How to set a baseline on Life QI

You are now aware of how to create a personal project, a measure, a chart and how to add data onto Life QI. But once you have started to add your data onto the chart, you need to eventually set a baseline.

On Life QI, there are three phases/stages for a project. Life QI uses the word phase, as will be evident in the guide below.

- Baseline: this shows data before any improvement changes are tested and shows how the system operates
- Test: this phase shows data between periods of testing during testing of improvement ideas
- Sustain: this phase shows data after you have gone into quality control and continue to monitor data after implementing your change ideas successfully

Please note that the process of setting the baseline is the exact same for both run charts and control charts. For this guide, we will be using a control chart in screenshots.

The starting point for this guide is after a chart has been created with data added in. If you are unsure how to do this, please refer to our other guides.

The data used in the screenshots below is dummy data. You may be using different data when practicing this, but **the steps are the exact same!**

Step by Step Guide

1. If you are not logged in, log in and navigate to your Life QI project and to the chart that you have created
2. Open the chart and click on "**edit**". This will allow you to manipulate the chart (as well as add on additional data)
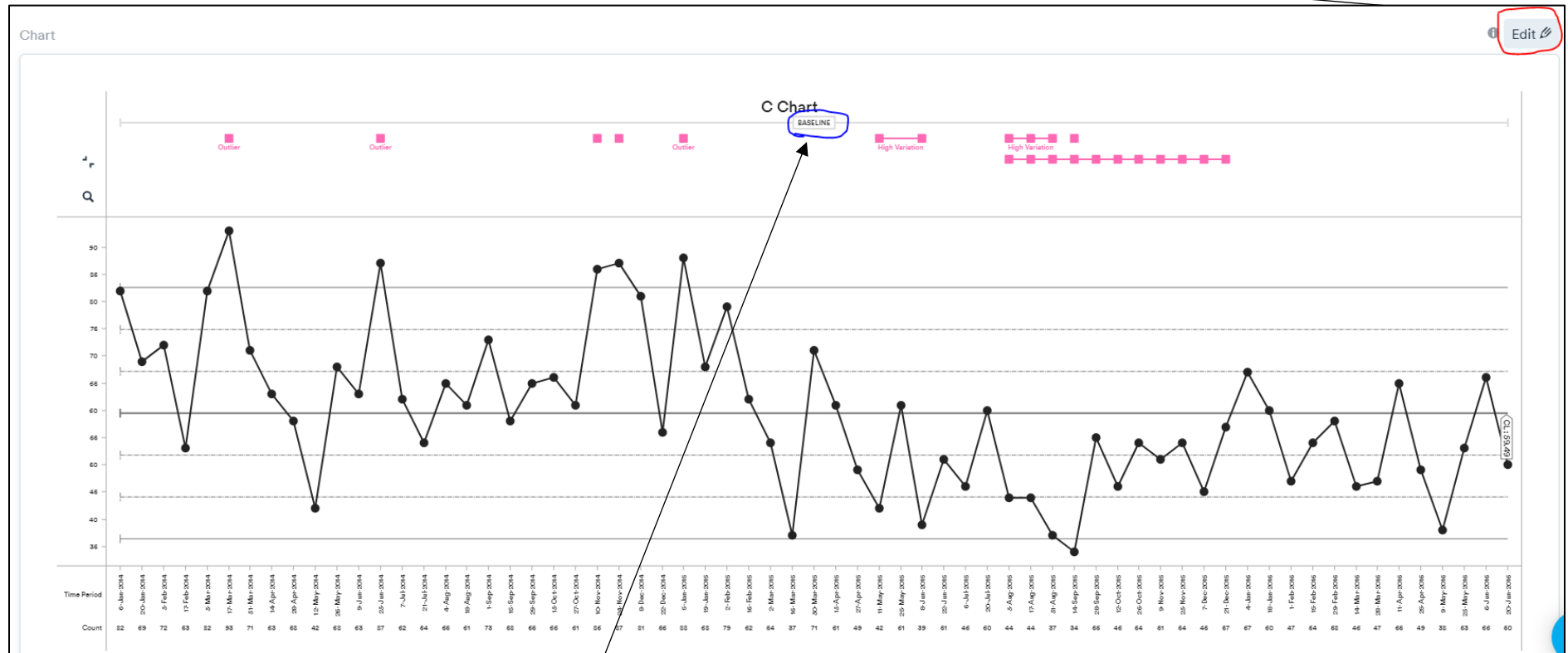

