

# i2B2 Webclient Help Documentation

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## 1. Quick Start

### 1.1 Basic Query

Basic queries are constructed by dragging and dropping terms from the 'Terms' panel into a 'Find Patients' group panel.

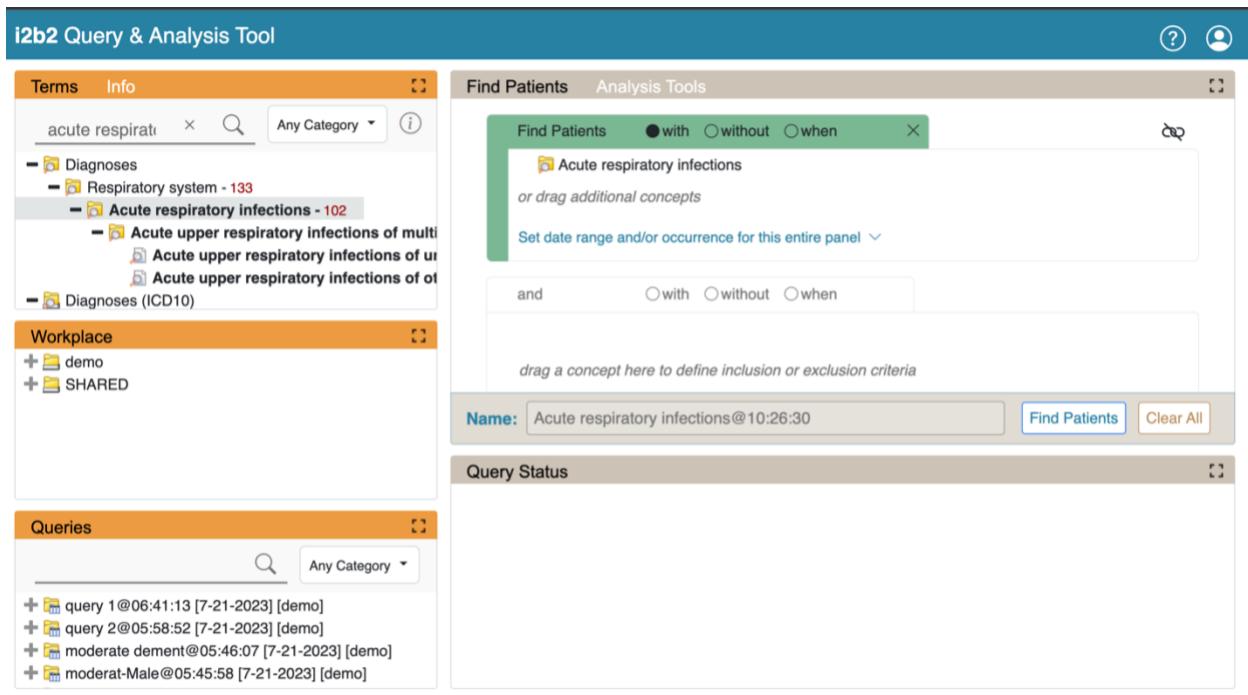
[How to]

1. Find a term
  - a. Go to 'Terms' tab
  - b. Click folders to expand the lists of terms
  - c. Select a term
2. Drag and drop to 'Find Patients' group panel
  - a. Drag the selected term into 'Find Patients> Find Patients' group panel
3. Run Query
  - a. Click 'Find Patients> Run Query Options' → 'Run Query'
4. Get Result
  - a. Query running status will be displayed in 'Query Status' section, which is located below 'Find Patients'.
    - b. Query result will be displayed in 'Query Status'
      - i. Number of patient
      - ii. Query name
5. The query and its result will be stored and displayed in 'Queries' tab

[Example]

Find all patients who have  
at least one diagnosis of *Acute respiratory infections*.

1. Find *Acute respiratory infections*
  - a. Go to 'Terms' tab
  - b. Click on *Diagnosis* folder to expand → Click on *Respiratory system* folder to expand → Find *Acute respiratory infections*
2. Drag and drop
  - a. Drag the *Acute respiratory infections* term into 'Find Patients > Find Patients' group panel
3. Run Query
  - a. Click 'Find Patients button > Run Query Options' > 'Run Query'
4. Get Results
  - a. See the 'Query Status' section for the query result.
    - b. The query is now stored in the 'Queries' tab



## 1.2 Adding an AND term

Terms in different groups have a logical AND relationship. When terms are combined with the AND operator, retrieved records must contain all the terms.

[How to]

1. Find a Term
  - a. Go to 'Terms' tab
  - b. Click term folders to narrow down the concept
2. Drag and drop to 'Find Patients' group panel
  - a. Drag the selected term into 'Find Patients > Find Patients' group panel
3. Find another Term
4. Drag and drop to 'and' group panel
  - a. Drag the selected term into 'Find Patients > and' group panel'
5. Run Query
  - a. Click 'Find Patients > Run Query Options' > 'Run Query'
6. Get Result
  - a. See the 'Query Status' tab for the query result
  - b. The query is now stored in the 'Queries' tab

[Example]

Find all patients who have  
at least one diagnosis of *Acute respiratory infections*  
**AND**  
at least one prescription of *Bronchodilators*.

1. Find *Acute respiratory infections*
  - a. Go to 'Navigate Terms' tab
  - b. Select *Diagnosis* → *Respiratory system* → *Acute respiratory infections*
2. Drag and drop
  - a. Drag the *Acute respiratory infections* term into 'Find Patients > Find Patients' group panel
3. Find *Bronchodilators*
  - a. Go to 'Navigate Terms' panel
  - b. Select *Medications* → *Respiratory agents* → *Bronchodilators*
4. Drag and drop
  - a. Drag the *Acute respiratory infections* term into 'Find Patients > and' group panel'
5. Run Query
  - a. Click 'Find Patients > Run Query Options' → 'Run Query'
6. Get Results
  - a. See the 'Query Status' tab for the query result
  - b. The query is now stored in the 'Queries' tab

**i2b2 Query & Analysis Tool**

The screenshot shows the i2b2 Query & Analysis Tool interface. On the left, there is a navigation sidebar titled "Terms" and "Info". The "Terms" section contains a tree view of clinical concepts, including Clinical Trials, Custom Metadata, Demographics, Diagnoses (with sub-categories like Circulatory system, Conditions in the perinatal period, Congenital anomalies, etc.), Procedures, Providers, Reports, and Visit Details. The "Info" section includes a search bar and dropdown menus for "Any Category" and "Search".

The main area is titled "Find Patients" and "Analysis Tools". It features a search bar with the query "Acute respiratory infections" and options to "with", "without", or "when". Below the search bar is a text input field for "Set date range and/or occurrence for this entire panel". A large text area below this is labeled "drag a concept here to define inclusion or exclusion criteria".

At the bottom, there is a "Name" field containing "Acute respiratory infections@21:39:19", a "Find Patients" button, and a "Clear All" button.

**i2b2 Query & Analysis Tool**

This screenshot shows the same i2b2 interface as above, but with a modified search query. In the search bar, "Acute respiratory infections" is followed by a logical operator "and" and the concept "Bronchodilators". The rest of the interface, including the search parameters and the bottom controls, remains identical to the first screenshot.

## 1.3 Adding an OR term

Terms in the same group have a logical **OR** relationship. When terms are combined with the **OR** operator, retrieved records will contain either or both terms.

### [How to]

1. Find a Term
  - a. Go to 'Terms' tab
  - b. Click term folders to narrow down the concept
  - c. Select a term
2. Drag and drop to 'Find Patients' group panel
  - a. Drag the selected term into 'Find Patients> Find Patients' group panel
3. Find another Term
4. Drag and drop to 'Find Patients' group panel
  - a. Drag the selected term into 'Find Patients> Find Patients' group panel, again.
5. Run Query
  - a. Click 'Find Patients> Run Query Options' → 'Run Query'
6. Get Result
  - a. See the 'Query Status' tab for the query result
  - b. The query is now stored in the 'Queries' tab

### [Example]

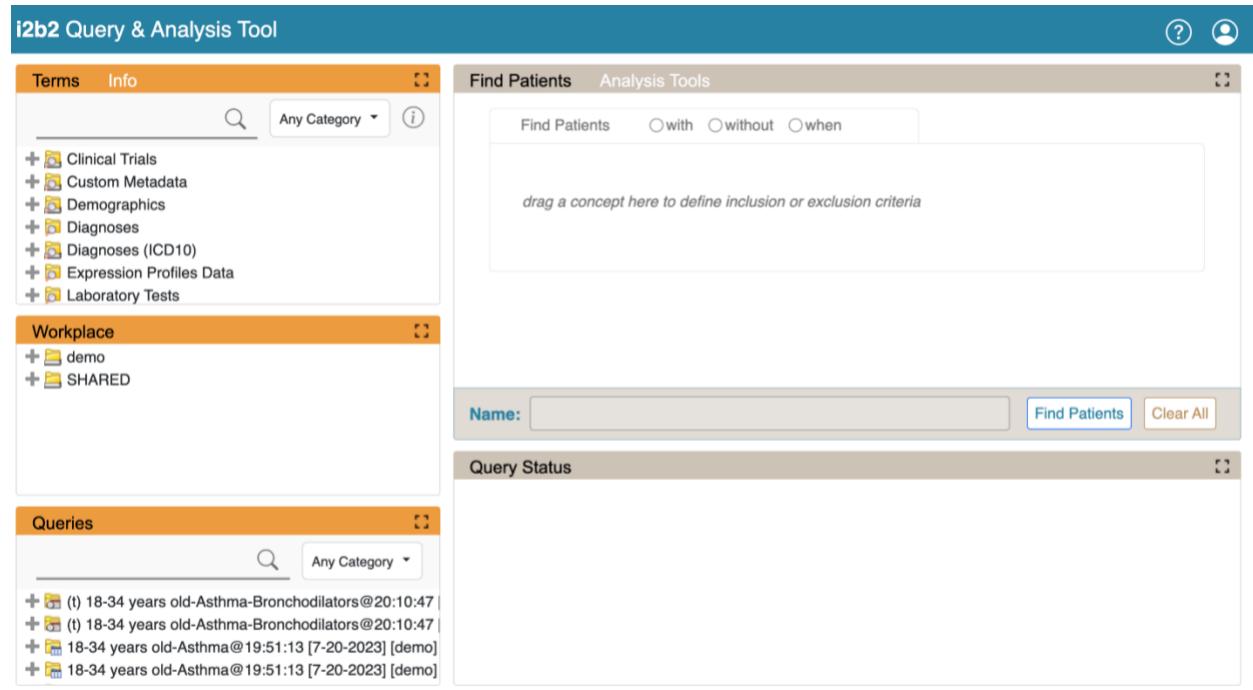
Find all patients who have  
at least one diagnosis of *Acute respiratory infections* **OR** at least one diagnosis of *Asthma*  
**AND**  
at least one prescription of *Bronchodilators*.

