



PATIENT AUDIT- FLEXIBLE QUERIES MANUAL

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To access the SCI Diabetes website, access via the Clinical Portal
or go to

<https://sci-diabetes.mhs.scot.nhs.uk/sci-diabetes/Auth/Login.aspx>

Navigation

Click on Main Menu ->Patient Audit ->Flexible Queries

The screenshot displays the SCI-Diabetes Ninewells Diabetes Clinic web application. The top navigation bar includes a 'Main Menu' button, a star icon, and links for 'User', 'Help', 'Default', and 'Logout (PHONE, Tele)'. The 'Main Menu' is expanded, showing a list of options: 'Search For A Patient Record', 'Population Overview', 'Regional Comparison', 'Patient Audit', 'Data Quality Review', 'Clinic Management', 'Patient List Management', 'Clinic Admin Functions', 'User Account Management', and 'Audit Report'. The 'Patient Audit' option is selected, and its sub-menu is visible, containing 'General Audit', 'Audit Patient Contacts', 'Patients With Deteriorating Recordings', 'View My Contacts', 'Paediatric Patient Lists', and 'Flexible Queries'. The 'Flexible Queries' option is highlighted with a red box and a red arrow. The 'Search For A Patient' section is also visible, featuring input fields for 'CHI is:', 'begins with:', 's:', 'begins with:', 'betes/Diagnosis is:', and 'nder is:'. The 'Search' button is located at the bottom right of the search section. The 'Search Results' section at the bottom of the page displays the message: 'Please enter search conditions to enable Search.'

Create a Query

The Flexible Queries screen provides users with the ability to manage the queries they have defined and to view the results of a particular query.

Click on "Add a new query" link

Flexible Queries

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit, edit, copy or delete a query.
[Add a new query](#)
No records found

Query Results:

Enter Query name. Select; Population/Domain, Notification and Query Template then Click on Save

Flexible Query Builder

Query:

Query Name: My Query

Population/Domain: Ninewells Diabetes Clinic

Notification: ☐ Send me email when query completes
☒ Do not send me an email when query completes

Email address: charles.flach@nhs.net

Created:

Last updated:

Query Template: Patient Audit

Query Size: Min Max

Query Template: The selected query template will populate your query with standard pre-defined data items. You will be able to add and remove data items as required.

Build a Query

This screen allows users to “build” custom queries to support analysis of patient data related to their clinical activities. To build the query:

1. **Add a new entry:** Clicking on this link enables user to define selection criteria for building a ‘custom’ query
2. **Rule Builder:** Define selection criteria by choosing Category, Data Item and Rule. (*multiple Data items can be added to build a query*)
3. **Rules:** The Rules table will give a detailed overview of the data items added to the query which can be Edited or Deleted

The screenshot shows the 'Flexible Query Builder' interface. A red arrow labeled '1.' points to the 'Add a new entry' link in the 'Rules' section. Another red arrow labeled '2.' points to the 'Rule builder: Add a new entry' dialog box, which is open and shows a list of data items with 'HbA1c' selected. A third red arrow labeled '3.' points to the 'Rules' table, which lists existing query rules with 'Edit' and 'Delete' links for each row.

Flexible Query Builder

Query:

Query Name: My Query
Population/Domain: Ninewells Diabetes Clinic
Notification: ☐ Send me email when query completes ☒ Do not send me an email when query completes
Email address: charles.flach@nhs.net
Created: 05-May-2015 08:57
Last updated: 05-May-2015 08:57
Query Size: Min

Rules:

Click on [Add a new entry](#) to add a data item to the list.
Click on [Group by and Sort](#) to tell the system how you want the data summarised.

Category	Data Item	Type	Rule	Group by and Sort		
Demographics	Patient ID/CHI	Select All	Select all		Edit	Delete
Demographics	Patient Name	Select All	Select all		Edit	Delete
Glycaemic Control	HbA1c	Number	Select all		Edit	Delete

Records 1 to 3 of 3

Records per page 20

Add Another Data Item

1.

Flexible Query Builder

Query:

Query Name:

Population/Domain:

Notification: ☐ Send me email when query completes ☒ Do not send me an email when query completes

Email address:

Created: 05-May-2015 08:57

Last updated: 05-May-2015 08:57

Query Size: Min

Rules:

Click on [Add a new entry](#) to add a data item to the list.

Click on [Group by and Sort](#) to tell the system how you want the data summarised.

Category	Data Item	Type	Rule	Group by and Sort		
Demographics	Patient ID/CHI	Select All	Select all		Edit	Delete
Demographics	Patient Name	Select All	Select all		Edit	Delete
Glycaemic Control	HbA1c	Number	Select all		Edit	Delete
Diagnosis	Diabetes Type	List	= Type 1 Diabetes Mellitus OR = Type 2 Diabetes Mellitus		Edit	Delete

Records 1 to 4 of 4

« « » »

Records per page

3.

a)

b)

2.