3. Also make a note of how it shows the **baseline** data.

4. If we refer to the above screenshot/chart and we wanted to set the baseline on the 20th data point (29th September 2014), we will need to go to the data point after it, so the 21st data point (13th October 2014) and click on it. This will open the below options:
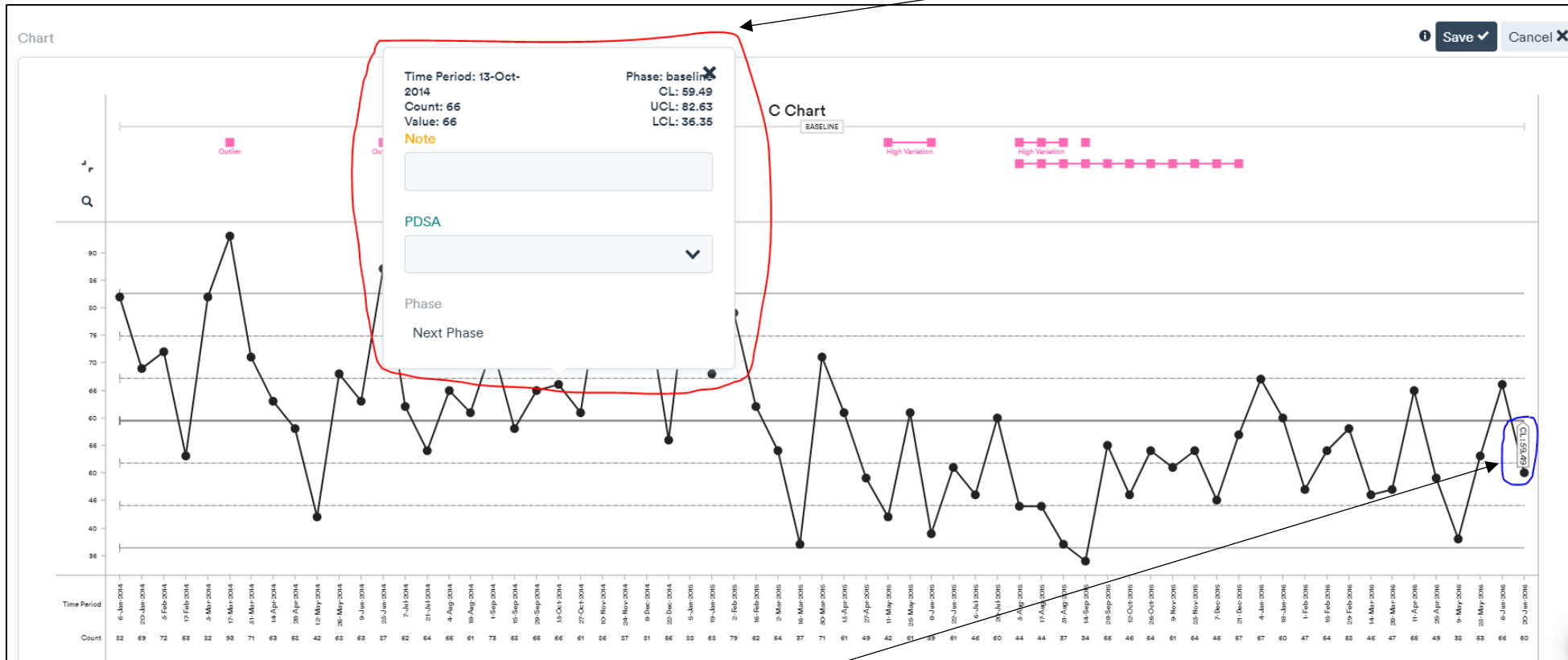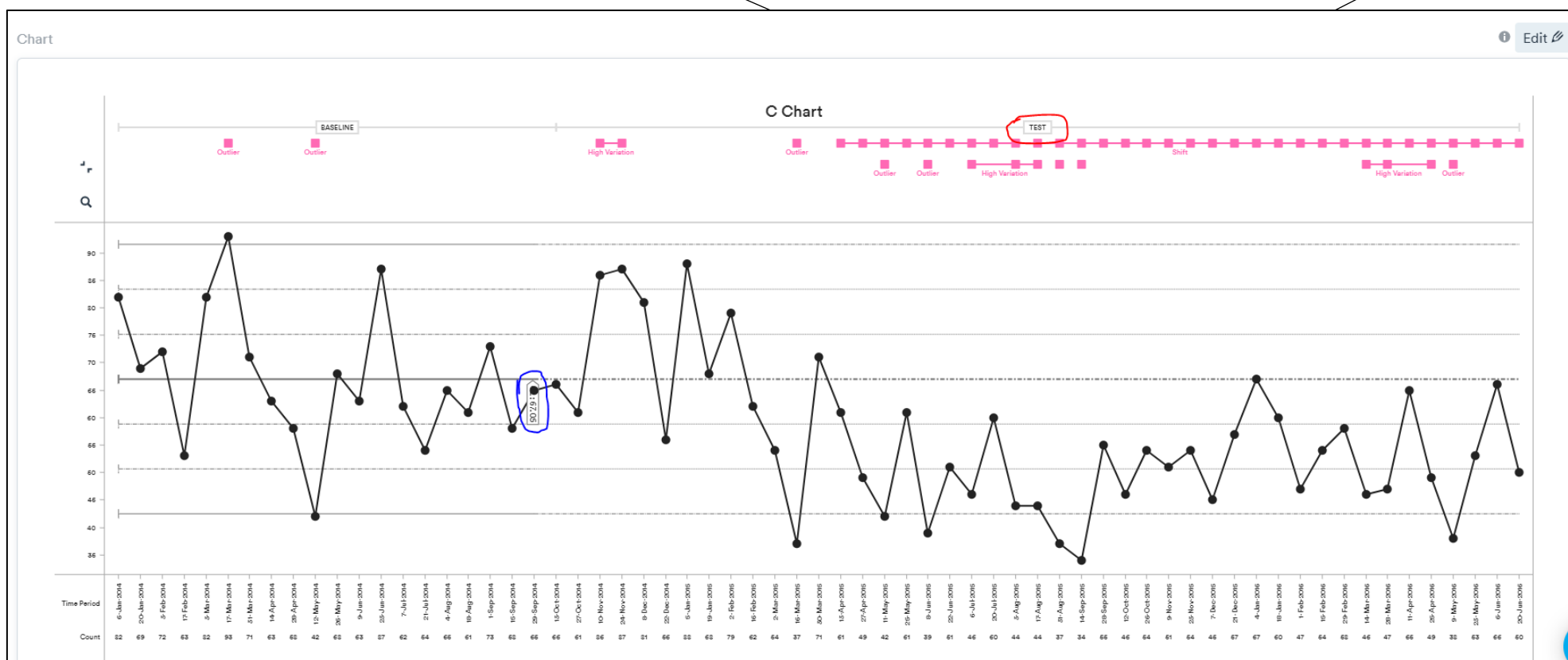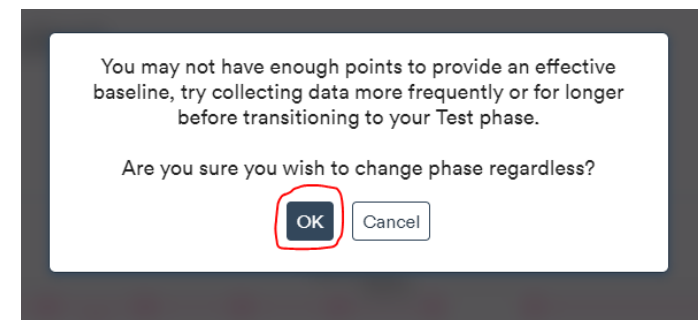

