUT** in the list:

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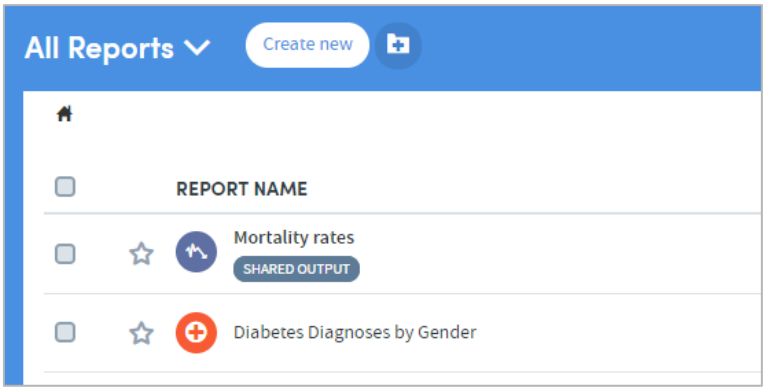
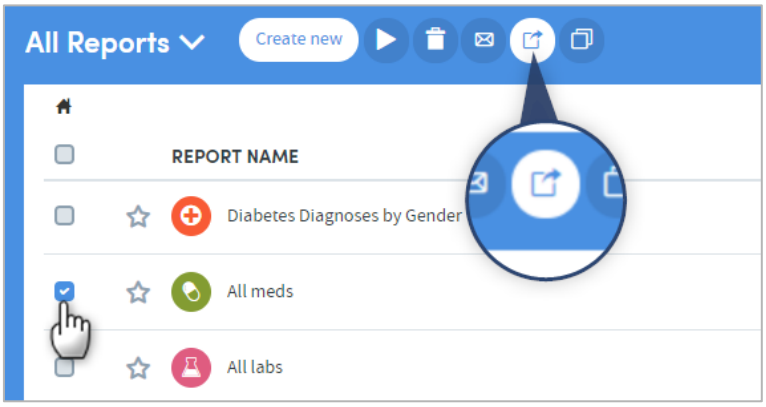


25.2 How to share a report definition

If you have been given the necessary user permissions, you may share report definitions that you have created.

Go to the **My Reports** area (accessed via the top menu bar) and click the checkbox on the left of the report whose definition you wish to share. Click the **Share report definition** icon:



A pop-up box will appear:

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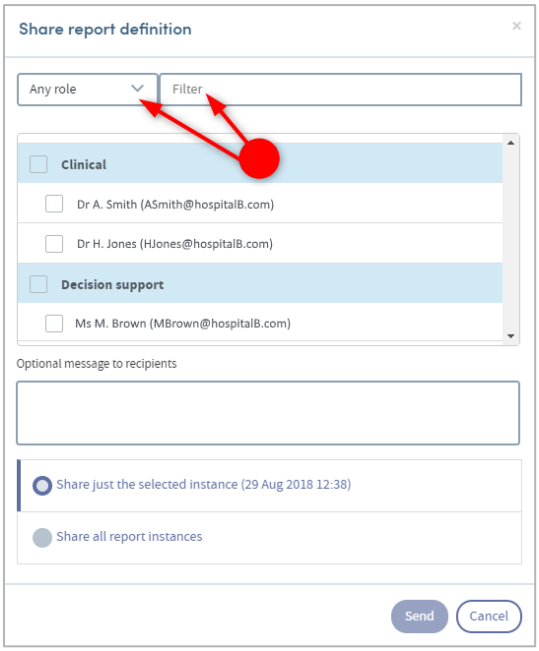
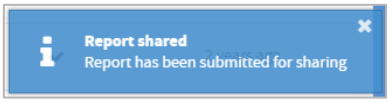


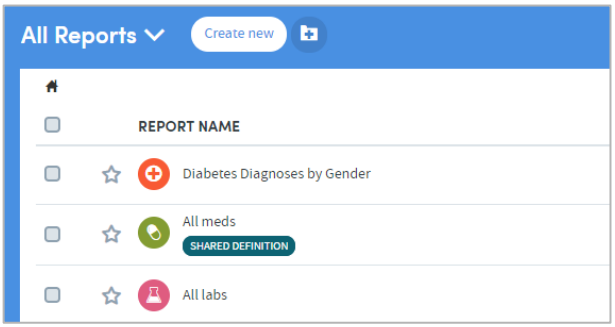
If you click the small down-arrow to the right of **Any role** you can select a specific role to narrow down the list of possible recipients. Alternatively, if you know their name, type this into the **Filter** space at the top, and the list below will display matching names for you to select from.