Rule builder: Add a new entry

Category:

Data Item:

Type: List

Rule Only: ☐ ☒ Select options ☐ Select all

Rule:

- ☒ Type 1 Diabetes Mellitus
- ☒ Type 2 Diabetes Mellitus
- ☐ Current Gestational Diabetes
- ☐ Maturity Onset Diabetes of Youth
- ☐ Latent Autoimmune Diabetes of Adulthood
- ☐ Maternally Inherited Diabetes and Deafness
- ☐ Neonatal Diabetes
- ☐ Secondary - Pancreatic Pathology
- ☐ Secondary - Drug Induced
- ☐ Secondary - Disease
- ☐ Impaired Glucose Tolerance
- ☐ Impaired Fasting Glucose
- ☐ History of Gestational Diabetes
- ☐ Stress Induced Hyperglycaemia (transitory)
- ☐ Diabetes Resolved
- ☐ Not Diabetic
- ☐ Diabetes in Remission
- ☐ Unconfirmed
- ☐ Other Type of Diabetes
- ☐ Not Known

[Save](#) [Cancel](#)

Rule Builder:

- a) **Rule Only:** If you want to use a data item to set a selection rule but do not need to see the actual values on the results then check the "Rule Only" box.
- b) **Select all:** If you want to see a data item on a report but do not want to apply any rules then choose the "Select all" option.

Group by and sort

To produce simple statistical reports use the "Group by and sort" options:

1.

The screenshot shows the 'Flexible Query Builder' interface. On the left, the 'Query' section includes fields for 'Query Name' (Contact Summary), 'Population/Domain' (Ninewells Diabetes Clinic), 'Notification' (Do not send me an email when query completes), 'Email address' (charles.flach@nhs.net), 'Created' (05-May-2015 09:51), 'Last updated' (05-May-2015 09:51), and 'Query Size' (Min). Below this is the 'Rules' section with instructions: 'Click on [Add a new entry](#) to add a data item to the list.' and 'Click on [Group by and Sort](#) to tell the system how you want the data summarised.'

On the right, the 'Rule builder: Group by and Sort' panel is shown. It contains a table with columns: 'Category', 'Data Item', 'Group by (clear all)', and 'Sort'. The table has three rows: 'Contact Record' with 'Contact Date', 'Contact Record' with 'HCP Associated With Contact', and 'Contact Record' with 'Mode'. The 'Group by' column has dropdowns with values 1 and 2. The 'Sort' column has icons for ascending and descending order. A 'Save' button and a 'Cancel' button are at the bottom right of this panel. Red arrows and numbers 1-4 indicate the steps: 1. Click on the 'Group by and Sort' link in the Rules section. 2. Select which data items are to be grouped and how they will be grouped. 3. Select the sort order you want the items to appear in. 4. The rules table is updated.

Category	Data Item	Type	Rule	Group by and Sort	Edit	Delete
Contact Record	Contact Date	Event Date	recorded within Last 28 days (Rule Only)			
Contact Record	HCP Associated With Contact	Text	Select all	1	Edit	Delete
Contact Record	Mode	List	Select all (Rule Only)	2	Edit	Delete

Records 1 to 3 of 3

Records per page 20

How to set up group by and sort:

1. Click on the "Group by and Sort" link.
2. Select which data items are to be grouped and how they will be grouped.
 - a. You can choose to group by up to 5 levels deep.
 - b. Use the "clear all" link to reset all selections and start again.
3. Select the sort order you want the items to appear in.
4. The rules table is updated.



