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Apelon Distributed Terminology System (DTS)

DTS Subset Editor Users Guide

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Introduction

Overview

The DTS Subset Editor functions are available through the use of two windows, each of which you can open via the *DTS Editor* window **Tools** menu or toolbar. Using these functions you can create and maintain custom **subsets** of concepts in DTS namespaces.

A **subset** is any collection of concepts that share a specific set of attributes, and may include only a few concepts or many concepts. The concepts in a subset may be derived from a subscription namespace or a local namespace; for a subset of an Ontylog Extension namespace, subset concepts can include those from both the local (i.e., extension) namespace and the linked Ontylog subscription namespace.

Note: Each DTS **namespace** has one **authority** which identifies the party responsible for that namespace. A subset does not (necessarily) reflect the viewpoint of that authority.

You may create a subset to restrict concept searches. You also may create a subset for **export** to external applications (e.g., for import and use in **spreadsheets** or **pick lists**, or in an underlying terminology database for an EMR system).

The *Subset Expression Editor* and *Subset List* windows provide all of the Subset Editor functionality. The following discussions include a brief introduction to each window.

Subset Expression Editor Window

A **subset expression** defines the hierarchy of criteria by which concepts will be selected from an existing namespace for each subset you create. You use the *Subset Expression Editor* window to create and maintain subset expressions.

For each subset, you can select individual concepts, or groups of concepts based on concept hierarchy, from a specific namespace. You can define **filters** that establish the criteria for concept selection. These filters can work in association with specified **exclude** conditions that will either exclude specific concepts from being selected, or all concepts that meet your exclusion criteria.

Subset List Window

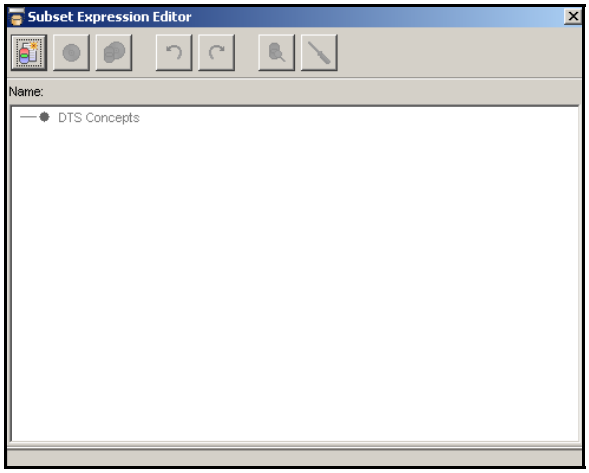
Using the *Subset List* window, you can enter the criteria to search all DTS namespaces for existing subsets. You then can view creation and modification dates for a selected subset, view the contents of a subset, and select subsets for deletion.

You can export the contents of a subset to a text file, or to an existing Thesaurus namespace. If a connection **other than** a Secured Socket Connection is used, you also can export the subset contents to a new namespace.

Add/Modify Expressions - Subset Expression Editor Window

The discussions in this section include procedures by which you can use the *Subset Expression Editor* window to add and maintain a **subset expression**. Each subset expression defines the hierarchy of criteria by which concepts will be selected from a designated namespace to populate the subset. In addition to specific concepts that you can select from the namespace, these expression criteria may include filters by which certain concepts will be selected for and/or excluded from the subset.

Click **New Subset Editor** in the **Tools** menu, or the **Open Subset Expression Editor** icon in the *DTS Editor Main* window toolbar. The *Subset Expression Editor* floating window displays.

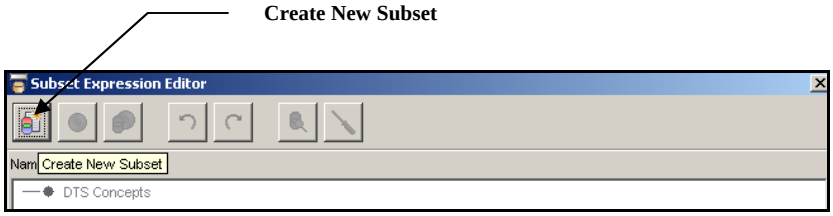


You can resize the *Subset Expression Editor* window, as desired. The window size setting is retained for future sessions. All of the concept selection criteria that you create for the subset expression will be displayed in a **tree** view in the *Subset Expression Editor* window.

