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TermManager User Guide

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Introduction

TermManager has been designed to make managing and mapping local term sets easy and convenient. This document provides a short introduction to get you started.

Text Links

Clickable text links (HTML hyperlinks) in TermManager appear blue with no underline. When you hover the mouse pointer over the link, it will appear blue, in bold text, with an underline.




Examples:

Clickable text link [click here](#)

Clickable text link when the mouse pointer is hovered above [**click here**](#)

Icon-Based Interface

TermManager actions are icon-based. When managing lists of items, a general convention is followed:

- To **Create** a new item, click the create  icon at the top of the list.
- To **Edit** an item, click the edit  icon at the right of the item's row.
- To **Delete** an item, click the delete  icon at the right of the item's row.
- Other actions may also be available for each item. Hovering the mouse pointer over an icon will reveal a tool tip describing the action.

List Sizes and Filters

Most lists in TermManager have options for page size and filters. These appear at the top right of applicable pages.

Where available, page size can be changed between 15, 25, 50, and 100 items. Select the desired page size and click **Apply**.

Where available, lists can be filtered using dropdown menus and text filters. Specify your desired filter or text to match, and click **Apply**.

Help

Context-sensitive help is available throughout TermManager by clicking **Help** in the top menu.

TermManager Concepts

Terms and Term Sets

A **Term** (or Search Term) is a name or phrase that is to be mapped to a Concept.

Terms are contained in a **Term Set**, and may optionally be associated with a code that is not required to be unique.

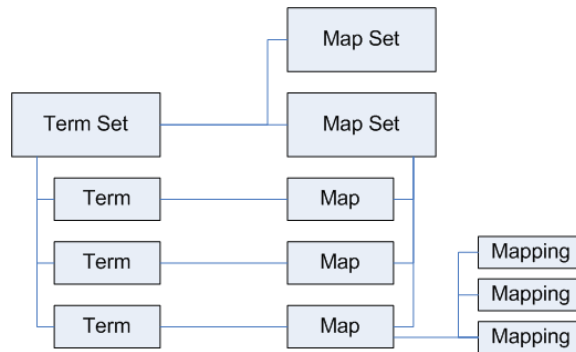
Maps, Map Sets, Mappings, and Mapping Qualifiers

A **Map** is a collection of Mappings for a given Term.

Maps are contained in a **Map Set**, which is associated with a Term Set. Every Term in a Term Set has one associated Map in a Map Set.

A **Mapping** is the relationship of a Term to a Concept in a target library. A Term's Map in a Map Set may contain multiple Mappings.

A **Mapping Qualifier** is a descriptor that can optionally be added to a Mapping.



Entity Relationship Diagram of Terms, Maps and Mappings

Workflow Types

When a Map Set is created, the creator chooses one of three Workflow Types:

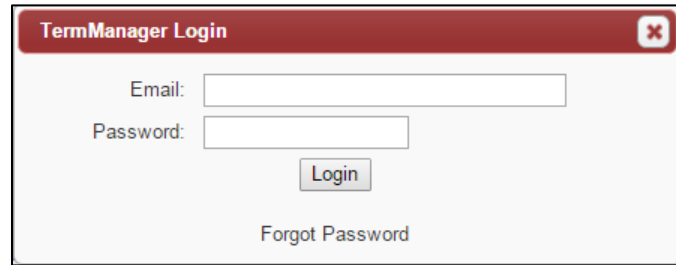
None	There is no workflow for this Map Set. Terms are mapped, but are not submitted to a Reviewer or Approver.
Approve Only	Terms are mapped, and those Maps are submitted to an Approver.
Review and Approve	Maps are first submitted to a Reviewer, who then submits them to an Approver.

Libraries

A **Library** is a collection of concepts from a terminology standard. It is the equivalent of an Index in TermWorks, which is created from a DTS Namespace or Subset.

Signing in to TermManager

To sign in to TermManager, click **Sign In** at the top-right of the TermManager screen. When prompted, enter your username (email address) and password, and click **Login**.



The image shows a screenshot of a web browser window titled "TermManager Login". The window has a red title bar with a close button (X) on the right. The main content area is white and contains two text input fields. The first field is labeled "Email:" and the second is labeled "Password:". Below the "Password:" field is a button labeled "Login". At the bottom of the dialog, there is a link labeled "Forgot Password".

TermManager Login Dialog

Forgot Password

If you have forgotten your TermManager password, click **Sign In** at the top-right of the TermManager screen. At the bottom of the login dialog, click **Forgot Password**. When prompted, enter your email address, and click **Reset Password**. Your TermManager password will be reset and emailed to you.

You will be required to change your password the next time you sign into TermManager.

Signing Out

You may sign out of TermManager at any time by clicking **Sign Out** at the top right of the TermManager screen.

The TermManager Home Page

After you sign in, you will see your personal TermManager Home page. You can always get back to your Home page by selecting **Home** in the menu bar. This page shows a summary of the tasks that have been assigned to you. You can click on existing assignments to be redirected to the Map Set page filtered on those assignments.