Click in the checkbox to the left of your chosen recipient(s). If you wish, you can add a message. Click **Send**.

You will see a message at the bottom of the screen:



If you now go to your list of reports in the **My Reports** area, you will see that the report definition you shared has been tagged as **SHARED DEFINITION** in the list:



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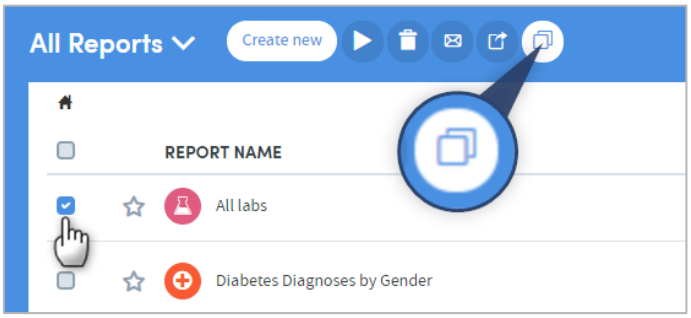
26 How to clone a report definition

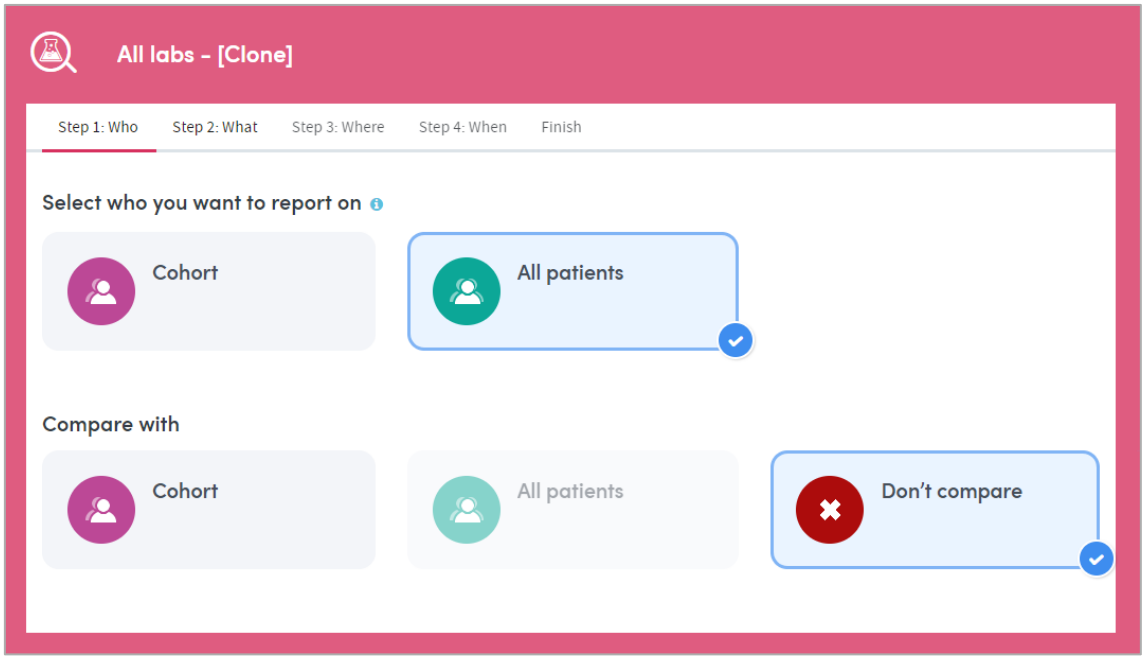
It is possible to create an exact copy of an existing report definition and then edit the report criteria. This is especially useful if you wish to create a variation of a complex report. The easiest way to do this is to clone the complex report and then alter the criteria, rather than create the whole report again. To do this:

Go to the **My Reports** page (accessed via the top menu bar) and click the checkbox to the left of the report definition you wish to clone. Then click on the **Clone** icon:



A pop-up box will appear, prompting you to give the new report definition a name and a description (a default name is supplied).

