

# Find and Replace User Guide

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## Common Behavior

### Export

The generic “Export” function, present in various pages/screens in the Find and Replace feature, allows the user to save a working copy of the current result list into a .csv (comma-separated variables) file, an Excel-compatible format.

### Tips

The  icon indicates tips are available for a respective button or function. Click on the icon to open the tips for the button/function in question.

### Buttons Disabling/Enabling

Various buttons within this feature will only be enabled when the required criteria have been met. Mouseover on each button to gain tips on how to enable it.

## Feature Limitations

The Find and Replace feature does not support the following types of data searches:

1. Orderable details (Med or Non-Med)
  2. Free Text details
  3. Bundle
  4. Virtual or Non-virtual Linkables
  5. Retired content
- Batch removal of Section and Problem item types
  - Batch Replacement of items with details. Instead, the feature provides a single location where the user can search, easily access the content, review the context of the term usage, and replace the term 1 item at a time.

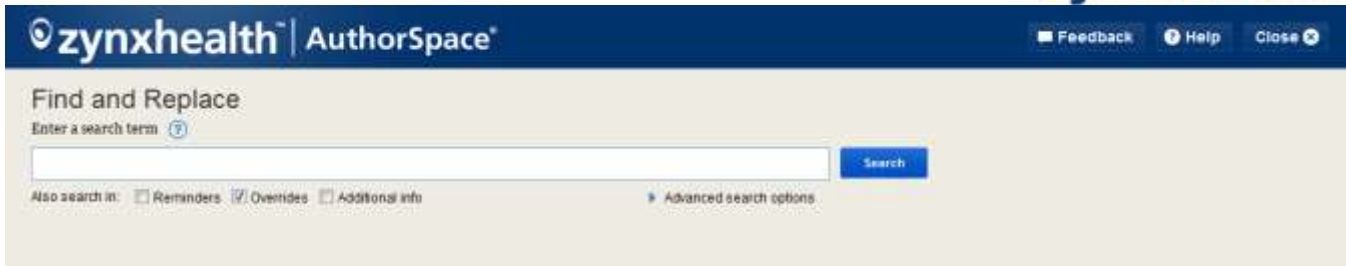
## Find and Replace – Search Function

On the Find and Replace main page, the user must perform a search before the Replace and/or the Remove function becomes available.

Users also have the option to search for matching words in:

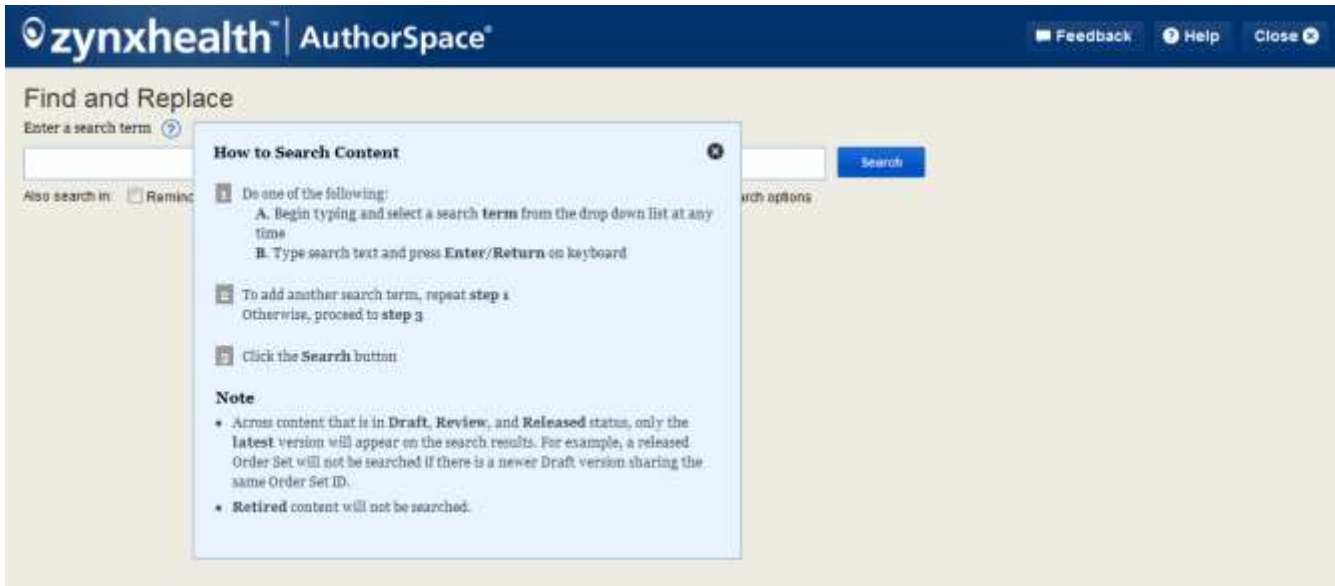
- Reminder items
- Override field
- Additional Info field

These options are made available via checkboxes. By default, the Override field is checked. The system will search in the checked field(s) for all items/appearances in the custom content. If none of the boxes is checked, the system will search only for data in the catalog term field matching the entered keyword(s).



## Search Tips

Clicking on the icon on top of the search box opens a popup window that provides tips on how to successfully enter 1 or more keywords into the search box.





The Find and Replace search function supports the ability to enter more than 1 catalog term, and/or partial keyword, independently of each other.

There are (2) ways to enter the search string in the Search box in the Find and Replace window:

A. Select search string from the Auto-Suggest List:

1. When the user enters a search string, the system will display a list of terms containing the entered keyword(s) from the environment's catalog.
2. When the user scrolls down the Auto-Suggest List and selects the term(s) from the Auto-Suggest List, the system will populate the search box with the selected term(s).

**Hint** The small x-icon (  ), located at the end of each search term, indicates that the search term is a valid search term, whether it is a complete term in the catalog or a partial search term. Additionally, users can click on this icon to remove the entered search term from the Search box.

 Click on a term to highlight it in the Auto-Suggest List and the system will input the term in the search box. Click on it again in the list and the system will remove the search entry from the Search box.

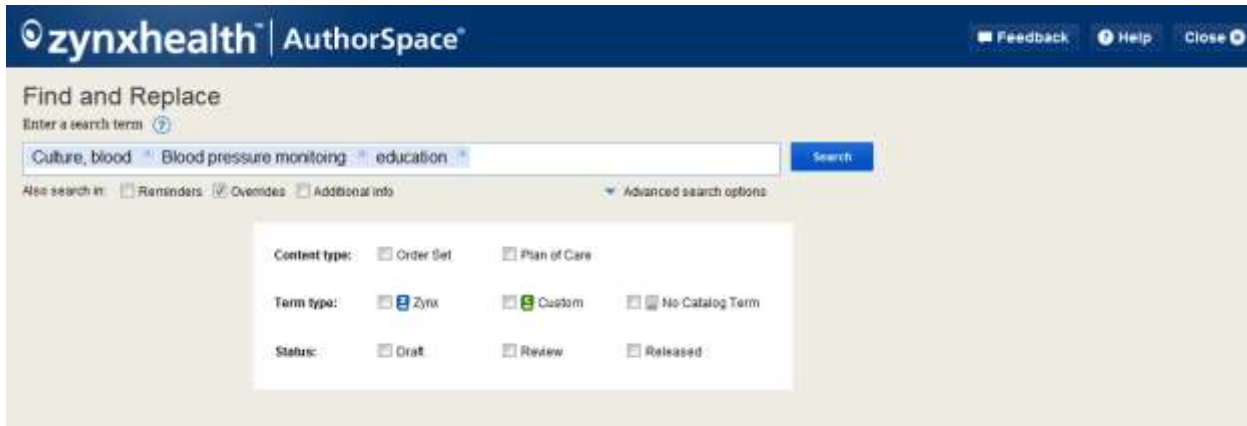
**B. Enter desired search string and press Enter/Return key:**

If the User enters the intended search string(s) and presses the Enter/Return key on the keyboard, the system will populate the search box with the entered string. If the user presses the Tab key after entering a keyword, the system defaults the cursor to the “Search” button, and when the Enter/Return keyboard key is pressed, the system initiates the search.

In the screen shot below, the keyword “education” represents a partial search word, in which the system will return any items matching the entered data.

## Advanced Search Options

This option is located under the Search box. Clicking on the arrow in front of the “Advanced Search Options” will open a drill-down box displaying the filtering options for any given search.



Three filtering categories are supported in the “Advanced search options”:

1. **Content type:** Searching in “Order Set” or “Plan of Care” content only or both
2. **Term type:** Searching for matching Zynx catalog term(s) or matching Custom catalog term(s) only or both



When the “No Catalog Term” option in the “Term type” category is checked and either the “Override” and/or “Additional info” checkbox is also checked, the system will search for matching items in either the Override field and/or the Additional info field AND items with no data in the catalog field. This search option is useful when one needs to search and replace a placeholder term with a valid catalog term.

3. **Content Status:** Searching in content that is in Draft, Review, or Released status only or any of those status combinations

### Hint

When 1 or more selections in the Advanced search options is checked, the “Advanced search option” button turns blue, indicating that at least 1 Advanced search option is active.



When the “Advanced search options” box turns blue, it is an indication that at least one advanced option is checked

## The Result List Grid

The system searches for matching Zynx and custom terms in the **latest** version of all custom content in the following status:

- Draft
- Review
- Released

By default, the system searches for matching terms in the following statuses:

- **Active** (applied to Zynx and Custom terms)
- **Inactive** (applied to Custom terms only)
- **Invisible** (applied to Zynx terms only)

Currently, the system does not search for **Deleted** terms.