Types of Query

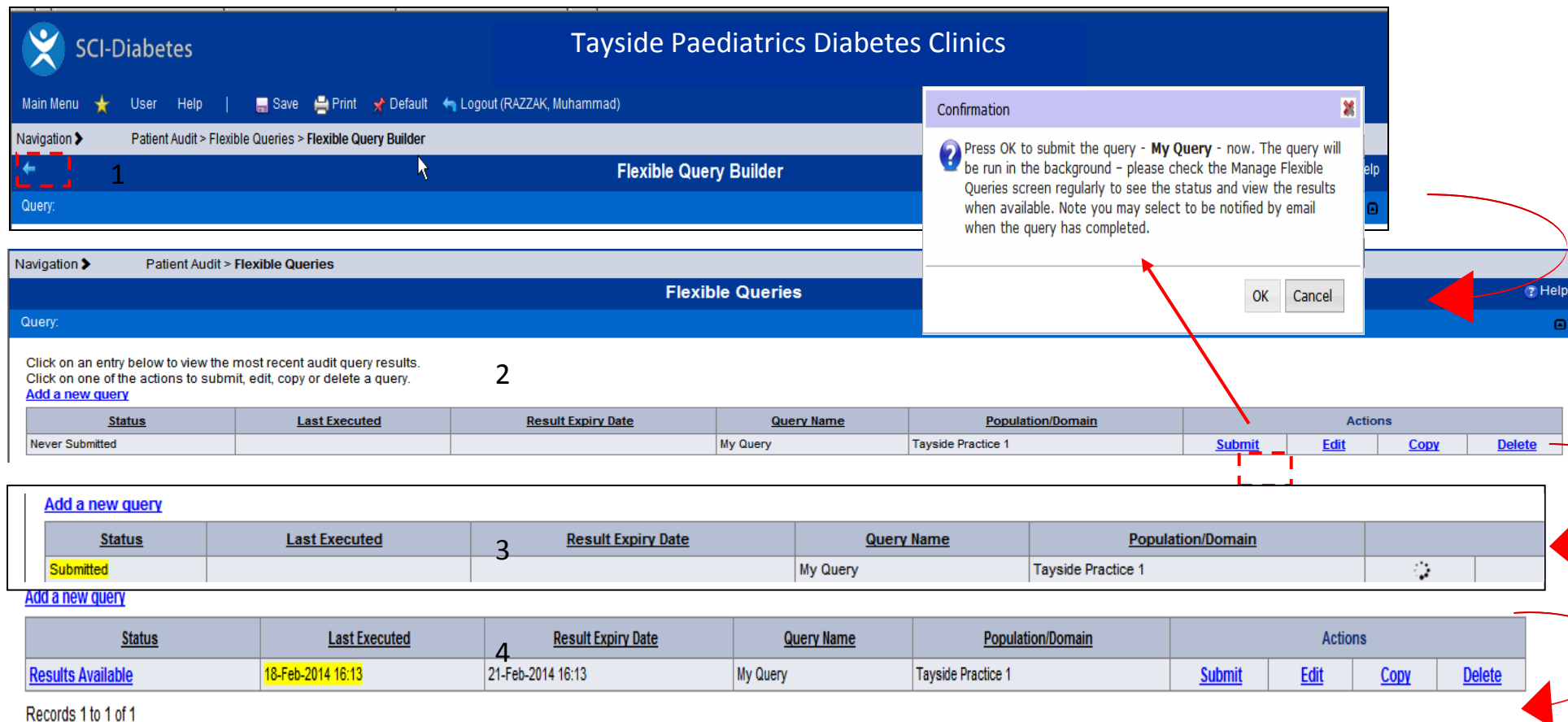
SCI-Diabetes supports four types of query:

Query Type	How Selected	What you can do
Patient Query	Build your query using only patient data categories and data items.	Combine and group by any combination of patient data items. The query report will be based on the current "summary" values (see below) for the data items selected.
Contact Query	Build your query and include at least one data item from the category "Contact Record".	<p>You should always include "Contact Date" in your contact query and set the range to cover the period you are interested in. The query report will include details from all the contacts that took place during that period. Even if one patient was contacted many times all the contact records will be included.</p> <p>You can include any patient query data items, again the summary values will be displayed.</p>
Inpatient Query	Build your query and include at least one data item from the category "Inpatient Record".	<p>You should always include "Admission Date" or "Date of Discharge from Hospital" in your Inpatient query and set the range to cover the period you are interested in. The query report will include details from all the Inpatient events that took place during that period. Even if one patient was in hospital many times all the inpatient records will be included.</p> <p>You can include any patient record data items, again the summary values will be displayed.</p>
Patient Education	Build your query and include at least one data item from the category "Patient Education".	<p>You should always include "Patient Education Event Date" or "Patient Education Record Form Action Date" in your patient education query and set the range to cover the period you are interested in. The query report will include details from all the patient education records that entered during that period. Even if one patient was involved with multiple patient education activities all the records will be included.</p> <p>You can include any patient record data items, again the summary values will be displayed.</p>

Note:	
Combining Queries	<p>You can not create a query that combines data items from "Contact Record", "Inpatient Record", or "Patient Education". The result of doing this would be unpredictable.</p> <p>You can combine patient record data items with a Contact Query or an Inpatient Query.</p>
Summary values	<p>SCI-Diabetes contains multiple records for data items e.g. for HbA1c there will be many historical records. The system will select one of these records (usually the latest from the most trusted source) to show on the patient record screens, this is the "summary" value.</p>

Run a Query

1. RUN QUERY-> To run the query Click on Return Icon  under the Navigation > Menu
2. SUBMIT QUERY-> Click on Submit under the Actions table
3. PROCESSING QUERY-> After Submit under the Status table will change from Never Submitted to Submitted whilst showing processing icon  under Actions table
4. VIEW RESULTS-> After Processing is complete the Status table will change from Submitted to Results Available



The screenshot shows the Tayside Paediatrics Diabetes Clinics Flexible Query Builder interface. It includes a navigation menu, a confirmation dialog, and three sequential views of the query status table.