Term Sets

The first component of any TermManager project is a Term Set.

Term Sets are lists of terms or names that you want to manage. These terms can represent values in a diagnostic pick list, names in a lab dictionary, or items from an enterprise charge master. TermManager maintains these lists (along with a corresponding alphanumeric code that is not required to be unique if desired) in Term Sets.

Map Manager privileges are required to create a Term Set.

A Term Set may contain a maximum of 10,000¹ terms.

Terms are currently limited to 1024 characters.

Creating a Term Set

1. Select **Terms** from the menu bar.
2. Click the **Create** (+) icon. The Term Set form will appear.

The screenshot shows a web form titled "Create a new Term Set". It includes a "Term Set Name" input field, a "Description" text area, and a "Choose File" button for uploading a text or Excel file. There are checkboxes for "Skip header row" and "Import Mappings". A large text area labeled "Enter terms:" is provided for manual entry, with "~ or ~" centered above it. At the bottom, there are radio buttons for selecting a delimiter: "Pipe (|)", "Tab", and "Comma", along with an "Other:" text input. A "Save" button is located at the bottom right.

Term Set form

3. Give the Term Set a unique name and (optionally) enter a description.
4. Populate the Term Set by specifying a file for upload, or by manually entering terms.
5. If you specify a text file or manually enter terms, specify the column delimiter.

¹ *This limit can be customized for your TermManager installation by your TermManager System Administrator.*

File Upload

Import files can be Excel spreadsheets or delimited text files. The term should be in the first field (column) and an optional associated code in the second field¹.

1. Click the Browse button and navigate to the desired file.
2. If your file contains a header row, check the Skip Header Row box.
3. If you are importing concept mappings with your terms, check the Import Mappings box. (See below for further instructions on importing mappings.)
4. If you are uploading a text file, specify the column delimiter.
5. Click Save to save the Term Set.

Manual Entry

For short Term Sets, you can alternately enter your terms in the text box.

1. Type (or cut-and-paste from another program) your terms and their codes into the text box. Enter each term/code on a new line.
2. If you are entering codes with your terms, specify the data delimiter.
3. Click **Save** to save the Term Set.

Importing Mappings with a Term Set

You may optionally import mappings with your Term Set when uploading a file. A new Map Set will be created containing the uploaded mappings.

By default, the columns in your input file should be¹:

- Term
- Code
- Mapped concept name
- Mapped concept code
- Mapped concept namespace
- Mapping Qualifier name (*optional*)
- Target Library (*optional*)²
- Target Library Version (*optional*)³

¹ *The column order may be customized for your TermManager installation by your TermManager System Administrator. To view the current column order for your system, select **Admin** from the top menu.*

² *If Target Library is omitted, concept namespace will be used to identify the target library for the new Map Set.*

³ *If Target Library Version is omitted, the version of the created mapping will be left blank.*

Mapping Import Column Descriptions

Concept Name	The name of the mapped concept
Concept Code	The code of the mapped concept
Concept Display Name	Optional alternate display name of the concept
Namespace	The namespace from which the concept originated
Mapping Qualifier	The name of an optional Mapping Qualifier to assign to this mapping
Target Library	The name of the search library containing the mapped concept. If omitted, the value specified in the Namespace column is used.
Library Version	The version of the search library
Status	The name of the TermManager status to assign this Term-Map. If multiple mappings are assigned to this Term, the last valid status specified is used.
Active Mapping	Y/N value indicating whether this is an active mapping. If omitted, “Y” is assumed. When “N” is specified, the mapping is imported as a deleted mapping only.
Mapping Activity Date	When specified, this date will be imported as the date the mapping was created. For deleted mappings, the date is used as the date the mapping was deleted.

To import mappings with your Term Set:

1. Check the **Import Mappings** box.
2. Specify the name of the Map Set to be created.
3. Specify the Map Set Priority of either “Low”, “Medium”, or “High”
4. Specify the initial Map Set Status. Map Sets can be set to the status of “New”, “Ready for Review”, “Ready for Approval”, “Approved”, or “Rejected”, and can be modified later during your workflow.
5. Specify the method for handling imported Mapping Qualifiers that are not present in your Organization’s Mapping Qualifier list.

Create	Missing qualifiers are added to your Organization's Mapping Qualifier list
Ignore	The missing qualifier is ignored, and the mapping is created without a qualifier.
Report	The missing qualifier is ignored, the mapping is created without a qualifier, and the missing qualifier will be reported to you as an exception (<i>see below</i>).

Term Set Creation Exceptions

When you click **Save**, TermManager will upload your file and begin to load your Term Set. TermManager will compile a list of exceptions encountered during the load, and email the exception list to you once the job is complete.

Possible exceptions include:


- There were fewer than the required number of columns in a line
- No term was specified on a line
- A line contained a duplicate search term
- A term longer than the maximum length was truncated

When importing mappings:

- The Map Set could not be created
- The target library was not available to your Organization
- An imported qualifier was not found in your Organization's list of Mapping Qualifiers (*if the **Report** method for handling missing qualifiers was chosen*).