The returning data are distributed across (3) tabs and presented, in table format, with the pertinent item information in each respective tab, and the matching keyword highlighted in yellow:

- **Items without Details** – This tab displays all items containing 1 or more matching keywords that have *no* orderable details added to the items.
- **Items with Details** – This tab displays all items containing 1 or more matching keywords that have 1 or more orderable or free text details added to the items.
- **Reminders** – This tab displays all reminder items containing 1 or more matching keywords.

When data are found matching the entered keyword, each of the tabs will have a corresponding number, listed in parentheses next to the tab name. This number represents the total number of matches found for each tab.

In the Result grid, the data are presented with the default primary sort on the “Item/Additional Info” column and the secondary sort on the “Content Name” column. Clicking on the Content Name link will open the content in a Content Viewer mode. Clicking on the Edit link (underneath each content name) will open the content in a Content Editor mode.



The presentation of the Edit link is based on the logon user's privileges. For users with no “Edit” permissions, this link will not be available.



When the Edit link is present, the system triggers the proper AuthorSpace warning message if the user clicks the Edit link from the Find and Replace page, of:

- Draft content that is checked out by another AuthorSpace user (to check in the content prior to check out for Find and Replace editing);
- Content in Review status (to revert the status to Draft from Review to check out for Find and Replace editing); and
- Content in Released status (to create the next version of the content in Draft status and check out for Find and Replace editing).

Each column header supports 2 functionalities, accessible via the arrow-down symbol on the right side of each column:

1. Sorting:

- Ascending
- Descending

2. Filtering:

The filtering function is available in 2 variations, depending on the data information the column contained. If the data can be categorized in a finite list of values, the grouping list value will be presented in a checkbox for selection. If the data are varied, such as data of the “Content Name,” the system provides a free-text filtering capability.

- Filter using a finite list of data category  
Checking a checkbox will filter the result per the checked entry (or entries). Un-checking an entry will remove the filtering.



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### Find and Replace

Enter a search term ?

Culture, blood Blood pressure monitoring education Search

Also search in:  Reminders  Overrides  Additional info Advanced search options

Items without Details (138) **Items with Details (149)**

Showing 1-50 of 136 results for **Culture, blood, Blood pressure monitoring, education**

Select one or more items and select an action below ?

Replace Item(s) Remove Item(s) Export Selected Results Export All Results

| Item                     | Item Additional Info  | Override | Item Type     | Content Name                      | Status | Folder Location     | Content Type | ↑ | ↓ |
|--------------------------|-----------------------|----------|---------------|-----------------------------------|--------|---------------------|--------------|---|---|
| <input type="checkbox"/> | <b>Culture, blood</b> |          | Non-med Order | Sort Ascending<br>Sort Descending | Draft  | 5.0 - Lab Exercises | Order Set    |   |   |
| <input type="checkbox"/> | <b>Education</b>      |          | Section       | Filter of Falls - diet            | Draft  | 5.0 - Lab Exercises | Plan of Care |   |   |
| <input type="checkbox"/> | <b>Education</b>      |          | Section       | Activity Intolerance              | Draft  | 2.0 - ZC Training   | Plan of Care |   |   |

- Filter using free-text

Enter text that matches the data in the respective column, and the system will filter the result and return a subset count based on the filtered criteria. The total count remains unchanged.

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### Find and Replace

Enter a search term ?

Culture, blood Blood pressure monitoring education Search

Also search in:  Reminders  Overrides  Additional info Advanced search options

Items without Details (138) **Items with Details (149)**

Showing 1-5 of 5 results for **Culture, blood, Blood pressure monitoring, education**

Select one or more items and select an action below ?

Replace Item(s) Remove Item(s) Export Selected Results Export All Results

Filters: **Item Type** **Content Name**

**Blue column header - indicators of filtering on respective columns**

**Filtering using free text**

| Item                     | Item Additional Info                 | Override | Item Type     | Content Name                                     | Status | Folder Location     | Content Type | ↑ | ↓ |
|--------------------------|--------------------------------------|----------|---------------|--|--------|---------------------|--------------|---|---|
| <input type="checkbox"/> | <b>Education</b> , activity          |          | Non-med Order | 0 1 Abdominal Aortic Aneurysm Repair - Discharge | Draft  | 5.0 - Lab Exercises | Order Set    |   |   |
| <input type="checkbox"/> | <b>Education</b> , diet              |          | Non-med Order | 0 1 Abdominal Aortic Aneurysm Repair - Discharge | Draft  | 5.0 - Lab Exercises | Order Set    |   |   |
| <input type="checkbox"/> | <b>Education</b> , smoking cessation |          | Non-med Order | 0 1 Abdominal Aortic Aneurysm Repair - Discharge | Draft  | 5.0 - Lab Exercises | Order Set    |   |   |

- Filtering indicators



There are 2 types of indicators that a filter is being applied to a column:

1. The column header turns blue.
2. A new button displays in the “Filters” row located under the “Replace Item(s)” and “Remove Item(s)” buttons.

To remove the filter from a column, simply click:

1. The arrow on the respective column header and uncheck the “Filters” checkbox OR
2. The X-icon on the respective button listed in the “Filters” row

## Pagination

The search results of the Find and Replace feature pages every 50 records. The page numbers are listed at the bottom of each page. The active page, or the current page, is denoted with a lighter blue color.

Due to pagination, the “Select All” checkbox (the checkbox icon in the column header of the first column on the result grid) will only select all the items in the current page. To this effect, it dictates the data to be included when using the “Export Selected Results” button. This button exports the data limited to the checked items on the current page. However, when the “Export All Results,” button is selected, the system exports the entire set of results of the current search, regardless of any existing column filtering or checked entries.

### Find and Replace

Enter a search term

Culture, blood blood pressure monitoring education Search

Also search: Reminders Overrides Additional info

Advanced search options

Items without Details (140) Items with Details (14)

Showing 1-50 of 140 results for **Culture, blood, blood pressure monitoring, education**

Select one or more items and select an action below

Replace Item(s) Remove Item(s)

Export Selected Results Export All Results

| Item                     | Item/Additional Info           | Override | Item Type     | Content Name  | Status | Folder Location     | Content Type |  |  |  |
|--------------------------|--------------------------------|----------|---------------|---|--------|---------------------|--------------|--|--|--|
| <input type="checkbox"/> | <a href="#">Culture, blood</a> |          | Non-med Order | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -dx<br><a href="#">Edit</a> | Draft  | 5.0 - Lab Exercises | Order Set    |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Risk of Falls - dx<br><a href="#">Edit</a>  | Draft  | 5.0 - Lab Exercises | Plan of Care |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Activity Intolerance<br><a href="#">Edit</a>  | Draft  | 2.0 - ZC Training   | Plan of Care |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Acute Pain<br><a href="#">Edit</a>  | Draft  | 2.0 - ZC Training   | Plan of Care |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Bleeding – Risk of (Full POC, after retrofit)<br><a href="#">Edit</a>                                   | Draft  | 9.0 - ZC Content    | Plan of Care |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Bleeding – Risk of (Full POC, before retrofit)<br><a href="#">Edit</a>                                  | Draft  | 9.0 - ZC Content    | Plan of Care |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Bleeding – Risk of (Starter Plan of Care, after retrofit)<br><a href="#">Edit</a>                       | Draft  | 9.0 - ZC Content    | Plan of Care |  |  |  |
| <input type="checkbox"/> | <a href="#">Education</a>      |          | Section       | Bleeding – Risk of (Starter Plan of Care, before retrofit)<br><a href="#">Edit</a>                      | Draft  | 9.0 - ZC Content    | Plan of Care |  |  |  |

1 2 3 4 5

## Find and Replace – Remove Function

The Batch Removal function is used when the user needs to remove an item that exists in custom content.

### Enabling the Remove Button

The Remove function is available across all 3 tabs. This button is enabled by selecting (checking) 1 or more:

- Any item types except Section and Problem in “Items without Details” and “Items with Details” tabs; or
- Reminder items in the “Reminders” tab

To remind users that the Remove button will not be enabled when an item in either Section or Problem item type is selected, a soft warning message, “Sections and Problems cannot be removed,” will briefly display at the top of the Find and Replace window.

The screenshot shows the 'Find and Replace' window in AuthorSpace. At the top, a yellow warning message states 'Sections and Problems cannot be removed'. Below the search bar, there are tabs for 'Items without Details (140)' and 'Items with Details (149)'. The search results table shows two items: 'Culture, blood' (Non-med Order) and 'Education' (Section). The 'Remove Item(s)' button is disabled.

| Item/Additional Info | Override | Item Type     | Content Name  | Status | Folder Location     | Content Type |
|----------------------|----------|---------------|---|--------|---------------------|--------------|
| Culture, blood       |          | Non-med Order | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) - 03a | Draft  | 5.0 - Lab Exercises | Order Set    |
| Education            |          | Section       | Risk of Falls - 03a   | Draft  | 5.0 - Lab Exercises | Plan of      |

The Remove or the Replace button is accessible via the icon at the end of the text. “Select 1 or more items and select an action below” above the respective buttons.

This screenshot is similar to the previous one but includes a tooltip that appears when the user hovers over the help icon next to the 'Remove Item(s)' button. The tooltip contains the following text:

**Replace Item(s)**  
To enable this button, selected rows must share the same Item Type.

**Remove Item(s)**  
To enable this button, deselect all rows containing Section and Problem Item Types. To remove these Item Types, edit the Order Set or Plan of Care individually.



Tips also display when the user mouses over the respective button.

