MAYO CLINIC LABORATORIES

Activity Metrics

Quick Reference Guide

Log in to Activity Metrics

1. On MayoClinicLabs.com, at top right, click **My Dashboard**.
2. Enter your **Professional username** (email address) and **Password**.
3. Click **Log in**.
4. Navigate to **METRICS & REPORTS** > **Activity Metrics**.

   Note: For access, contact Customer Service.
5. Click the **Launch Activity Metrics** button.

Functionality overview

On the **ACTIVITY METRICS** page:

- **Dashboard tabs:** Across top of page is a row of tabs, each of which opens its corresponding dashboard in a new browser tab. **Summary** is first; the rest follow alphabetically.
- **Tableau Toolbar:** At top left, with the following icons: **Undo last action**, **Redo last action**, **Reset view** (to the view when dashboard was first opened), **Refresh data in this view**, **Pause data queries while applying actions**, **View**, and **Tableau Download.**
- **Main and Export tabs:** Each dashboard except **Summary** has two tabs. The left-hand tab visualizes data. From the right-hand tab, you can export data.
- **Icons at top right:** Depending on the dashboard, they are **Download**, **Information**, and **Help**.
- **Information Bar:** At left, **Row Counts** (number of rows appearing on main tab); at right, **Latest Update** (date/time stamp of most recent data refresh).
- **Scrolling:** Scroll up, down, left, and/or right to view additional data.

Available dashboards

Note: For all dashboards, the default data range is the last 24 months, but you can adjust this range.

- **Summary:** Default when Activity Metrics opens. Provides overview of metrics measured by all other dashboards for any or **All** of last 24 full months, plus trends for date range specified.
  - No **Export** tab. Data must be exported individually from each specific dashboard, but you can click **Download** icon to download **Summary** page in its entirety.
  - At bottom, **Proficiency Testing** values for Mayo Clinic Laboratories as a whole over the last eight quarters.
- **Canceled Tests (CT):** Visualizes monthly volumes of tests canceled by either your organization or Mayo Clinic Laboratories.
- **Critical Callbacks (CC):** Visualizes number of critical callbacks made by Mayo Clinic Laboratories. The **% Callbacks Meeting Criteria** line graph displays monthly percentage of callbacks completed within 60 minutes of callback request.
- **Revised Tests (RT):** Visualizes number of revised and resulted tests reported by Mayo Clinic Laboratories. As well as filters, it lists **Revision Status** for each test: **Revised**, **Revised to Canceled**, **Revised Prior to Final**, or **Revised at Final**.
- **Service Touchpoints (ST):** Visualizes total number of case inquiries requiring additional resolution; organizes them by primary and secondary reasons for contact.
- **Turnaround Time (TAT):** Tracks time elapsed between specimen receipt at Mayo Clinic Laboratories and result reporting.
- **Volumes (VOL):** Visualizes number of tests ordered as a line graph, sorted by date of order creation.

Filter data

Specific filters:

- **Health System:** What you can see depends on user access.
- **Client Facility Account - Name:** Users with access to multiple sites within a health system can use this to include/exclude sites.
- **Mayo Test ID Name:** View data for one or more Test Codes. (all dashboards but **ST**)
- **ZW Referral Test ID Name:** View data for specific referral (ZW) tests only, all referral tests only, or all tests except referral tests. (**VOL**)
- **Ordered, Reflex or Add-on Test:** Specify test type. (**CT**, **RT**, **TAT**, **VOL**)
- **Mayo Order Number:** Search for a particular Mayo order number or within a range thereof, or view data from which certain order numbers have been excluded. (all dashboards but **VOL**)
- **Revision Status:** Filter tests by revision status. (**RT**)
- **Date Selector:** Filter name depends on dashboard. View orders placed, callbacks made, tests revised, or calls/fax inquiries made within a range of dates. Options allow for quick selection of ranges.
- **Requesting Physician:** Filter tests by physician(s) who requested them. (**CC**, **VOL**)
- **Criteria Met:** View data based on whether the quality metric criterion has been met. (**CC**, **TAT**)
- **Method:** Filter calls and fax inquiries by whether they were made via Message Center, another communication method, or any method. (**ST**)
- **Primary Reason Code/Secondary Reason Code:** Sort calls and fax inquiries by primary/secondary reasons for contact. (**ST**)
- **Performing Lab:** View tests performed by Mayo Clinic Laboratories, tests performed by other laboratories, or all tests. (**CC**, **CT**, **RT**, **VOL**)
- **Display Data for:** On either tab, filter by **Turnaround Time Summary**, **Orders Beyond TAT Target**, or **Turnaround Time Details** on **TAT**; and by **Volume Details** on **VOL**.