Term Set Actions


Edit

(*Map Manager Only*) To modify a Term Set's name or description, click its **Edit** () icon. A form will appear allowing you to change the Term Set's name and description.

Click **Save** when changes are complete.

View/Edit Terms

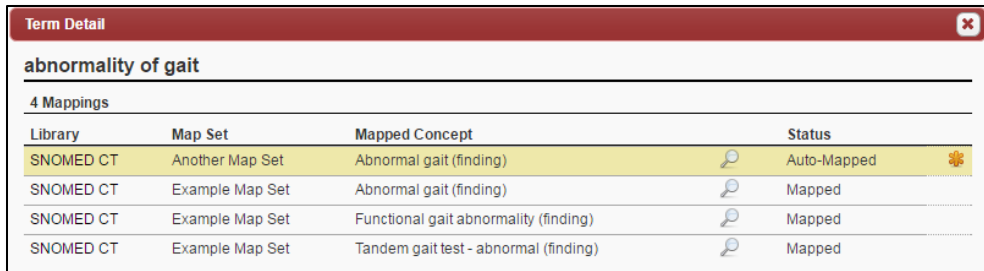
To view or edit terms in a Term Set, click either the Term Set's name or its **View/Edit Terms** () icon. A page listing the Term Set's terms will appear.

To add terms, click the **Add Terms** () icon next to the Term Set name. A form for adding terms will appear. Type (or cut-and-paste from another program) your list of new terms and their optional codes, using the same format detailed above in the Term Set creation process. Click **Save** to add your new terms.

To delete a term, click its **Delete** () icon. Any mappings to this term in any Map Set will also be deleted.

You must have Map Manager privileges to add or delete Terms in a Term Set.

Clicking on a Term will display the Term Detail popup. This popup window will display the Term's name, code, and any Concepts to which the Term is currently mapped. *Only mappings from Map Sets that are visible to the current User are displayed.*



The screenshot shows a 'Term Detail' popup window with a red header bar. The title is 'abnormality of gait'. Below the title, it says '4 Mappings'. There is a table with four columns: 'Library', 'Map Set', 'Mapped Concept', and 'Status'. The first row is highlighted in yellow and shows 'SNOMED CT', 'Another Map Set', 'Abnormal gait (finding)', and 'Auto-Mapped'. The other three rows show 'SNOMED CT', 'Example Map Set', and 'Mapped' for different mapped concepts.

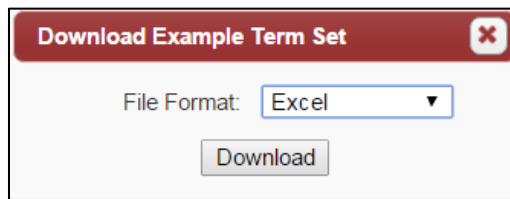
Library	Map Set	Mapped Concept	Status
SNOMED CT	Another Map Set	Abnormal gait (finding)	Auto-Mapped
SNOMED CT	Example Map Set	Abnormal gait (finding)	Mapped
SNOMED CT	Example Map Set	Functional gait abnormality (finding)	Mapped
SNOMED CT	Example Map Set	Tandem gait test - abnormal (finding)	Mapped

Delete

(*Map Manager only*) Delete the Term Set. Deleting a Term Set will also delete any associated Map Sets. You will not be allowed to delete a Term Set if any associated Map Sets contain mappings.

Download

Click the **Download** () icon to download a Term Set to a file. The Term Set Download dialog box will appear:



The screenshot shows a 'Download Example Term Set' dialog box with a red header bar. It contains a 'File Format:' label, a dropdown menu with 'Excel' selected, and a 'Download' button.

Select a file format and click **Download**.

Map Sets

A Map Set is a collection of mappings between the terms in a Term Set and concepts in a target terminology library. There can be more than one Map Set associated with a Term Set, each representing mappings to different target terminology library or different use cases. A term in a Map Set can have zero, one, or many mapped concepts.

Creating a Map Set

1. Select **Mapping** from the menu bar.
2. Click the **Create** (+) icon. The Map Set form will appear.

The screenshot shows a window titled "Create a new Map Set" with a close button in the top right corner. The form contains the following fields and controls:

- Map Set Name:
- Description:
- Term Set:
- Target:
- Workflow Model:
- Visibility:
- Priority:
- Map Set Status:
- Mappers:
- Reviewers:
- Approvers:
- Save button

Map Set form

3. If the appropriate Mapping Collaboration function is enabled in System Settings, a Map Manager in the Managing Organization can specify the Organization that this Map Set will be assigned to.
If a different Organization is selected, then only Term Sets and Targets that are available to the selected Organization will be displayed. Users from the selected Organization will be available to assign to roles, as well as Users from the Managing Organization who have been specified as Collaborators.
4. Give the Map Set a unique name and (optionally) enter a description.
5. Specify the Term Set and Target Library of the Map Set.
6. Specify the Workflow Model for the Map Set. Your Organization's default Workflow Model will be initially selected.