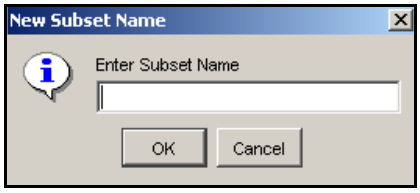
Create a New Subset Expression and Assign a Name

Follow this procedure to assign a name to the new subset expression.

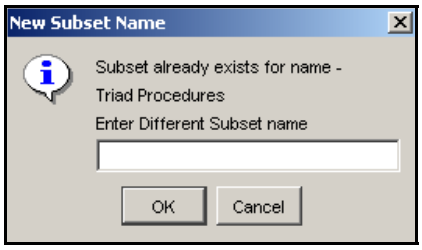
1. When the *Subset Expression Editor* window displays, click the **Create New Subset** icon.



The *New Subset Name* window displays.

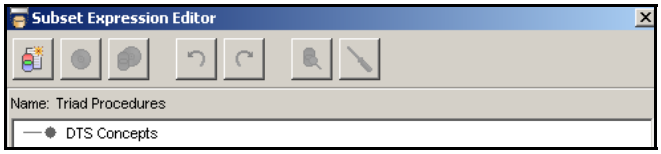


2. Enter the name of the new subset in the *Enter Subset Name* field.
3. Click **OK**. If the subset name already exists, a message in the *New Subset Name* window indicates this.



Enter a different subset name, then click **OK**.

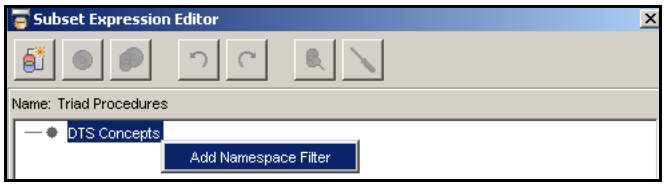
The new subset name is indicated on the *Subset Expression Editor* window. Note that the **DTS Concepts** root node is established for the subset expression automatically.



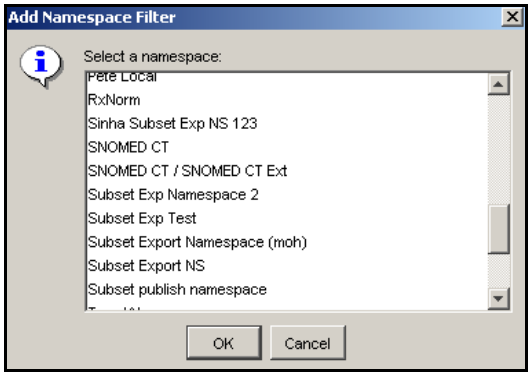
Add a Namespace Filter

Follow this procedure to designate the namespace from which subset concepts will be selected.

1. To designate the specific namespace from which concepts for the subset will be selected, right click on the **DTS Concepts** root node. Click the **Add Namespace Filter** option when it displays.

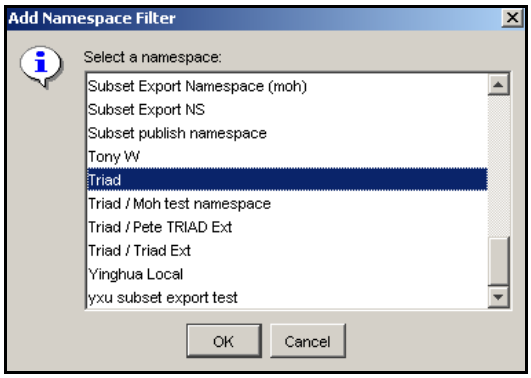


The *Add Namespace Filter* window displays.

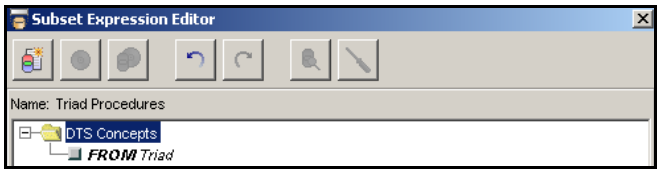


Using this window you choose the specific namespace from which concepts will be selected to populate the new subset.

2. From the *Select a namespace* field dropdown list, select the namespace (**Triad** in the example) from which to select concepts for the subset. Note that if an **Ontylog Extension** namespace is listed, it is paired with the linked Ontylog Subscription namespace (e.g., **SNOMED CT / SNOMED CT EXT**).



