7. Workplace

A users' personal workspace, for storing favorite concepts and queries.

7.1 Layout of the 'Workplace' panel
7.1.1 Containers
7.1.2 Folders
7.1.3 Leaves (Items)
7.2 Adding a folder and items
7.2.1 Folders and Items Draggable to Workplace
7.2.2 Adding a Folder
7.2.3 Adding Items
7.2.3.1 Adding Concept, Concept Folder, Modifier, and Modifier Folder
Adding from 'Find Terms' tab
Adding from 'Navigate Terms' tab
7.2.3.2 Adding Previous Query, Patient Set, and Encounter Set
'Previous Queries' Panel
Adding Previous Query from 'Previous Queries' Panel
Adding Patient Set or Encounter Set from 'Previous Queries' Panel
7.3 Navigation
7.3.1 Folders
7.3.1.1 Expand / Collapse a Folder
7.3.1.2 Rename a Folder
7.3.1.3 Annotate a Folder
7.3.1.4 Delete a Folder
7.3.2 Items
7.3.2.1 Rename Items
7.3.2.2 Annotate Items
7.3.2.3 Delete Items
7.4 Using Items in 'Workplace' Panel
7.4.1 Items Draggable from Workplace
7.4.2 Using Folders, Concepts, Modifier Folders, Modifiers, Patient Set, and Encounter Set
Adding to 'Query Tool' Panel
7.4.3 Using Previous Query
Adding Previous Query to Query Name in 'Query Tool' Panel (New Query)
Adding Previous Query to Group in 'Query Tool' Panel (Query-in-Query)

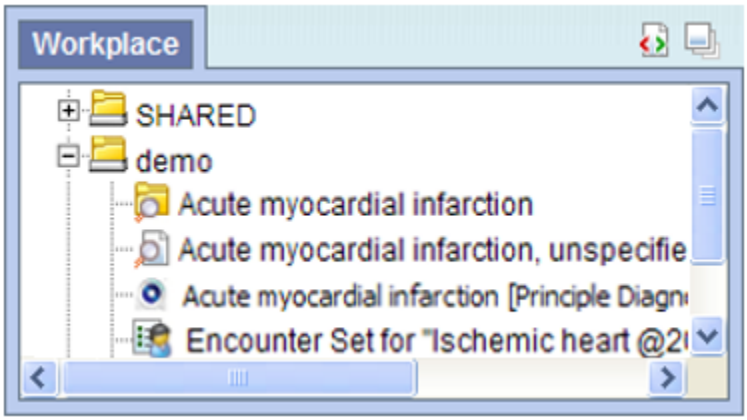
The main objectives of the 'Workplace' are:

- Save and organize user specific items.
- Share information with other project users.
- Project managers can view the workplace for individual team members.

The items stored in the 'Workplace' panel can be used in many of the i2b2 panels and plug-ins, such as the 'Query Tool'.

7.1 Layout of the 'Workplace' panel

The 'Workplace' panel is hierarchical display of items (concepts, queries) added by the user. There are three main branches or components of the tree that displays.



7.1.1 Containers

Containers are the highest level folders () that are created automatically. The **User container** is created with the user's name and is used to store items added by the user. The **SHARED container** is a place to share concepts and queries with other users. Containers cannot be dragged into 'Query Tool' groups as query criteria.

7.1.2 Folders

A **folder** () contains other folders and / or items added by the user. It can be expanded and collapsed by clicking on the *plus sign* () or *negative sign* () next to it.

7.1.3 Leaves (Items)

Leaves (items) are the lowest level of the hierarchy. They cannot be expanded further. Some examples of items are listed below.

- Concepts ()
- Group of concepts (ontology folder) ()
- Modifiers ()
- Group of modifiers (modifier folder) ()
- Patient set ()
- Encounter set ()
- Previous query ()

7.2 Adding a folder and items

7.2.1 Folders and Items Draggable to Workplace

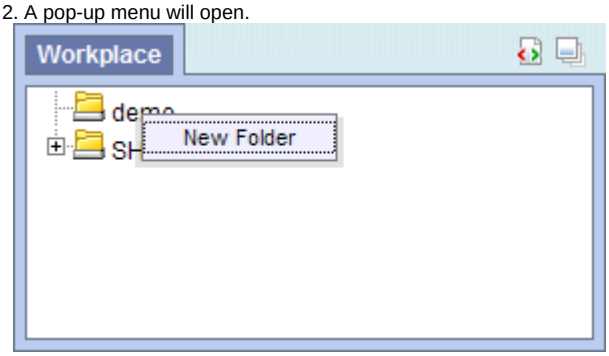
Folders and Items can be dragged and dropped (copied) into the 'Workplace' panel from other panels in the i2b2 Web Client.

A Concept Folder() and all its concepts (children), a Modifier Folder (), a concept (), a modifier () can be dragged to the 'Workplace' from the 'Navigate/Find Terms' panel.