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Find and Replace

Enter a search term

Culture, blood blood pressure monitoring education Search

Also search in:  Reminders  Overrides  Additional info Advanced search options

Items without Details (140) Items with Details (149)

Showing 1-50 of 140 results for **Culture, blood, blood pressure monitoring, education**

Select one or more items and select an action below

Replace Item(s) Remove Item(s) Export Selected Results Export All Results

| Item/Additional Info | Override | Item Type     | Content Name  | Status | Folder Location     | Content Type |
|----------------------|----------|---------------|---|--------|---------------------|--------------|
| Culture, blood       |          | Non-med Order | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to MedSurg) -dra | Draft  | 5.0 - Lab Exercises | Order Set    |

## The Removal Flow

The removal flow is identical in all 3 tabs.

### Step 1: Select Item(s)

After the selected items with supported items types are checked, the Remove button is enabled. Clicking on this button will start the flow for the Removal process, during which the system will guide the user through 2 screens.



When the Find and Replace completes processing a request, AuthorSpace will send an e-mail to the login user reporting on the status of the request. This e-mail includes an attachment, covering the data available via the “Export List” function, plus detailing the transaction status for each submitted item.



Users who do not have an e-mail address saved in AuthorSpace, should refer to the section titled “Find and Replace – User with No E-mail” for details on how to enter the e-mail address.

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Find and Replace

Enter a search term

Culture, blood blood pressure monitoring education Search

Also search in:  Reminders  Overrides  Additional info Advanced search options

Items without Details (140) Items with Details (149)

Showing 1-50 of 88 results for **Culture, blood, blood pressure monitoring, education**

Select one or more items and select an action below

Replace Item(s) Remove Item(s) Export Selected Results Export All Results

Filters: Item Type

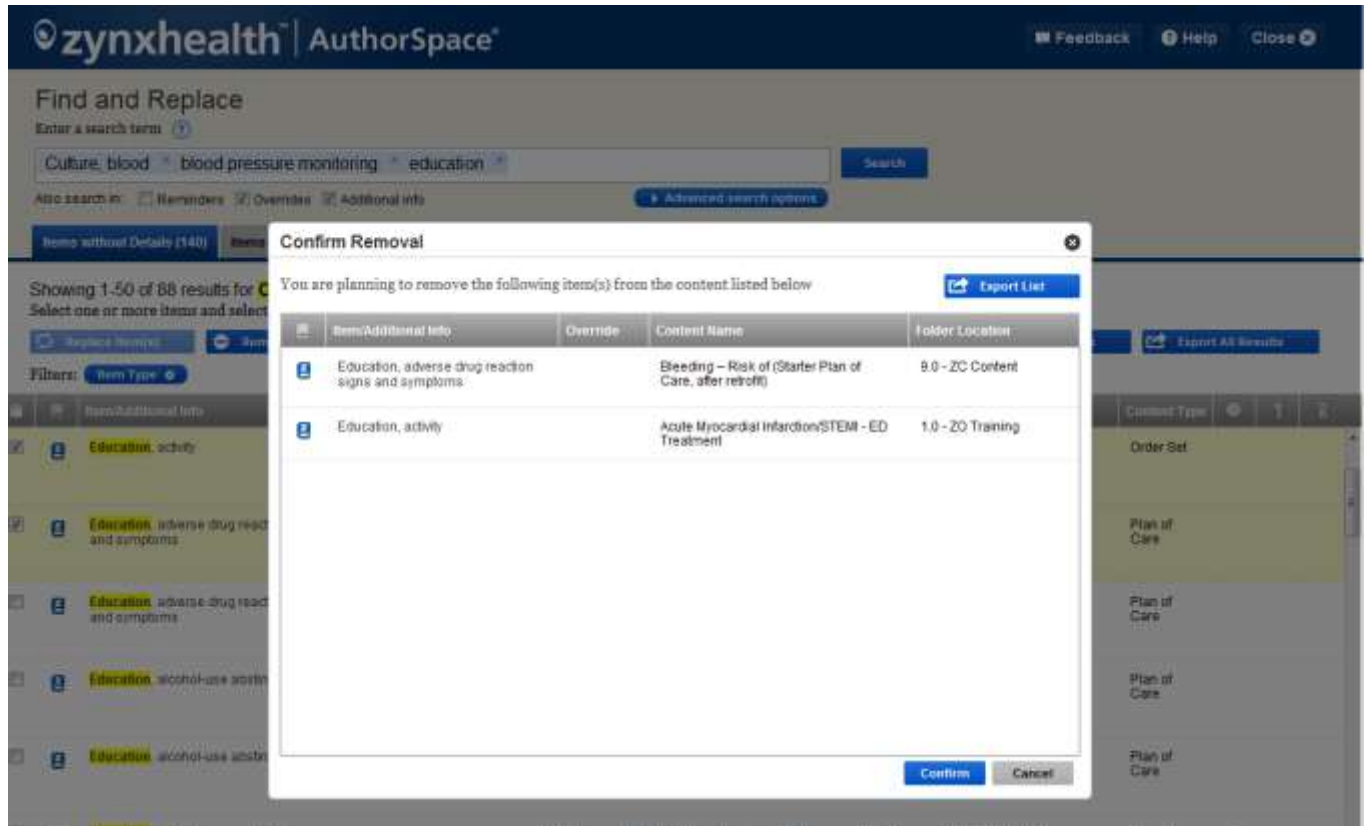
| Item/Additional Info                                | Override | Item Type     | Content Name  | Status | Folder Location   | Content Type |
|---|----------|---------------|---|--------|-------------------|--------------|
| Education, activity                                 |          | Non-med Order | Adult Myocardial Infarction/STEM-ED Treatment Edit            | Draft  | 1.0 - ZO Training | Order Set    |
| Education, adverse drug reaction signs and symptoms |          | Activity      | Bleeding – Risk of (Starter Plan of Care, after retest) Edit  | Draft  | 9.0 - ZC Content  | Plan of Care |
| Education, adverse drug reaction signs and symptoms |          | Activity      | Bleeding – Risk of (Starter Plan of Care, before retest) Edit | Draft  | 9.0 - ZC Content  | Plan of Care |



## Step 2: Confirm Removal

The first screen is the “**Confirm Removal**” screen. This screen summarizes the list of items the user needs to remove from the selected content. Use the “Export List” button to save a copy of this list if needed.

Click the “Confirm” button to move to the second screen of the Removal process, the “**Start Removal**” screen.



## Step 3: Start Removal

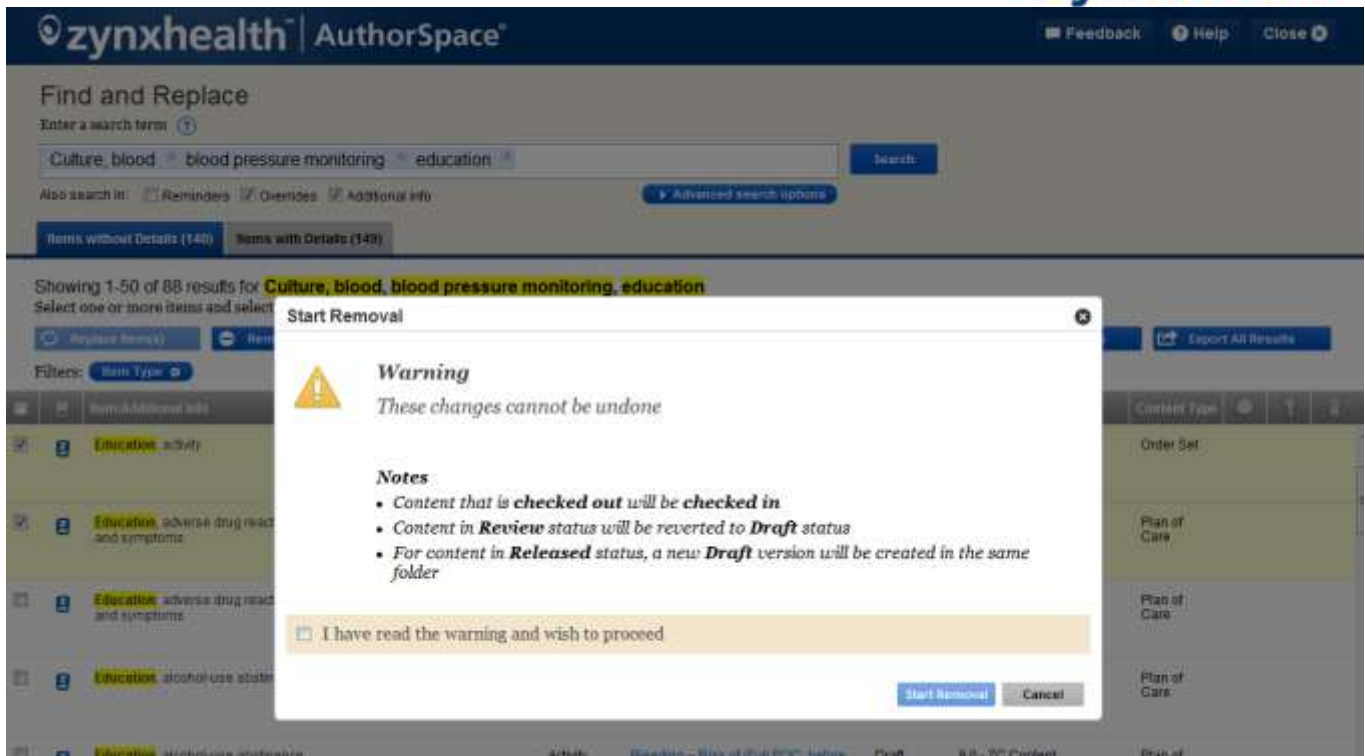
The “**Start Removal**” or “**Start Replacement**” for the Batch Replacement will be described later. The screen provides additional information after the request is submitted:

- How the system will handle content in various statuses, eg:
  - Content that is checked out will be checked in
  - Content in Review status will be reverted to Draft status
  - For content in Released status, a new Draft version will be created in the same folder
- The system cannot reverse these changes automatically

This screen also requires the user to acknowledge the information by checking the checkbox, “I have read the warning and wish to proceed,” before the “**Start Removal**” (or the “**Start Replacement**”) button is enabled.