3. Click **OK** to add the namespace filter node to the tree. The display format is ***FROM*** *<namespace Name>*. Note that the namespace filter, and all of the filters that you add subsequently, display in italics until you save the subset expression.



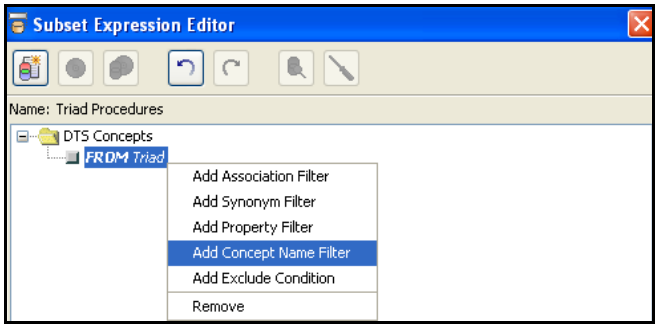
Each subset expression can include only a **single** namespace filter.

Add Concept Name Filters to the Subset Expression

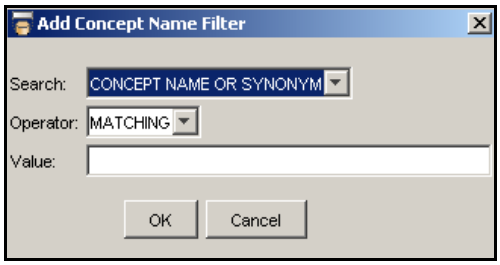
Create a New Concept Name Filter

Follow this procedure to create a concept name filter for the subset expression. This filter defines criteria by which concepts will be selected (from the specified namespace) to populate the subset.

1. To add a concept filter to the subset expression, right-click on the namespace node (***FROM** Triad* in the example). Click **Add Concept Name Filter** when the option list displays.



   The *Add Concept Name Filter* window displays.

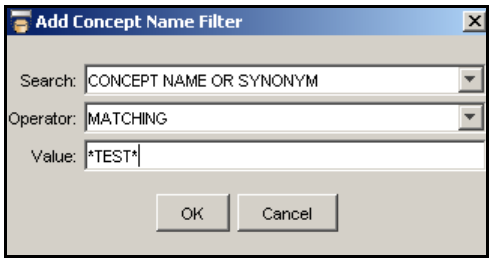


2. A concept filter is comprised of a **Search Type** and **Value** (the criterion **Operator** is set to **Matching**, and is not editable). From the *Search* field dropdown list, select either the **CONCEPT NAME OR SYNONYM** option (the default) or the **CONCEPT NAME** option for the filter.

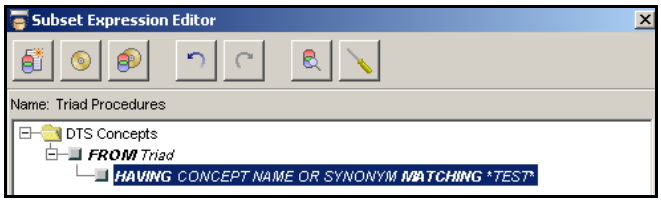
   If you select the **CONCEPT NAME** option, your search term will be matched against only concept names in the selected namespace. If you select **CONCEPT NAME OR SYNONYM**, your search term will be matched against concept names as well as their synonyms in the selected namespace.

3. In the *Value* field, enter the text string that will be matched against concept names (or concept names and synonyms) in the namespace you selected. Text string matching is case insensitive, and you may use **wild cards** (asterisk characters), as needed.

In the illustration, matches in the namespace will be found for any concept name or synonym that contains the text string **TEST** (in upper or lower case).



4. Click **OK** to add the concept name filter node to the subset expression tree (the display format is ***HAVING*** *CONCEPT NAME OR SYNONYM* ***MATCHING*** *<concept Name>*).



Add Concept Name Filters Using Drag/Drop

Follow this procedure to drag a concept (that resides in the selected namespace) from another displayed window or panel and drop it into the new subset expression as a concept name filter. Based on your selection from the available options, this directly adds the following value(s) to the new subset expression.