Enter the name and optional description, and click on **Save**. You will be taken straight to **Step 1: Who** of the relevant App:



The criteria you set in your original report definition will be 'pre-loaded' into the report definition steps of the App. At any point in the process, you can edit the criteria of the report as you would any other, and generate the report in the usual way.

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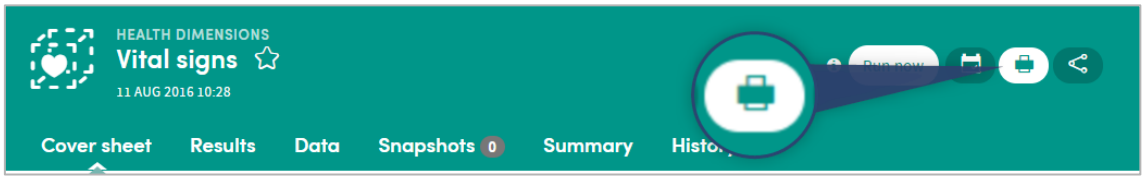
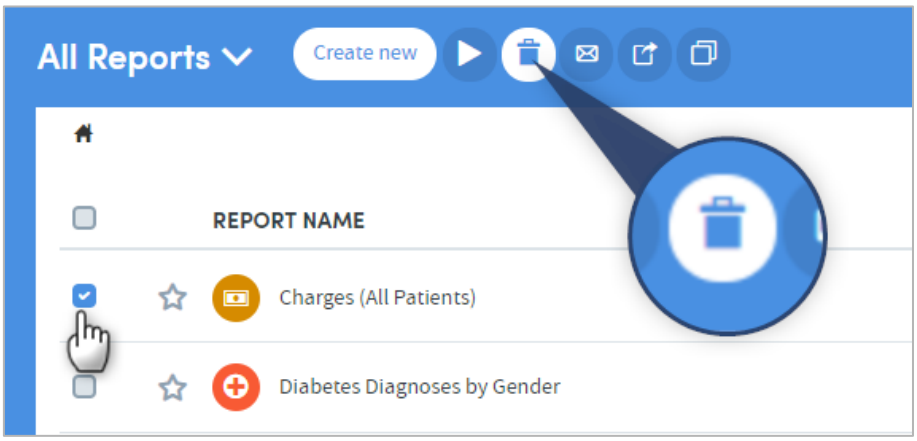
27 How to print a report

When viewing a report, you can print the page which is currently displayed on screen, by clicking on the **Print** icon on the top right:

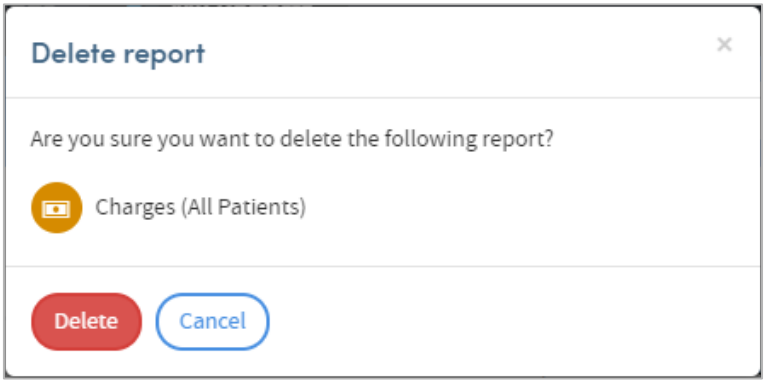


28 How to delete a report

Go to the **My Reports** area (accessed via the top menu bar) and click the checkbox on the left of the report(s) you wish to delete. Click on the **Delete** icon:



A pop-up box will appear, asking you to confirm your wish to delete the report(s):



Click on **Delete** to confirm.

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