1. **Thanks for opportunity**
   1. First was more meet and greet to let know what we had
   2. Didn't anticipate to be a full-fledged demo
   3. Why went through lengthy introductions last time so wouldn’t have to do it during ACTUAL demo
   4. So... let's focus on Mapping today!
2. **Introduce application**
   1. We think our product is really well thought out
   2. Tool supports basic 1:1 mappings, it is optimized to support complex mappings at scale
      1. This is what are older customers required
      2. EG SCT-ICD10 has 110,000 mappings
   3. What do I mean?
      1. Review others mappings
         1. Modify what is wrong
      2. We don’t have auto-mapping yet… don’t take our solution
         1. Feature is in the works for a new customer
         2. But not in place yet
      3. Support identifying Changes of target concepts’ versions of terminologies
   4. Other customizations
      1. Group: multiple targets
      2. Rule: targets contextualized from HER
      3. Relationship such as Narrower than/Broader than etc
      4. Advice: May need to refine based on other goals (ICD “place of occurrence” or “causation code”)
         1. IE: Poisoning: Intentional or accidental
         2. Rule stating: “Look for other information to refine the results”
   5. So…Tool ideal for maintaining an existing mapping over time
      1. Functionality not needed for simple map set
   6. We can add/replace SNOMED CT Browser link with another browser
      1. We do have our own Terminology Browser and Meta-Thesaurus Browser
   7. More basic simple support tools also in the works for less complex and simple code-list cases
      1. We can still support this, but not as cleanly
   8. Users can have roles on different projects in single environment
      1. Show UAT webpage and select different project
3. **Introduce Projects’ starting state**
   1. Show that we have the 20 concepts (10 from each example of allergens & medications)
   2. State how we have imported this from a file with a code and name
   3. Steps
      1. Imported Source & target terminologies
      2. Configured Map project with
         1. Users
         2. Roles
         3. User/Roles matrix
         4. Source & Target terminologies defined
      3. 4 PRE-LOADED Workflow paths to choose from type (each with associated diagram)
         1. Can create new ones
         2. They are
            1. Simple (no review)
            2. Review (1 author/1 review)
            3. Dual Author Single Review (only with conflict resolution)
            4. Pre-existing map with Dual Review
      4. Also initialized things available to editor (as unassigned)
         1. Concepts in the source terminology
         2. If already have mappings to a few concepts, don’t add those
      5. Created single mapping that fails a QA Check (to be viewed later)
4. **Show how two projects**
   1. **BRIAN report strategy on creating two projects and other approaches we could have taken**
5. **Review Project Details tab**
   1. Overview of the project itself
      1. Each Accordion opens more metadata of project
   2. Map Records shows published data
      1. “We will review this at the end”
   3. Show how can re-assign a role
      1. Admin 1&2 also exist but doesn’t have role in project
   4. Reassign a role (or switch)
      1. Specialist 1 & 2/Lead 1&2/
         1. Admin 1&2 also exist but doesn’t have role in project
         2. Logout/in after assign
   5. State restricting to Sub-Hierarchies of SCT
   6. Mapping Relationships configurable
6. **AS LEAD START AT ALLERGY project**
   1. Show all concepts in “available Work”
      1. State how these are the unassigned source concepts requiring mapping
   2. Assign Lead1 5 concepts
      1. Select Lead1 from Picklist
      2. Click Assign
   3. Show how only 4 concepts “Available Work”
   4. Search for concepts
      1. Search for Specialist 1
      2. Search for Lead 1
   5. In the list of desired functionality, we saw that you require functionality enabling specification of a reviewer during assignment creation
      1. This is a request that other customers haven’t requested. Each wanted to have role-based rather than user-based assignments
         1. Certainly a configuring such an approach is possible
      2. There are a couple of solutions available in the meantime
         1. Make multiple projects out of same terminology
            1. With a single reviewer per project with multiple mappers
            2. Thus customize assignments ahead of time
         2. Utilize the Notes field to define whom should review a mapping
            1. Reviewers add Search Filters on the
      3. While either is a perfect solution, should satisfy your needs for the short-term until feature made available
   6. Do NOT Switch Projects to assign medications
7. **As Specialist in Allergy Project** 
   1. Show 5 of 10 are assigned
