

Medtech Query Builder Webinar

1. Query Builder Screen

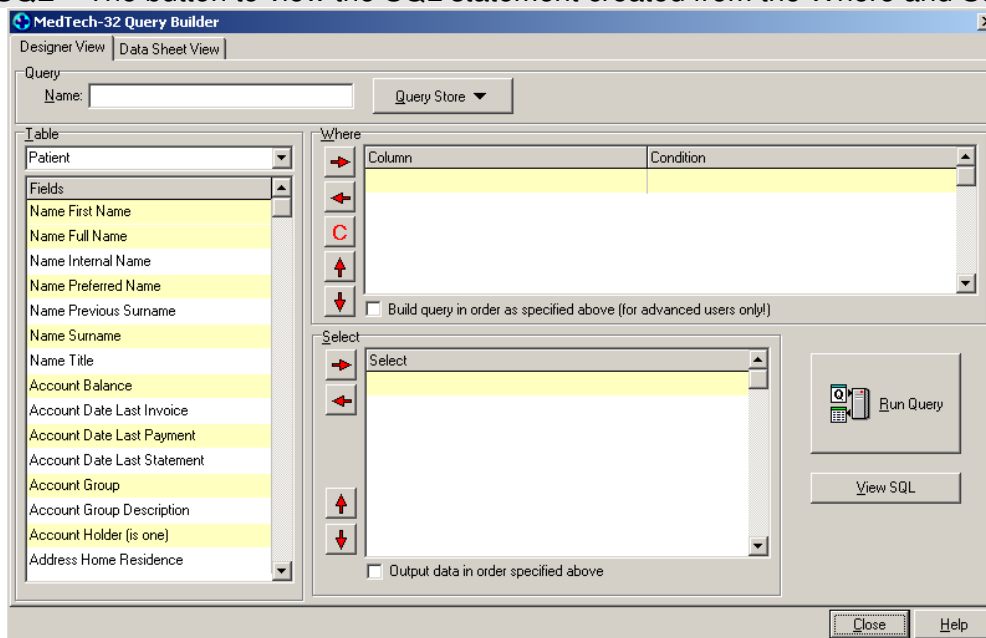
Opening the Query Builder screen

Select **Tools ► Query Builder** or click the **Query Builder** icon . The **Medtech32 Query Builder** screen will be displayed.

The Query Builder screen

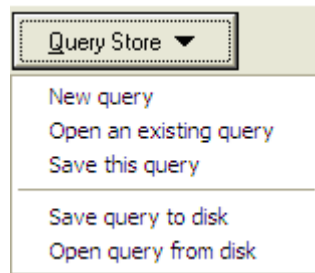
The **Designer View** tab in the Query Builder window is made up of the following areas:

- **Name** – The title or name of the query.
- **Table** – The modules (data tables) to be selected from.
- **Where** – The data to be queried.
- **Select** – The fields to be viewed in the query output.
- **Run Query** – The button to execute the query.
- **View SQL** – The button to view the SQL statement created from the Where and Select areas.



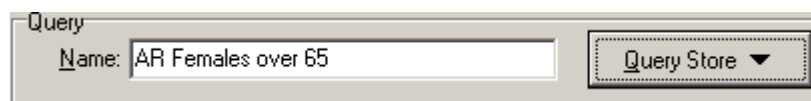
The **Query Store** button holds the following functionality (accessed by clicking on the button):

- **New Query** – Resets the Query Builder screen for a new query.
- **Open an existing query** – Opens a previously created query that has been saved.
- **Save this query** – Saves the query for later use.
- **Save query to disc** – Saves the query to a disc for later use.
- **Open query from disc** – Opens a query that has been previously stored onto disc.



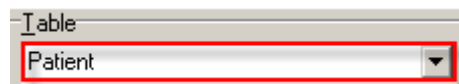
2. Building a Query

1. Open the Query Builder screen using the steps above.
2. Enter the title of the query into the **Name** field.

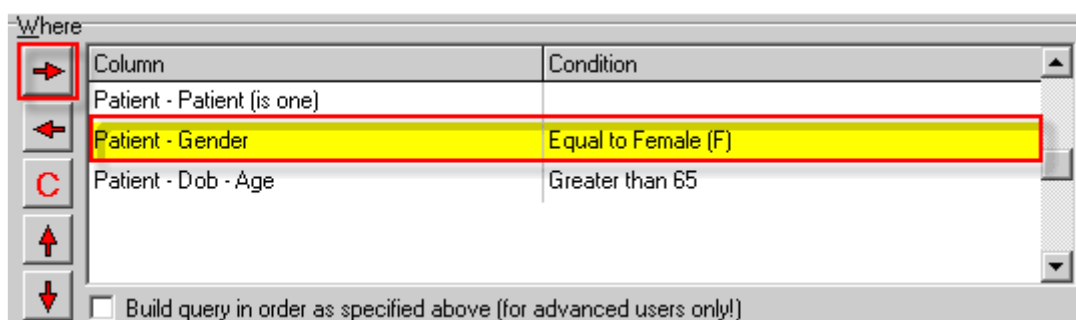


To organise your queries and to ensure you are using the correct working queries in the future, add your initials in front of the query name.