1. Find *Acute respiratory infections*
  - a. Go to 'Terms' tab
  - b. Select *Diagnosis* → *Respiratory system* → *Acute respiratory infections*
2. Drag and drop
  - a. Drag the *Acute respiratory infections* term into 'Find Patients> Find Patients' group panel
3. Find *Asthma*
  - a. Go to 'Terms' tab
  - b. Select *Diagnosis* → *Respiratory system* → *Chronic obstructive diseases* → *Asthma*
4. Drag and drop
  - a. Drag the *Acute respiratory infections* term into 'Find Patients> Find Patients' group panel, again
5. Find *Bronchodilators*
  - a. Go to 'Terms' tab
  - b. Select *Medications* → *Respiratory agents* → *Bronchodilators*
6. Drag and drop
  - a. Drag the *Acute respiratory infections* term into 'Find Patients> and' group panel'
7. Run Query
  - a. Click 'Find Patients> Run Query Options' → 'Run Query'
8. Get Results
  - a. See the 'Query Status' tab for the query result
  - b. The query is now stored in the 'Queries' tab



## 2. Webclient Layout

The i2b2 Webclient has five main panels, laid out in the following manner.



### Find Patients (Top Right)

The **Find Patients** panel is where queries are constructed and run. Users can specify query criteria in the group panels. Query criteria can be any terms contained in the vocabularies (also called ontologies) in the **Terms** section, as well as past queries or query results.

### Terms (Top Left)

The **Terms** panel contains hierarchical vocabularies of terms for constructing queries. Users can navigate through the vocabularies using the default Terms view, or can search by text or codes using the search input field.

### Query Status (Bottom Right)

The **Query Status** panel shows information about the state of a query, such as if it is currently running, or, when it completes, the results. It can also display various graphical representations of the results. The **Query Report** button provides a textual representation of the query.

### Queries (Bottom Left)

Previously-run queries and their results are stored in the **Queries** panel. Users may re-use them by dragging them into the Query Name section or groups in the **Find Patients panel** or save them by

dragging them into the **Workplace** panel. The most recently run queries are displayed at the top. Users can use the **search input field** to search for a prior query they created.

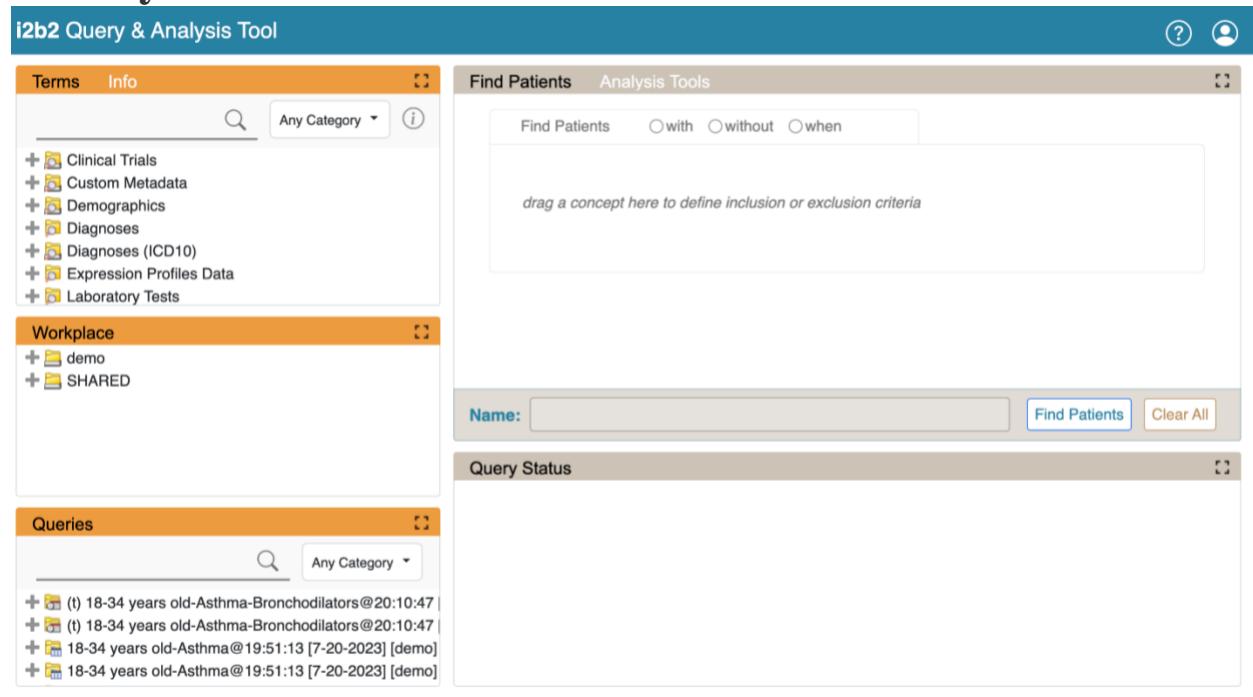
## **Workplace (Middle Left)**

The **Workplace** panel stores information, such as prior queries, that can be referred to or used later. Users may store previously-run queries, patient sets, individual patients, and terms in this panel. Users can create folders to organize the workplace. The workplace is private by default, but there is a SHARED folder that everyone has access to. Users can use the SHARED folder to share terms and queries with other colleagues.

### 3. Query Tool

The **Query Tool** panel is where queries are constructed and run.

#### 3.1 Layout



**Query Run Options** allow users to (1) set options for the panel, and (2) resize the panel.

**Query Name** shows the name of the current query. Users can also drop a previous query here to load it.

**Query Timing Selector** enables users to select the appropriate timings for their query, including temporal queries.

**Query Groups** are where users can drag and drop terms to build queries. There are initially one Group, but more are automatically added.

**Tool Bar** contains buttons to run queries, clear all the panels, and name the query

#### 3.2 Creating a Query

##### 3.2.1 i2b2 Items for Querying

These items may be dragged into Query Groups to construct queries.

Icons	Names	Description
	Terms	Terms (also called concepts) are the words or phrases that make up vocabularies. Terms are the basic query items.
	Term Groups	Related terms are grouped into hierarchies. When a term group is used in a query, all terms in the group are searched for.
	Modifiers	Modifiers are descriptors that can be attached to terms to make small changes to them. For example, a Diagnosis concept may be additionally described by Modifiers "Principal Diagnosis" or "Secondary diagnosis."
	Modifier Groups	Groups of Modifiers, similar to Term Groups.
	Previous Queries	Previous Queries are queries that have been run before and are stored in the 'Previous Queries' panel.
	Individual Patients	If selected when running a query, a query can return a Patient Set, which is a set of patient numbers that satisfy the query criteria . The Patient Set is stored with the query in the Previous Queries panel. The Patient Set can be expanded, and individual subjects dragged into query groups to be used in a new query.
	Patient Sets	If selected when running a query, a query can return a Patient Set, which is a set of patient numbers that satisfy the query criteria. The Patient Set is stored with the query in the Previous Queries panel and can be dragged into query groups to be used in a new query.
	Encounter Sets	If selected when running a query, a query can return an Encounter Set, which is a set of encounter numbers that satisfy the query criteria. The Encounter Set is stored with the query in the Previous Queries panel and can be dragged into query groups to be used in a new query .

### 3.2.1 Operators and Order of Precedence

i2b2 items are combined using Boolean operators **AND** and **OR**. Items within each Group are first **OR** ed together. The Groups are then **AND** ed together.

**Example 1 (AND):** This query finds patients with *Acute Myocardial Infarction AND Angina Pectoris*.

The screenshot shows the i2b2 Query & Analysis Tool interface. On the left, there is a navigation bar with tabs for 'Terms' and 'Info'. Below this is a search bar with the term 'angina pectori' and a dropdown menu set to 'Any Category'. The 'Terms' panel lists categories like 'Diagnoses' and 'Diagnoses (ICD10)'. Under 'Diagnoses', 'Angina pectoris' is listed with a count of 3. The 'Workplace' section includes 'demo' and 'SHARED' items. On the right, the main panel is titled 'Find Patients' and 'Analysis Tools'. It contains two search panels. The top panel has 'Find Patients' with the condition 'with' selected. It lists 'Acute myocardial infarction' and 'Angina pectoris'. The bottom panel also has 'Find Patients' with 'with' selected, listing 'Angina pectoris'. Between these panels is the word 'and'. At the bottom of the main panel, there is a text input field 'Name:' containing 'Acute myocardial infarction-Angina pectoris@10:31:18'.

**Example 2 (OR):** This query finds patients with *Acute Myocardial Infarction OR Angina Pectoris*.

The screenshot shows the i2b2 Query & Analysis Tool interface. The left side features a navigation bar with 'Terms' and 'Info' tabs, a search bar with 'Any Category', and a 'Workplace' section with 'demo' and 'SHARED'. The 'Terms' panel lists various diagnostic categories, including 'Hypertensive disease - 40', 'Ischemic heart disease - 17' (which includes 'Admit Diagnosis', 'Principal Diagnosis', 'Secondary Diagnosis'), 'Acute myocardial infarction - 7', 'Angina pectoris - 3' (which includes 'Old myocardial infarction - 1'), 'Other acute and subacute forms of ischemic heart disease - 5', 'Other forms of chronic ischemic heart disease - 14', 'Other forms of heart disease - 35', and 'Venuous and lymphatic disease - 10'. The 'Find Patients' panel on the right shows a search for 'Acute myocardial infarction' or 'Angina pectoris'. The 'Name:' field at the bottom contains 'Acute myocardial infarction@8:22:55'.

**Example 3 (AND of ORs):** This query finds patients with (*Acute Myocardial Infarction OR Angina Pectoris*) AND who are *male*.

\*Note that the OR expression in the parentheses is evaluated first.

The screenshot shows the i2b2 Query & Analysis Tool. The main window is titled "Find Patients". In the search bar, there are two concepts: "Acute myocardial infarction" and "Angina pectoris", connected by an "or" operator. Below the search bar, there is a "with" operator selected for the concept "Male". The left sidebar has sections for "Terms" (showing Clinical Trials, Custom Metadata, Demographics, Age, Income, Language, Marital Status, and Race), "Info" (showing Workplace with demo and SHARED), and a search bar with "Any Category". At the bottom, there is a "Name:" field containing "Acute myocardial infarction-Male@8:21:33" and buttons for "Find Patients" and "Clear All".