- The selected concept (only)

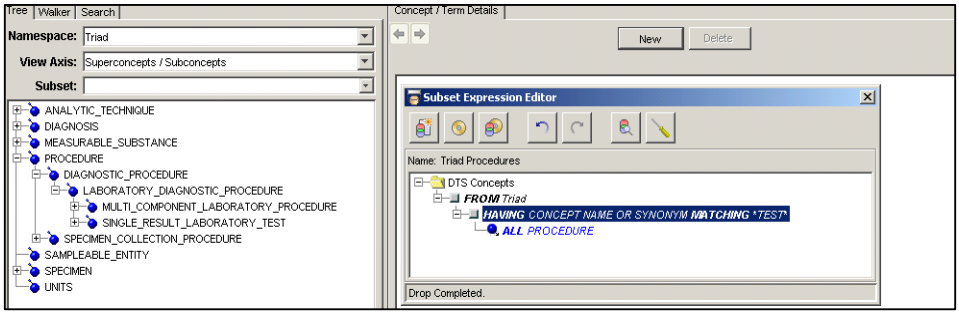
OR

- The selected concept's descendants (only)

OR

- Both the selected concept **and** its descendant concepts

1. Drag the desired concept from another displayed panel or window (e.g., *Tree* panel, *Search* window, etc.) and drop it into the *Subset Expression Editor* window. In the illustration, the concept **PROCEDURE** was dragged from the *Tree* panel and dropped onto the concept name filter node in the *Subset Expression Editor* window.



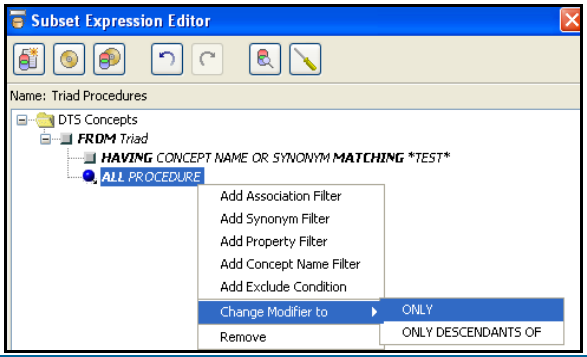
Drop Completed displays in the *Subset Expression Editor* window **Status Bar** to indicate successful copy of the concept you selected.

For a subset of an Ontylog Extension namespace, the concept you select for drag/drop can be from the linked Ontylog Subscription namespace, or from the extension namespace itself. For all other namespaces, the concept you select for drag/drop must be from the same namespace specified in the namespace filter node (**Triad** in this example). If you attempt to drag and drop a concept from a different namespace, the following message window displays.

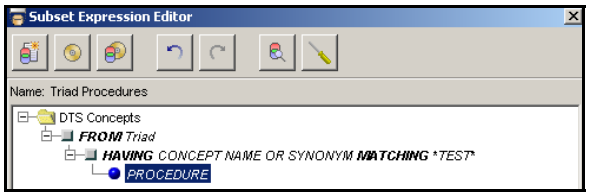
Click **OK**, then drag and drop a concept from the correct namespace.

2. The default is to include the selected concept **and** all of its descendant concepts in the subset (i.e., the default modifier is ***ALL***). You have the option to include in the subset only the selected concept (without its **descendants**) or only the selected concept's descendants (without the **selected concept**).

   Right-click the concept you dropped into the *Subset Expression Editor* window (***ALL** PROCEDURE* in this example). Click **Change Modifier to** in the displayed option list.

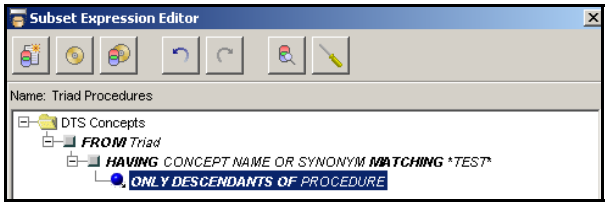


Click the modifier **ONLY** to include only the selected concept in the subset. The concept node in the *Subset Expression Editor* window changes (the modifier ***ALL*** is removed) to reflect that only the single concept will be selected for the subset. Note the illustration.