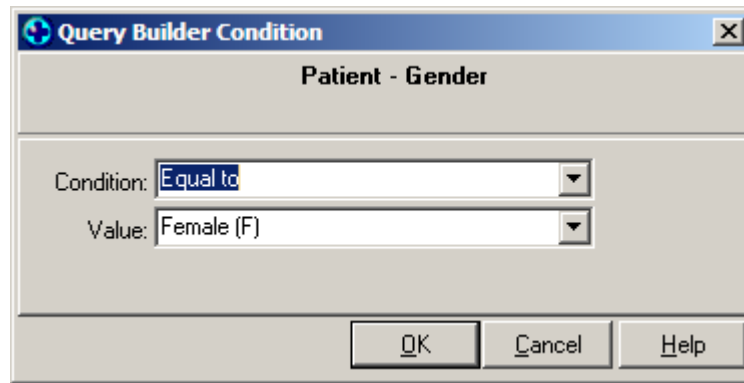
3. From the **Table** dropdown list, select the module (or window) in Medtech32 that data is to be retrieved from.



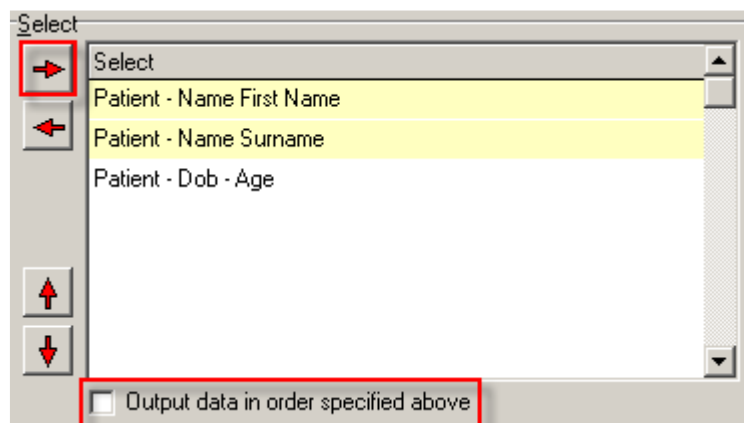
4. Highlight a required field within the table list and choose the
5. Click the **Add field to where condition** icon . The highlighted field will be moved into the **Where** box.



6. Whilst the field is still highlighted in the **Where** box, click the **Define the condition on the selected field** icon or double click the field. The **Query Builder Condition** window will be displayed.
7. Select the requirements from the **Condition** and **Value** dropdown lists. E.g. In the example below the Condition is 'Equal To' and the Value is 'Female'.

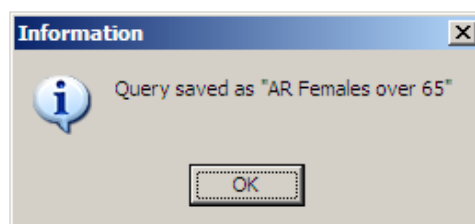


8. Repeat the steps 3 – 7 until all of the criteria required for the query have been selected and moved into the **Where** box.
9. Define the fields to be displayed on the report by highlighting the appropriate item from the **Table** list and clicking the **Add field to select / output** icon . The highlighted item will be moved into the **Select** box.