Confirmation Dialog:

Press OK to submit the query - **My Query** - now. The query will be run in the background - please check the Manage Flexible Queries screen regularly to see the status and view the results when available. Note you may select to be notified by email when the query has completed.

Flexible Query Builder - Step 1:

Navigation > Patient Audit > Flexible Queries > Flexible Query Builder

Query:


Flexible Queries - Step 2:

Click on an entry below to view the most recent audit query results. Click on one of the actions to submit, edit, copy or delete a query.
[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions			
Never Submitted			My Query	Tayside Practice 1	Submit	Edit	Copy	Delete

Flexible Queries - Step 3:

[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions			
Submitted			My Query	Tayside Practice 1				

Flexible Queries - Step 4:

[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions			
Results Available	18-Feb-2014 16:13	21-Feb-2014 16:13	My Query	Tayside Practice 1	Submit	Edit	Copy	Delete

Records 1 to 1 of 1

*While the Query is under processing users can continue with other applications or build another query simultaneously. If the email notification option is selected by the User they can be notified by email of once the query is processed and results are available to view.

View Query Results

1. Click on the [Results Available](#) Link will generate the Results of the Query: My Query

Flexible Queries [Help](#)

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit, edit, copy or delete a query.
[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions			
Results Available	18-Feb-2014 16:13	21-Feb-2014	My Query	Tayside Practice 1	Submit	Edit	Copy	Delete

Records 1 to 1 of 1

Results:

Query: My QueryResults from: 18-Feb-2014 16:13

Patient ID/CHI	Patient Name	Angina	Diabetes Type
1705643627	Thomas, Mike	Yes	Type 1 Diabetes Mellitus

Records 1 to 1 of 1

Records per page 20

Edit a Query

1. Click on [Edit](#) under the Actions table to edit the Query.

Flexible Queries [Help](#)

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit, edit, copy or delete a query.
[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions			
Results Available	18-Feb-2014 16:13	21-Feb-2014	My Query	Tayside Practice 1	Submit	Edit	Copy	Delete

Records 1 to 1 of 1

2. This will then take the user back to Edit page where the user can Add a new Entry, Group by and sort, Delete or Edit current Data Items in the Query.

Flexible Query Builder [Help](#)

Query:

Query Name:

Population/Domain:

Notification:
☐ Send me email when query completes
☒ Do not send me an email when query completes

Email address:

Created: 05-May-2015 08:57

Last updated: 05-May-2015 09:43

Query Size: Min Max

Rules:

Click on [Add a new entry](#) to add a data item to the list.

Click on [Group by and Sort](#) to tell the system how you want the data summarised.

Category	Data Item	Type	Rule	Group by and Sort		
Demographics	Patient ID/CHI	Select All	Select all		Edit	Delete
Demographics	Patient Name	Select All	Select all		Edit	Delete
Glycaemic Control	HbA1c	Number	Select all		Edit	Delete
Diagnosis	Diabetes Type	List	= Type 1 Diabetes Mellitus OR = Type 2 Diabetes Mellitus		Edit	Delete

Records 1 to 4 of 4

Records per page

Copy a Query

Users can reuse queries built by them to further add new rules and selections so that they don't have to start building the whole query again. Copy Query function enables this functionality.

Flexible Queries							Help
Query:							
Click on an entry below to view the most recent audit query results. Click on one of the actions to submit, edit, copy or delete a query. Add a new query							
Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions		
Results Available	18-Feb-2014 16:13	21-Feb-2014	My Query	Tayside Practice 1	Submit	Edit	Copy
Records 1 to 1 of 1							

1. User can click on the Copy link which will recreate My Query allowing user to rename the new query with rules already copied from in My Query build by the user earlier. User can now edit, delete or add new Data items to modify the copied query as per their requirements.

Flexible Query Builder							Help						
Query:													
Query Name	<input type="text" value="My Query (Copy)"/>												
Population/Domain	<input type="text" value="Ninewells Diabetes Clinic"/>												
Notification	<input type="radio"/> Send me email when query completes <input checked="" type="radio"/> Do not send me an email when query completes												
Email address	<input type="text" value="charles.flach@nhs.net"/>												
Created	05-May-2015 12:42												
Last updated	05-May-2015 12:42												
Query Size	Min <div><div></div></div> Max												
Rules:													
Click on Add a new entry to add a data item to the list.													
Click on Group by and Sort to tell the system how you want the data summarised.													
Category	Data Item	Type	Rule	Group by and Sort									
Demographics	Patient ID/CHI	Select All	Select all		Edit	Delete							
Demographics	Patient Name	Select All	Select all		Edit	Delete							
Glycaemic Control	HbA1c	Number	Select all		Edit	Delete							
Diagnosis	Diabetes Type	List	= Type 1 Diabetes Mellitus OR = Type 2 Diabetes Mellitus		Edit	Delete							
Records 1 to 4 of 4					Records per page <input type="text" value="20"/>								

Query Sharing

Users can define, save and share with other users in any domain, flexible queries parameters which can then be accepted and used to define flexible queries to interrogate the SCI-Diabetes Audit database to identify specific cohorts of patients and display clinical indicators based on the shared flexible queries defined parameters.