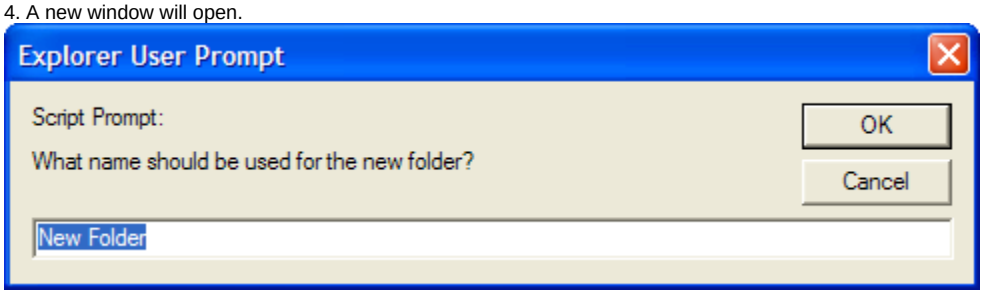
A Patient set () , An Encounter set () ,A previous query () can be added to the 'Workplace' by dragging from the 'Previous Queries' panel.

7.2.2 Adding a Folder

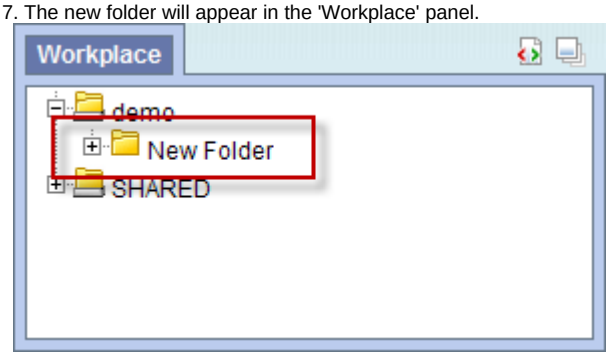
1. Using the *right mouse button*, click on your user folder in the 'Workplace'.
2. A pop-up menu will open.



3. Select **New Folder**.
4. A new window will open.



5. In the text box enter the name you want to be displayed.
6. Click on the **OK button**.
7. The new folder will appear in the 'Workplace' panel.

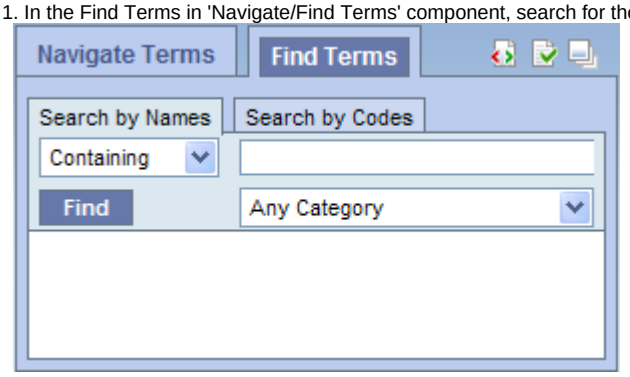


7.2.3 Adding Items

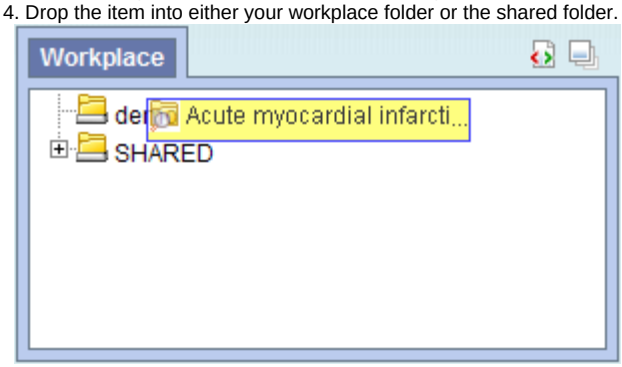
7.2.3.1 Adding Concept, Concept Folder, Modifier, and Modifier Folder

Adding from 'Find Terms' tab

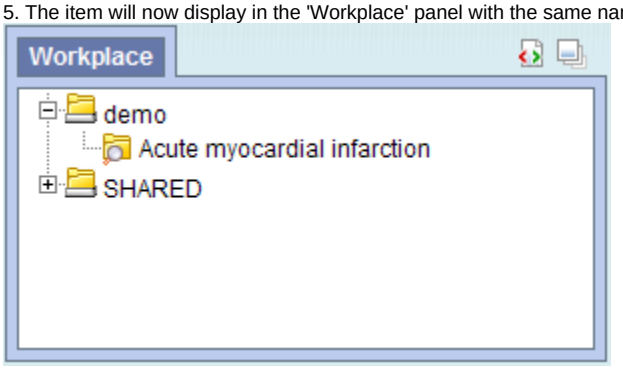
1. In the Find Terms in 'Navigate/Find Terms' component, search for the item(s) to add.



2. Highlight the concept folder( ) or other type (concept, modifier, modifier folder) of item by clicking on its name.
3. While holding the *left mouse button* down, drag the item over to the 'Workplace' component.
4. Drop the item into either your workplace folder or the shared folder.