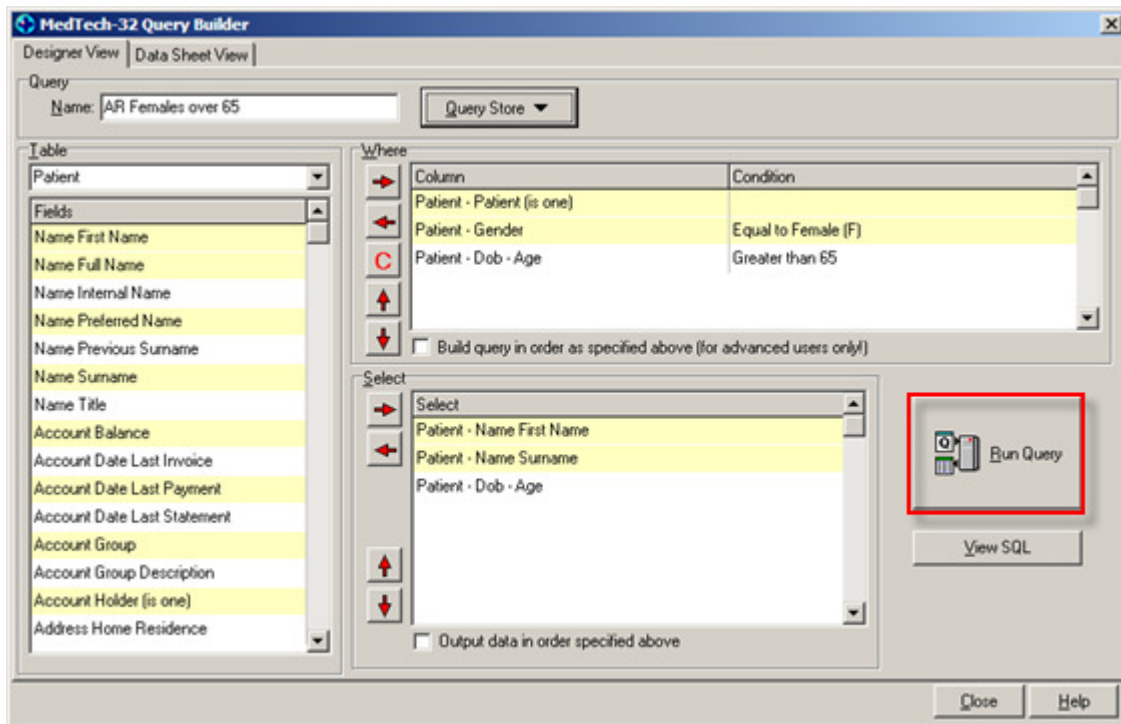
Ticking the box “Output data in order specified above” will ensure that the output is listed in the A to Z or 1 to 100+ order, based on the first field in the **Select** section.

10. Repeat step 9 until all of the fields to be viewed on the report have been highlighted and moved into the **Select** box.
11. Save the query by clicking the **Query Store** button followed by **Save this query**. An **Information** window will be displayed.

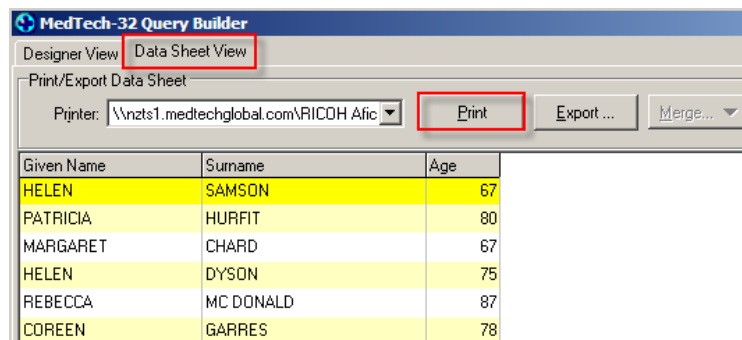


12. Click **OK** or press **Enter**.

13. Click on the **Run Query** button.



14. The **Data Sheet View** tab will display the results. Click the **Print** button to print the results if required.



3. Types of Queries

There are three main types of Query Builder Reports that can be run: List Queries, Count Queries and Merge Queries


- **List Query**

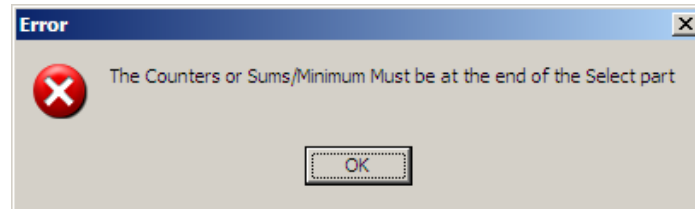
A list query is when a list of information is sought from defined criteria, e.g. a list of all female patients over the age of 65 as shown in the example above.