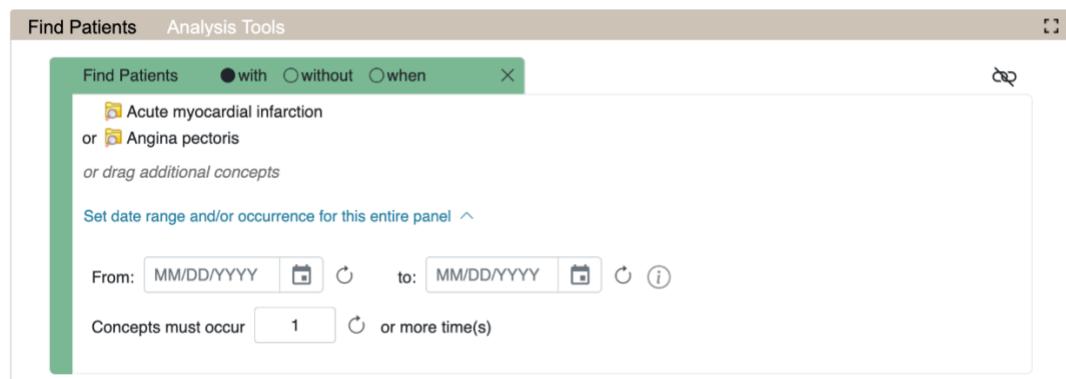
### 3.2.2 Constraints

**Constraints** are used to narrow down the search criteria to a particular time frame, number of occurrences or a specific value or range of values. In i2b2, there are several types of constraints that can be defined in the Find Patients view.

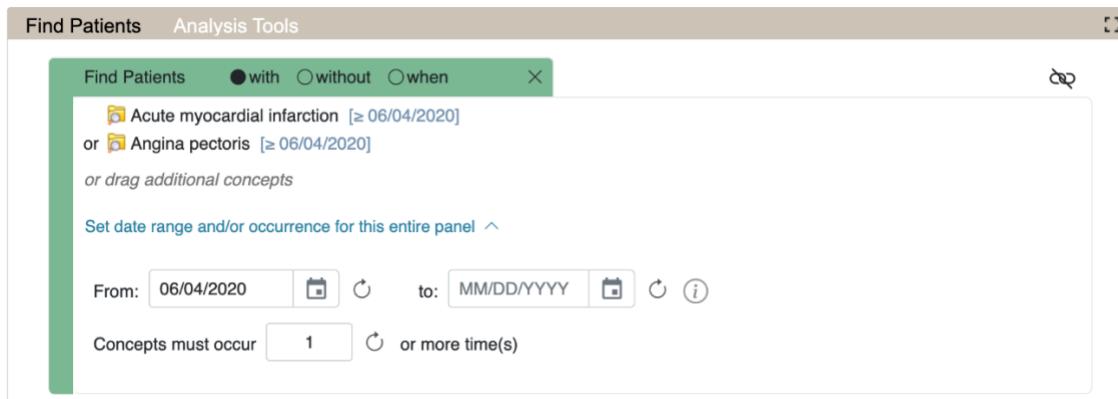
#### 1. Group Constraints

##### 1. Date Constraint

## Setting Date Constraint for the entire Group



Clicking on 'Set date range and/or occurrence for this entire panel' will expand and display controls to set a date range that can be selected to restrict the occurrences of the items in the Group to within that range. Check one or both of the check boxes to indicate whether there is a begin date (From) or an end date (To) or both.

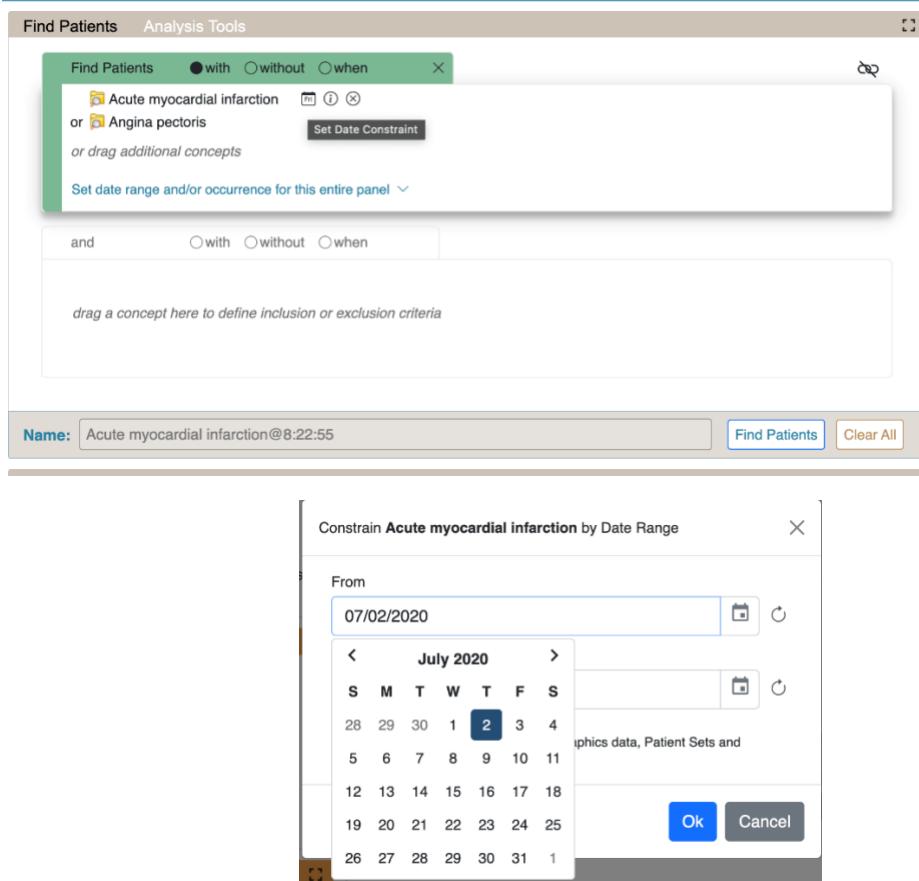


Then type the date directly in the text box or click on the drop-down arrow to open the calendar below to select a date. This will set the date range for all items in this Group.

## Setting Date Constraint on individual items

Sometimes only some items in the Group need date constraints or different items in one group require different date constraints. In this case, hover over the item and select **Set Date Constraint calendar icon** to set the date constraint for that item

specifically.



Once a date constraint is applied, **Dates** will now be underlined to indicate a date constraint has been set.

Find Patients   Analysis Tools

Find Patients    with  without  when  

Acute myocardial infarction [≥ 07/02/2020]  
or Angina pectoris  
or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

and    with  without  when

drag a concept here to define inclusion or exclusion criteria

Name: Acute myocardial infarction@8:22:55  

## 2. Occurrence Constraint

Users can define the number of times an item must occur for each subject.

Clicking on 'Set date range and/or occurrence for this entire panel' will expand and display controls to select to restrict the occurrences of the items in the Group to within that range. Enter a value in the field

Find Patients   Analysis Tools

Find Patients    with  without  when  

Acute myocardial infarction  
or Angina pectoris  
or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

From:     to:    

Concepts must occur   or more time(s)

**Occurs** has been set and the 1 will be replaced with the selected number.

Find Patients     with  without  when    X

or  Acute myocardial infarction  
or  Angina pectoris  
*or drag additional concepts*

Set date range and/or occurrence for this entire panel ▾

From:  MM/DD/YYYY  to:  MM/DD/YYYY  *i*

Concepts must occur  3  or more time(s)

### 3. Exclusion

Constraint will not include patients with the concepts listed in the panel.

Click on the “without” radio button located in the selection criteria section of the panel. The background color will change to a red hue.

Find Patients    Analysis Tools

Find Patients     with  without  when    X

or  Acute myocardial infarction  
or  Angina pectoris  
*or drag additional concepts*

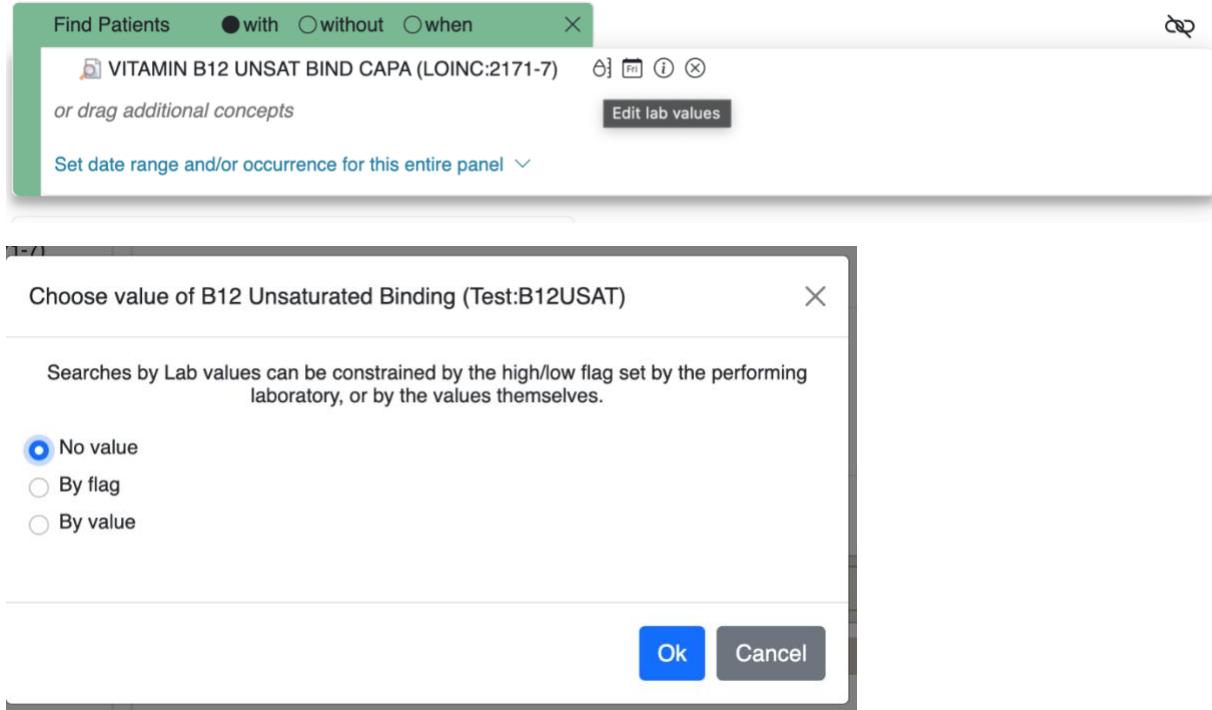
Set date range and/or occurrence for this entire panel ▾

and     with  without  when

*drag a concept here to define inclusion or exclusion criteria*

### 4. Value Constraints (eg. labs)

Constraint is by the value associated to a concept or modifier. Not all items have values. The value constraint window will open automatically when you drop a concept into a panel in the Find Patients view. To set the constraint at a later time, hove over the term and select the corresponding icon to select Set Value.



## 1. Numeric

The numeric value is defined in the source system when the result is entered. Enter a numerical value at the Please enter a value field.

Unlike flag and text values, numeric values use operators, such as greater than or less than when setting the constraints.

The Units will default to the normal units defined for the item. Click on the drop-down arrow to change the units.

(In order for unit conversion to work a parameter called CRC\_ENABLE\_UNITCD\_CONVERSION must be defined for the project. If this is not defined you need to contact your system administrator.)