7. Specify the Visibility of the Map Set. There are two options available:

All Organization Users

This Map Set will be visible to:

- All Users in your Organization
- Users in other Organizations that are assigned to roles in this Map Set
(if *Mapping Collaboration* is enabled)

Assigned Users Only

This Map Set will only be visible to:

- Map Managers in your Organization
- Any User that is assigned to a role in this Map Set

8. Specify the Priority of the Map Set. This can be “Low”, “Medium”, or “High”.

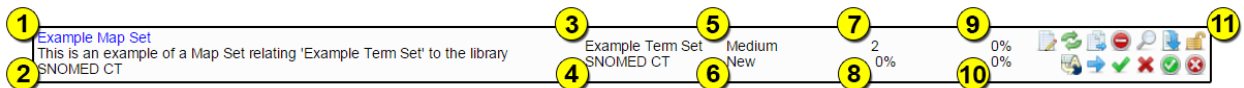
9. Specify the initial Map Set Status. This can be “New”, “Ready for Review”, “Ready for Approval”, “Approved”, or “Rejected”.

10. Assign Mappers, Reviewers, and Approvers to the Map Set, as appropriate to your selected Workflow Model. Multiple users may be selected for any role.

If the appropriate Mapping Collaboration function is enabled in System Settings, Users from the Managing Organization who have been designated as Collaborators may be available for role assignment, in addition to Users from your own Organization.

11. Click **Save** to create the Map Set.

The Map Set Row



The Map Set row provides a great deal of information about the Map Set.

1. Name
2. Description
3. Related Term Set
4. Target Library
5. Map Set Priority
6. Map Set Status
7. Number of Terms
8. Percentage of Terms that are mapped
9. Percentage of Terms that have been reviewed (if applicable)
10. Percentage of Terms that have been approved (if applicable)
11. Available Map Set actions, described below


The Map Set name can be clicked to enter the mapping screen.

The target library will appear in red if the library is not available to your Organization.

Map Set Actions

Not all actions are available to all users. If a listed icon does not appear, you do not have access to that function.

Edit

(*Map Manager only*) To modify a Map Set's name, description, Workflow Model, or change user roles, click its **Edit** () icon. A form will appear allowing you to change the Map Set's details.

A Map Set's related Term Set and target library cannot be changed.

Click **Save** when changes are complete.

Refresh Mappings

To **Refresh Mappings**, Click on the **Refresh Mappings** () icon for the appropriate Map Set.

For existing Map Set mappings, this will perform an automatic identification of broken mappings and new/existing mappings against the Maps Set's current or recently updated Target Library. Ideal for validating imported Map Set mappings against the Map Set's current Target Library and for validating Map Set mappings after a Map Set's Target Library is updated.

- If all of a Term's mapped concepts are deprecated in the Target Library, the mapping is set to "**Not Migrated**".
- If all of a Term's mapped concepts exists in the Target Library, the mapping is set to "**Mapped**".
- If a Term has a mix of mapped Concepts that exist and are deprecated in the Target Library, the mapping is set to "**Migrated with Exceptions**".


Migrate

(*Map Manager only*) Migrate a Map Set to a new Map Set. See **Migrating a Map Set** below for more details.


Delete

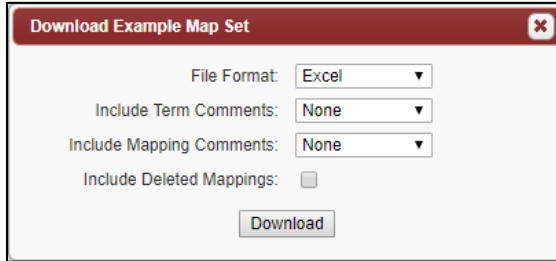
(*Map Manager only*) Delete the Map Set. If the Map Set contains mappings, either Organization Administrator or System Administrator privileges are also required to delete the Map Set.

View Mappings

Click the **View Mappings** () icon, or click the Map Set name, to enter the mapping screen.

Download

Click the **Download** () icon to download a Map Set to a file. The Map Set Download dialog box will appear:



Select a file format and an option for including comments and deleted mappings in the download, and click **Download**.

Lock/Unlock

A Map Manager may use the **Lock/Unlock** () to lock or unlock the Map Set for further changes. The current lock state of the Map Set is represented by the icon.

Auto-Complete

(Mapper only) Auto-map all appropriate terms. See **Auto-Mapping** below for more details.

Submit for Review/Approval

(Mapper only) Submit all term-maps for review or approval (*depending on the selected Workflow Model*). Only mapped terms with no unconfirmed suggested mappings will be submitted.

Accept Review, Submit for Approval

(Reviewer only) Accept all term-maps that have been submitted for review and submit them for approval.

Reject Review

(Reviewer only) Reject all term-maps that have been submitted for review.