- **Count Query**

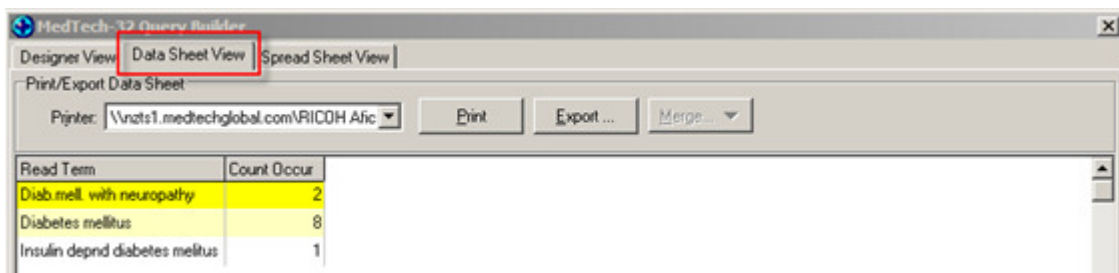
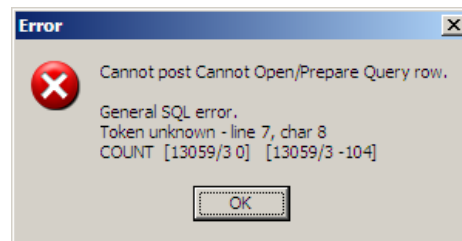
The count query will take the criteria defined and numerically count the number of values. It is possible to add field values to the count to appear as a spreadsheet.

1. Use the Count Function Table and Count Occurrence Field to show a total within the Select portion of the query builder.

- Count function must be the last value in the **Select** section of the query builder. The following error message will appear if this condition is not satisfied. Use  button within the **Select** section to move Count Function to the bottom.



- Output data in order specified above" tick box cannot be used when you have Count Function count occurrence as the only entry in the Select section. The following error message will appear if this condition is not satisfied.



Data Sheet View

When the count function is chosen from the Table dropdown and there are less than two field values in the select section, the query builder enables two other views; Spread Sheet View and Chart View.

Spread Sheet View

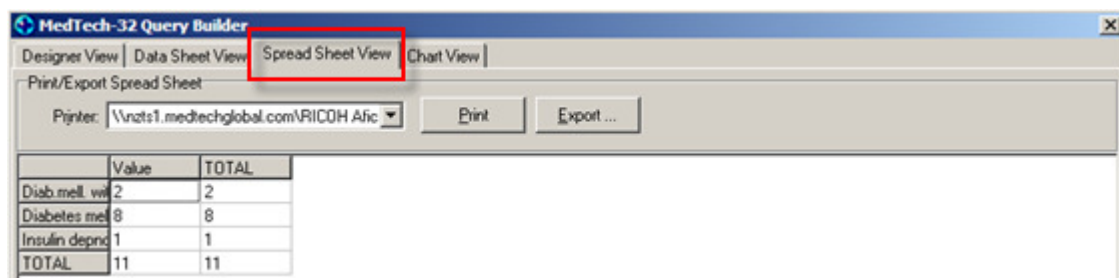


Chart View (Bar Chart)

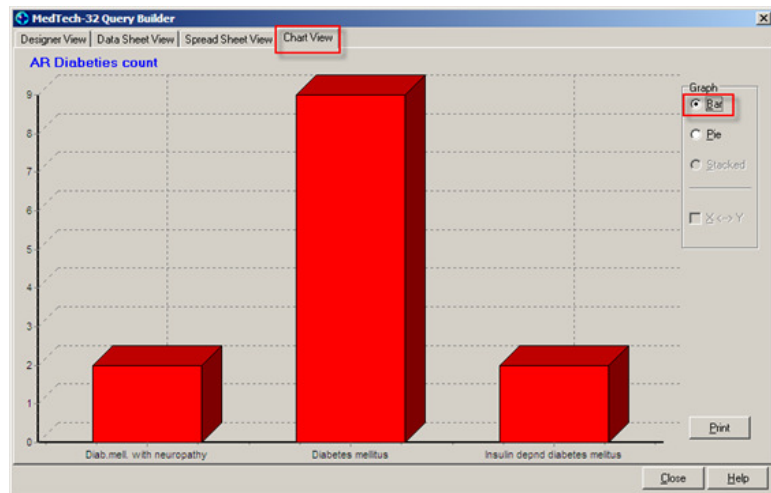


Chart View (Pie Chart)