Click on "Share"

Flexible Queries

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit, edit, copy or delete a query.
[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions
Results Expired (7)	16-Oct-2015 14:51	19-Oct-2015	29 Jul	Tayside Inpatients	Submit Edit Copy Delete Share
Never Submitted			29 Jul	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (20)	29-Jul-2015 14:43	01-Aug-2015	29 Jul	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (173)	19-Oct-2015 12:56	22-Oct-2015	Age + Duration of Diabetes	Tayside Practice 3	Submit Edit Copy Delete Share
Never Submitted			Age + Duration of Diabetes (Copy)	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (4)	22-Oct-2015 13:37	25-Oct-2015	Any Test Query	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (2)	23-Oct-2015 12:38	26-Oct-2015	Flex audit	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (2)	23-Oct-2015 12:40	26-Oct-2015	Flex audit	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (173)	20-Aug-2015 09:11	23-Aug-2015	Test 1	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (12)	27-Jul-2015 14:31	30-Jul-2015	Test 2	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (51)	27-Jul-2015 14:28	30-Jul-2015	Test 3	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (28)	17-Jul-2015 09:33	20-Jul-2015	Test query	Tayside Inpatients	Submit Edit Copy Delete Share
Results Expired (7)	30-Jul-2015 16:16	02-Aug-2015	met	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (16)	10-Sep-2015 10:38	13-Sep-2015	test 4	Tayside	Submit Edit Copy Delete Share
Never Submitted (518)			test 4 (Copy)	Tayside	Submit Edit Copy Delete Share
Never Submitted			test 5	Tayside Practice 3	Submit Edit Copy Delete Share

Records 1 to 16 of 16

Query Results:

Share with Individual:

Radio button for sending query to Individual Recipient is preselected

Flexible Queries

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit, edit, copy or delete a query.
[Add a new query](#)

Select Query Share Option

☒ Send to Individual Recipient
 ☐ Send to Group

Select Recipient

Email Address:

Share

Cancel

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions
Results Expired (7)	16-Oct-2015 14:51	19-Oct-2015	29 Jul	Tayside Inpatients	Submit Edit Copy Delete Share
Never Submitted			29 Jul	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (20)	29-Jul-2015 14:43	01-Aug-2015	29 Jul	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (173)	19-Oct-2015 12:56	22-Oct-2015	Age + Duration of Diabetes	Tayside Practice 3	Submit Edit Copy Delete Share
Never Submitted			Age + Duration of Diabetes (Copy)	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (4)	22-Oct-2015 13:37	25-Oct-2015	Any Test Query	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (2)	23-Oct-2015 12:38	26-Oct-2015	Flex audit	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (2)	23-Oct-2015 12:40	26-Oct-2015	Flex audit	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (173)	20-Aug-2015 09:11	23-Aug-2015	Test 1	Tayside Practice 3	Submit Edit Copy Delete Share
Results Expired (12)	27-Jul-2015 14:31	30-Jul-2015	Test 2	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (51)	27-Jul-2015 14:28	30-Jul-2015	Test 3	Ninewells Diabetes Clinic	Submit Edit Copy Delete Share
Results Expired (28)	17-Jul-2015 09:33	20-Jul-2015	Test query	Tayside Inpatients	Submit Edit Copy Delete Share

Start to type recipients email address and an auto complete email list of potential recipients is displayed.

The screenshot shows the 'Flexible Queries' interface. On the left, there is a table with columns 'Status' and a count. The main area has a 'Query:' section with instructions and a link 'Add a new query'. A modal window titled 'Select Query Share Option' is open, showing 'Send to Individual Recipient' as the selected option. Below this, there is a 'Select Recipient' section with an 'Email Address:' field containing 'ol'. A dropdown list of email addresses is visible, including 'TAYLOR, Andrew [ataylor_old@nhs.net]', 'D'CHOLMONDLEY-WARNER, Charley'oh [charles.flach@nhs.net]', 'PATON, Carolyn [Carolyn.Paton@aapct.scot.nhs.uk]', and 'PATON, Carolyn [Carolyn.Paton@aapct.scot.nhs.uk]'. On the right, there is a 'Shared Queries' table with columns 'Population/Domain' and 'Actions'.