   2. **IF NOT HAVING EITHER** Peanut or Iron Allergy not part of 5 assigned
      1. Select Dairy Mapping
      2. Search for“Dairy Allergy” in search screen
      3. **BRIAN Explain how results will be displayed and why and options**
   3. **IF ONE OF PEANUT OR IRON** 
      1. Select that
      2. Search for“Peanut Allergy” or “Iron Allergy” in search screen
   4. Explain restrictions (available hyperlinks)
   5. Map first concept
      1. Click TARGET in browser
      2. State how “exact match” Mapping Relationship is default
      3. Show result in Record Summary
      4. **CLICK VERY QUICKLY THE** Finish button **TWICE**
      5. State how now only have 4 concepts assigned
      6. Show how if click on “Finished” under available Work, concept shows up
   6. Map second concept
      1. Claim 2nd Allergy by clicking the arrow on left of ID in Available Work
         1. **PEANUT OR IRON**
         2. Show how now part of Assigned Work
         3. Search for“Peanut Allergy” or “Iron Allergy” in search screen
         4. Map first concept
            1. Click TARGET in browser
            2. State how “exact match” Mapping Relationship is default
            3. Show result in Record Summary
            4. **CLICK VERY QUICKLY THE** Finish button **TWICE**
   7. Look at History of Fixed Concept (IF IMPLEMENTED)
      1. See recently Edited
      2. Click “Plus” button
      3. Show historical Map Records

1. **Switch Project to Medications**
   1. Claim all 10 concepts
   2. Select “warafin”
      1. Demo Validation
         1. Search for “Oxycodone”
         2. Click Finish
         3. Show warning
            1. Fail “Source/Target share word” rule
         4. This is custom QA we have added for this demo
      2. Demo Proper Mapping
         1. Search for “Warafin”
         2. **BRIAN Explain how results will be displayed and why and options**
         3. Select “Warfarin Sodium 6 MG Oral Tablet” **BY MISTAKE (State on purpose)**
         4. Show default is exact match in Record Summary. Then show whoops by mistake
         5. Review Record Summary
         6. Click Finish
   3. Select “oxycodone 15mg insulin resistance tab”
      1. Search for “Oxycodone”
         1. So many results
      2. Search for “oxycodone 15”
         1. Select “ Oxycodone Hydrochloride 15 MG Extended Release Oral “
      3. Restrict
         1. Select “Narrower than” relationship mapping
         2. Show result in Record Summary
         3. Select “Add Group”
         4. Show result in Record Summary
         5. Select **AGAIN** “Oxycodone Hydrochloride 15 MG Oral Tablet Oral “
         6. Select “Partial” in relationship mapping
         7. Review Record Summary
   4. I now want to add some notes
      1. Internal: Feedback
         1. In Feedback write “I am uncertain that I mapped this correctly”
         2. Select Add Feedback
      2. External: Advice & Notes
         1. In Notes write: “Use of grouping requested by customer”
         2. Select Add Note
2. **Login as LEAD 1 in ALLERGY PROJECT**
   1. Review Iron
      1. Select Review under Available Work
      2. Claim 2 concepts via assign batch
      3. Select Iron Concept
      4. Click Start Here
      5. “Review”
      6. Click Finish
      7. Click Publish
      8. Review Summary
      9. Click Publish
   2. Review Dairy
      1. Show Map History
      2. Show Specialist has history
      3. Show how Review\_New state meaning hasn’t been reviewed
         1. Thus Error in bottom
      4. Click Finish
      5. Click Publish
      6. Review Summary
      7. Click Publish
   3. Show Map Records
3. **Click Dashboard to switch project to Medications**
   1. Fix Warafin
      1. Switch Projects to Medications
      2. Claim the two concepts
      3. Click Warafin
      4. Click Start Here
      5. Put in feedback “This should be 7.5mg, not 6mg”
      6. Search “Warafin”
      7. Select 7.5mg
      8. Click Finish
   2. Review Oxycodone
      1. Read Feedback
      2. State “You did this correctly”
      3. Click Finish
      4. Show Mapping History
         1. Show Notes & Feedback
   3. Click Publish All
   4. Click Publish
   5. Show Map Records
4. **Review Project Details tab**
   1. Map Records shows published data
5. **Other Features we didn’t go over**
   1. Searching existing maps
      1. Show advanced search
   2. Reports
      1. Defined by Mapping Admin
      2. Run by picklist
      3. Have historical access
      4. “Specialist Productivity”
      5. Have reports in other projects that are really “Exports”
         1. Into Excel file
         2. This meets your needs
   3. Recently Edited
      1. By logged in user
   4. QA Can also be done on map records once completed
      1. Daily/Weekly/or at end of projects
      2. They are
         1. Project specific
         2. client specific
         3. Domain Specific
6. **Offer Kathy as reference (ASSUMING)**
7. **Re-summarize opening setup**