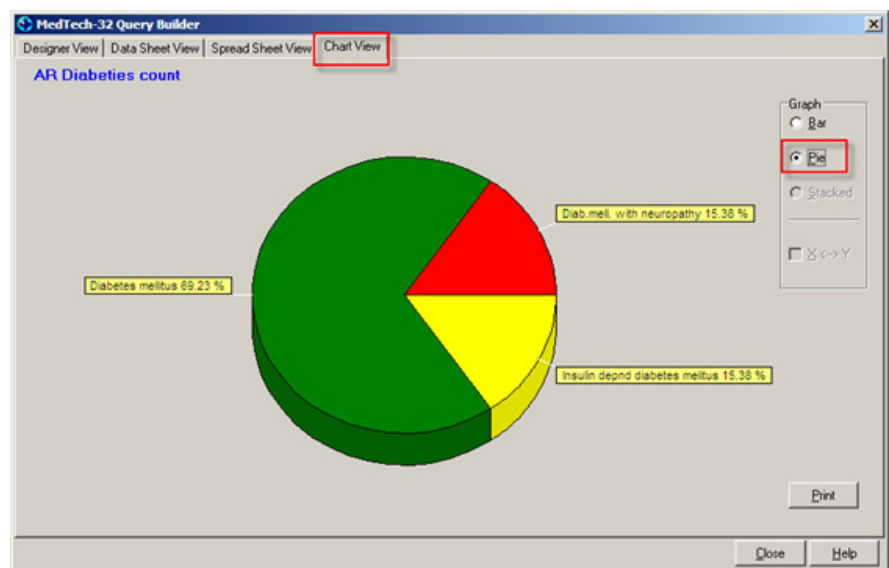
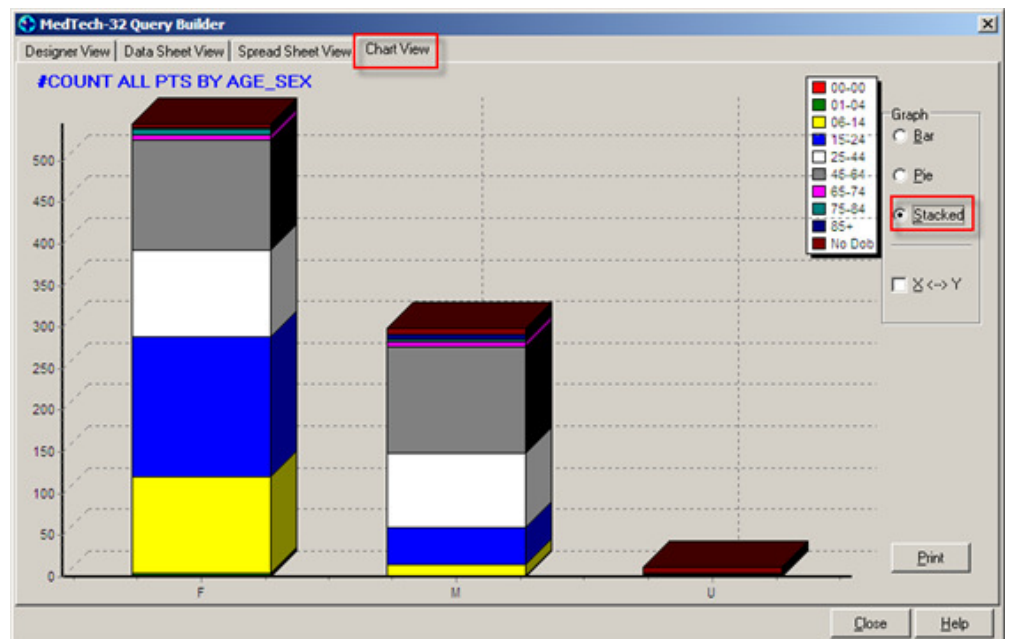


Chart View (Stacked Chart)