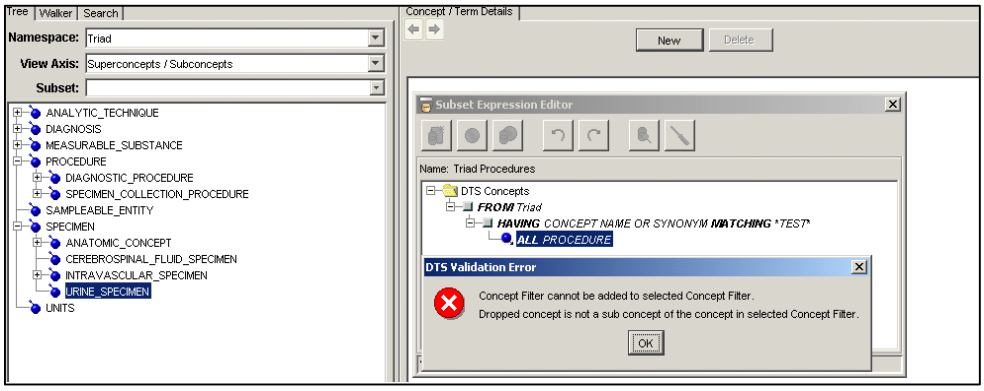


You cannot add additional concept filter nodes to an existing concept node for which you selected the modifier **ONLY**. The following message displays if you attempt to add a new concept filter.

Click the modifier **ONLY DESCENDANTS OF** to include only the selected concept's descendants in the subset. The concept node displayed in the *Subset Expression Editor* window changes to reflect that only descendants of the concept you chose will be selected for the subset (***ONLY DESCENDANTS OF*** *PROCEDURE* is shown in the illustration).



If you want to drag additional concepts to this concept node, the additional concepts must be descendants of the concept established in that node. An error message displays if you attempt to drop onto an existing concept node an additional concept (filter) that is not a descendant. Note the illustration.

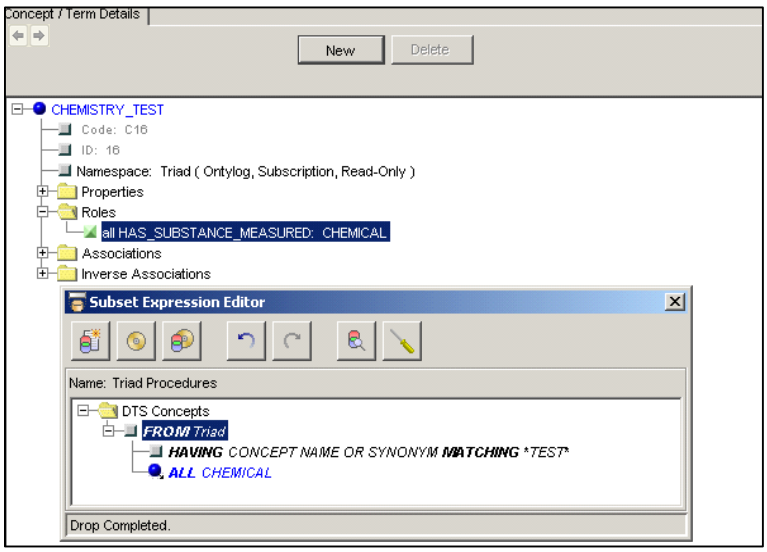


Create Concept Filters from Roles and Associations

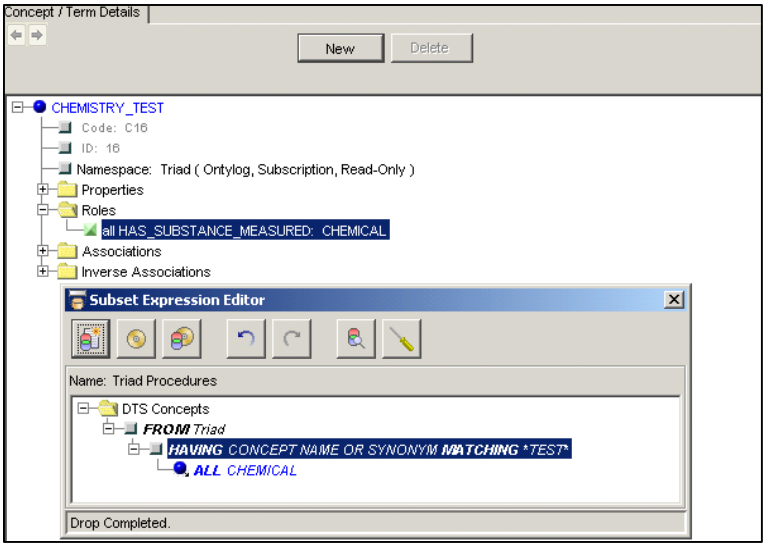
Follow this procedure to drag a role or association from another displayed window or panel (e.g., *Concept/Term Details* panel) and use the role or association value to create a concept filter in the subset expression.