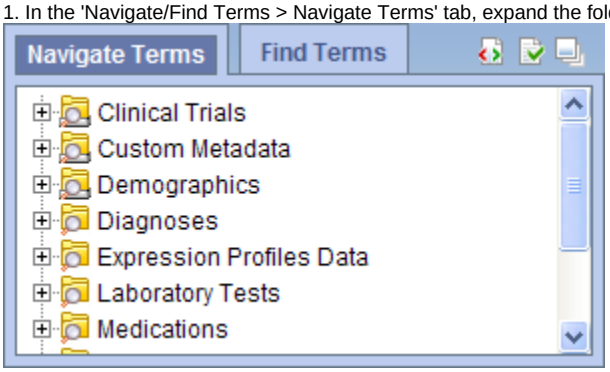


5. The item will now display in the 'Workplace' panel with the same name.



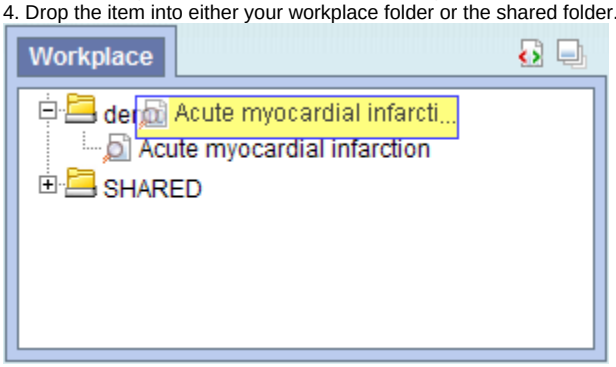
Adding from 'Navigate Terms' tab

1. In the 'Navigate/Find Terms > Navigate Terms' tab, expand the folder(s) that contains the concept or grouping of concepts you want to add.

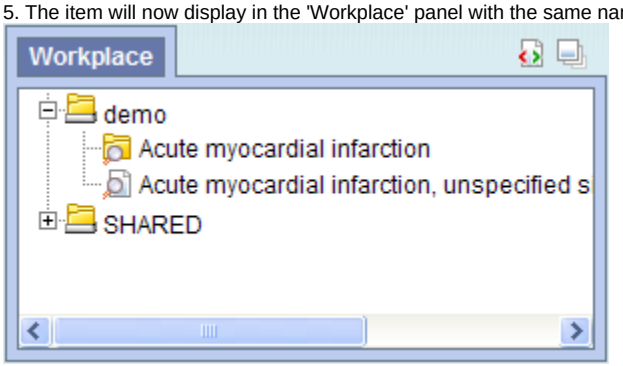


NOTE:
How the items are grouped and displayed is dependent on how the database is setup.

2. Highlight the folder( ) or other type (concept, modifier, modifier folder) of item by clicking on its name.
3. While holding the *left mouse button* down, drag the item over to the 'Workplace'.
4. Drop the item into either your workplace folder or the shared folder.



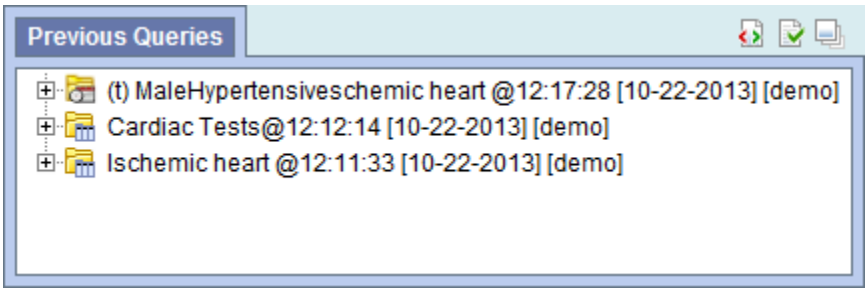
5. The item will now display in the 'Workplace' panel with the same name.



7.2.3.2 Adding Previous Query, Patient Set, and Encounter Set

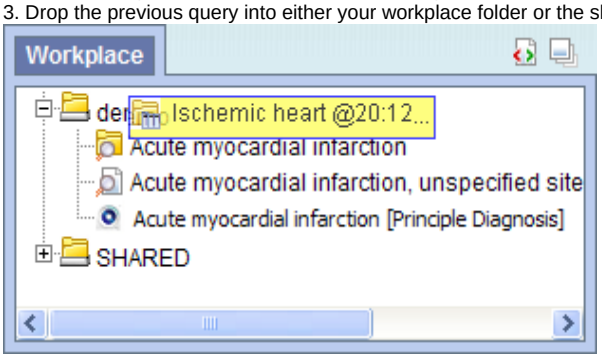
'Previous Queries' Panel

The **'Previous Queries' panel** displays the queries that were run by the user. Each previous query contains a set of results; within these results are the result options that were selected when the query was originally run. The result options include Patient set, Encounter set, Number of patients as well as various other patient breakdowns

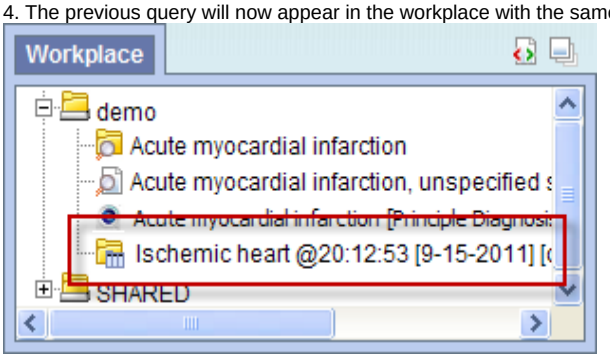


Adding Previous Query from 'Previous Queries' Panel

1. Highlight the **previous query** ( ) by clicking on the name of the query.
2. While holding the *left mouse button* down, drag the item to the **'Workplace' panel**.
3. Drop the previous query into either your workplace folder or the shared folder.