Choose value of B12 Unsaturated Binding (Test:B12USAT) X

Searches by Lab values can be constrained by the high/low flag set by the performing laboratory, or by the values themselves.

No value      Please select operator:

By flag      LESS THAN (<) ▼

By value      Please enter a positive integer value:

Click on a bar segment to help specify a value or range:  
 Range in **ng/l**

Units = ng/l ▼

Ok Cancel

## 2. Categorical

---

Choose value of Medication Route (Test:MED:ROUTE) X

Searches by Lab values can be constrained by the high/low flag set by the performing laboratory, or by the values themselves.

No value  
 By value

Please select a value:

inhalation  
 injection  
 Intravenous  
 By Mouth  
 By Rectum

Ok Cancel

## 3. Text

Choose value of Patient Instructions (Test: MED: INST) X

You are allowed to search within the narrative text associated with the term Choose value of Patient Instructions (Test: MED: INST)

No Search Requested    Enter Search Text:  
 Search within Text   

Use Database Operators (*Advanced Searching*)

Ok Cancel

#### 4. Flags (high, low, etc.)

Choose value of B12 Unsaturated Binding (Test: B12USAT) X

Searches by Lab values can be constrained by the high/low flag set by the performing laboratory, or by the values themselves.

No value                  Please select a range:  
 By flag                  ✓ Normal  
High  
Low  
 By value

Ok Cancel

#### 5. Modifier Value Constraints

Choose value of Medication Route (Test: MED:ROUTE) X

Searches by Lab values can be constrained by the high/low flag set by the performing laboratory, or by the values themselves.

No value  
 By value

Please select a value:

inhalation  
injection  
Intravenous  
By Mouth  
By Rectum

Ok Cancel

### 3.2.3 Query Timing

Choose the relationship between the query panels. The default timing is independent.

#### 1. *Independent*

- The items (facts) can occur at any time in the patient's history.

#### [Example]

Patient has a medication with a dose greater than 500 mg and a medication that is taken once a day documented at any time in their history.

Find Patients   Analysis Tools

Find Patients   ● with   ○ without   ○ when   X

Heparin {Dose > 500 mg}

or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

and   ● with   ○ without   ○ when   X

Heparin {Frequency = ("Once per day")}

or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

and   ○ with   ○ without   ○ when

Name: Heparin-Heparin@10:6:23   Find Patients   Clear All

## 2. Same Financial Encounter

- The items (facts) occur during the same visit (financial encounter).
- When this is selected, individual panels can be included in the "same encounter" query, or they can be treated independently

### [Example]

Patient has a diagnosis of Acute MI documented at any time in their history and they have a medication with a dose greater than 500 mg and a medication that is taken once a day documented during the same visit.

Find Patients   Analysis Tools

Find Patients   ● with   ○ without   ○ when   X

Acute myocardial infarction

or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

and   ● with   ○ without   ○ when   X

Heparin {Dose > 500 mg}

or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

and   ● with   ○ without   ○ when   X

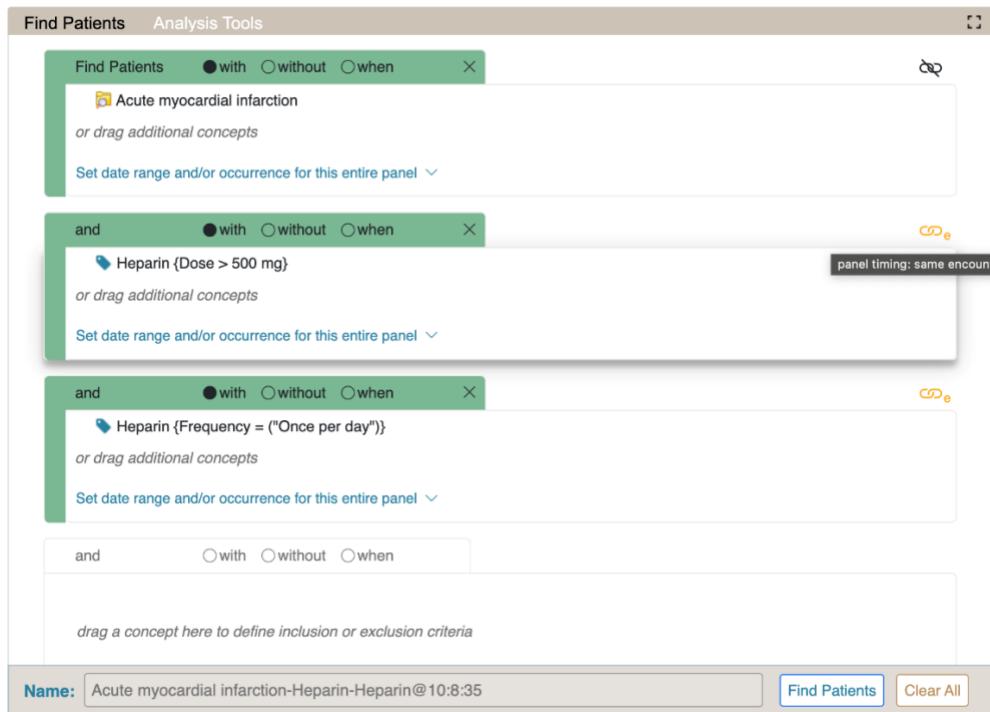
Heparin {Frequency = ("Once per day")}

or drag additional concepts

Set date range and/or occurrence for this entire panel ▾

drag a concept here to define inclusion or exclusion criteria

Name: Acute myocardial infarction-Heparin-Heparin@10:8:35   Find Patients   Clear All



### 3. Temporal Query

- In this mode, a sequence of events are defined that are anchored by a constraining population. The constraining population is defined exactly like other query types. To build a sequence of events, select the “when” radio button located in the selection criteria section of the panel. The background color will change to a yellow hue.

Find Patients   Analysis Tools

Find Patients    with  without  when

**Event 1**  
or drag additional concepts  
Set date range this entire panel ▾  
The start of the first occurrence of Event 1 occurs before the start of the first occurrence of Event 2 ▾

**Event 2**  
or drag additional concepts  
Set date range this entire panel ▾

**+ ADD EVENT**

and       with  without  when

drag a concept here to define inclusion or exclusion criteria

Name:  Find Patients Clear All

### [Example]

- Finds patients who were diagnosed with diabetes (*Event 1*) prior to the first observation of an antidiabetic medication (*Event 2*). The population is constrained to patients over 64 years of age (*bottom panel*).

Find Patients   Analysis Tools

Find Patients    with  without  when

**Event 1**  
Diabetes mellitus (e08-e13)  
or drag additional concepts  
Set date range this entire panel ▾  
The start of the first occurrence of Event 1 occurs before the start of the first occurrence of Event 2 ▾

**Event 2**  
Antidiabetic agents  
or drag additional concepts  
Set date range this entire panel ▾

**+ ADD EVENT**

and       with  without  when

>= 65 years old  
or drag additional concepts  
Set date range and/or occurrence for this entire panel ▾

and       with  without  when

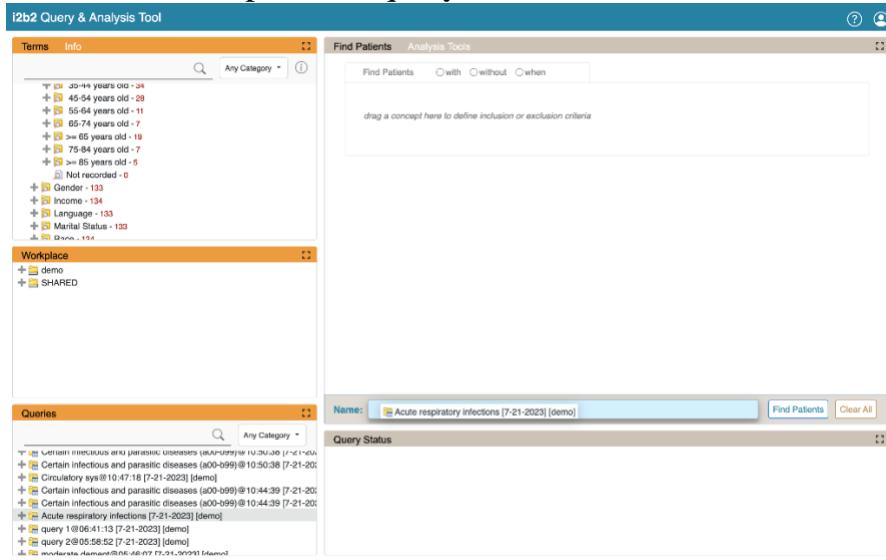
drag a concept here to define inclusion or exclusion criteria

Name: >= 65 years old-Diabetes mellitus (e08-e13)-Antidiabetic agents@10:19:29   Find Patients Clear All

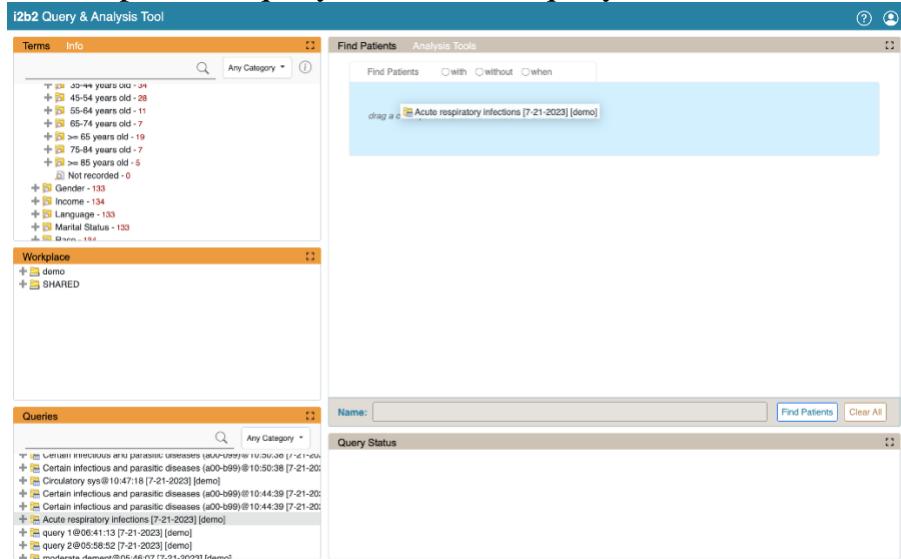
### 3.2.4 Reloading a Previous Query

Saved queries (either from Queries panel or the Workplace) can be reloaded by dragging them to the Name bar at the bottom of the Find Patients panel. They can be used within a query by dragging them into a query panel. See the [Query section](#).

- Reload a previous query.



- Use a previous query within a new query.