Approve

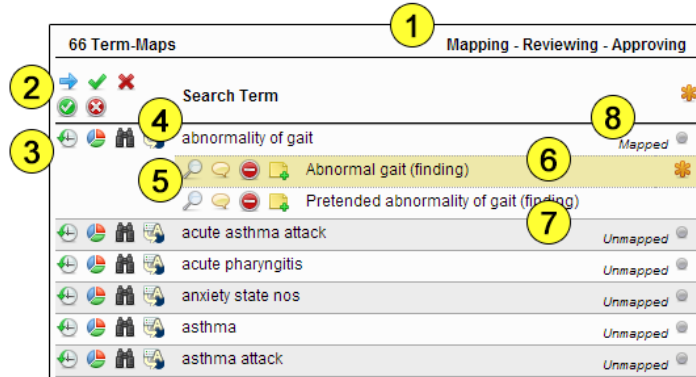
(Approver only) Approve all term-maps that have been submitted for approval.

Reject Approval

(Approver only) Reject all term-maps that have been submitted for approval.

Mapping

In the Mapping screen, you will see a list of terms, mapped concepts, and numerous actions.



1. The roles the user is assigned in this Map Set.
2. Actions to apply to all terms on the current page.
3. Actions on a given term.
4. Term name.
5. Actions on a mapping to the term.
6. An example of a suggested *unconfirmed* mapping. An unconfirmed mapping will have a shaded background and an additional action icon to its right.
7. An example of a *confirmed* mapping.
8. The status of this term's map.

Clicking on a Term will display the Term Detail popup. This popup window will display the Term's name, code, and any Concepts to which the Term is currently mapped. *Only mappings from Map Sets that are visible to the current User are displayed.*

Term Detail				
abnormality of gait				
4 Mappings				
Library	Map Set	Mapped Concept		Status
SNOMED CT	Another Map Set	Abnormal gait (finding)		Auto-Mapped
SNOMED CT	Example Map Set	Abnormal gait (finding)		Mapped
SNOMED CT	Example Map Set	Functional gait abnormality (finding)		Mapped
SNOMED CT	Example Map Set	Tandem gait test - abnormal (finding)		Mapped

Statuses

Each term-map will have one of several statuses:

- Unmapped
- Auto-Mapped
- Mapped
- Migrated
- Not Migrated
- Migrated with Exceptions
- Submitted for Review
- Submitted for Approval
- Rejected
- Approved

Term Actions

Search

Search the target library for the keywords in the term. See **Searching** below for more details.

Auto-Complete

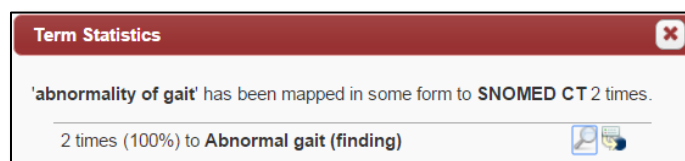
(Mapper only) Auto-map this term. See **Auto-Mapping** below for more details.



View History

View the mapping audit trail for this term.


View Statistics

View the community mapping statistics for this term. This will show how other TermManager users have mapped the term against this library.



From these results, you can click on the **Details** () icon to view concept details or the **Assign** () icon to map the concept to the selected term.

Comments

View and add comments on a term. Only Mappers, Reviewers, and Approvers may add comments. When comments exist on a term, the icon will contain an ellipsis ()

 **Submit for Review/Approval**

(Mapper only) Submit a term for review or approval (*depending on the selected Workflow Model*). This icon only appears when the term is mapped and all mappings are confirmed.

 **Accept, Submit for Approval**

(Reviewer only) Accept a term submitted for review, and submit it for approval.

 **Reject**

(Reviewer only) Reject a term submitted for review.

 **Approve**

(Approver only) Approve a term submitted for approval.

 **Reject**

(Approver only) Reject a term submitted for approval.

 **Undo**

Undo the previous submission, acceptance, approval or rejection.

Mapping Actions

 **View Detail**

Display the details of the mapped concept.

 **Comments**

View and add comments on a mapping. Only Mappers, Reviewers, and Approvers may add comments. When comments exist on a mapping, the icon will contain an ellipsis (⋮).

 **Delete Mapping**

(Mapper only) Delete this mapping. Only Mappers may delete mappings.

 **Add Qualifier**

(Mapper only) Assign a qualifier to this mapping.

 **Remove Qualifier**

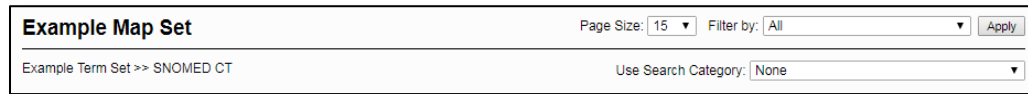
(Mapper only) Remove the existing qualifier from the mapping.

 **Confirm Suggested Mapping**

(Mapper only) Confirm a suggested mapping.

Using Search Categories













If there are Search Categories defined for the Map Set’s target library, you can select one from the dropdown list on the right of the screen.