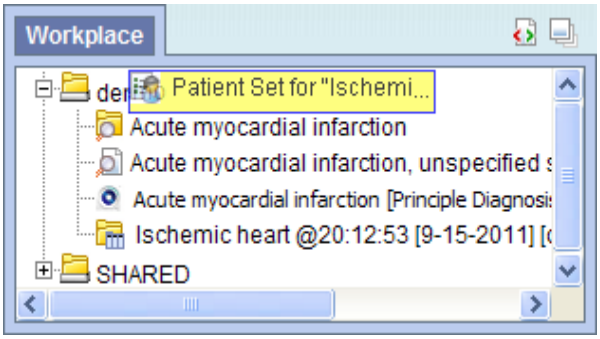


4. The previous query will now appear in the workplace with the same name.

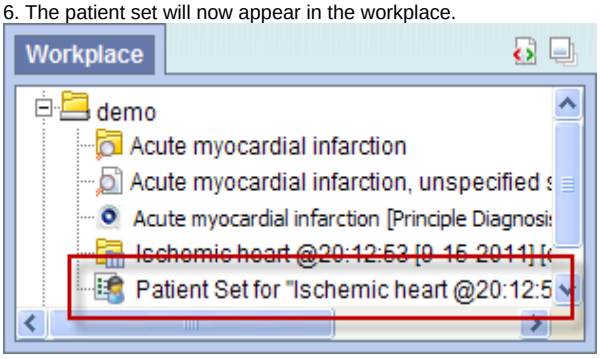


Adding Patient Set or Encounter Set from 'Previous Queries' Panel

1. Click on the plus sign ( ) next to the name of the previous query that contains the patient set.
2. Click on the plus sign ( ) next to the results folder.
3. Highlight the **Patient set**( ) or the **Encounter set**( ) by clicking on its name.
4. While holding the *left mouse button* down, drag the **Patient Set** or the **Encounter set** to the **'Workplace' panel**.
5. Drop the patient or encounter set into either your workplace folder or the shared folder.



6. The patient set will now appear in the workplace.



7.3 Navigation

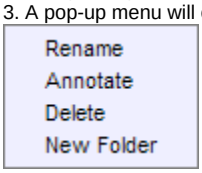
7.3.1 Folders

7.3.1.1 Expand / Collapse a Folder

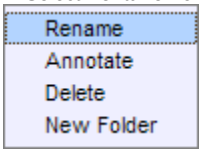
Users can expand or collapse a folder by clicking on the plus sign (⊞) or negative sign (⊟) next to the folder icon.
Expand (Open) a Folder
1. Click on the **plus sign** (⊞) next to the folder in the *'Workplace' panel.*
2. The folder will open and all the items in the folder will display.
Collapse (Close) a Folder
1. Click on the **negative sign** (⊟) next to the folder in the *'Workplace' panel.*
2. The folder will close and all the items in the folder will display.

7.3.1.2 Rename a Folder

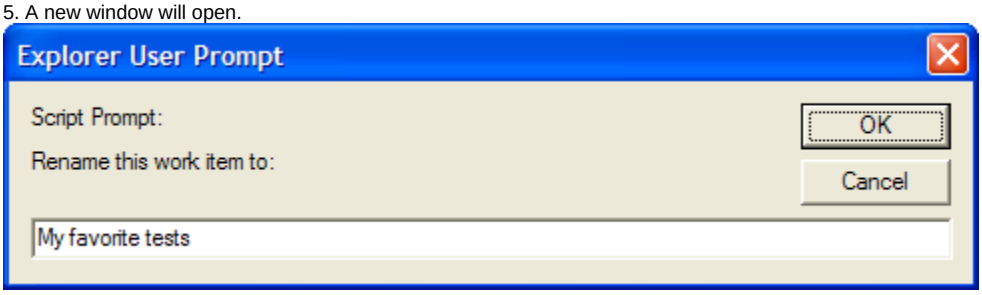
1. Users can easily **rename** an existing folder.
2. Using the *right mouse button*, click on the folder you want to rename.
3. A pop-up menu will open.



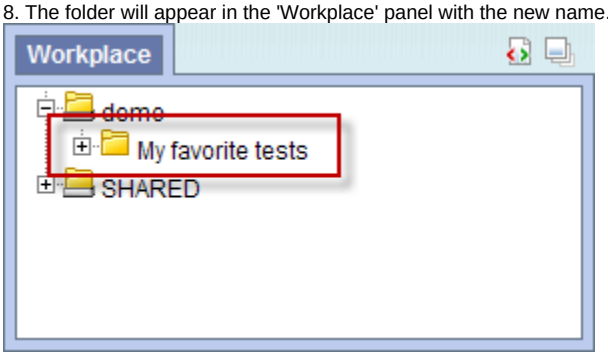
4. Select ***Rename*** from the list.



5. A new window will open.



6. In the text box change the current name to the new name.
7. Click on the **OK button**.
8. The folder will appear in the 'Workplace' panel with the new name.

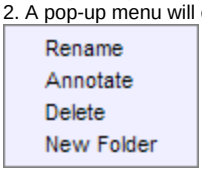


7.3.1.3 Annotate a Folder

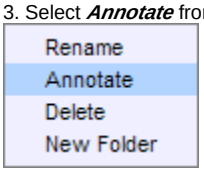
Users can change the default **annotation** for any of their folders in the 'Workplace' panel.

