

# Instrument Manager™ Rules Overview Virtual Course

## Course Description

Rules Training is an intensive, hands-on course that teaches the use of Instrument Manager Rules Engine functionality and how to write and test rules which can be used for various purposes including flagging results to be reviewed, adding to test orders and evaluating results against critical ranges. The class covers instrument request and result rules, testing rules and managing rules within the rules engine.

## Prerequisites

Participants should have an understanding of their own laboratory workflows, and operation of their Laboratory Information System (LIS) for transmission of test orders, and receipt of results and comments from laboratory interfaces. Prior attendance in an Instrument Manager course for system builders and administrators and/or experience building and maintaining configurations in Instrument Manager is highly recommended.

Additionally, all participants must complete a pre-check from the computer they will be using for the virtual class. Please see the Virtual Classroom Technical Requirements and Connectivity Pre-check document.

## Course Agenda

3 Days 12:20 PM – 4:30PM

*Note: To successfully participate in the workshop, trainees must complete 1 – 2 hours of homework between sessions.*

Welcome and Introductions

Participants' Learning Goals

IM's role in laboratory workflow

IM Rules engine: Device rules for requests and results

Writing Device Rules using different methods

Device Request Rules: Add Indices

Device Result Rules:

- Flag and hold critical results
- Non-numeric results
- Save data in designated fields

Testing Rules:

- Establishing test criteria
- Finding the edges
- Documenting test process

Rules Management options and non-default locations

Value List rule construction and testing

“Add” vs “Set” and “Order” vs “Add”

Construction of Calculation Rules

Importing rules and parent/child rules

Common errors when writing and testing rules