Status	
Results Expired (7)	16
Never Submitted	
Results Expired (20)	29
Results Expired (173)	19
Never Submitted	
Results Expired (4)	22
Results Expired (2)	23
Results Expired (2)	23
Results Expired (173)	20
Results Expired (12)	27
Results Expired (51)	27
Results Expired (28)	17
Results Expired (7)	30

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share

Populate email address field with the recipient's email address and select the "Share" button to share the query with the recipient

The screenshot shows the 'Flexible Queries' interface. The modal window 'Select Query Share Option' is still open. The 'Email Address:' field now contains 'oluwatosin.oludipe@nhs.net'. The 'Share' button is highlighted with a red arrow. The 'Cancel' button is also visible. The background tables are the same as in the previous screenshot.

Share with a Group (New):

1. Select radio button to send query to group.

Flexible Queries

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit the query.
[Add a new query](#)

Select Query Share Option

☐ Send to Individual Recipient ☒ Send to Group

Add New Group

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Test Group	23/10/2015 14:12:07	Share Delete

Records 1 to 16 of 16

Shared Queries

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

1. Select the “[Add New Group](#)” link to create a new Group.

Flexible Queries

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit the query.
[Add a new query](#)

Select Query Share Option

☐ Send to Individual Recipient ☒ Send to Group

Add New Group

Please enter group name

Bazooka

[Save](#) [Cancel](#)

2.

Records 1 to 16 of 16

Shared Queries

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

2. Screen pops up with field for user to type the “Group” name and save.

1. A new “Group” is created (“Bazooka” in the sample below) and added to the list of existing groups.

Flexible Queries

Query: Click on an entry below to view the most recent audit query results. Click on one of the actions to sub...

Add a new query

Status	Count
Results Expired (7)	16
Never Submitted	
Results Expired (20)	29
Results Expired (173)	19
Never Submitted	
Results Expired (4)	22
Results Expired (2)	23
Results Expired (173)	20
Results Expired (12)	27
Results Expired (51)	27
Results Expired (28)	17
Results Expired (7)	30
Results Expired (16)	10
Never Submitted (518)	
Never Submitted	

Records 1 to 16 of 16

Query Results:

Select Query Share Option

Select Recipient

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Test Group	23/10/2015 14:12:07	Share Delete
Bazooka		Share Delete

Add New Group

Group Name: Bazooka

Email Address:

Add to List

Shared Queries

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

2. In addition “Add to List” screen is automatically displayed with the new group name Bazooka AND Email address field for the user to commence adding recipients to the new “Group”

1. User populates the email field with recipients email addresses and selects the “+” button to add them the new “Group” list

Flexible Queries

Query: Click on an entry below to view the most recent audit query results. Click on one of the actions to sub...

Add a new query

Status	Count
Results Expired (7)	16
Never Submitted	
Results Expired (20)	29
Results Expired (173)	19
Never Submitted	
Results Expired (4)	22
Results Expired (2)	23
Results Expired (173)	20
Results Expired (12)	27
Results Expired (51)	27
Results Expired (28)	17
Results Expired (7)	30
Results Expired (16)	10
Never Submitted (518)	
Never Submitted	

Records 1 to 16 of 16

Query Results:

Select Query Share Option

Select Recipient

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Test Group	23/10/2015 14:12:07	Share Delete
Bazooka		Share Delete

Add New Group

Group Name: Bazooka

Email Address: [and]

Name	Email Address	Action
OLUDIPE, Tosin	oluwatosin.oludipe@nhs.net	Delete
FLACH, Charles	charles.flach@nhs.net	Delete

Share Cancel

Shared Queries

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

2. User can also use the “Delete” link to remove users from the “Group” list if they were added mistakenly or no longer required in the list.
3. User then selects the “Share” button to share the query with the Group recipients or the “Cancel” button if they are not ready to share or no longer interested in sharing query with the “Group”

Share with a Group (Existing):

1. Select radio button to send query to group.

Flexible Queries

Query:

Click on an entry below to view the details of the query.

Click on one of the actions to submit the query.