NOTE:
The annotation is what is displayed in the tool tip.

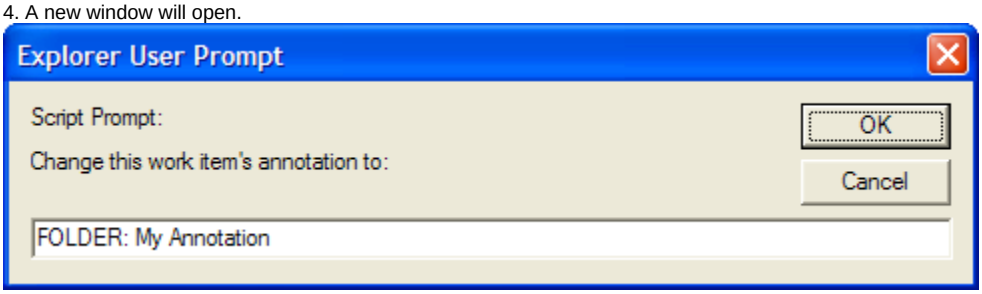
1. Using the *right mouse button*, click on the folder you want to annotate.
2. A pop-up menu will open.



3. Select ***Annotate*** from the list.



4. A new window will open.



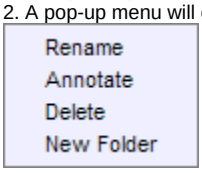
5. In the text box enter the text you want to appear when the tooltip is displayed.
6. Click on the **OK button**.
7. Using the *mouse*, hover over the folder you just annotated.
8. The text you entered will display as a tool tip.

7.3.1.4 Delete a Folder

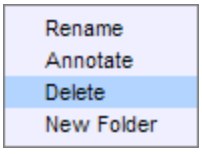
Users can remove a folder from the 'Workplace' panel.

WARNING:
All items in the folder will be deleted when the folder is removed. It is recommended that you move those items you want to keep to another folder.

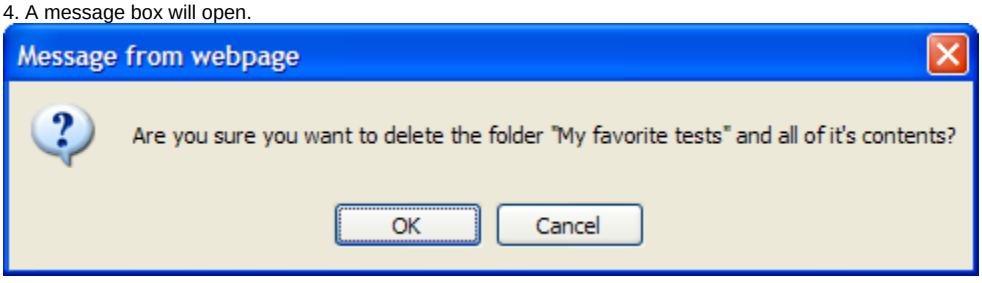
1. Using the *right mouse button*, click on the folder you want to delete.
2. A pop-up menu will open.



3. Select ***Delete*** from the list.



4. A message box will open.

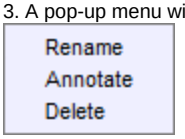


5. Click on the **OK button**.
6. The folder and all of its contents will no longer appear in the 'Workplace' panel.

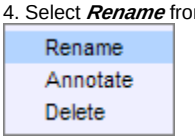
7.3.2 Items

7.3.2.1 Rename Items

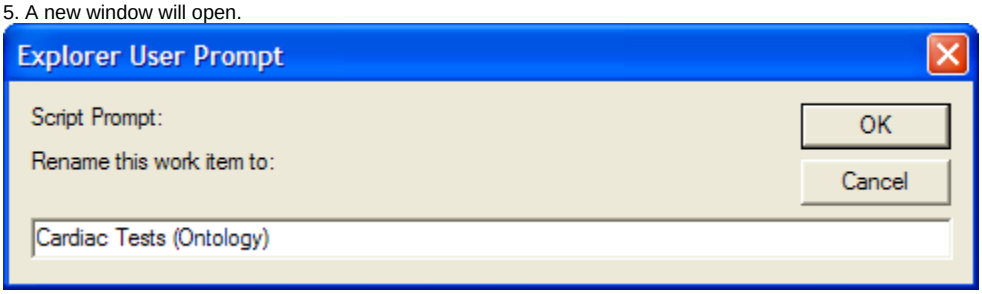
1. Users can easily **rename** an item in the 'Workplace' panel.
2. Using the *right mouse button*, click on the item you want to rename.
3. A pop-up menu will open.



4. Select ***Rename*** from the list.



5. A new window will open.



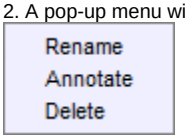
6. In the text box change the current name to the new name.
7. Click on the **OK button**.
8. The item will appear in the 'Workplace' panel with the new name.

7.3.2.2 Annotate Items

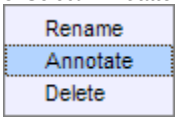
Users can change the default **annotation** for any of the items in their Workplace folder.

NOTE:
The annotation is what is displayed in the tool tip.