Once the Removal process starts, the system does not provide the ability to go back to the previous screen in the flow. Users would need to cancel the current process and initiate a new flow.



#### Step 4: System Acknowledgment

Once the request has been submitted successfully, the system displays an acknowledgement of the request with the following message: “Your change request has been submitted successfully. You will receive an e-mail once the changes have been completed.” This message disappears after 6 seconds of display.



After the request has been submitted successfully, the system will disable the checkbox(es) of the submitted entries in the current search to prevent users from re-submission of the same item. Users should still be able to submit removal or replacement for non-selected items.

Click the Search button again to refresh the result list or change the search term in the Search box to see the updates once the changes have been processed, ie, when the Change Request Processed e-mail is received.

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**Find and Replace** Your change request has been submitted successfully. You will receive an e-mail once the changes have been completed.

Enter a search term

Also search in:  Reminders  Overrides  Additional info

Showing 1-50 of 88 results for **Culture, blood, blood pressure monitoring, education**  
 Select one or more items and select an action below

Filters:

| <input type="checkbox"/>            | Item/Additional Info  | Override | Item Type     | Content Name  | Status | Folder Location | Content Type |
|-------------------------------------|---|----------|---------------|---|--------|-----------------|--------------|
| <input checked="" type="checkbox"/> | <b>Education</b> , activity                                 |          | Non-med Order | Acute Myocardial Infarction/STEMI - ED Treatment<br><a href="#">Edit</a>          | Draft  | 1.0-ZO Training | Order Set    |
| <input checked="" type="checkbox"/> | <b>Education</b> , adverse drug reaction signs and symptoms |          | Activity      | Bleeding - Risk of (Starter Plan of Care, after retrofit)<br><a href="#">Edit</a> | Draft  | 9.0-ZC Content  | Plan of Care |

### Step 5: The Change Request Processed E-mail

Once AuthorSpace has completed processing the request, the system sends an e-mail and status report to the login user. The screenshot of the e-mail is presented below.

From: [authorspace@zynx.com](mailto:authorspace@zynx.com) Sent: Wed 7/18/2012 11:13 AM  
 To: [amscott@zynx.com](mailto:amscott@zynx.com)  
 Cc:  
 Subject: Find and Replace - Change Request Processed

Message

Dear Tony Scott

Your Find and Replace request has been completed.

**Summary**

|                           |  |
|---------------------------|--|
| Environment               | Albert Demo Environment                              |
| Search Keywords           | Culture, blood, blood pressure monitoring, education |
| Request Type              | Remove/Items without Details                         |
| Number of Items Submitted | 2  |
| Number of Items Changed   | 2  |
| Submitted                 | 07/18/2012 11:12:29 PDT                              |
| Completed                 | 07/18/2012 11:12:31 PDT                              |

Note: If the number of items submitted is different from the number of items changed (as shown above), refer to the "Notes" column in the attached .csv file.

Thank you,  
 Zynx Health Support  
 888.996.0435  
[support@zynx.com](mailto:support@zynx.com)

An attachment is also included in this e-mail detailing the status of each transaction within this batch request, as presented in column A (**Change Result**) and B (**Notes**) in the spreadsheet below.



| Change Result | Notes | Catalog Type | Catalog Term  | Additional Info | Override | Item Type     | Content Name  | Status | Folder Location   | Content Type | Evidence | Key Clinical Processes | Performance Measures |
|---------------|-------|--------------|---|-----------------|----------|---------------|---|--------|-------------------|--------------|----------|------------------------|----------------------|
| Removed       |       | Zynx         | Education, activity                                 |                 |          | Non-med Order | Acute Myocardial Infarction/STEMI - EII Treatment         | Draft  | 1.0 - ZI Training | Order Set    |          |                        |                      |
| Removed       |       | Zynx         | Education, adverse drug reaction signs and symptoms |                 |          | Activity      | Bleeding - Risk of (Starter Plan of Care, after retrofit) | Draft  | 6.0 - ZI Content  | Plan of Care |          |                        |                      |

## Find and Replace – Replace Function

The Batch Replacement function is used when the user needs to replace:

- An existing catalog term of an item with another catalog term
- The override placeholder with a catalog term

An example of a common replacement use is replacing a Zynx catalog term with an equivalent custom term. AuthorSpace supports the replacement of a catalog term for another catalog term of the same item type only. The Find and Replace feature extends this behavior in the Batch Replacement process.

### Enabling the Replace Button

As mentioned in the limitation of the feature section above, the Batch Replacement function is not available in the tab “Items with Details.” Enabling the Replace button in the tab:

- “Items without Details” is by selecting (checking) 1 or more items sharing the same Item Type:
- “Reminders” is by selecting (checking) 1 or more Reminder items

Similar in concept but slightly different in flow, this section describes 2 Batch Replacement flows in the “Items without Details” tab and the “Reminders” tab.

To remind users that the Replace button will not be enabled when selecting items of different item types, a soft warning message, “Different Item Types cannot be replaced en masse,” will briefly display at the top of the Find and Replace window.

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### Find and Replace

Enter a search term ⚠ Different Item Types cannot be replaced en masse

Culture, blood Blood pressure monitoring education Search

Also search in:  Reminders  Overrides  Additional info Advanced search options

Items without Details (137) **Items with Details (148)**

Showing 1-50 of 85 results for **Culture, blood, Blood pressure monitoring, education**

Select one or more items and select an action below ?

Replace Item(s) Remove Item(s) Export Selected Results Export All Results

Filters: **Item Type**

| Item                                | Item/Additional Info                     | Override | Item Type     | Content Name  | Status | Folder Location     | Content Type |
|-------------------------------------|--|----------|---------------|---|--------|---------------------|--------------|
| <input type="checkbox"/>            | <b>Culture, blood</b>                    |          | Non-med Order | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -dis Edit | Draft  | 5.0 - Lab Exercises | Order Set    |
| <input checked="" type="checkbox"/> | <b>Education, activity</b>               |          | Non-med Order | 0.1 Abdominal Aortic Aneurysm Repair - Discharge Edit                                 | Draft  | 5.0 - Lab Exercises | Order Set    |
| <input checked="" type="checkbox"/> | <b>Education, alcohol-use abstinence</b> |          | Activity      | Bleeding – Risk of (Full POC after reflow) Edit                                       | Draft  | 9.0 - ZC Content    | Plan of Care |
| <input type="checkbox"/>            | <b>Education, alcohol-use abstinence</b> |          | Activity      | Bleeding – Risk of (Full POC before reflow)   | Draft  | 9.0 - ZC Content    | Plan of Care |

## “Items Without Details” – The Batch Replacement Flow

### Step 1: Select Item(s)

After the selected items with the same items types are selected (checked), the Replace button is enabled. Click this button to start the flow for the replacement of catalog terms in the selected items.

**zynxhealth | AuthorSpace** Feedback Help Close

### Find and Replace

Enter a search term ?

assess Search

Also search in:  Reminders  Overrides  Additional info Advanced search options

Items without Details (136) **Items with Details (100)**

Showing 1-50 of 136 results for **assess**

Select one or more items and select an action below ?

Replace Item(s) Remove Item(s) Export Selected Results Export All Results

Select rows sharing the same Item Type to replace them

| Item                                | Item/Additional Info              | Item Type     | Content Name   | Status   | Folder Location     | Content Type |
|-------------------------------------|-----------------------------------|---------------|--|----------|---------------------|--------------|
| <input checked="" type="checkbox"/> | <b>Assess nausea and vomiting</b> | Non-med Order | 0.1 Abdominal Aortic Aneurysm Repair - Discharge Edit          | Draft    | 5.0 - Lab Exercises | Order Set    |
| <input checked="" type="checkbox"/> | <b>Assess neurologic status</b>   | Non-med Order | Acute Myocardial Infarction(STEMI) - AB Day 2 - Version 2 Edit | Released | 3.0 - Web Demo      | Order Set    |
| <input type="checkbox"/>            | <b>Assess neurologic status</b>   | Non-med       | Acute Myocardial Infarction(STEMI) - Admission to              | Draft    | 3.0 - Web Demo      | Order Set    |

## Step 2: Replacement Item(s)

When the user selects a replacement catalog term in this first screen, the “**Replacement Item(s)**” screen, the resulting Auto-Suggest List in the replacement term selection field is limited to matching entries to the entered keyword(s) that have the same Item Type as the items selected in the Result grid.



If the replacement item term is not available in the Auto-Suggest List, it indicates that the desired term is not in the current Catalog. As with the existing AuthorSpace functionality, the desired term would need to be added to the catalog prior to executing term replacement individually or in batches.