5. Also make note of where the label, which is showing the value of the centre line on the control chart, is (circled in blue)

6. What we need to then do is click on "**Next Phase**"
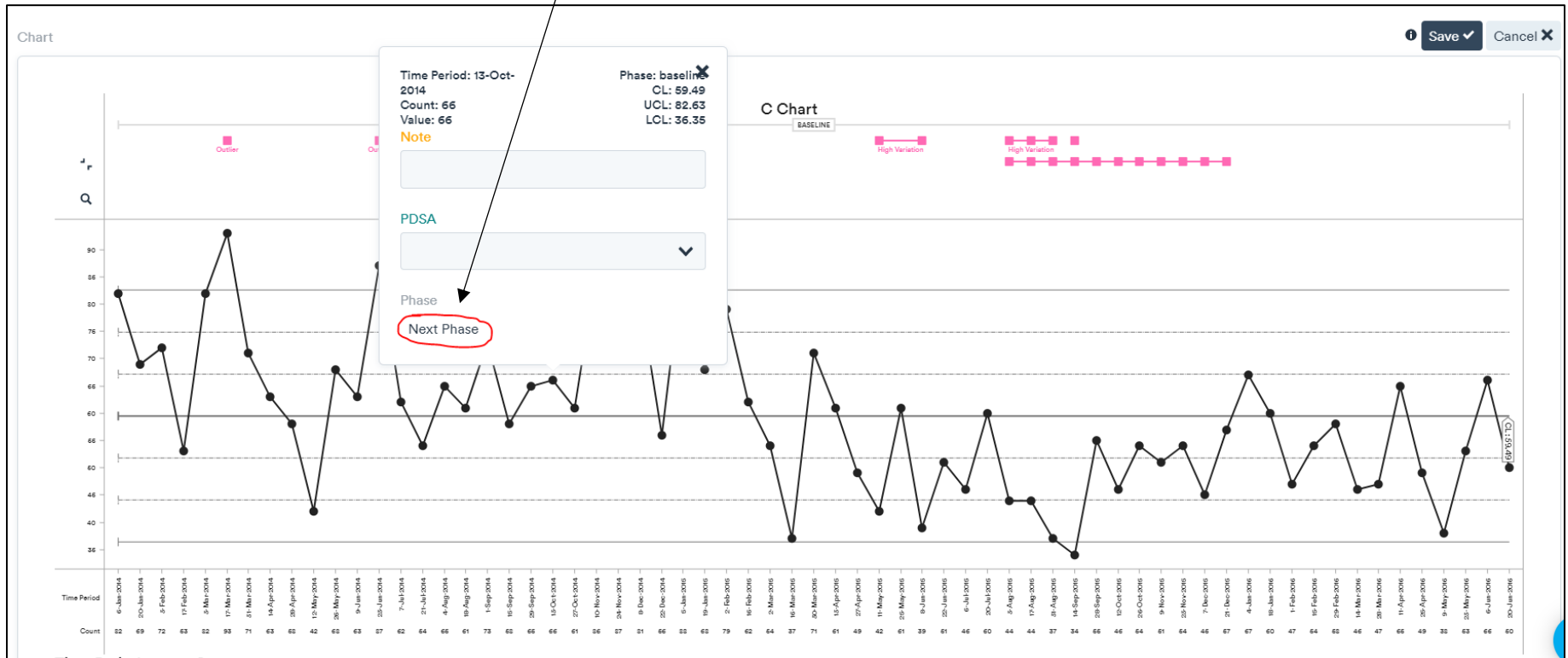
7. Please note that after clicking on next phase, you may get a message like this on the page.