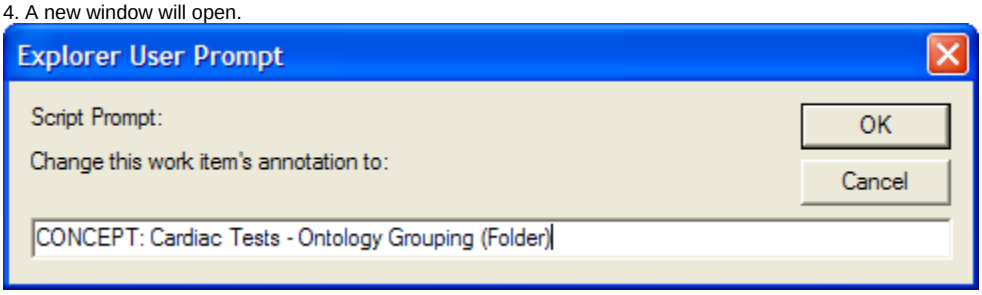
1. Using the *right mouse button*, click on the item you want to annotate.
2. A pop-up menu will open.



3. Select ***Annotate*** from the list.



4. A new window will open.

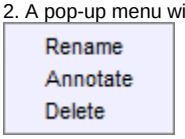


5. In the text box enter the text you want to appear when the tooltip is displayed.
6. Click on the **OK button**.
7. Using the *mouse*, hover over the item you just annotated.
8. The text you entered will display as a tool tip.

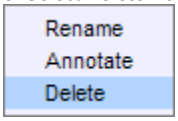
7.3.2.3 Delete Items

Users can remove items from the 'Workplace' panel.

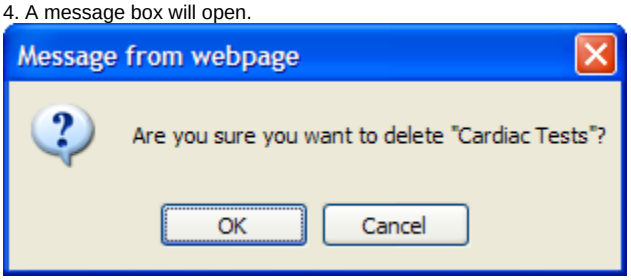
1. Using the *right mouse button*, click on the item you want to delete.
2. A pop-up menu will open.



3. Select ***Delete*** from the list.



4. A message box will open.



5. Click on the **OK button**.
6. The item will no longer appear in the 'Workplace' panel.

7.4 Using Items in 'Workplace' Panel

7.4.1 Items Draggable from Workplace

Items can be dragged and dropped (copied) from the 'Workplace' panel to other panels in the i2b2 Web client.

-
  - Ontology Folder ( ) and all its concepts (children)

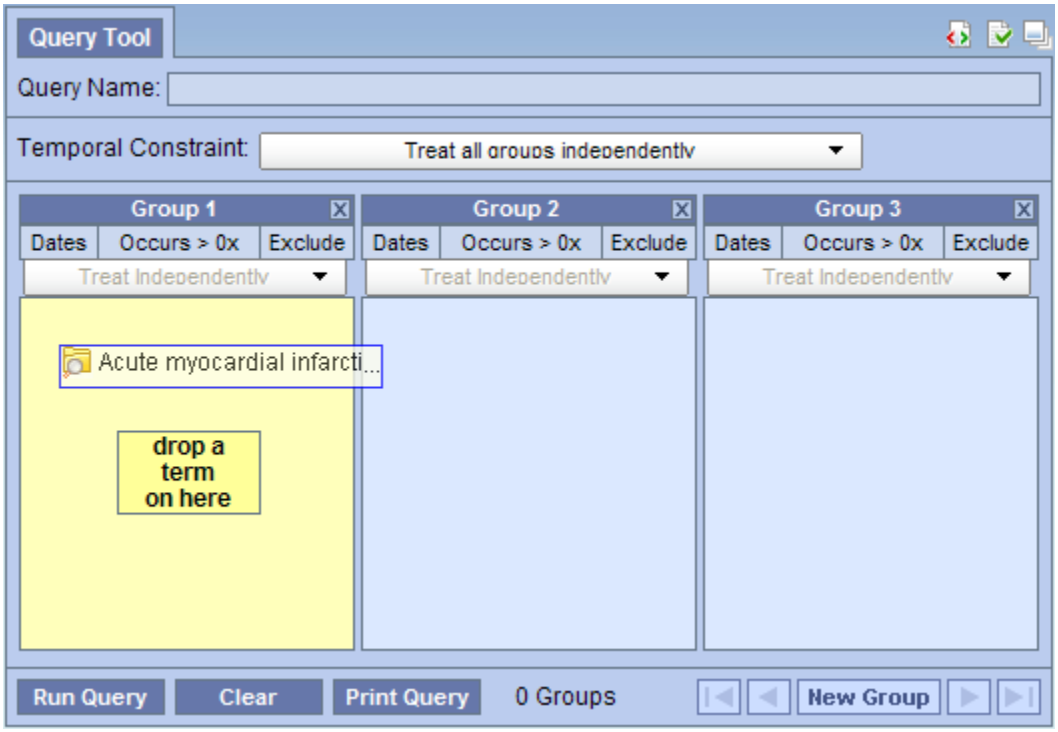
    NOTE:
    User folders cannot be dragged from the 'Workplace' panel.
  - Modifier Folder ( ) and all its modifiers (children)
  - Concept ( )
  - Modifier ( )
  - Previous Query ( )
  - Patient Set ( )
  - Encounter Set ( )