When a Search Category is selected, all searches will be constrained by the selected Category, including Auto-Mapping of Terms.

Searching


When a search on a target terminology is performed, search results are displayed on the right side of the mapping page.

Score	Concept Name	
100.0	Acute pharyngitis (disorder)	 
79.3	Enteroviral lymphonodular pharyngitis (disorder)	 
79.3	Acute gangrenous pharyngitis (disorder)	 
79.3	Acute phlegmonous pharyngitis (disorder)	 
79.3	Acute ulcerative pharyngitis (disorder)	 
79.3	Acute bacterial pharyngitis (disorder)	 

Search results are shown in descending match score order.

Inactive Concepts in the search results will appear in italics and slightly greyed.

At the top of the list is a text entry box, in which you can refine the term submitted to the search engine. If you map a result using a search term other than the selected term, the search term used will be stored with the mapping as an “alternate search term”, and will be included listed with the mapping when the Map Set is downloaded.

To refine your search term, simply modify the entry in the text box, and click the **Search** () icon to its right.

Search Engine Directives

Your search term can be modified using directives for the search engine. Some of these directives include:

Result Must Include Word (\$+ prefix)

Prefix a word in the term with “\$+” to return only results containing this word.

Example: “acute \$+pharyngitis”

Result Must Exclude Word (\$- prefix)

Prefix a word with “\$-” to return only results that *do not* contain this word.

Example “acute pharyngitis \$-viral”

Fuzzy Search (\$f suffix)

Append “\$f” to a word to perform a “fuzzy” search on that word. This will return results containing words similar in spelling to the selected word.

Example: “acute pharyngitis\$f”

Search Result Actions

Each search result will have associated action icons, depending on the user’s role in the Map Set.



View Detail

Display the details of the concept.



Assign Mapping

(Mapper only) Map this concept to the selected term. The term must be in a mappable state for this icon to appear.



Suggest Mapping

(Reviewer/Approver only) Suggest this concept as a mapping to the selected term. The term must be *Submitted for Review* or *Submitted for Approval* for the icon to appear.

Suggesting a mapping will create an unconfirmed mapping on the term, and create a comment on the mapping indicating it was suggested by the user.

Auto-Mapping

Auto-mapping is a powerful tool that allows you to have TermManager search the target library for a term, and automatically map the top search result to the term.

There are three ways to perform auto-mapping on a term.

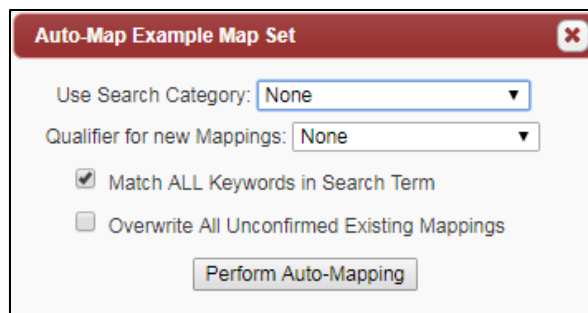
Auto-Map a Single Term

To auto-map a single term, click that term's **Auto Complete** (📄) icon. If a result is found, TermManager will erase any existing mappings on the term, and add an unconfirmed mapping to the top search result.

If a Search Category is selected, the search results will be constrained by the selected Category.

Auto-Map an Entire Map Set

To auto-map an entire Map Set, click the Map Set's **Auto Complete** (📄) icon in the Map Set list. The Auto Complete Map Set dialog will appear, with multiple options for you to specify.



Auto Map Map Set Dialog

Use Search Category	Specify a Search Category if you want search results to be constrained by a Search Category. <i>This option will only appear if there are Search Categories defined for the Map Set's target library.</i>
Qualifier for New Mappings	If desired, specify a mapping qualifier to assign to the newly created mappings.
Match ALL Keywords in Search Term	Return only search results that contain all the keywords in the search term.
Overwrite All Unconfirmed Existing Mappings	When selected, if a new mapping is created, all existing unconfirmed mappings will be erased, regardless of their mapping qualifier. Otherwise, only existing unconfirmed mappings whose qualifier matches the specified qualifier are erased.

Specify your desired options, and click **Perform Auto-Mapping**.

Map Set Auto-Mapping Procedure

When auto-mapping an entire Map Set, TermManager will perform a search on each term that is in a mappable state.

If the search on the term yielded results, **and** a *confirmed* mapping with the specified qualifier (*or no qualifier, if no qualifier was specified*) **does not** exist, TermManager will create a new unconfirmed mapping to the top search result, and also:

- If **Overwrite All Unconfirmed Existing Mappings** *was not* selected, erase any existing unconfirmed mappings having the specified qualifier, or any existing unconfirmed mappings with no qualifier, if no qualifier was specified.
- If **Overwrite All Unconfirmed Existing Mappings** *was* selected, erase **all** existing unconfirmed mappings, regardless of qualifier.