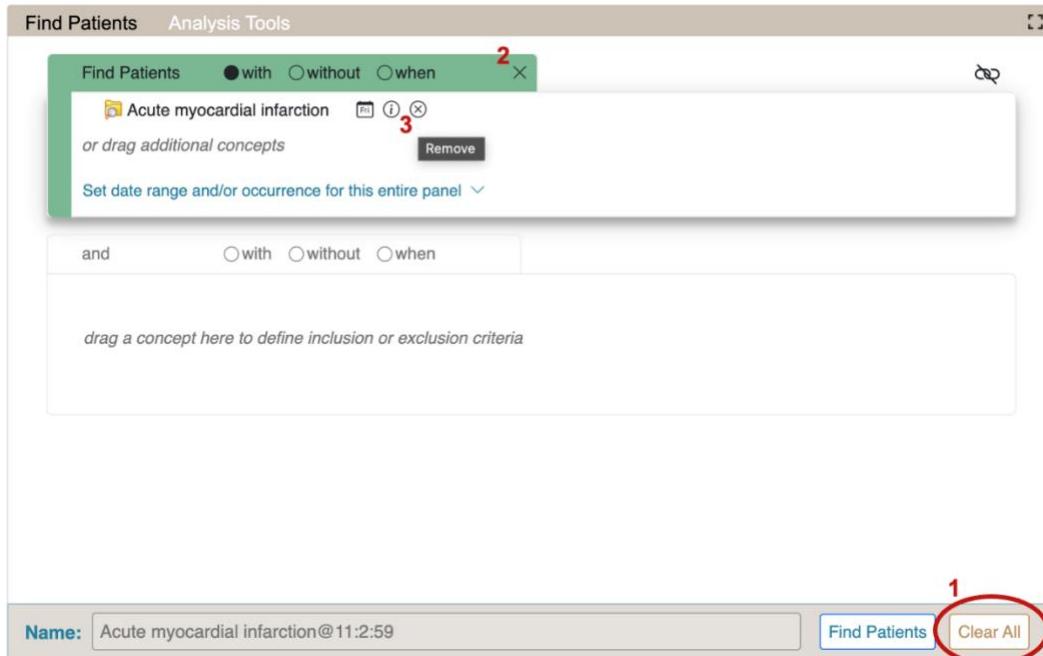
### 3.2.5 Resetting the Query Tool

There are three options for resetting the **Find Patient panel**. Users can (1) reset all the groups, (2) clear all items in a panel, or (3) delete an individual item from the group.

**1. Reset All Groups:** Click on the **Clear All** button located on the toolbar at the bottom of the *Find Patients panel*.

**2. Clear Items in a Panel / Group :** Click on the **Delete “X” button** located in the top right corner of the panel (next to the panel controls).

**3. Delete Single Item:** Hover over a concept, and click on the X icon to remove from the panel



### 3.3 Running a Query

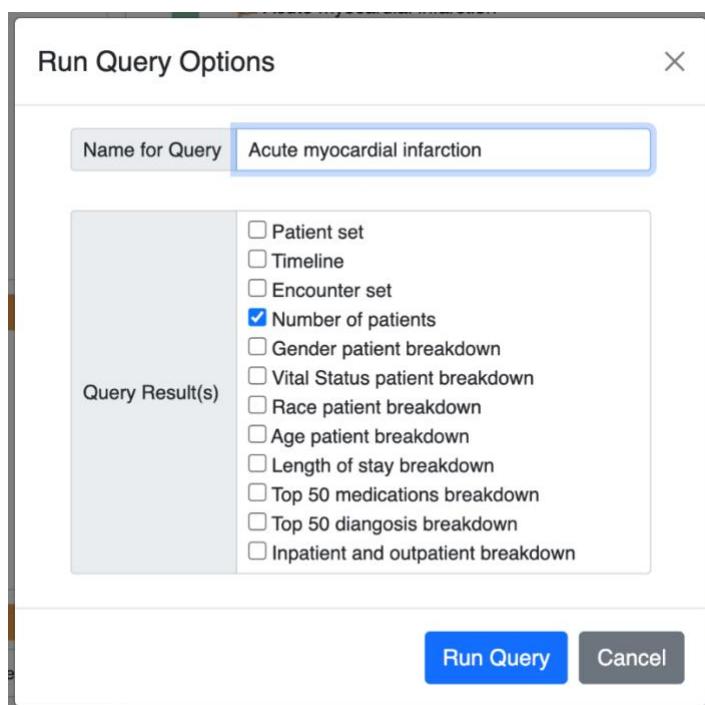
#### 3.3.1 Run Query

Once the query criterion has been defined, the final steps are to click on the **Find Patient button**, select the result type(s), and click on the ‘Run Query’ button to run the query.

Once you have defined the search criteria, click on the ‘**Find Patients**’ button located on the toolbar at the bottom of the Find Patients panel. A new ‘Run Query Options’ window will open.

- A name for the query will default at the ‘Name for query’ field. Either change the name of the query or accept the default.
- In the query result type section, click on the checkboxes for those result types you want to include when the query is run.
- Click on the ‘Run Query’ button.
- The Run Query Options window will close and the querying process will begin.

Once you begin the process of running the query the Query Status view will display “Running Query”, the name of the query, and the time that has elapsed.



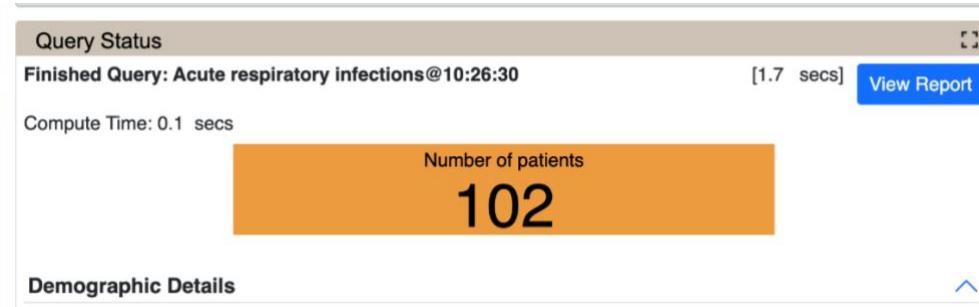
### 3.3.2 Query Result Options

There are three categories of query type: counts, sets, and breakdowns.

Note: The Timeline type is not used in the Web Client. If selected it will work the same as patient set.

#### 1) Number of Patients

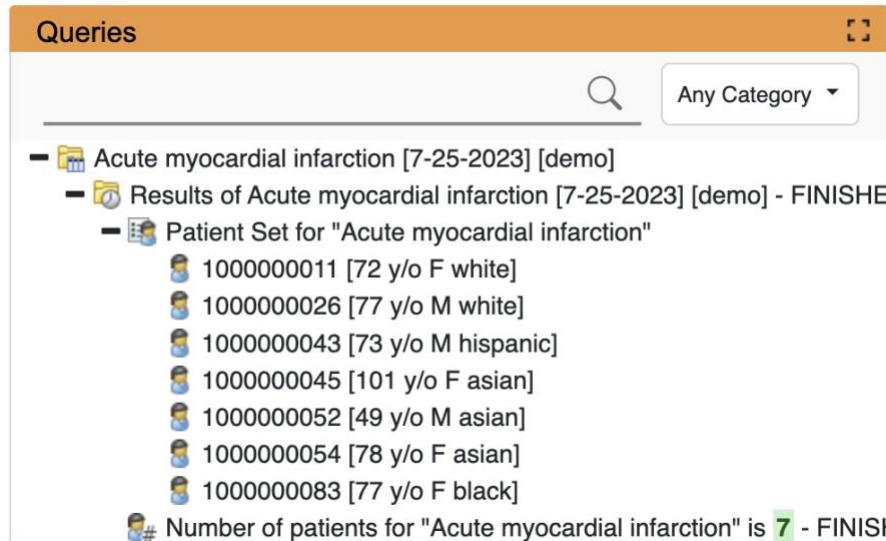
This option will return a total count for those patients who meet the defined criteria. This is the most common and fastest query type.



#### 2) Patient/Encounter Set

These options return a set of patients or encounters that meet the defined criteria. The set is visible in the Queries panel and can be used in future queries, the workspace, and by plugins.

Only information on the query's completion is shown in the Query Status panel.



### *3) Patient Breakdowns*

The following query types will return patient counts stratified by the selected breakdown category (e.g., Gender or Age).

#### **Breakdown type**

Gender patient breakdown

Vital Status patient breakdown

Race patient breakdown

Age patient breakdown

Length of Stay breakdown

Top 20 Medications Breakdown

Top 20 diagnoses Breakdown

Inpatient and Outpatient Breakdown

#### [3.3.3. Query Status](#)

*When a query is running, the query status panel will show its status.*

<b>Status</b>	<b>Meaning</b>
---------------	----------------

Running	The query is currently running on the server and the client is waiting for results.
---------	---

Finished	The query has completed. Results will be shown below this message.
----------	--

Queued	The query took longer than the configured timeout. (Defaults to 180 seconds.) It is still running in the background and the results will appear in Previous Queries when it completes.
--------	--

Error      An error occurred running the query. More information might be available in the XML Message Log.

## 4. Navigate Terms

Terms, (also called concepts), make up vocabularies (or ontologies) in i2b2 and are the building blocks of i2b2 queries. The Terms Panel is used to find terms for constructing queries. It has two modes, **Term view** and the **Search** view.

The **Terms** tab is used to drill into a hierarchy of terms and find terms of interest to query.

The **Search input** is used to search for terms or codes to be used in queries.

### Navigate Terms Tab

The **Navigate Terms** tab is used to find ontology items to be used in a query. This panel displays the i2b2 query terms or concepts. Terms are grouped with similar items and displayed in a hierarchical tree structure that can be expanded to view all items in the category.

Folders are expanded by clicking on the '+' sign. The '+' changes to a '-' and the next level of detail is displayed. The hierarchical structure consists of [containers](#) , [folders](#) and [leaves](#) .

The screenshot shows a software interface with a navigation bar at the top labeled 'Terms' and 'Info'. Below the bar is a search field with a magnifying glass icon and a dropdown menu labeled 'Any Category'. To the right of the search field is an information icon. The main content area displays a hierarchical tree structure. At the top level, there are several collapsed categories: Clinical Trials, Custom Metadata, Demographics, Diagnoses, Diagnoses (ICD10), Expression Profiles Data, Laboratory Tests, Medications, Procedures, Providers, Reports, and Visit Details. The 'Providers' category is expanded, revealing its sub-categories: Emergency Medicine - 0, Medicine - 0, Neurology - 0, Neurosurgery - 0, Obstetrics and Gynecology - 0, Oncology - 0, Orthopaedic - 0, Pediatric - 0, Psychiatry - 0, and Surgery - 0. The 'Emergency Medicine' node is highlighted with a green oval. Underneath it, several physician names are listed: Burns, Frank, MD; Carter, John, MD; Greene, Mark, MD (which is also highlighted with a blue oval); Lewis, Susan, MD; McIntyre, Trapper John, MD; and Pierce, Benjamin Franklin, MD.