7.4.2 Using Folders, Concepts, Modifier Folders, Modifiers, Patient Set, and Encounter Set

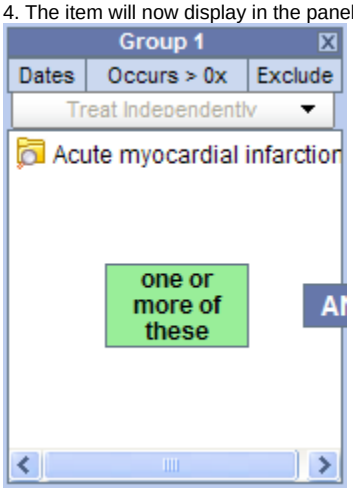
A folder or individual concept can be added to the 'Query Tool' Panel by simply dragging the item from **'Workplace' panel** and dropping it into one of the panels in the **'Query Tool' panel**.

Adding to 'Query Tool' Panel

1. Highlight the **folder** ( ), **concept** ( ), **modifier folder** ( ), **modifier** ( ), **patient set** ( ), or **encounter set** ( ) by clicking on the name of the folder.
2. While holding the *left mouse button* down, drag the item over to the **'Query Tool' panel**.
3. Drop the item into the **panel** labeled **Group 1**.



4. The item will now display in the panel for Group 1.



7.4.3 Using Previous Query

A **previous query** can be used to run a new query or as an item within a query (query-in-query). To add a previous query to the **'Query Tool' panel** simply drag the query name from the **'Workplace' panel**.

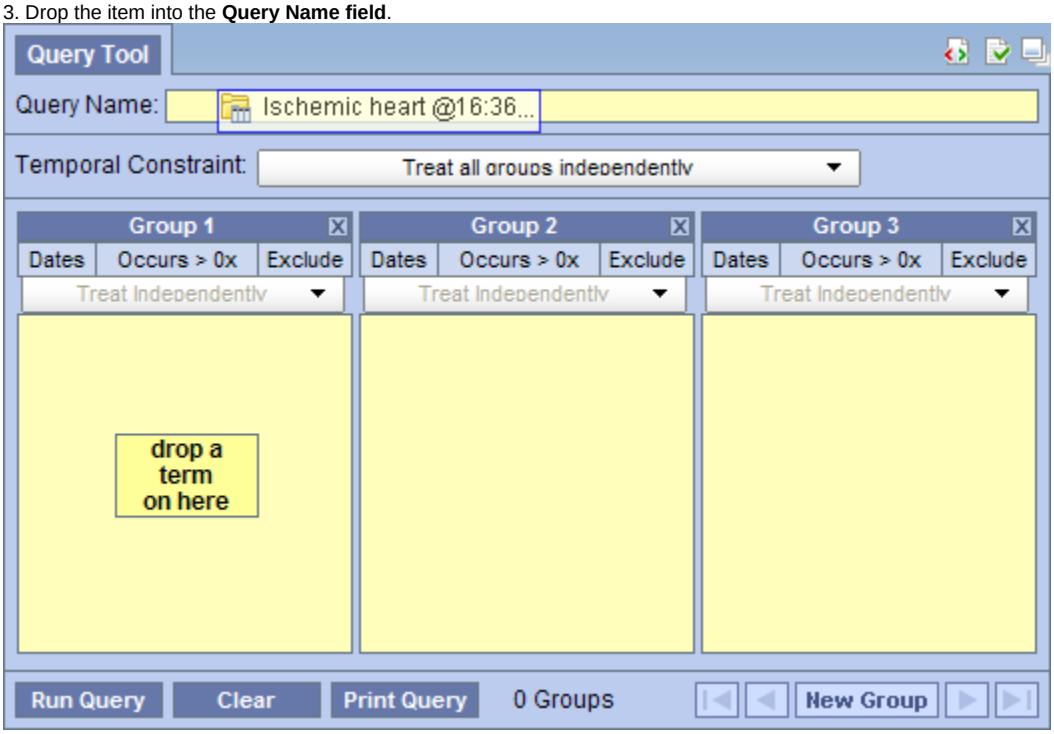
Within the 'Query Tool' panel, the previous query can be added to one of the following two locations.

Query Name field	The items and constraints from the original query will be used to create a new query. This information can be edited to make a new query or can be used as is to run the query again.
Panel (Group)	Used within a new query (query-in-query). The information associated with the previous query cannot be edited. Add additional search criteria (items) to be used in the new query.