Other means of filtering:

- In graphs and tables organized by date:
  1. Select your date range using date selector.
  2. Hover to left of date labels or headers until drill icons appear.
  3. Click plus sign icon to drill down to weekly or daily view, or minus sign icon to drill up to quarterly or yearly view.
- In bar charts, click a colored segment of a bar to filter chart by criteria represented by segment color and by entire bar.
- Click a square in a legend to filter main graph by the criterion the square represents.
- Narrow down data shown in a dashboard's main graph by clicking a table cell or row, or a bar in a smaller bar graph. You can combine these filters.
- Select a table row to filter table by the criterion of that row.

Clear filters:

- If the filter was set using a drop-down menu, click the **Cancel Filter** icon at top right of the menu.
- If the drop-down menu used to set the filter has check boxes, select **(All)** at top to select all check boxes, which clears the filter.
- If you filtered a dashboard by selecting an item in a chart or table, click same item again.

- In Tableau Toolbar, click **Reset view** to restore your view to what you saw when you first opened the dashboard.

Manage Custom Views of a tab

Create a Custom View

1. Apply all desired customizations.
2. In Tableau Toolbar, click **Save Custom View**.
3. In **Save Custom View** dialog box:
   a. **Name this view.**
   b. Check **Make it my default** box if desired.
   c. Click **Save**.
4. To create additional Custom Views, filter/modify the View again and repeat steps above, entering a different name for each new View.
5. To make a newly created Custom View active, click **View: Original** to manage Custom Views (see below), then select desired View.

Manage your Custom Views

Click button on Tableau Toolbar indicating your current view to open the **Manage Custom Views** dialog box. In this dialog box:

- All Custom Views appear in the **My Views** section.
- Check mark ✓ to left of View indicates it is current default View.
- **Private** icon shows **View Status**—i.e., Custom View is private.

Set a Custom View as default view

Click **Set this view as your default** icon to right of View name under **My Views**. It changes to **Current default** icon.

Revert to Original View

In **Other Views** section of **Manage Custom Views** dialog box, click **Original**.

To reset default View to **Original** View, click **Set this view as your default** icon. It changes to **Current default** icon.

Rename a Custom View

1. To right of View name under **My Views**, click **Rename** icon.
2. In the activated text field, enter a new name.

Delete a Custom View

1. To right of View name under **My Views**, click **Delete** icon.
2. In **Are you sure?** pop-up, click **Delete**.

Download data

Notes:

- On the **TAT** and **Volumes** dashboards:
  - Before selecting an option from the **Display Data For** drop-down menu, first apply any other filters to the dashboard.
  - If the details of more than 50,000 rows are loaded, the table could take several minutes to return, and in some cases may not return.
  - To export the data, click the **Export** tab and follow instructions there.
- On the **Export** tabs of all dashboards:
  - By default, only the first 1,000 rows of data are shown in the table and may be downloaded. Using the **Load Table with a Maximum of** drop-down menu, you can instead choose to download 10,000 rows, 50,000 rows, or all data.

Depending on various factors such as filter selections, internet speed, or network traffic, the table may take extra time (several minutes) to load/export.

To download data from the main dashboard tab:

1. On **TAT** or **VOL** dashboard only: Choose **Display Data for** option.
2. At top right, click **Tableau Download** icon.
3. From drop-down menu, select **Crosstab**.
4. From the **Download Crosstab** dialog box, select the desired sheet.
5. Under **Select Format**, select **Excel**.
6. Click **Download**.

*To download data from the **Export** tab of a given dashboard:*

1. Click the **Export** tab.
   The **Export** tab for the dashboard appears.
2. At top right, click **Tableau Download** icon and, from drop-down menu, select **Crosstab** option.
3. From **Download Crosstab** dialog box, select desired sheet.
   Note: Do not select any sheet with **Z** in the filename.
4. Under **Select Format**, select **Excel**.
5. Click **Download**.

To download data from a section of a dashboard:

1. Click the section title (not on a specific data point or bar).
2. At top right of dashboard, click **Tableau Download** icon.
3. From the menu, select **Data**.
4. At top right of **View Data** window, click **Download** icon. Download