**Containers** are the highest level of the hierarchy. They can be expanded by clicking on the *plus sign* (+) or collapsed by clicking on the *minus sign* (-). Containers cannot be dragged to other panels.



**Folders** Like containers, folders can be expanded using the + and collapsed using the -. Unlike containers, folders can be dragged to other panels. When a folder is dragged into a query group, the resulting query will return results for everything in the folder.



**Leaves** are the lowest level of the hierarchy. They cannot be expanded or collapsed. They can be dragged into query groups as query criteria.

## Find Mode

The **Find** mode provides a way to search for query items. Query terms can be located using the Find input field.

The screenshot shows a software interface for 'Find Mode'. At the top, there are tabs for 'Terms' and 'Info'. Below the tabs is a search bar with a magnifying glass icon and a dropdown menu set to 'Any Category'. To the right of the search bar is an 'Info' button. A red bracket on the right side of the interface points to the main content area, which is labeled 'Search Results Displayed here'. On the left, there is a sidebar containing a list of categories, each preceded by a plus sign and a small icon. The categories listed are: Clinical Trials, Custom Metadata, Demographics, Diagnoses, Diagnoses (ICD10), Expression Profiles Data, Laboratory Tests, Medications, Procedures, Providers, Reports, and Visit Details.

### A. The Search by Names mode is used to find all query items containing particular text.

1. Enter search string. All results returned will be those terms whose name or code CONTAINS the text entered in the search input field.
2. Choose a category from the drop-down menu or leave it as the default of 'Any Category', which will search all categories.
3. Click Enter on the keyboard or click the search icon to run the search
4. Select any terms returned by the search and drag them into a query group to use as query criteria.

[Example] Find all terms containing the text 'rheumatic fever'.

The screenshot shows the 'Find Terms' interface. The search bar at the top contains the text 'rheumatic fever'. To the right of the search bar are buttons for 'Any Category' and a help icon. Below the search bar is a list of search results categorized under 'Diagnoses' and 'Diagnoses (ICD10)'. Under 'Diagnoses', there is a single result: 'Circulatory system - 66', which is further broken down into 'Acute Rheumatic fever - 0', 'Rheumatic fever with heart involvement - 0', and 'Rheumatic fever without mention of heart involvement - 0'. Under 'Diagnoses (ICD10)', there are two results: 'Diseases of the circulatory system (I00-I99) - 68' and 'Acute rheumatic fever (I00-I02) - 0', each with its own sub-categories.

Note: New in v1.7.12

The Find Terms view has changed. The same query now shows many fewer results and it shows their placement in the hierarchy. Search results are highlighted in bold emphasis, and parent results can also be dragged into other panels. Results which are hierarchically within another result are omitted to save space (e.g., many of the results in the graphic above are within the Acute Rheumatic fever folder).

Right click on a term to view a menu. Click “View in Tree” to restore the navigate mode.

This screenshot shows the 'Find Terms' view with the same search results as the previous one. A context menu is open over the 'Acute RI' result under 'Circulatory system - 66'. The menu items visible are 'Show More Info', 'View in Tree', and 'Show Modifiers'. A blue arrow points from the left side of this screenshot towards the right side, indicating a transition or comparison.

This screenshot shows the 'Find Terms' view after selecting 'View in Tree'. The interface has changed significantly. The search bar now contains 'Any Category'. The results are displayed as a tree structure. The 'Diagnoses' category is expanded, showing its sub-categories: 'Circulatory system - 66', 'Admit Diagnosis', 'Principal Diagnosis', and 'Secondary Diagnosis'. The 'Acute Rheumatic fever - 0' result is highlighted in red, indicating it is the current node being viewed. Other categories like 'Clinical Trials', 'Custom Metadata', and 'Demographics' are also listed.

## B. The Search by Codes tab is used to find coded variables.

To use this option, a code must be entered and a coding system selected.

[Example] Find LOINC code 32673-6

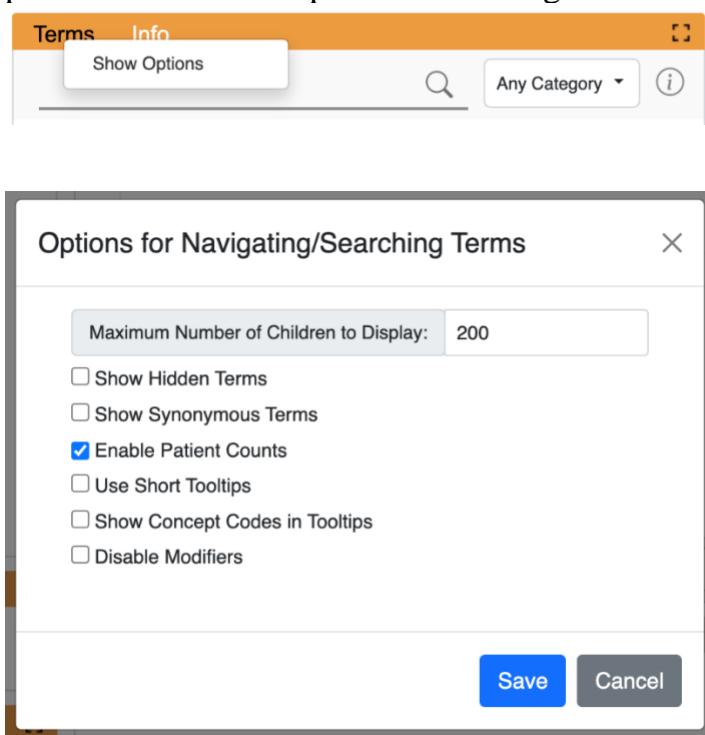
1. Enter the code in the search input field
2. Click on the **drop-down arrow**, select **Coding System**, and select **LOINC** from the drop down list.
3. Click Enter on the keyboard or click the search icon to run the search
4. The results will be displayed in the results section.

The screenshot shows a search interface with a top navigation bar containing 'Terms' and 'Info'. Below this is a search bar with the code '32673-6' entered. To the right of the search bar are buttons for 'Any Category' and an information icon. A dropdown menu is open, showing options like 'Category »' and 'Coding System ». The 'Coding System »' option is highlighted. A second dropdown menu, titled 'Find Patients', is also open, listing various coding systems: DEMZIPCODE, DSG-NLP, ICD10, ICD9, LCS-I2B2, LOINC, NDC, None, and UMLS. The 'LOINC' option is highlighted in this list.

The screenshot shows the search results for the code '32673-6' with the 'LOINC' coding system selected. The results are displayed as a hierarchical tree. At the top level, there is a single item: 'Laboratory Tests'. Underneath it, there is a branch for 'Chemistry - 133', which further branches into 'Cardiac Tests - 64', and finally 'CK-MB (CK2) (Group:CK2/MB) - 0', which is identified as 'CK 2 (MB) IU/L (LOINC:32673-6)'.

## Options for Finding Terms

Right clicking on Terms opens an the Options for Navigating/Searchng Terms that provides additional options for finding terms.



### Maximum Number of Children to Display

The default value for **Maximum number of children to display** for a search of terms or codes is usually 200. However, this number can be changed to retrieve either more or fewer results. When a search is run, once the maximum number of terms is reached a message will appear to say that the query has reached the maximum number of terms and suggest searching again with a more specific query. Running a search with a more specific query will narrow results as the selection criteria will not be as broadly defined.

### Show Hidden Terms

In the metadata table, an attribute is set to determine whether a term is active, inactive or hidden. If an item is marked as hidden it will not appear in the list of terms.

Selecting **Show Hidden Terms** will display those items marked to be hidden. For easy identification, hidden terms will be **red** when displayed in the results list.

### Show Synonymous Terms

Some terms may be flagged in the metadata table as a synonym of another term.

Selecting **Show Synonymous Terms** will display both the original term and the synonym in the *Terms view*. For easy identification, synonymous terms will be **blue** when displayed in the results list.

### Enable Patient Counts

The **Enable patient counts** option will display the total number of patients that have a fact entered for that item.

### Use Short Tooltips

In the i2b2 webclient, a tooltip displays when the cursor hovers over an item. By default, the tooltip that displays contains the entire path name and the tooltip that is specific to that item. Enabling the **Use short tooltips** option will only display the tooltip information; the path will not be included.

### Show Concept Codes in Tooltips

In addition to showing the tooltip, this option will also display the concept code associated with the item.

### Disable Modifiers

The ability to search for modifiers will not be available if the **Disable modifiers** option is checked off.

## 5. Query Status

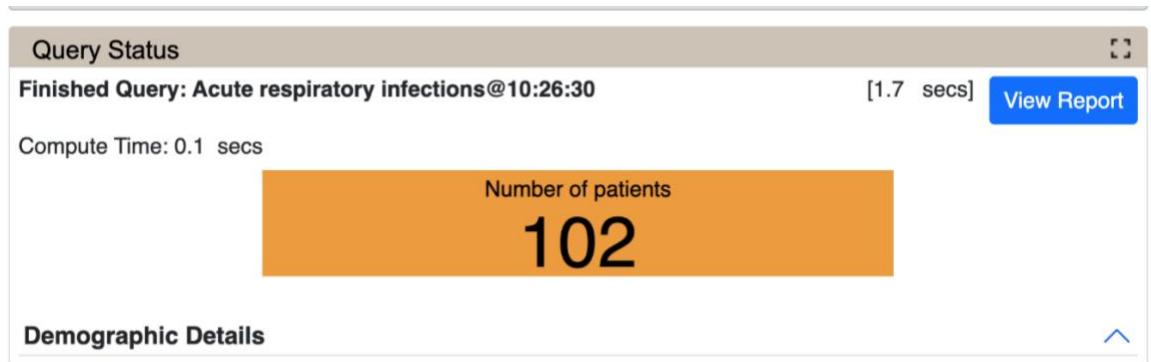
The **Query Status** panel contains information regarding the state of a query.

## Show Query Status

While a query is running, the name of the query and how long it has been running will appear.

Additional information that shows up in this tab depends on which options are selected in the 'Run Query Options' popup box when the query is run.

Once the query has finished, the number of patients meeting the search criteria, and the time it took to run the query, will appear.



## Graph Results

If any of the breakdown categories (Age, Race, Gender, Vital Status, Length of Stay, Top 20 diagnoses, Top 20 medications, Inpatient and Outpatient) are selected in 'Run Query Options', a bar graph will display for each category selected.