The terms displayed in the Auto-Suggest List in this screen are matching **active** status Zynx and Custom terms

## Show/Hide Advance Options

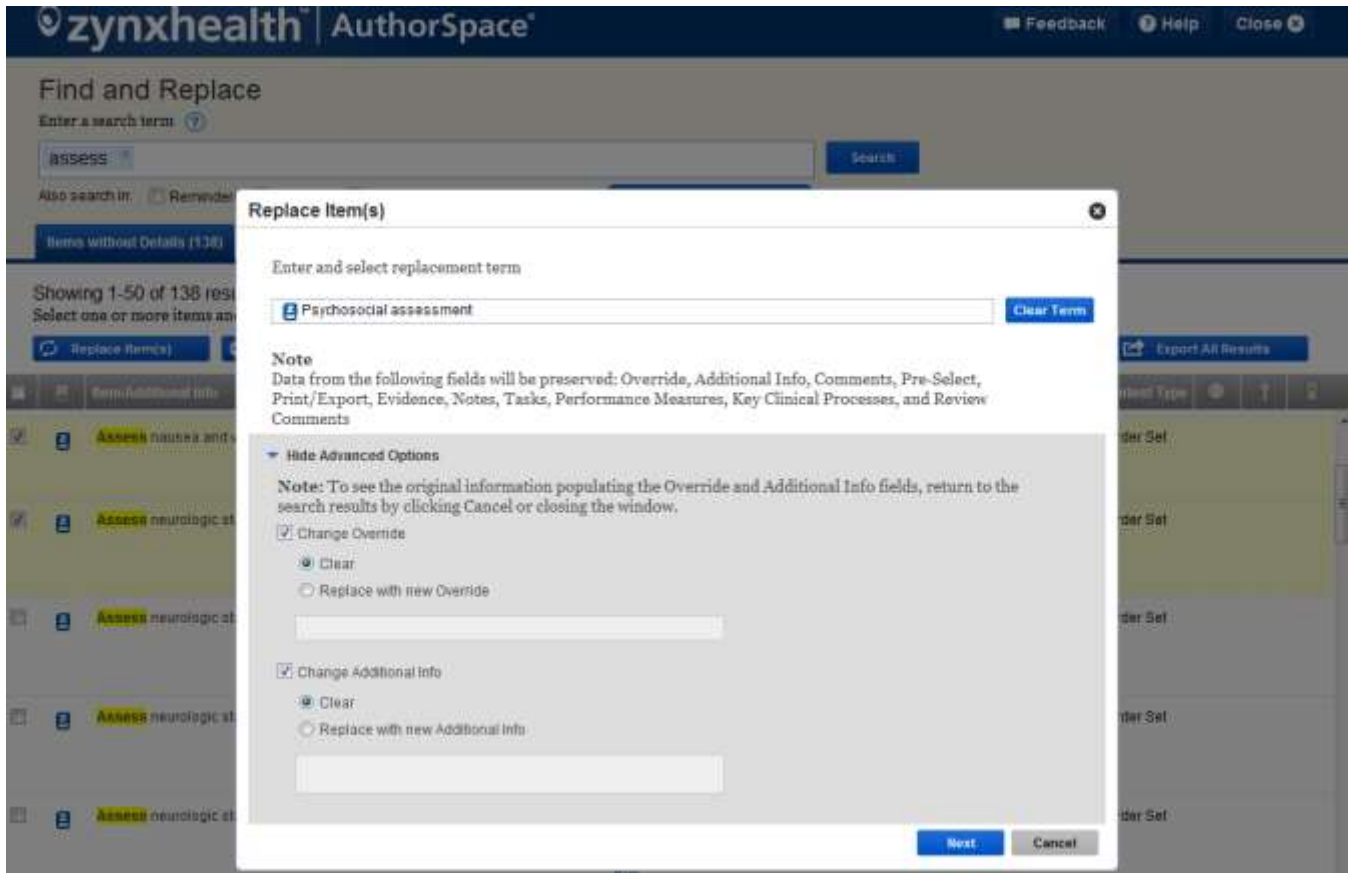
The Find and Replace feature also supports the ability to modify the Override and the Additional Info feature for the replacement items. As a rule, when carrying out the Batch Replacement, the system preserves the existing data in the Override and the Additional Info fields. However, with the Advance Options, users can elect to clear or modify the data in these 2 fields for all selected items.

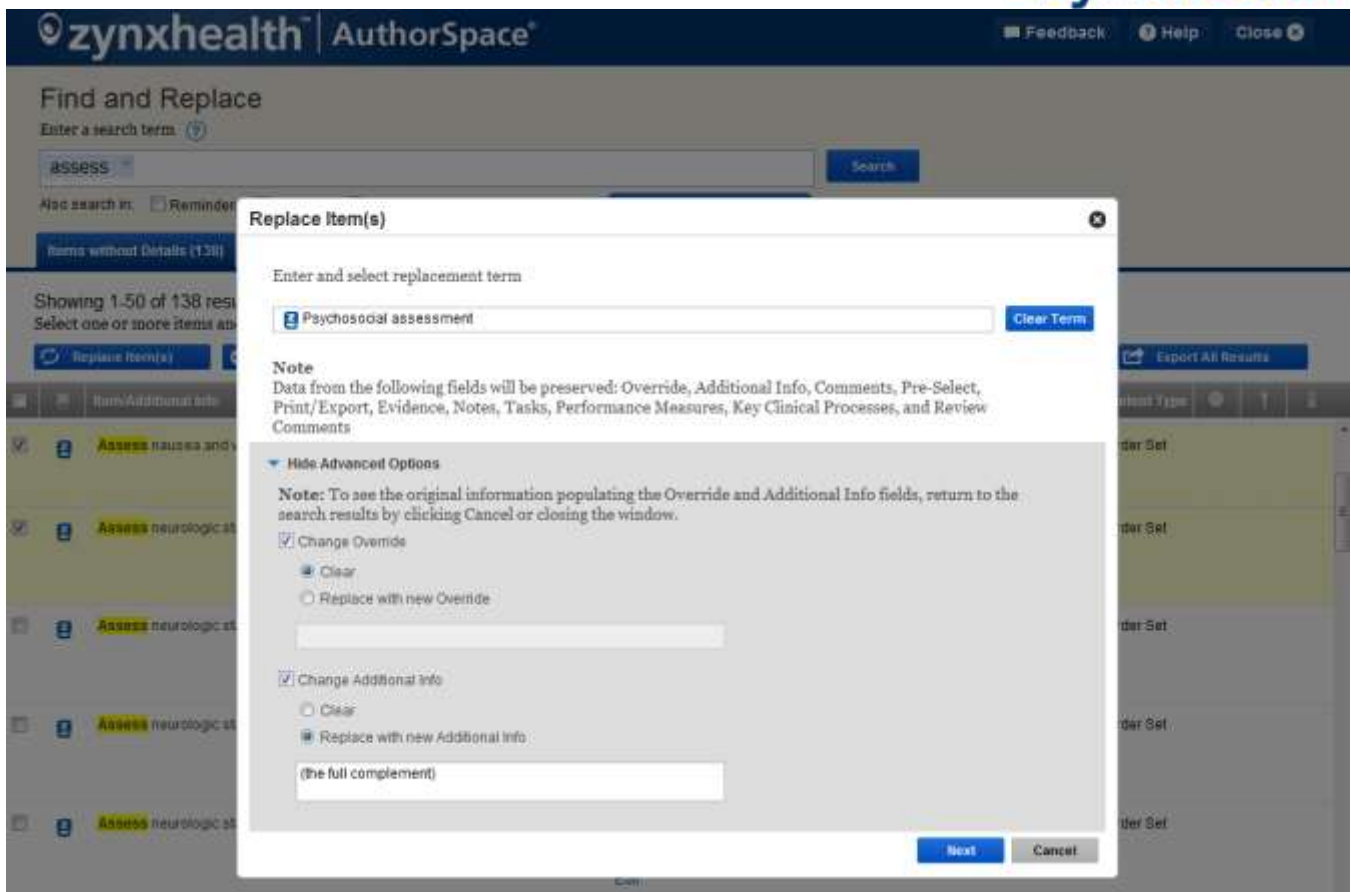
Click on the arrow in front of the “Show Advance Options” section to expand the advanced options. Two checkboxes are used to manage these changes:

- Change Override
- Change Additional Info

The system will enable the proper section for input once the user checks on a respective checkbox.

By default, the system sets to **clear** (remove) the Override and/or Additional Info when the user checks either checkbox.