Migrating a Map Set

Migrating a Map Set will create a new Map Set, based on the same Term Set, and copy its Mappings to the new Map Set when possible. You may choose any available target Library for the new Map Set. All other attributes of the new Map Set are set just as if you were creating a new Map Set.

The migration process will examine each Term in the existing Map Set, validate all mapped Concepts against the new Map Set's Library, and copy Mappings to the new Map Set when the mapped Concept exists in the new target Library.

If a Term has no mapped Concepts, the status of the Term in the new Map Set will remain *Unmapped*.

If all of a Term's mapped Concepts are valid in the new target, all Mappings are copied and the new status will be *Migrated*.

If some of a Term's mapped Concepts are valid in the new target, and others are not, the valid Mappings are copied and the new status will be *Migrated with Exceptions*.

If none of a Term's mapped Concepts are valid in the new target, none of its Mappings are copied, and the new status will be *Not Migrated*.

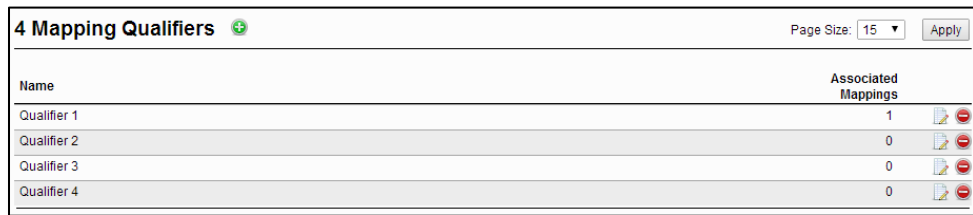
If any Mappings could not be copied, an Exception Report will be emailed to you when the migration process is complete.

Mapping Qualifiers

Mapping Qualifiers are descriptors that can be optionally added to a mapping of a term to a concept. Each Organization in TermManager has its own list of available qualifiers.

Mapping Qualifiers can be added and deleted only by users having Map Manager privileges.

To view or maintain your Organization's list of qualifiers, select **Qualifiers** in the top menu bar.



Name	Associated Mappings
Qualifier 1	1
Qualifier 2	0
Qualifier 3	0
Qualifier 4	0

Mapping Qualifier List

The list displays the qualifier names and the number of mappings each is assigned to.

Creating Mapping Qualifiers

To add qualifiers, click the **Add** (+) icon at the top of the list. Just as when creating a Term Set, new qualifiers can be uploaded in a file (Excel or text) or inserted into the text box. Qualifier uploads have only one column, the qualifier name.

Mapping Qualifier Actions

Edit

(Map Manager only) To edit the qualifier name, click the **Edit** icon. Modify the qualifier name as needed, and click **Save**.

Delete

(Map Manager only) To delete a qualifier, click its **Delete** icon. If a qualifier is assigned to a mapping, both Map Manager and either Organization Administrator or System Administrator privileges are also required to delete a qualifier and remove it from any mappings it is assigned.

Search Categories

Search Categories can be used to constrain search results to a portion of a Library's hierarchy.

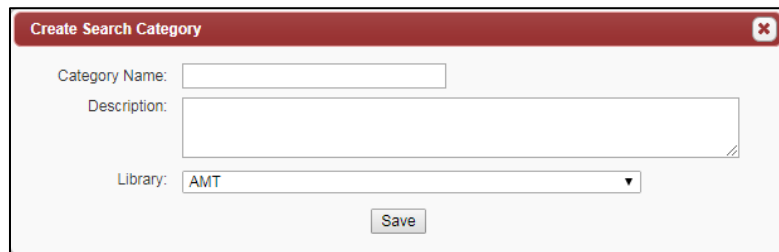
A Search Category contains one or more Concepts from a given Library. When the Search Category is applied to a concept search, only Concepts that are descendants of the selected Search Category's Concepts are returned.

Search Categories can be added, modified, and deleted only by users having Map Manager privileges.

To view or maintain your Organization's Search Categories, select **Categories** in the top menu bar.

Creating a Search Category

1. Select **Categories** from the menu bar.
2. Click the **Create** (+) icon. The Search Category form will appear.




Search Category form

3. Give the Search Category a unique name and (optionally) enter a description.
4. Specify the Library of the Search Category.
5. Click **Save** to create the Search Category.

Search Category Actions


Edit



(*Map Manager Only*) To modify a Search Category's name or description, click its **Edit** () icon. A form will appear allowing you to change the Search Category's name and description.

A Search Category's Library cannot be changed.


Click **Save** when changes are complete.

 **View/Edit Concepts**

To view or edit Concepts in a Search Category, click either the Search Category's name or its **View/Edit Concepts** () icon. A page listing the Search Category's Concepts will appear.

To add a Concept, enter a search term and click the **Search** () icon. A list of matching Concepts will appear. Click the **Add Concept** () icon for a Concept to add it to the Search Category. Added Concepts will appear in the list on the left side of the screen.

Click a Concept's **Details** () icon to view concept details.

Any Concept that has been added to the Search Category can be removed by clicking its **Delete** () icon.