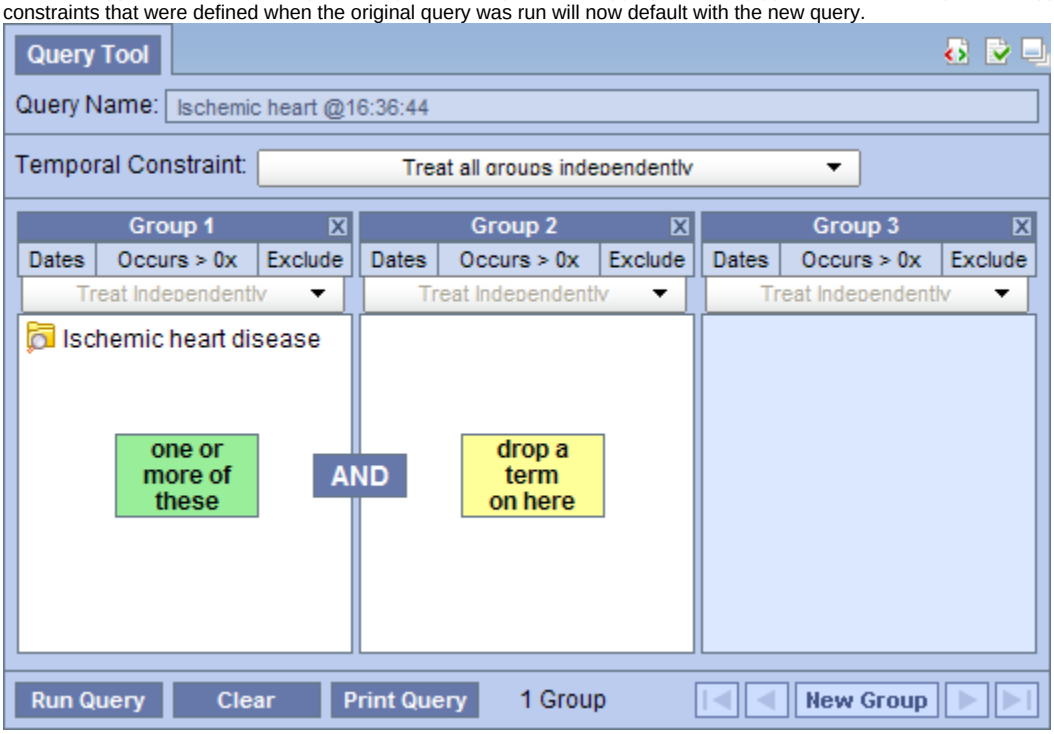
NOTE:
The process of adding a previous query to the 'Query Tool' panel is the same for both standard i2b2 queries ( )and temporal queries ( ).

Adding Previous Query to Query Name in 'Query Tool' Panel (New Query)

1. Highlight the **previous query** (/) by clicking on the name of the query.
2. While holding the *left mouse button* down, drag the item to the **'Query Tool' panel**.
3. Drop the item into the **Query Name field**.



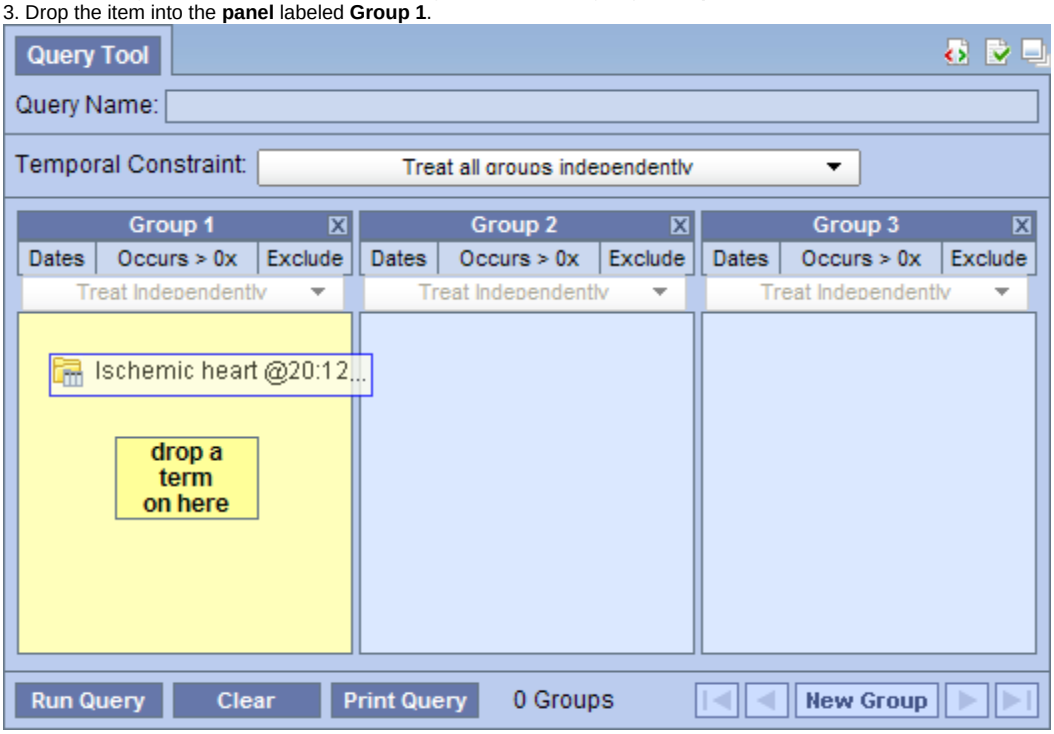
4. The item(s) associated with the previous query will display in the appropriate group(s), the name of the query will appear at **Query Name**, and any constraints that were defined when the original query was run will now default with the new query.



NOTE:
When you run the query it will receive a new name. This is to distinguish the first previous query from the second.

Adding Previous Query to Group in 'Query Tool' Panel (Query-in-Query)

1. Highlight the **previous query** (/) by clicking on the name of the query.
2. While holding the *left mouse button* down, drag the item to the **'Query Tool' panel**.
3. Drop the item into the **panel** labeled **Group 1**.



4. The previous query will now display in the panel for Group 1.