8. This is telling us that we may not have enough data points to create an effective baseline. ***Note: best practice would dictate that we have 15-20 data points as a baseline for control charts***. *On Life QI, the message appears if you set the baseline for control charts with less than 15 data points.*

9. Click on "**Ok**" to proceed (circled in red, opposite)

10. Once you have done this, click "**save**" and then close the chart and re-open it. When you reopen the chart, you will see that a '**test**' phase (circled in red) has been added in and that the label has moved (circled in blue)

> You may not have enough points to provide an effective baseline, try collecting data more frequently or for longer before transitioning to your Test phase.
>
> Are you sure you wish to change phase regardless?
>
> **OK**   Cancel

11. You may also notice that the centre line before the label is solid line (baseline phase), but after the label (test phase) the centre line is now dashed instead. This indicates that the centre line has been extended across to the rest of the data on the chart. This sets the foundation for us to notice whether any changes we have made have led to any improvements, as we can compare it to the centre line that has been set.

12. Congratulations, you have now set a baseline! **Again, please note that the same steps are applicable for setting the baseline for run charts!**

## What if you accidentally set the baseline on the wrong date?

13. Let's say that you needed to set the baseline on the above chart starting on 1st September 2014 (18th data point), instead of 29th September 2014 (20th data point), like it has been shown on the above screenshots…

14. **You would not need to re-create the chart!** What you need to simply do is, click edit and then on the last data point on the chart, and you will see the following options
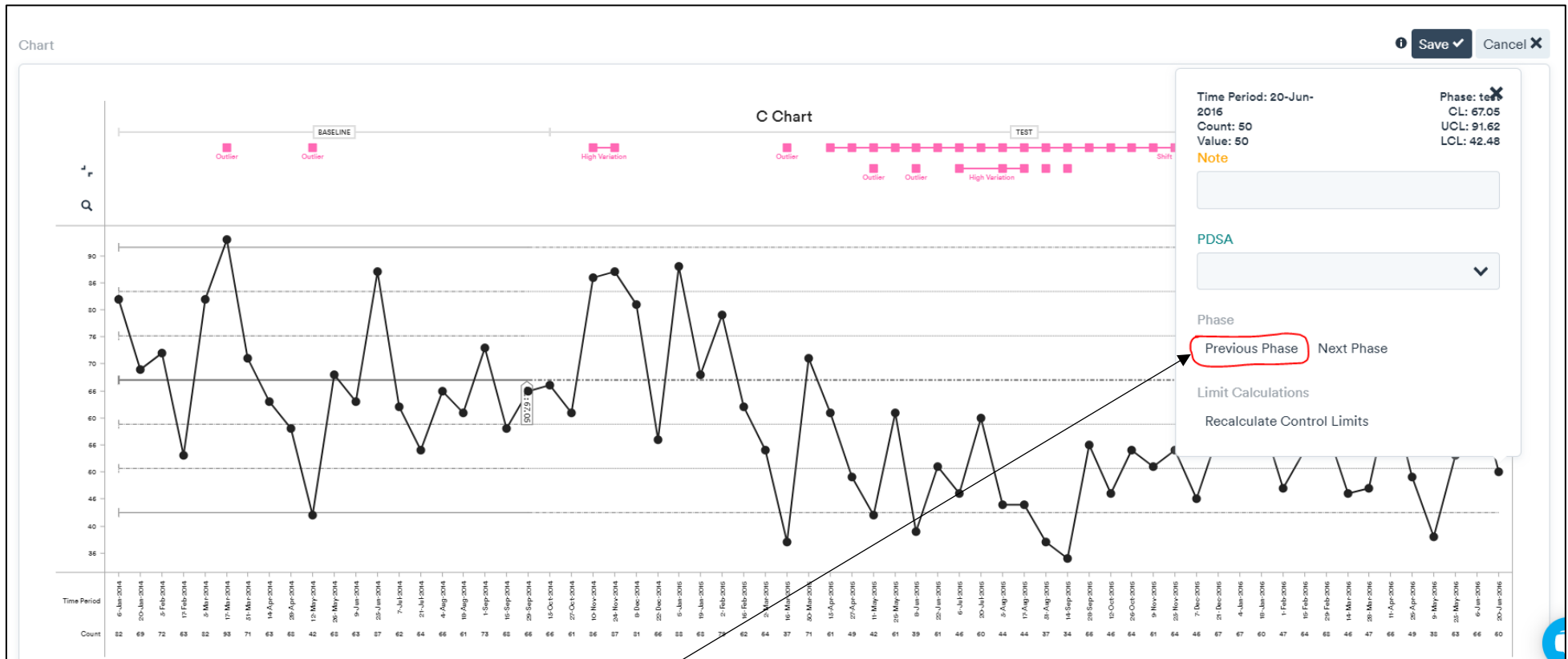
15. What you need to do is click on "**Previous Phase**" (circled in red above). Then click on save and then close and re-open the chart once more.