This is the Run Query Options showing default breakdown types:

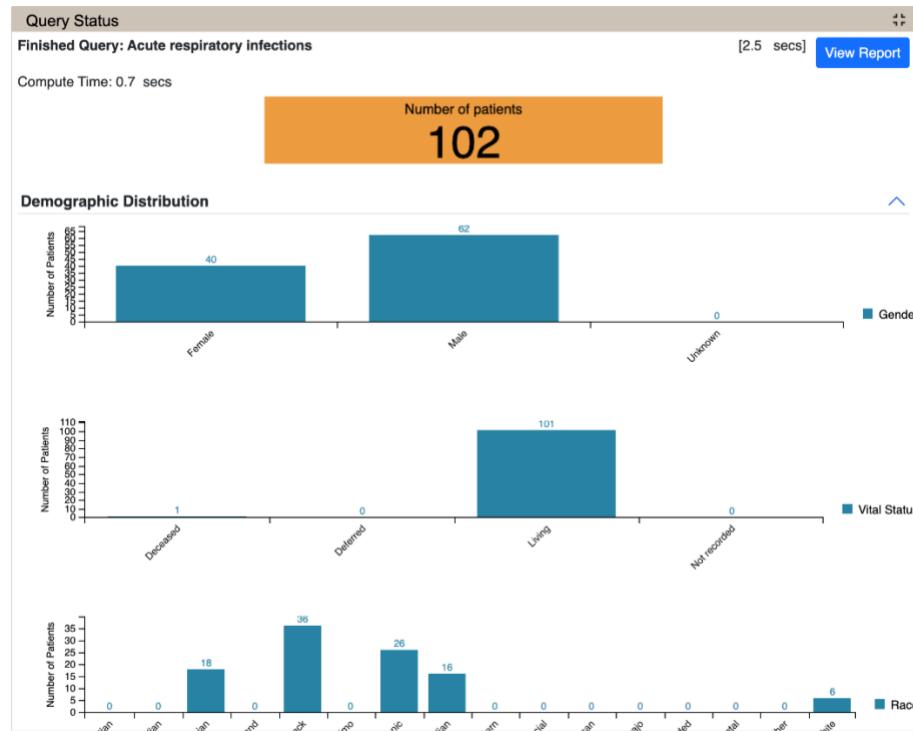
**Run Query Options**

Name for Query: Acute respiratory infections

**Query Result(s)**

- Patient set
- Timeline
- Encounter set
- Number of patients
- Gender patient breakdown
- Vital Status patient breakdown
- Race patient breakdown
- Age patient breakdown
- Length of stay breakdown
- Top 50 medications breakdown
- Top 50 diagnosis breakdown
- Inpatient and outpatient breakdown

**Run Query**   **Cancel**



## Query Report

The 'Query Report' button displays a textual representation of the query. It can be printed by clicking on the 'View Report' button in the upper right hand corner.

i2b2 Query Report

### i2b2 Query Report

The query entitled "Acute respiratory infections" submitted on 7/25/2023 @ 5:15:33 PM, was successfully completed on 7/25/2023 @ 5:15:34 PM. This query was performed by "i2b2 User". The search was completed in 0.747 seconds.

#### Query Definition

Temporal Constraint: Treat All Groups Independently

**All Groups**

Acute respiratory infections  
Diagnoses \ Respiratory system \ Acute respiratory infections  
Independent of Visit  
From earliest date available to latest date available  
# of times an item is recorded is >= 1

#### Query Results

Number of results: 0

[View Report](#)

[Close](#) [Print Report](#)

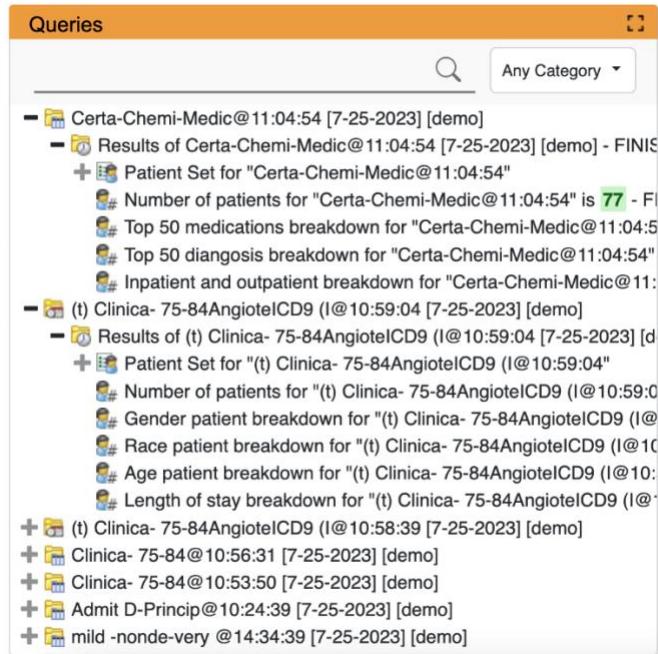
## 6. Previous Queries

View and search queries run by the user.

The 'Queries' panel has 2 views. The default mode lists all queries run by the user, and the search mode allows users to search for their previously run queries.

### 6.1 'Queries' tab

The 'Previous Queries' tab displays queries run by a user, with the most recent ones listed first. Results associated with the query can also be viewed in this tab. Both a *standard i2b2 query* (  ) and a *Temporal query* (  ) will appear in the 'Queries.' Please see [3. 'Query Tool'](#) for query types.



The screenshot shows the 'Queries' tab interface. At the top, there is a search bar with a magnifying glass icon and a dropdown menu labeled 'Any Category'. Below the search bar is a list of previous queries, each represented by a small icon and a timestamp. The queries are organized into sections, indicated by a minus sign (-) before the section name and a plus sign (+) to expand it. The expanded sections show the results of the queries, such as 'Patient Set for' and various breakdowns like 'Number of patients', 'Top 50 medications', etc.

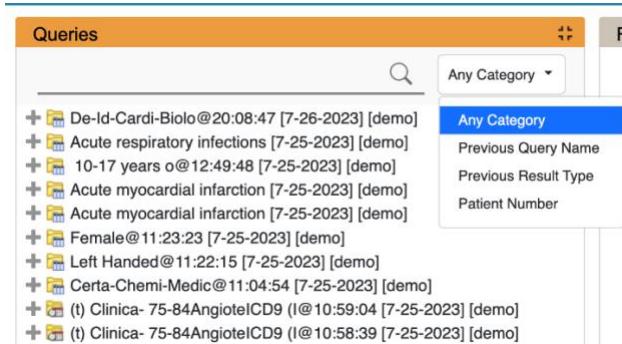
-  Certa-Chemi-Medic@11:04:54 [7-25-2023] [demo]
  -  Results of Certa-Chemi-Medic@11:04:54 [7-25-2023] [demo] - FINISH
    - +  Patient Set for "Certa-Chemi-Medic@11:04:54"
      - # Number of patients for "Certa-Chemi-Medic@11:04:54" is 77 - FINISH
      - # Top 50 medications breakdown for "Certa-Chemi-Medic@11:04:54"
      - # Top 50 diagnosis breakdown for "Certa-Chemi-Medic@11:04:54"
      - # Inpatient and outpatient breakdown for "Certa-Chemi-Medic@11:04:54"
-  (t) Clinica- 75-84AngiotelCD9 (@10:59:04 [7-25-2023] [demo])
  -  Results of (t) Clinica- 75-84AngiotelCD9 (@10:59:04 [7-25-2023] [demo])
    - +  Patient Set for "(t) Clinica- 75-84AngiotelCD9 (@10:59:04)"
      - # Number of patients for "(t) Clinica- 75-84AngiotelCD9 (@10:59:04)" is 100 - FINISH
      - # Gender patient breakdown for "(t) Clinica- 75-84AngiotelCD9 (@10:59:04)"
      - # Race patient breakdown for "(t) Clinica- 75-84AngiotelCD9 (@10:59:04)"
      - # Age patient breakdown for "(t) Clinica- 75-84AngiotelCD9 (@10:59:04)"
      - # Length of stay breakdown for "(t) Clinica- 75-84AngiotelCD9 (@10:59:04)"
- +  (t) Clinica- 75-84AngiotelCD9 (@10:58:39 [7-25-2023] [demo])
- +  Clinica- 75-84@10:56:31 [7-25-2023] [demo]
- +  Clinica- 75-84@10:53:50 [7-25-2023] [demo]
- +  Admit D-Princip@10:24:39 [7-25-2023] [demo]
- +  mild -nonde-ver@14:34:39 [7-25-2023] [demo]

### 6.2 Query Search mode

The **Find** mode provides a way to search for a query or query result type. Query terms can be located using the Find input field and will find all query items containing particular text.

5. Enter search string. All results returned will be those terms whose name or code CONTAINS the text entered in the search input field.

6. Choose a result type from the drop-down menu or leave it as the default of 'Any Category', which will search all categories. Other categories are: 'Previous Query Name', 'Previous Result Type', 'Patient Number'.
7. Click Enter on the keyboard or click the search icon to run the search
8. Select any terms returned by the search and drag them into a query group to use as query criteria.



## 6.3 Layout of a Previous Query Display

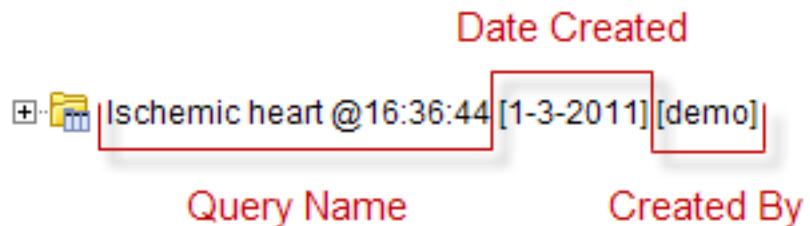
A **previous query** (📁 / 📂) is created when a query is run from the 'Query Tool'. These previous queries can be used to run new queries or to easily populate other panels.

The query in the 'Previous Queries' panel is comprised of multiple hierarchical levels that can be seen by expanding each level of the tree. These levels are outlined below.

### 6.3.1 Previous Query Name

The name of the previous query is the top level of the hierachal tree and is comprised of these three components.

1. **Query Name** - the name given at the time the query was created. The default name contains an abbreviated description and the time the query was run.
2. **Date** - the date the query was created.
3. **User Id** - the user who created (ran) the query.



### 6.3.2 Results Folder

The **Results folder** ( ) contains the results of the query. To see the query results simply expand the folder by clicking on the *plus sign* ( ) located next to the result name.

#### 6.3.2.1 Results

The results associated with a **previous query** are determined by the **query result type(s)** that are selected when the query is run in the 'Query Tool'.

##### 6.3.2.1.1 Patient Set

The **Patient set** ( ) appears if *Patient set* or *Timeline* was checked at the time the query was run. The set contains all the patients who met the defined search criteria.

##### 6.3.2.1.2 Encounter Set

The **Encounter Set** ( ) appears if *Encounter set* was checked at the time the query was run. The set contains all the patients whose encounters met the defined search criteria.

##### 6.3.2.1.3 Number of Patients

The **Number of Patients** ( ) appears if *Number of Patients* was checked at the time the query was run. The results are a total count for those patients who met the defined criteria.