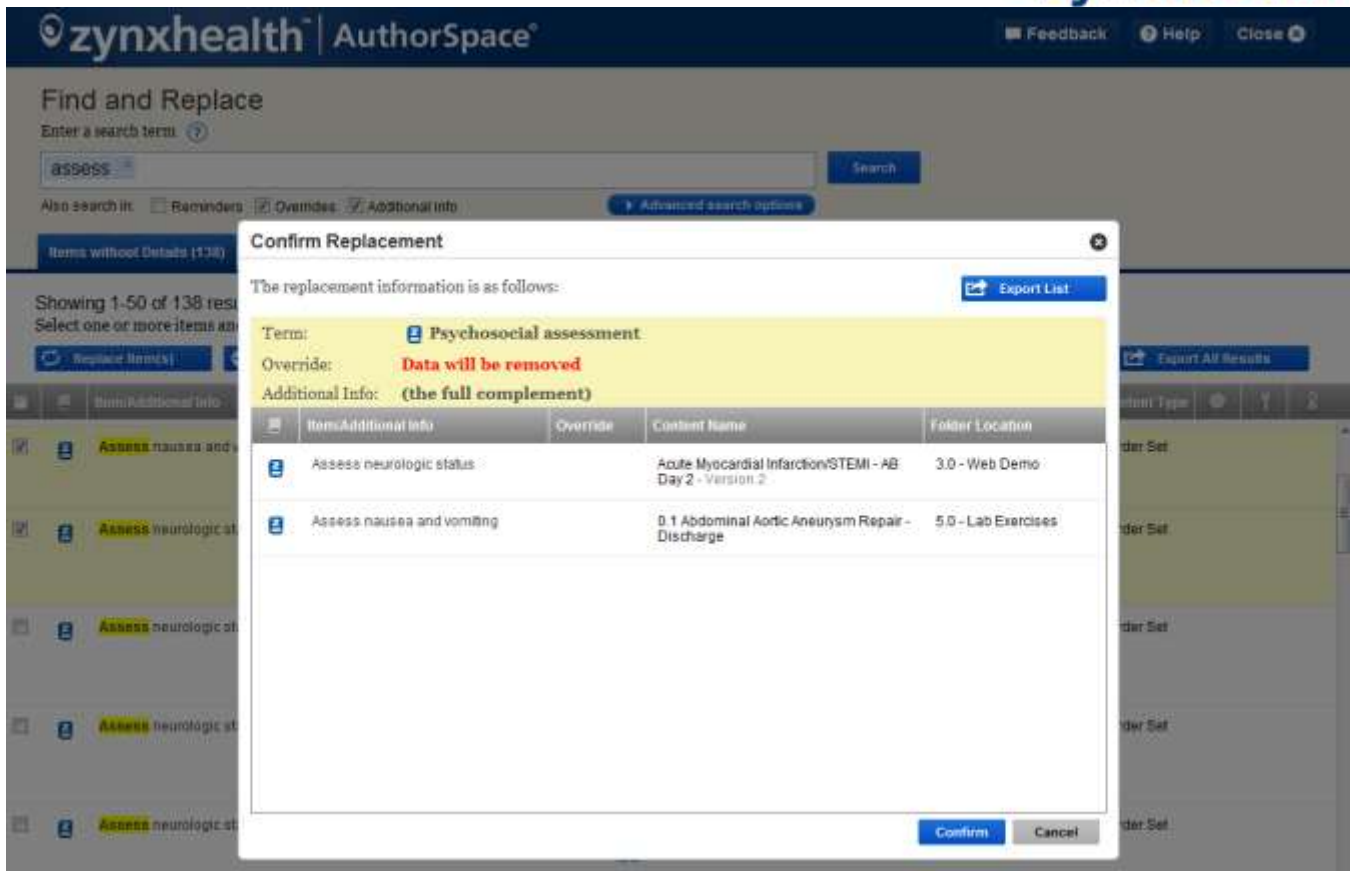
There are 2 options for each section:

- The Clear option is used when the user wants to clear the existing data in the respective fields.
- When the “Replace with new [override]/[additional information]” option is selected, the user must enter a new text string for the respective field.

When the Batch Replacement is submitted, the system will either clear the data or update the indicated fields with the entered text in the indicated field for all selected replacement items.

### Step 3: Confirm Replacement

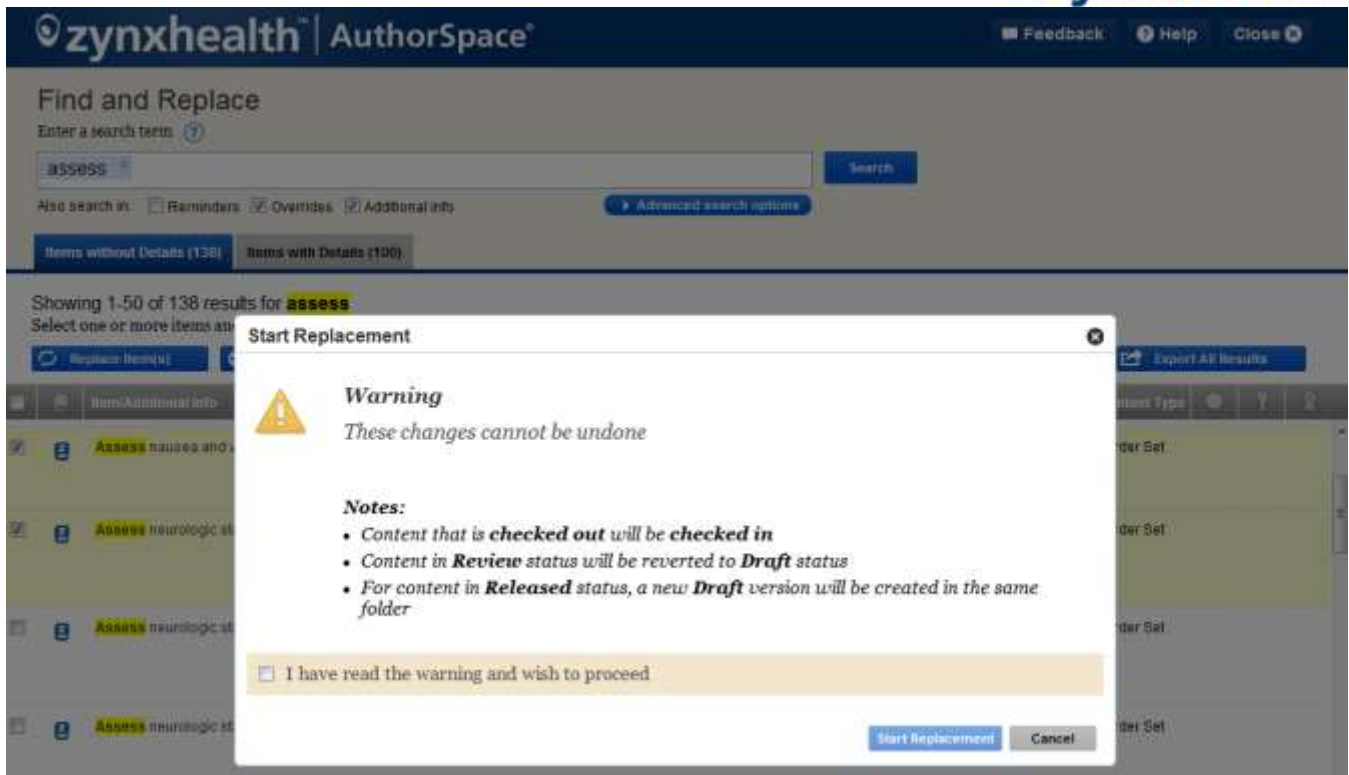
This second screen, “**Confirm Replacement**,” summarizes the selected list of items the user needs to replace from the selected content. Use the “Export List” button to save a copy of this list if needed.



#### Step 4: Start Replacement

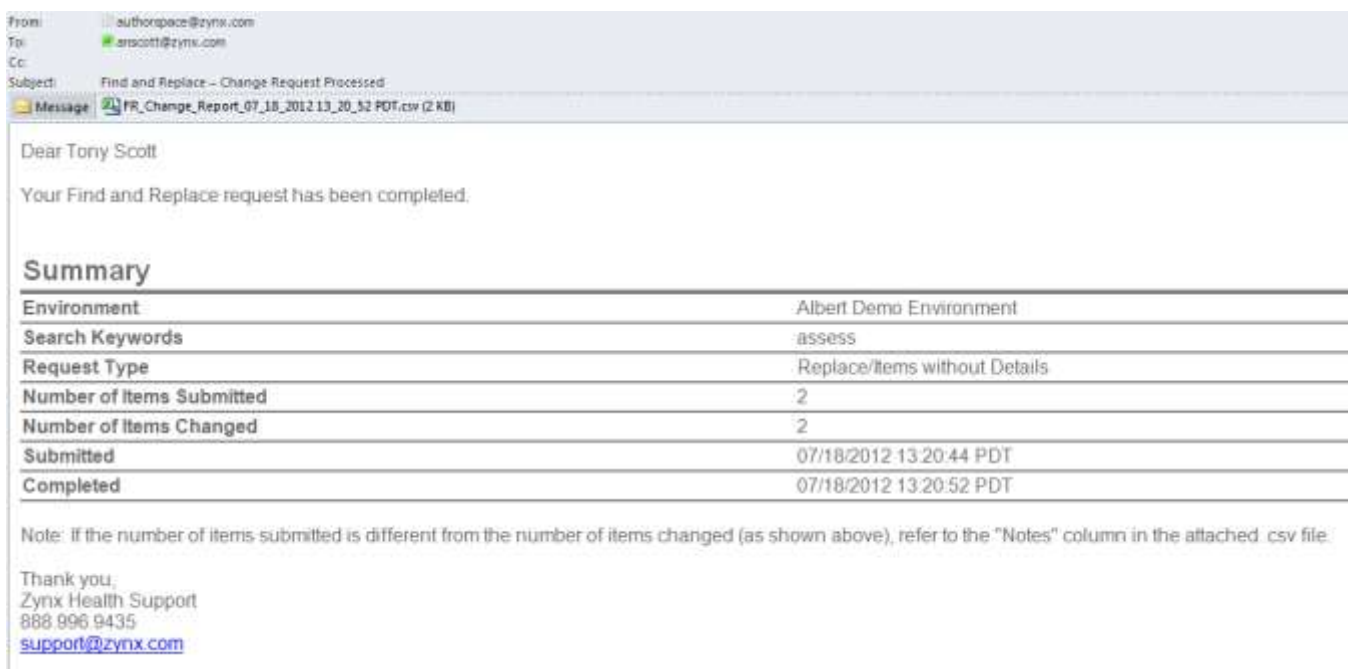
The “**Start Replacement**” screen provides additional details on how the system would handle the content once the request is submitted, as mentioned in the “**Start Removal**” screen above, including the user acknowledgement of the information before the “**Start Replacement**” button is enabled.





Step 5: The Change Request Processed E-mail

Please refer to the [Remove request processed e-mail](#) for details.