Add a new query

Status	Count
Results Expired (7)	16
Never Submitted	
Results Expired (20)	29
Results Expired (173)	19
Never Submitted	
Results Expired (4)	22
Results Expired (2)	23
Results Expired (2)	23
Results Expired (173)	20
Results Expired (12)	27
Results Expired (51)	27
Results Expired (28)	17
Results Expired (7)	30
Results Expired (16)	10
Never Submitted (518)	
Never Submitted	

Records 1 to 16 of 16

Select Query Share Option

☐ Send to Individual Recipient
 ☒ Send to Group

Select Recipient

Add New Group

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Bazooka		Share Delete
Test Group	23/10/2015 14:12:07	Share Delete

Shared Queries

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

1. "Add to List" screen is automatically displayed, and the user is able to undertake the following actions

a) Share query with the existing Group immediately by selecting the "Share" button

Flexible Queries

Query:

Click on an entry below to view the most recent audit query results.
Click on one of the actions to sub

[Add a new query](#)

Select Query Share Option

☐ Send to Individual Recipient ☒ Send to Group

Select Recipient

[Add New Group](#)

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Bazooka		Share Delete
Test Group	23/10/2015 14:12:07	Share Delete

[Add to List](#)

Group Name:

Email Address:

Name	Email Address	Action
OLUDIPE, Tosin	oluwatosin.oludipe@nhs.net	Delete
FLACH, Charles	charles.flach@nhs.net	Delete

[Share](#) [Cancel](#)

Records 1 to 16 of 16

Query Results:

Shared Queries

Population/Domain	Submit	Edit	Copy	Delete	Share
Inside Inpatients	Submit	Edit	Copy	Delete	Share
Inside Practice 3	Submit	Edit	Copy	Delete	Share
ewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Inside Practice 3	Submit	Edit	Copy	Delete	Share
Inside Practice 3	Submit	Edit	Copy	Delete	Share
ewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
ewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Inside Practice 3	Submit	Edit	Copy	Delete	Share
ewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
ewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Inside Inpatients	Submit	Edit	Copy	Delete	Share
ewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Inside	Submit	Edit	Copy	Delete	Share
Inside Practice 3	Submit	Edit	Copy	Delete	Share

b) Add recipients to the existing "Group" list address field for the user to commence adding recipients to the new "Group"

c) Remove recipients from the list by selecting The "[Delete](#)"

Delete Groups:

1. Select radio button to send query to a group.
2. User selects the Delete link for the group to be removed under the "Action" column (Test Group in the sample below)

The screenshot shows the 'Flexible Queries' interface. On the left, there is a table of query results with columns 'Status' and 'Records'. The 'Test Group' is listed with a status of 'Never Submitted' and 518 records. In the center, a modal dialog titled 'Select Query Share Option' is open. It has two radio buttons: 'Send to Individual Recipient' (selected) and 'Send to Group'. Below the radio buttons is a table titled 'Add New Group' with columns 'Group Name', 'Date Last query Shared', and 'Action'. The 'Test Group' is listed with a date of '23/10/2015 14:12:07' and actions 'Share' and 'Delete'. A red arrow points from the 'Delete' link to the 'Send to Group' radio button, labeled '1.'. Another red arrow points from the 'Delete' link to the 'Test Group' row, labeled '2.'.

Status	Records
Results Expired (7)	16
Never Submitted	
Results Expired (20)	29
Results Expired (173)	19
Never Submitted	
Results Expired (4)	22
Results Expired (2)	23
Results Expired (2)	23
Results Expired (173)	20
Results Expired (12)	27
Results Expired (51)	27
Results Expired (28)	17
Results Expired (7)	30
Results Expired (16)	10
Never Submitted (518)	
Never Submitted	

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Bazooka		Share Delete
Test Group	23/10/2015 14:12:07	Share Delete

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

Group named "Test Group" is removed from the list.

The screenshot shows the 'Flexible Queries' interface after the 'Test Group' has been removed. The 'Add New Group' table now only contains 'Tosin' and 'Bazooka'. The 'Test Group' is no longer present in the table. The 'Send to Group' radio button is still selected in the dialog box.

Status	Records
Results Expired (7)	16
Never Submitted	
Results Expired (20)	29
Results Expired (173)	19
Never Submitted	
Results Expired (4)	22
Results Expired (2)	23
Results Expired (2)	23
Results Expired (173)	20
Results Expired (12)	27
Results Expired (51)	27
Results Expired (28)	17
Results Expired (7)	30
Results Expired (16)	10
Never Submitted (518)	
Never Submitted	

Group Name	Date Last query Shared	Action
Tosin	23/10/2015 12:29:22	Share Delete
Bazooka		Share Delete

Population/Domain	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share

Accepting shared query (Recipient)

1. Recipients receives email notification from “SCI- Diabetes Mailbot” informing them that a new flexible query has been shared with them
2. Recipients screen displays query that has just been shared titled “Newly Shared Query” highlighted in yellow
3. User can chose to accept/not accept shared query by selecting the following
 - a) [Edit](#) to accept query on their flexible Queries screen
 - b) [Delete](#) link on their flexible Queries screen

Flexible Queries										Help
Query:										
Click on an entry below to view the most recent audit query results. Click on one of the actions to submit, edit, copy or delete a query. Add a new query										Shared Queries
Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions					
Results Expired (7)	16-Oct-2015 14:51	19-Oct-2015	29 Jul	Tayside Inpatients	Submit	Edit	Copy	Delete	Share	
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share	
Results Expired (20)	29-Jul-2015 14:43	01-Aug-2015	29 Jul	Ninewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share	
Newly Shared Query			29 Jul		Submit	Edit	Copy	Delete	Share	

1. User selects [Edit](#) and the system displays the Flexible Query Builder screen
2. Relevant fields “Query Name” and recipients “Population/Domain” are auto populated and recipient selects **Save** button at the top of the screen.