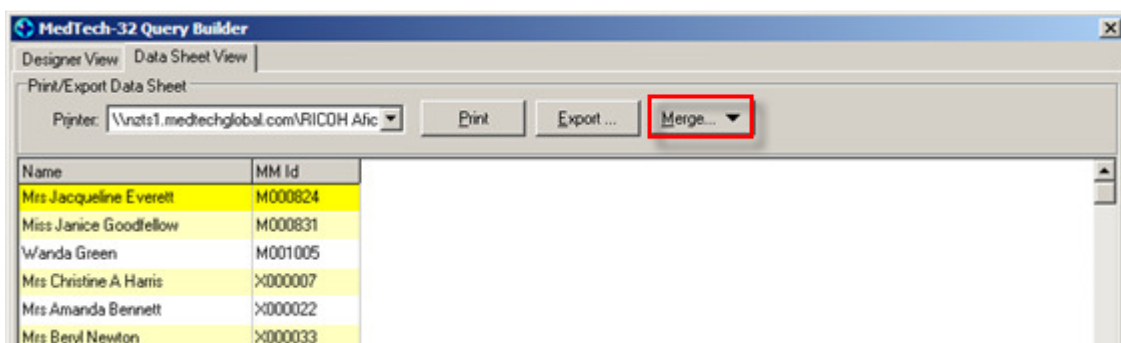
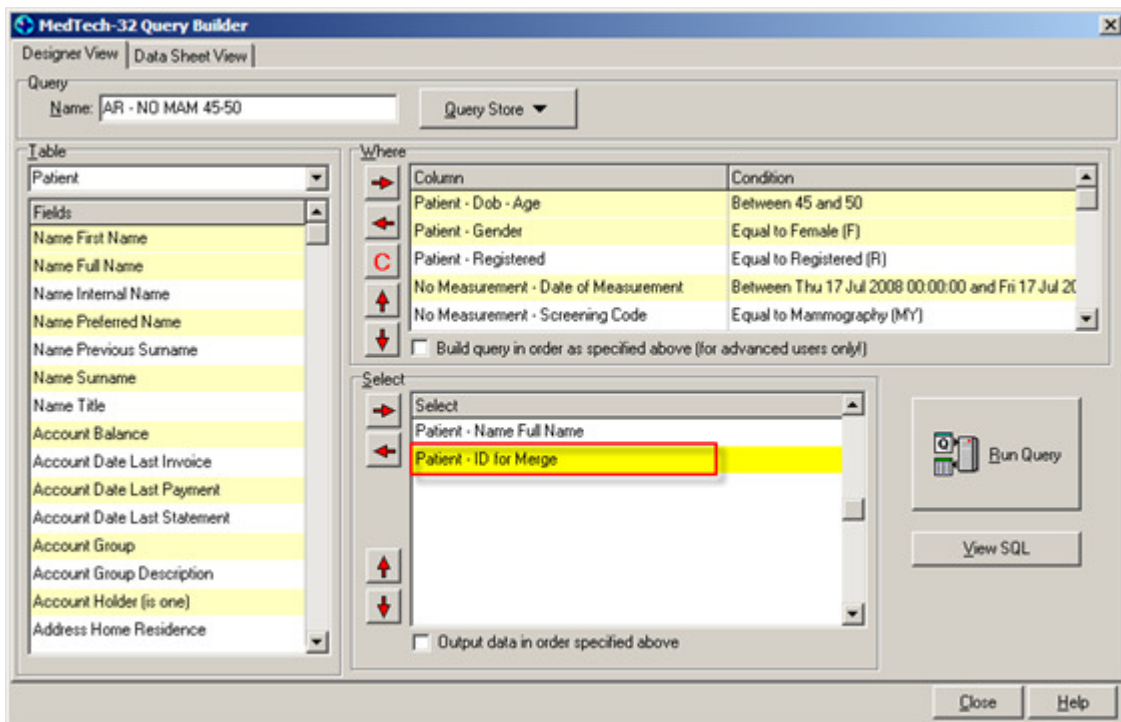
To select Bar, Pie or Stacked Graphs, select the associated radio buttons as highlighted.

Merge Query

The merge query takes information from the list query and using the **ID for Merge** field from the patient table, merges information into a letter, an alert, a recall or a task for each patient.

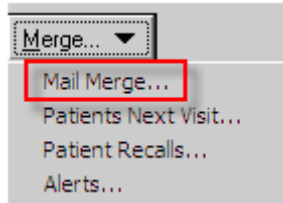
A sample is displayed below of a query built on the following criteria: Registered female patients aged 45 to 50 with no mammogram within last 12 months. Also displayed is the output based on the criteria defined.

You can use an existing List query as a base for the Merge query. Use Query Store to open an existing query.

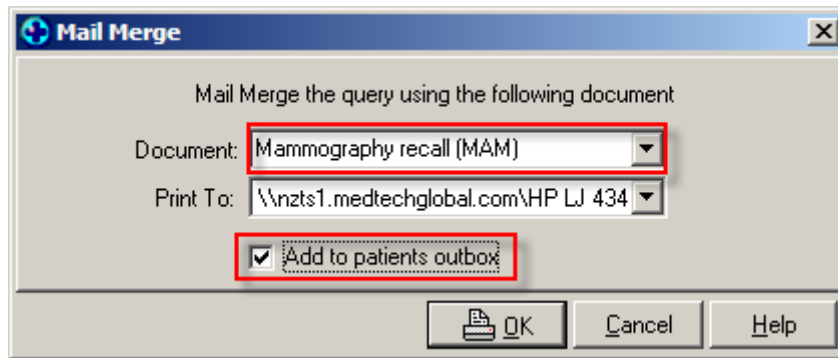


Notice how once the query is run the Merge button on the Data Sheet View tab becomes enabled. To merge the information into a letter:

1. Click the **Merge** button.
2. Select the merge option required, i.e. Mail Merge to merge into Outbox Document



3. Select Outbox Document for patients' names to be merged into,
4. Tick the box "Add to patient outbox". This will ensure that a copy of the record is saved in the patient record for future reference.