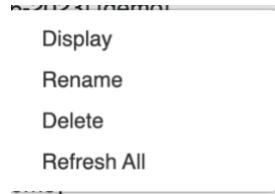
##### 6.3.2.1.4 Breakdown

The **breakdown** ( ) appears if *Gender / Vital Status / Race / Age patient breakdown* was checked at the time the query was run. The results are a breakdown by gender / vital status / race /age for those patients who met the defined criteria.

## 6.4 Navigation

### 6.4.1 Menu

Using the **mouse right click** on the 'Queries' panel, users can open the **Queries Menu**. 'Display,' 'Rename,' 'Delete' options act on the selected, or mouse hovered previous query. When the menu is called from a blank space, those menu options are applied to the previous target query.



#### 6.4.1.1 Display

Users can see a previous query information by selecting **Display** from the *popup menu*. It loads its query name, the query design, and the results in the 'Find Patients' panel.

#### 6.4.1.2 Rename a Previous Query

Users can rename a previous query from the list by selecting **Rename** from the *popup menu*.

*Note: When dragging a previous query to another view the new name will appear when it is dropped*

#### 6.4.1.3 Delete / Remove a Previous Query

Users can rename a previous query from the list by selecting **Delete** from the *pop-up menu*.

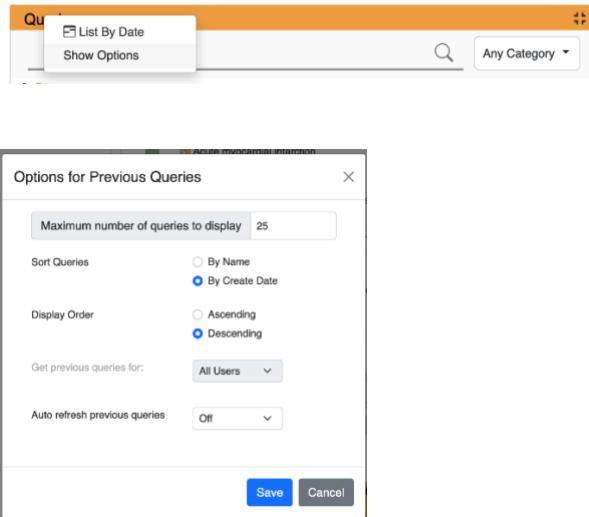
**WARNING:** Once you click on Delete, the previous query will be removed from the view and there is no way to restore it. Therefore, you need to make sure you want to remove it from the list.

#### 6.4.1.4 Refresh the List

Users can refresh the list of previous queries from the list by selecting **Refresh All** from the *pop-up menu*.

### 6.4.2 Options

Right click on the 'Queries' label to open an **Options** window. Users can define how many previous queries to display, the order in which they will appear in the list, and auto refresh setting.



#### 6.4.2.1 Maximum to Display

The **Maximum number of queries to display** defines how many previous queries will be visible in the '**Queries**' panel. Once the maximum number is reached the oldest query will no longer appear in the view.

*TIP: Recommendation: Use the 'Workplace' panel to save those previous queries that will be used often. In addition to being more convenient it will also prevent you from loosing a common query if the maximum number to display has been reached.*

#### 6.4.2.2 Sort Queries by Name

Selecting to sort **By Query Name** will sort the queries in the '**Queries**' alphabetically by the name of the query. Once you select to sort by name, you need to define whether it will be in ascending or descending order.

**Ascending:** queries are displayed in alphabetical order with the *beginning* of the *alphabet* at the *beginning* of the list. (A to Z)

**Descending:** queries are displayed in alphabetical order with the *beginning* of the *alphabet* at the *end* of the list. (Z to A)

#### 6.4.2.3 Sort by Create Date

Selecting to sort **By Create Date** will sort the queries in the '**Queries**' by the date and time the query was created. Once you select to sort by the creation date, you need to define whether it will be in ascending or descending order.

**Ascending:** displays the *oldest* query *first*.

**Descending:** displays the *newest query first*.

**NOTE:** Renaming a query will not affect the sort order as the date and time is stored with the previous query.

#### 6.4.2.4 Auto Refresh

Users can turn off the auto refresh, or select the auto refresh frequency from the combo box.

**NOTE:** If the auto refresh option is turned off, users need to use the refresh button (  ) to see the updated previous queries list.

## 6.5 Using a Previous Query

### 6.5.1 Draggable Items

Different parts of the previous query can be dragged and dropped (copied) from the '**Queries**' panel to other views in the i2b2 Web Client.

#### 6.5.1.1 Previous Query

Associated with each **previous query** (  /  ) are the items used to run the query, any constraints that were defined, and the results. A previous query can be added to other views by dragging the previous query name from '**Queries**' panel to one of the following views.

- **'Find Patients' panel** by drop in the *panel (as a concept) or Name section (to reload the query)*.
- **'Workplace' panel** by drop in a *user or shared folder*.

#### 6.5.1.2 Patient Set

A specific set of patients can be added to other views by dragging the **Patient set** (  ) from '**Queries**' to one of the following views.

- **'Find Patients' panel** by drop in the *panel*.
- **'Workplace' panel** by drop in a *user or shared folder*.

#### 6.5.1.3 Encounter Set

A specific set of encounters (visit list) can be added to other views by dragging the **Encounter Set** (  ) from '**Queries**' to one of the following views.

- **'Find Patients' panel** by drop in the *panel*.
- **'Workplace' panel** by drop in a *user or shared folder*.

## 6.5.2 Add to 'Find Patients'

The 'Find Patients' is designed to simplify the process of retrieving information from the database associated to the i2b2 Web Client.

Within the '**Queries**' panel are several items that can be used in the 'Find Patients' to run a query. The following sections explain how to add the previous query, patient set and encounter set to the 'Find Patients'.

### 6.5.2.1 Add Previous Query to 'Find Patients'

Within the 'Find Patients', a previous query can be added to one of the following two locations.

<b>Name field</b>	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.
<b>Panel (Group)</b>	Used within a new query (query-in-query). The information associated with the previous query can not be edited. Add additional search criteria (items) to be used in the new query.

#### 6.5.2.1.1 Add Previous Query to the Name field (New Query)

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

#### 6.5.2.1.2 Add Previous Query to the Panel (Query-in-Query)

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

#### 6.5.2.2 Add Patient Set to the 'Query Tool'

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** ( ) by clicking on its name.  
While holding the *left mouse button* down, drag the item over to the 'Query Tool'
4. Drop the item into the **Find Patients panel**.

#### 6.5.2.3 Add Encounter Set to the 'Query Tool'

1. Click on the plus sign ( ) next to the name of the previous query that contains the encounter set.
2. Click on the plus sign ( ) next to the results folder.
3. Highlight the **Encounter set** ( ) by clicking on its name.  
While holding the *left mouse button* down, drag the item over to the 'Query Tool'
4. Drop the item into the **Find Patients panel**.

### 6.5.3 Add to 'Workplace' panel

Information in the workplace is related to the most common concepts and queries that an individual uses and in essence becomes their personal workplace.



#### 6.5.3.1 Add Previous Query to 'Workplace' Panel

1. Highlight the **previous query** ( / ) by clicking on the name of the query.
2. While holding the *left mouse button* down, drag the previous query name 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.

#### 6.5.3.2 Add Patient Set to 'Workplace' 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** ( ) by clicking on its name.

4. While holding the *left mouse button* down, drag the **Patient set** to the '**Workplace**' **panel** .
5. Drop the Patient set into either your workplace folder or the shared folder.
6. The Patient set will now appear in the workplace.

#### 6.5.3.3 Add Encounter Set to 'Workplace' panel

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

## 7. Workplace

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

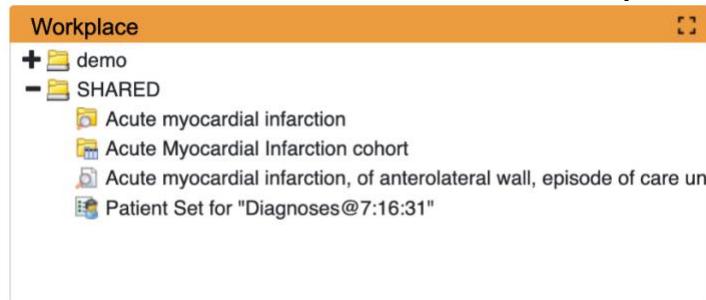
The main objectives of the 'Workplace' are:

- 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 'Find Patients' panel.

### 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 'Find Patients' 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

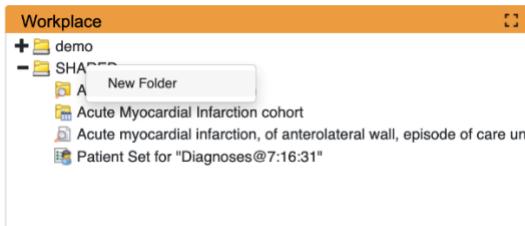
Folders and Items can be dragged and dropped (copied) into the 'Workplace' panel from other panels in the i2b2 Web Client.

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. Select **New Folder** and enter a name. Click **Ok**
3. 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 '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.

### 7.2.3.2 Adding Previous Query, Patient Set, and Encounter Set

*'Queries' Panel*

The '**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 '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 '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. Expand / Collapse a Folder

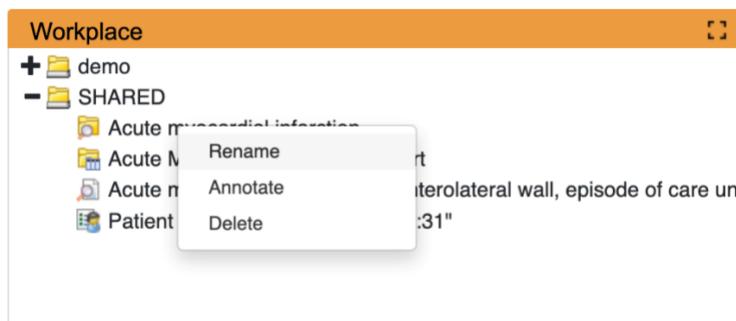
Users can expand or collapse a folder by clicking on the plus sign ( ) or negative sign ( ) next to the folder icon.

#### **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.



### 7.3.2 Rename a Folder or an Item

Users can easily **rename** an existing folder or an item.

1. Using the *right mouse button*, click on the folder or item you want to rename. Select Rename.
2. In the text box change the current name to the new name. Click Ok

3. The folder will appear in the 'Workplace' panel with the new name.

#### 7.3.3 Annotate a Folder or item

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

1. Using the *right mouse button*, click on the folder or item you want to annotate. Select **Annotate**.
2. 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 or item you just annotated.
8. The text you entered will display as a tool tip.

#### 7.3.4 Delete a Folder or item

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 or item you want to delete. Select **Delete**.
2. Click on the **OK button to confirm**.
3. The folder and all of its contents 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)
- Modifier Folder ( ) and all its modifiers (children)
- Concept ( )
- Modifier ( )
- Previous Query ( )
- Patient Set ( )
- Encounter Set ( )