Save Print Default Logout (OLUDIPE, Tosin)

Flexible Queries > Flexible Query Builder

Flexible Query Builder

Help

Query:

Query Name

Population/Domain

Notification

Email address

Created

Last updated

Query Size

29 Jul

Tayside Practice 3

☐ Send me email when query completes

☒ Do not send me an email when query completes

oluwatosin.oludipe@nhs.net

02-Nov-2015 16:05

02-Nov-2015 16:05

Min

Max

Shared query is now displayed as Never “Submitted” on the Flexible Queries screen and the user is now able to undertake any of the following actions:

[Submit](#) [Edit](#) [Copy](#) [Delete](#) or [Share](#)

Flexible Queries

Query:

?

Help

Click on an entry below to view the most recent audit query results.
Click on one of the actions to submit, edit, copy or delete a query.

[Add a new query](#)

[Shared Queries](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions				
Results Expired (7)	16-Oct-2015 14:51	19-Oct-2015	29 Jul	Tayside Inpatients	Submit	Edit	Copy	Delete	Share
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share
Results Expired (20)	29-Jul-2015 14:43	01-Aug-2015	29 Jul	Ninewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share
Results Expired (173)	19-Oct-2015 12:56	22-Oct-2015	Age + Duration of Diabetes	Tayside Practice 3	Submit	Edit	Copy	Delete	Share

View Shared Queries:

1. User selects the [Shared Queries](#) link to view the history of queries that have been shared.

Flexible Queries Help

Query:

Click on an entry below to view the most recent audit query results.

Click on one of the actions to submit, edit, copy or delete a query.

[Add a new query](#)

[Shared Queries](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions				
Results Expired (7)	16-Oct-2015 14:51	19-Oct-2015	29 Jul	Tayside Inpatients	Submit	Edit	Copy	Delete	Share
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share
Results Expired (20)	29-Jul-2015 14:43	01-Aug-2015	29 Jul	Ninewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share
Results Expired (173)	19-Oct-2015 12:56	22-Oct-2015	Age + Duration of Diabetes	Tayside Practice 3	Submit	Edit	Copy	Delete	Share

The system displays the Shared Queries History pop up screen, with the history of Query Names, Shared Date and Recipient.

Flexible Queries Help

Query:

Click on an entry below to view the most recent audit query results.

Click on one of the actions to submit, edit, copy or delete a query.

[Add a new query](#)

Status	Last Executed	Result Expiry Date	Query Name	Population/Domain	Actions				
Results Expired (7)	16-Oct-2015 14:51	19-Oct-2015	29 Jul	Tayside Inpatients	Submit	Edit	Copy	Delete	Share
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share
Results Expired (20)	29-Jul-2015 14:43	01-Aug-2015	29 Jul	Ninewells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
Never Submitted			29 Jul	Tayside Practice 3	Submit	Edit	Copy	Delete	Share
Results Expired (173)	19-Oct-2015 12:56	22-Oct-2015	Age + Duration of Diabetes	Tayside Practice 3	Submit	Edit	Copy	Delete	Share

Shared Queries History

Query Name	Shared Date	Recipient
Flex audit	23-Oct-2015	Test Group
Flex audit	23-Oct-2015	Test Group
Flex audit	23-Oct-2015	Tosin
Flex audit	23-Oct-2015	Tosin
Flex audit	23-Oct-2015	Tosin
Flex audit	23-Oct-2015	Tosin
29 Jul	16-Oct-2015	Kingsize
29 Jul	20-Oct-2015	Tosin
29 Jul	21-Oct-2015	Tosin
29 Jul	16-Oct-2015	Tosin
29 Jul	02-Nov-2015	Tosin
Age + Duration of Diabetes	19-Oct-2015	t
Flex audit	23-Oct-2015	Test Group
Flex audit	19-Oct-2015	Tosin Oludipe
29 Jul	16-Oct-2015	Tosin Oludipe

Cancel

[Shared Queries](#)

Population/Domain	Actions				
de Inpatients	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de Inpatients	Submit	Edit	Copy	Delete	Share
vells Diabetes Clinic	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de	Submit	Edit	Copy	Delete	Share
de Practice 3	Submit	Edit	Copy	Delete	Share