5. Select a printer you wish to print to.
6. Press OK button.

- **Mail Merge** – If this option is selected the **mail merge** window will be displayed. Select an outbox document from the **Document** dropdown list. Select the required printer from the **Print To** dropdown list. Click **OK**.
- **Patients Next Visit** – If this option is selected the **Patients Next Visit** window will be displayed. Enter notes in the **Task** field and click **OK** or press **Enter**. This will display a **Patient Task** for all patients listed on the query on their next visit.
- **Patient Recalls** – If this option is selected the **Patient Recalls** window will be displayed. Enter the recall required and click **OK**.
- **Alerts** – If this option is selected the **Alerts** window will be displayed. Add the alert required and click **OK**.

4 Query Views

There are four query views that are available:

4.1 Designer View – Where the query is designed and the criteria are defined.

4.2 Data Sheet View – Where the query output report is displayed.

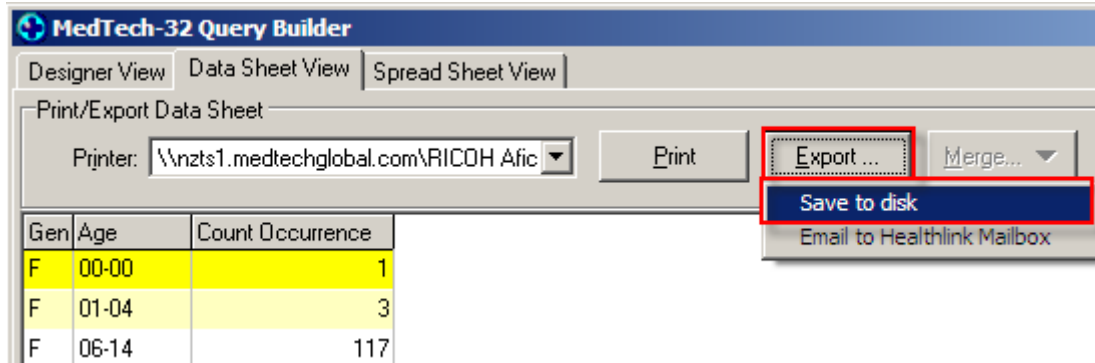
4.3 Spread Sheet View – When a count is defined with field values in the select section, the Spread Sheet View tab will become available.

4.4 Chart View – When a count is defined with the field values in the select section, the Chart View tab will become available. There are three types of charts; bar, pie and stacked.

5. Exporting Query Data

To export the output of a **Query**, use the **Export** button found in the **Datasheet** and **Spreadsheet** view. Data can be saved as .CSV (comma separated value) file and then viewed as Excel spreadsheet.

1. Click **Export** button and select **Save to disk** option.



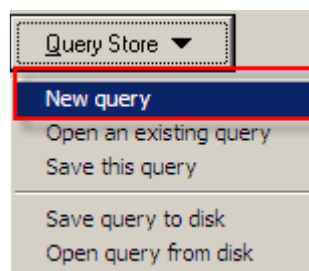
2. Navigate to the folder where you would like to save the query outcome and click Save button.

6. Using the Query Store

The **Query Store** option provides the following options: New query, Open an existing query, Save this query, Save query to disk, Open query from disk.

New Query

If you already have a query open and wish to start building a new query, use the New query option from the Query Store drop down menu.



Open an Existing Query

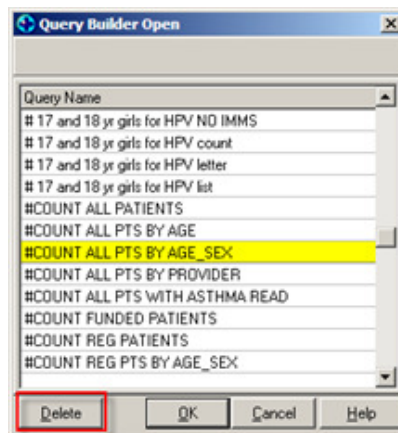
1. Open the Query Builder screen.
2. Click the **Query Store** button.
3. Select **Open an Existing Query**.
4. The **Query Builder Open** window will be displayed.
5. Highlight the query to be opened.
6. Click **OK**. The **Query Builder** window will display the pre-saved criteria.
7. Click the **Run Query** button. The **Data Sheet View** will be displayed.

Delete a Saved Query

1. Open the Query Builder screen.

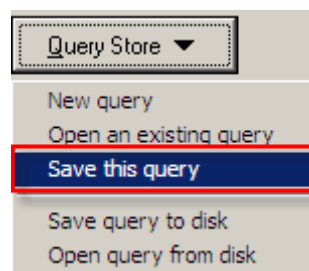
Query Builder Webinar

2. Click the **Query Store** button.
3. Select **Open an existing query**.
4. Highlight the query to be deleted.
5. Click the **Delete** button. The query will be removed.