In addition to the Change Result and the Notes columns, the Replacement Report also includes the entered replacement details applied for the requested items.

| Change Result | Notes  | Catalog Type | Catalog Term               | Replacement Term        | Additional Info | Replacement Additional Info | Override | Replacement Override | Item Type     | Content Name  | Status   | Folder Location     | Content Type | System | Key Clinical Process | Performance Measures |
|---------------|--|--------------|----------------------------|-------------------------|-----------------|-----------------------------|----------|----------------------|---------------|---|----------|---------------------|--------------|--------|----------------------|----------------------|
| Replaced      |  | Zynx         | Assess nausea and vomiting | Psychosocial assessment |                 | (the full complement)       |          |                      | Non-med Order | 0.1 Abdominal Aortic Aneurysm Paper - Discharge           | Draft    | 3.8 - Lab Exercises | Order Set    |        |                      |                      |
| Replaced      | Order Set/Plan of Care was originally in Released status. A new version was created and is now in Draft status. Review content and change status as appropriate. | Zynx         | Assess neurologic status   | Psychosocial assessment |                 | (the full complement)       |          |                      | Non-med Order | Acute Myocardial Infarction/STEMI - I&B Day 2 (Version 2) | Released | 3.8 - Web Demos     | Order Set    |        |                      |                      |



## “Reminders” – The Batch Replacement Flow

### Step 1: Select Reminder(s)

To search for Reminders, the user must click the checkbox “Reminders” in the “Also search in” section prior to executing the search. After at least 1 reminder is selected in the **Reminders** tab, the Replace button is enabled. Click this button to start the flow for the replacement process for the selected reminders.

**zynxhealth | AuthorSpace** Feedback Help Close

### Find and Replace

Enter a search term ?

ASSESS Search

Also search in:  Reminders  Overrides  Additional Info Advanced search options

Items without Details (138) | Items with Details (100) | **Reminders (49)**

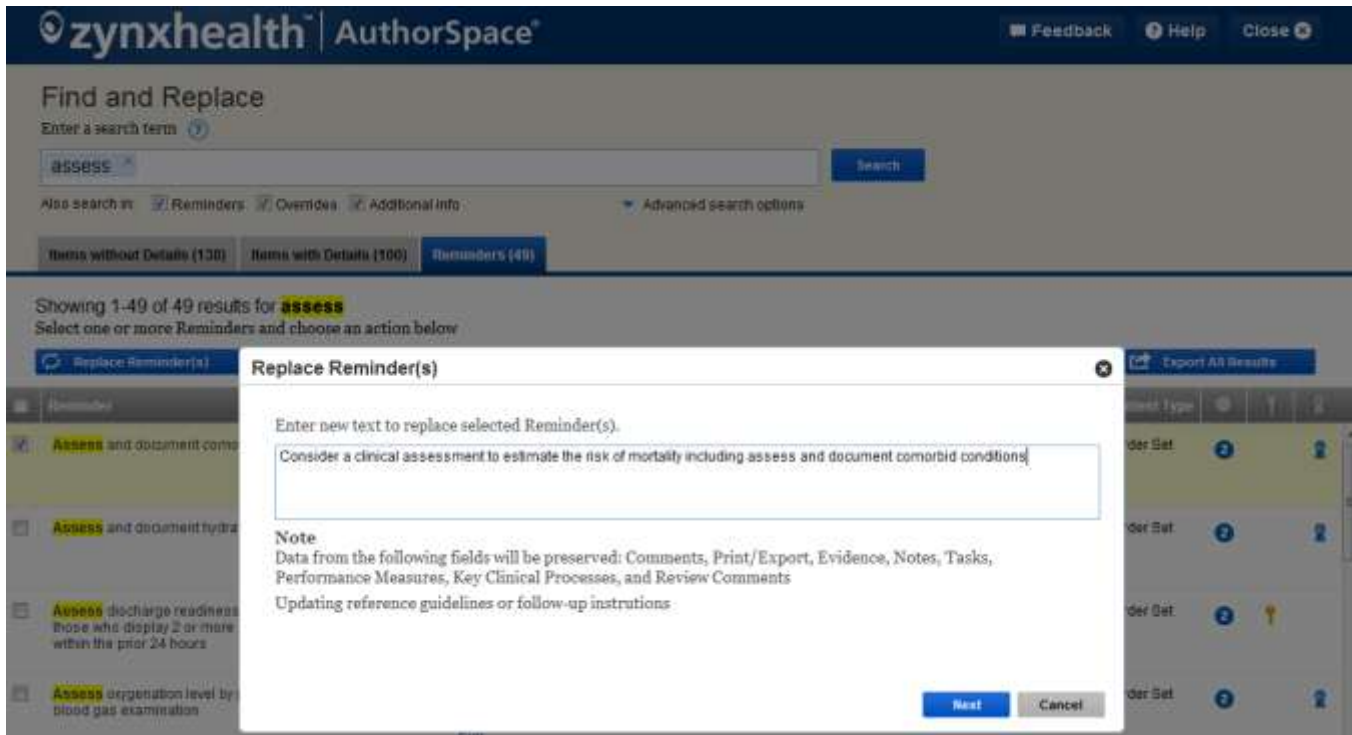
Showing 1-49 of 49 results for **assess**  
Select one or more Reminders and choose an action below

Replace Reminder(s) Remove Reminder(s) Export Selected Results Export All Results

| Reminder  | Content Name   | Status | Folder Location     | Content Type |   |  |  |
|---|--|--------|---------------------|--------------|---|--|--|
| <input checked="" type="checkbox"/> Assess and document comorbid conditions   | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -drs<br>Edit | Draft  | 5.0 - Lab Exercises | Order Set    | 2 |  |  |
| <input type="checkbox"/> Assess and document hydration status   | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -drs<br>Edit | Draft  | 5.0 - Lab Exercises | Order Set    | 2 |  |  |
| <input type="checkbox"/> Assess discharge readiness and delay discharge for those who display 2 or more signs of clinical instability within the prior 24 hours | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -drs<br>Edit | Draft  | 5.0 - Lab Exercises | Order Set    | 2 |  |  |
| <input type="checkbox"/> Assess oxygenation level by pulse oximetry or arterial blood gas examination   | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -drs<br>Edit | Draft  | 5.0 - Lab Exercises | Order Set    | 2 |  |  |
| <input checked="" type="checkbox"/> Consider a clinical assessment to estimate the risk of mortality  | Acute Myocardial Infarction/STEMI - AB Day 2<br>Edit                                     | Draft  | 3.0 - Web Demo      | Order Set    | 2 |  |  |
| <input type="checkbox"/> Consider a clinical assessment to estimate the risk of   | Acute Myocardial Infarction/STEMI - Admission to   | Draft  | 3.0 - Web Demo      | Order Set    |   |  |  |

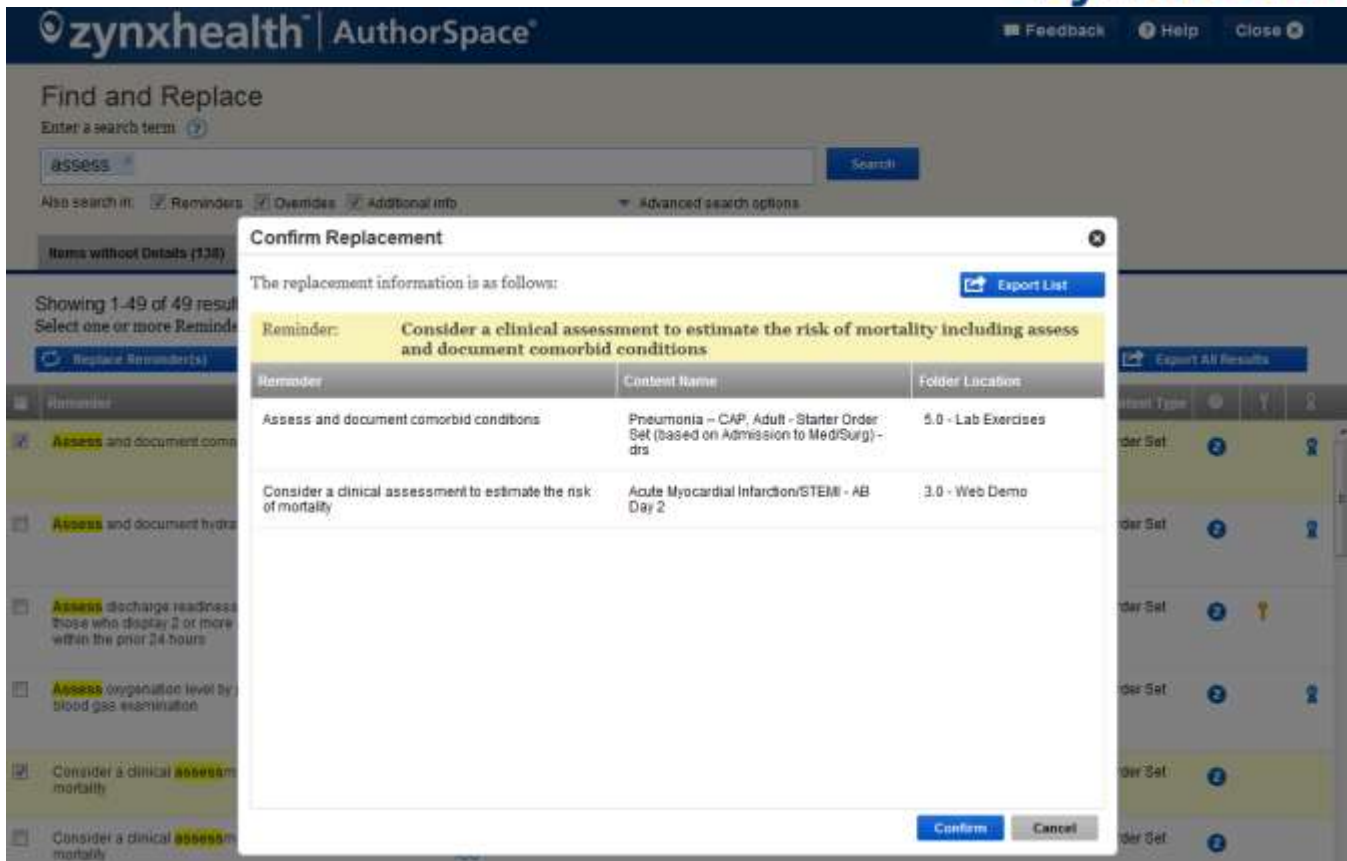
## Step 2: Replace Reminder(s)

The user enters the new reminder text for replacement and clicks “Next”:



## Step 3: Confirm Replacement

This screen presents the summary list of reminders selected for replacement in this batch.



