

# Intermediate Rules Training for Instrument Manager™

## Course Description

This is an intermediate level program, with a high degree of interaction and collaborative work with fellow participants. There will be extensive hands-on practice to learn Instrument Manager Rules engine functionality and construction of rules for auto-verification (AV) of patient results. The class covers data elements for special purposes, calculations, AV rules, best practices, complex functions, and notifier integration.

## Prerequisites

Participants must understand laboratory workflows and operation of Laboratory Information Systems for transmission of orders and receipt of results from laboratory instrument interfaces. Prior attendance in a Data Innovations Introduction to Rules course or equivalent training, plus at least six months experience writing rules in Instrument Manager is required. **Prior to registering for a class, participants must successfully complete a Rules competency quiz.**

## Course Agenda

### Day One: 9:00AM - 4:00PM

#### Concepts Review

- Data Flow Overview
- Rule Writing and Message Types
- Rule Placement

#### Operators, Actions and Data Elements Review

- Extract Component vs. Extract Section of
- Add vs. Set
- Order vs. Add
- Specimen Indices and Assigning User Fields

#### Rules Testing

- Best Practices for Dry Testing Rules
- Multiple Message Test Scenarios
- Importing Test Cases from Patient Records

#### Calculation Rules

- Via Assigned User Fields
- Cross Analyzer Calculations

### Day Two: 9:00AM - 4:00PM

#### Auto-Verification Rule Sets

- What is AV?
- Validation
- Implementation and Approval Documentation
- Naming Rules and Naming Test Scenarios/Test Cases

#### Data Collection for AV

- Typical data used in AV rule sets
- Sample spreadsheets for data collection & use in rules writing

#### Converting Workflows to Rule Sets

- Writing and testing rules commonly used in AV sets

#### Writing AV Rule Set Exercise

- Small group activity to construct and test an AV rule set for sample coagulation workflow

### Day Three: 9:00AM - 4:00PM

#### Writing an AV Rule Set Exercise (continued)

#### Complex Functions

- Pattern matching

#### Notifier Integration

- Using Rules to trigger alert messages

#### Language Locale

- Renaming User Fields

#### Non-Default Locations

- Writing rules in alternate places along IM data flow