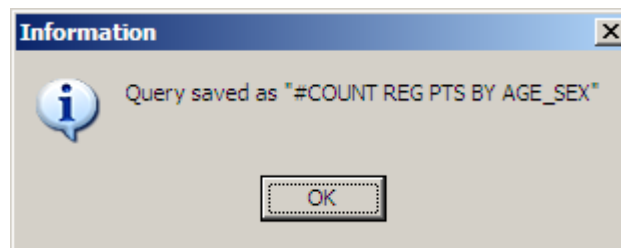


Save A Query

1. Open the Query Builder screen.
2. Click the **Query Store** button.
3. Select **Save this query**.



4. Click Ok.



You can re-use existing queries. Open an existing query, modify and save it with a new name. This way you will keep the existing query and use it as a base for your new query.

Query Builder Webinar Useful Query Builders

We have included a number of useful query builders on the following pages.

Patients Not Enrolled

The screenshot shows the MedTech-32 Query Builder interface. The query name is 'AR Not Enrolled'. The 'Table' dropdown is set to 'Patient'. The 'Where' clause is defined as:

Column	Condition
Patient - Patient (is one)	
Patient - Enrolment Status Code	Equal to Declined to Enrol (D)

The 'Select' clause is defined as:

Select
Patient - Name Full Name
Patient - ID for Merge

Buttons for 'Run Query', 'View SQL', 'Close', and 'Help' are visible at the bottom right.

List Reg patients not seen since date

The screenshot shows the MedTech-32 Query Builder interface. The query name is '#LIST REG PTS NOT SEEN SINCE DATE'. The 'Table' dropdown is set to 'Patient'. The 'Where' clause is defined as:

Column	Condition
Patient - Patient (is one)	
Patient - Registered	Equal to Registered (R)
Patient - Account Date Last Invoice	To Fri 31 Jul 1998

The 'Select' clause is defined as:

Select
Patient - Name Surname
Patient - Name First Name
Patient - Account Date Last Invoice
Patient - Chart No

The checkbox 'Output data in order specified above' is checked. Buttons for 'Run Query', 'View SQL', 'Close', and 'Help' are visible at the bottom right.

List patients with 12+ Consultations

MedTech-32 Query Builder

Designer View | Data Sheet View

Query Name: #LIST PTS WITH 12+ CONSULTS

Table: Patient

Fields:

- Domicile Description
- Donor Codes
- Donor Details
- E Mail
- Employer
- Enrolment Status Code
- Enrolment Description
- Enrolment Confirmed/Declined Date
- Enrolment Method Code
- Enrolment Method Description
- Enrolment Funding Status Code
- Enrolment Funding Description
- Enrolment Funding Reason
- Enrolment Funding From Date
- Enrolment Funding To Date

Where:

Column	Condition
Invoices/Payments - Date of Invoice/Payment	Between Tue 01 Jul 2008 00:00:00 and Mon 06 Jul
Invoices/Payments - Invoice/Payment Type	Equal to Invoice (I)
Invoiced Services - Service Code	In C
Invoiced Services - Funder Code	Not In A,D,G,I,M,S,X
Count Function - Count Occurrence	Greater than or Equal to 12

Build query in order as specified above (for advanced users only!)

Select:

- Patient - Name Surname
- Patient - Name First Name
- Patient - Chart No
- Patient - Provider
- Count Function - Count Occurrence

Output data in order specified above

Buttons: Run Query, View SQL, Close, Help

Care Plus Count

MedTech-32 Query Builder

Designer View | Data Sheet View

Query Name: Care Plus count

Table: Patient

Fields:

- Name First Name
- Name Full Name
- Name Internal Name
- Name Preferred Name
- Name Previous Surname
- Name Surname
- Name Title
- Account Balance
- Account Date Last Invoice
- Account Date Last Payment
- Account Date Last Statement
- Account Group
- Account Group Description
- Account Holder (is one)
- Address Home Residence

Where:

Column	Condition
Patient - Patient (is one)	
Patient - Registered	Equal to Registered (R)
Patient - Enrolment Status Code	Equal to Confirmed Enrolment (C)
Patient - Care Plus-Is Care Plus Patient	Is Ticked (One)

Build query in order as specified above (for advanced users only!)

Select:

- Count Function - Count Occurrence

Output data in order specified above

Buttons: Run Query, View SQL, Close, Help