#### Step 4: Start Replacement

Refer to the [Start Replacement](#) section for details.

#### Step 5: The Change Request Processed E-mail

Please refer to the [Remove request processed e-mail](#) for details.

### Find and Replace – Audit Trail

To maintain an audit trail of the action carried out in the Removal or Replacement Batch processing, the Find and Replace feature logs a record of each action in the history section of the respective content, accessible via the Manage link.

|                     |   |                         |                              |
|---------------------|---|-------------------------|------------------------------|
| <b>Name:</b>        | Pneumonia – CAP, Adult - Starter Order Set (based on Admission to Med/Surg) -drs (Order Set ID: 537255-1) | <b>Assigned Team:</b>   | Base Team                    |
| <b>Status:</b>      | Draft   | <b>Expiration Date:</b> |                              |
| <b>Event:</b>       | Admission   | <b>Venue:</b>           | Med/Surg                     |
| <b>Module:</b>      | Pneumonia – CAP, Adult  | <b>Current Version:</b> |                              |
| <b>Institution:</b> | Albert Demo Hospital (default)  | <b>Owned By:</b>        | Steffen, Danielle (dsteffen) |
| <b>External ID:</b> |   | <b>Comments:</b>        |                              |
| <b>Options:</b>     | <input type="checkbox"/> Mark as Linkable Content<br><input type="checkbox"/> Publish to ViewSpace        |                         |                              |

**Order Set Process Life Cycle**

| Milestone | Target Date | Actual Date | Last Modified |
|-----------|-------------|-------------|---------------|
|           |             |             |               |

[Add](#) | [Update](#) | [Delete](#)

**Work Queue**

| Subject | Priority | Status | Due Date | Requested By | Assigned To | Delegated To |
|---------|----------|--------|----------|--------------|-------------|--------------|
|         |          |        |          |              |             |              |

[Add](#) | [Edit](#) | [Delete](#)

**Review Status**

| Request Date | Reviewer | Status | Review Date |
|--------------|----------|--------|-------------|
|              |          |        |             |

**Order Set Reviews**

| Review Date | Reviewed By | Comments |
|-------------|-------------|----------|
|             |             |          |

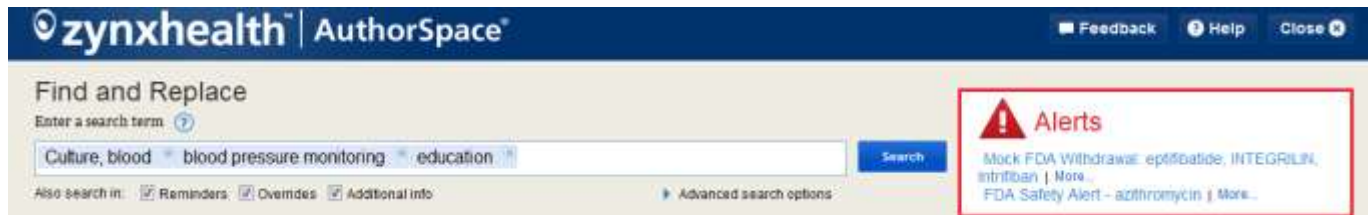
**Order Set History**

| Change Date/Time     | User              | Change   |
|----------------------|-------------------|--|
| 7/18/2012 1:34:40 PM | Scott, Tony       | Find and Replace > Reminder replaced                       |
| 7/18/2012 1:34:39 PM | Scott, Tony       | Find and Replace > Content checked in                      |
| 3/26/2012 1:56:37 PM | Steffen, Danielle | Content Checked out  |
| 3/26/2012 1:51:36 PM | Steffen, Danielle | Duplicate created from Zynx in folder: 5.0 - Lab Exercises |

## Find and Replace – The Alerts Box

The Alerts Box is a special function and only appears if there is a medication currently being withdrawn by the FDA. The duration of its display is dependent on the expiration date set by the Zynx Clinical Team for the respective search link.

When present, the box is located at the upper right-hand corner of the Find and Replace window. It displays the link(s) to the medication(s) currently, or recently, being set as withdrawn. When a link in this box is clicked, the system populates the Search box with all the appropriate keyword(s), matching the respective withdrawal medication(s), as determined by the Zynx Clinical Team.



Click the Search button to generate a result list for the matching items used in the current custom content. The Remove and Replace function will be available as described in the above flow.

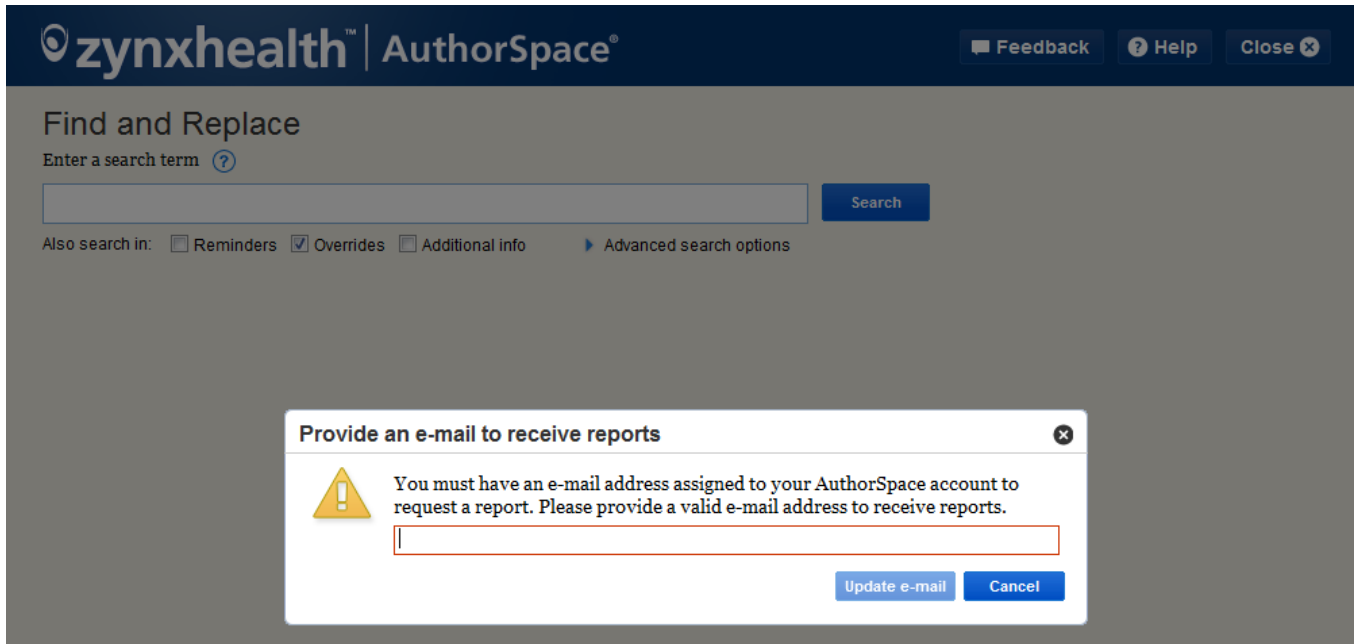
The “More...” link at the end of each search description is a reference link to an external source, supporting the reason for the withdrawal.

When there are no active alerts, this box will not be displayed on the application.



## Find and Replace – Environment Manager With No E-mail

As stated previously, the Find and Replace function will send a status report to the submitting user when the batch has been processed. To ensure the user receives the report, AuthorSpace checks to see if the user has an e-mail address on file. When no e-mail address exists for the logged in user, AuthorSpace displays a dialog pop-up window for the user to enter and submit an e-mail address. The system validates the format of the entered e-mail address and enables the “Update E-mail” button.



The screenshot shows the AuthorSpace interface for the 'Find and Replace' function. At the top, there is a dark blue header with the 'zynxhealth | AuthorSpace' logo and navigation buttons for 'Feedback', 'Help', and 'Close'. Below the header, the main content area is titled 'Find and Replace' and contains a search input field with a placeholder 'Enter a search term' and a 'Search' button. Below the search field, there are search filters: 'Also search in:' with checkboxes for 'Reminders', 'Overrides' (checked), and 'Additional info', along with a link for 'Advanced search options'. A modal dialog box is open in the center, titled 'Provide an e-mail to receive reports'. The dialog contains a warning icon and the text: 'You must have an e-mail address assigned to your AuthorSpace account to request a report. Please provide a valid e-mail address to receive reports.' Below the text is an empty text input field. At the bottom right of the dialog are two buttons: 'Update e-mail' and 'Cancel'.