You must have Map Manager privileges to add or delete Concepts in a Search Category.

 **Delete**

(Map Manager only) Delete the Search Category.

Admin

To view your current status or change your password, select **Admin** from the top menu. You will see a menu at the left of the screen listing your available actions.

If you are a System Administrator, you will see additional administrative actions available. See the TermManager Admin Guide for more details about these System Administrator level actions.

Current Status

The Current Status screen displays information about the current user and the TermManager system.

This is the default screen when selecting **Admin** from the top menu, and it can also be reached by clicking on **Current Status** in the left menu.

Current User

Displays the name, email, and permissions of the current user.

Organization

The Organization of the current user and its available libraries are listed.

Import/Export File Columns

The current configuration of the column orders for import and export files are listed here.

Change My Password

To change your TermManager password:

1. Click **Change My Password** in the left menu.
2. In the **Old Password** field, specify your current password.
3. Enter your new password in the **New Password** field.
4. Re-enter your new password in the **Confirm New Password** field.
5. Click **Change Password**.

Administering Your Organization

Organization Administrators have access to additional administrative tasks.

Organization Details

Allows an Organization Administrator to view and update their Organization name, description, default workflow model, and available libraries. They may also view, but not change, their Organization's maximum users

My Organization

Organization Details

Name:

Description:

Default Workflow Model:

Maximum Users: Unlimited

Libraries


You may select any of these Libraries to make them available to your Organization.

Namespaces
AMTv3
CPT
CVX
FDA UNII
HCPCS
HL7
ICD-10 R
ICD-10-CM
ICD-10-CM 2014
ICD-10-PCS
ICD-9-CM
ICD-9-CM 2014.1
ICPC [International Classification of Primary Care]
LOINC
LOINC 2.46
LOINC 2.48
LOINC Inactive Codes
LOINC Inactive Codes 2.48
MedKnowledge

Manage Users

As an Administrator of your Organization, you may add, modify, or delete Users within your Organization.

Adding a User

To add a User, click the **Add** () icon at the top of the Users list. To edit or delete a user, click the

User Actions

Edit

To edit a User, click the User's **Edit** icon. Modify the User as needed, and click **Save**.

Delete

To delete a User, click the User's **Delete** icon. You will be prompted to confirm this action, as deleting a User cannot be undone. *The current user cannot be deleted.*

User Fields

First Name	The User's first name
Last Name	The User's last name
Email Address	The User's email address. This will also serve as the User's login ID, and must be unique in TermManager.
Map Manager	Grant Map Manager privileges
Organization Administrator	Grant Organization Administration privileges
Deactivated	Set this flag to restrict the User from signing into TermManager.

Mapping Collaboration

If Mapping Collaboration is enabled in System Settings, a Map Manager in the Managing Organization will have access to additional functions.

Specify Collaborators

When Cross-Organizational Collaboration is enabled, Users in the Managing Organization that are selected as Collaborators are eligible to be assigned to roles in Map Sets that belong to other organizations.

To specify Collaborators in the Managing Organization, click **Specify Collaborators** in the **Admin** Menu, and use the Add, Remove, Add All, and Remove All buttons to adjust the list of collaborators as desired. Changes are saved with each button click.

Assign Users to Map Sets

If this function is enabled in System Settings, a Map Manager in the Managing Organization may use this function to assign Users from any Organization to roles in a Map Set belonging to any other Organization.

To assign users to Map Set roles across Organizations:

1. Click **Assign Users to Map Sets** in the **Admin** menu.
2. Select the Organization that owns the Map Set to which you will assign users.
3. Select the desired Map Set.
4. Lists of the Map Set's Mappers, Reviewers, and Approvers will be displayed, in accordance with the Map Set's Workflow Model.
5. Use the **Add**, **Remove**, and **Remove All** buttons for each list to adjust the lists as desired. Changes are saved with each button click.

Assign Cross-Organization Map Set Roles

Select Organization: Organization 1
Select Map Set: Organization 1 Map Set

Available Users	Mappers	Reviewers	Approvers
Organization 1 Jane Doe My Organization John Smith Organization 2 Douglas Fairbanks	Organization 1 Jane Doe My Organization John Smith	Organization 1 Jane Doe	Organization 1 Jane Doe

Support

To view your support options, select **Support** in the top menu. You will find available support actions in the left menu.

About TermManager

This page lists a brief description of TermManager and Apelon. This is the default screen when **Support** is selected. You may also reach this screen by selecting **About TermManager** in the left menu.

User Guide

Clicking **User Guide** in the left menu will download a copy of this document.

Release Notes

View the **Release Notes** document for the current version of TermManager.

Contact Support

This option is available only to Organization Administrators.

An Organization Administrator can send an email to TermManager Support by clicking **Contact Support**. Enter your email subject and message, and click **Send Message**.

The **Contact Support** menu item is only available if your TermManager System Administrator has configured TermManager to use email, and has configured an email address to receive TermManager Support emails.