16. You should now see the that the chart has reset. There is only one phase (baseline) and the label is now back on the last data point and the whole of the centre line is solid, with no dashes present.
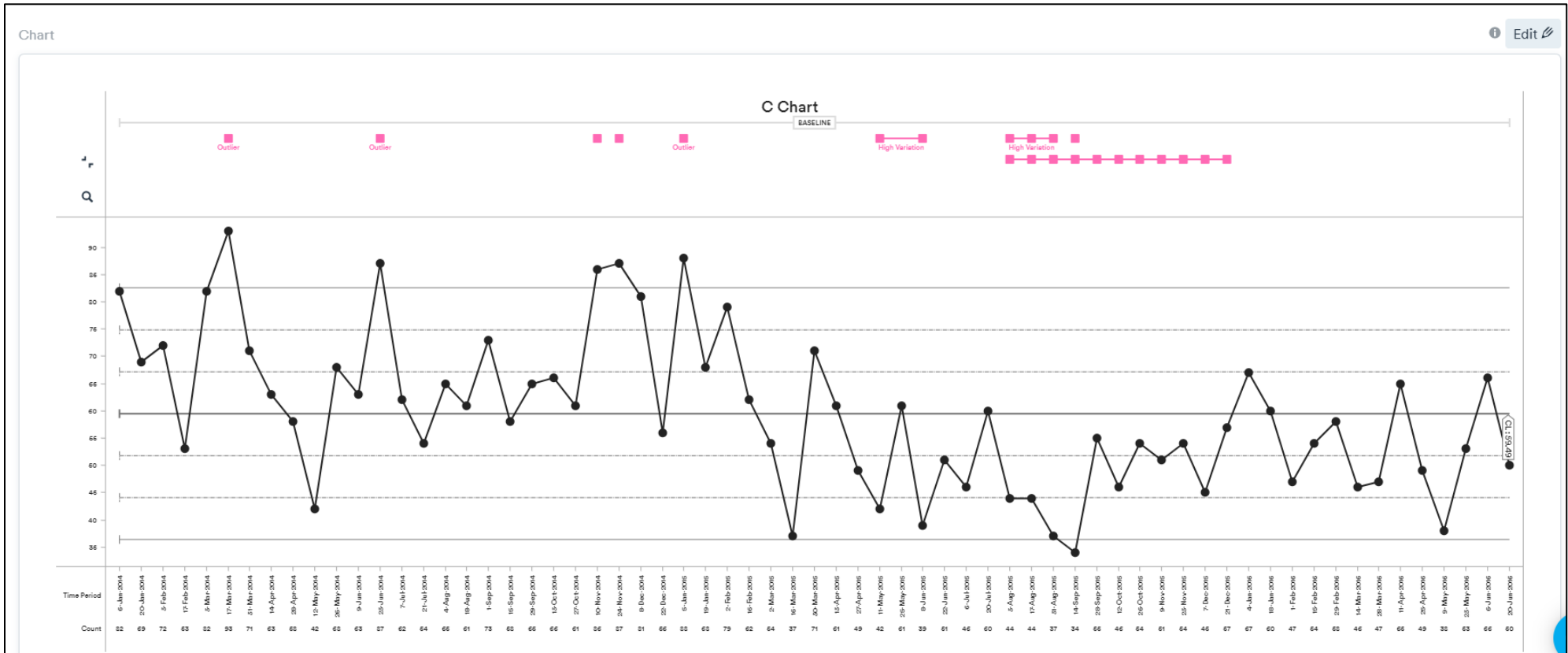
17. To set the baseline again, you would need to follow steps 4 to 10 once more.