1. Drag the desired role or association from another displayed panel or window (e.g., *Concept/Term Details* panel) and drop it into the *Subset Expression Editor* window. You can add the new concept filter (based on the concept value of the role or association) to the namespace node, or add it to an existing node as an additional filter.

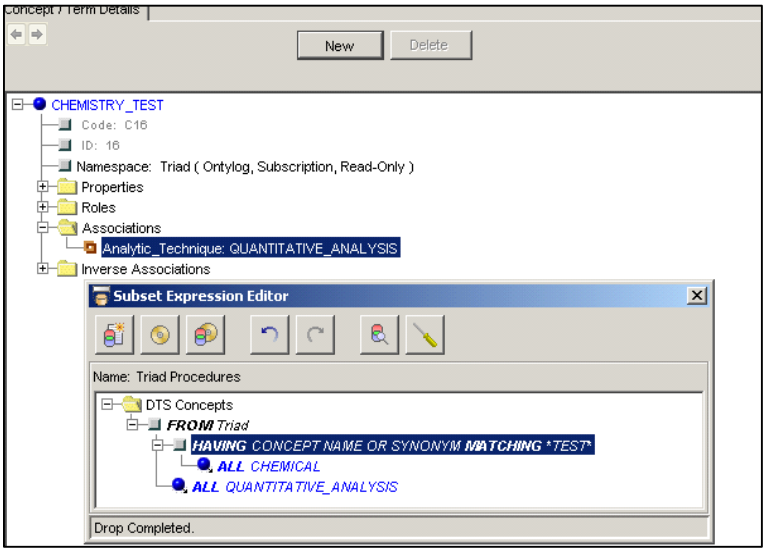
   In the following illustration, the role **all HAS_SUBSTANCE_MEASURED: CHEMICAL** was dragged from the *Concept/Term Details* panel to the namespace filter node, so an ***ALL** CHEMICAL* filter was added. Notice that there are two "sibling" filters under the namespace node; concepts from that namespace which pass either of the filters are included in the subset.



In the next illustration, the role **all HAS_SUBSTANCE_ MEASURED: CHEMICAL** was dragged from the *Concept/Term Details* panel to a concept filter node, so an ***ALL*** *CHEMICAL* filter was added.



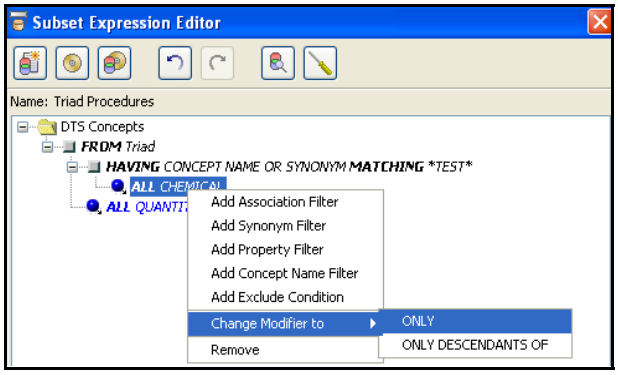
In the following illustration, the association **Analytic_Technique: QUANTITATIVE ANALYSIS** was dragged from the *Concept/Term Details* panel to the namespace filter node, so an ***ALL*** *QUANTITATIVE ANALYSIS* filter was added.



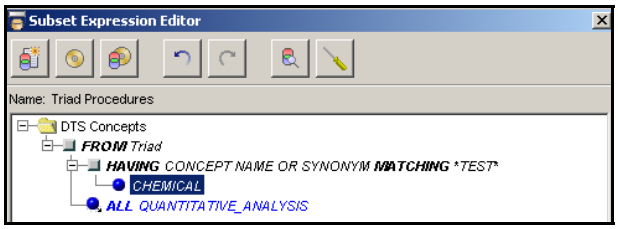
Drop Completed displays in the *Subset Expression Editor* window **Status Bar** to indicate a successful copy.

2. For each role or association you copy to the subset expression, the default is to create a concept filter that includes the associated concept **and** all of its descendant concepts in the subset expression (i.e., the default modifier is ***ALL***). You have the option to include the concept (without its **descendants**) or only the concept's descendants (without the **selected concept**).

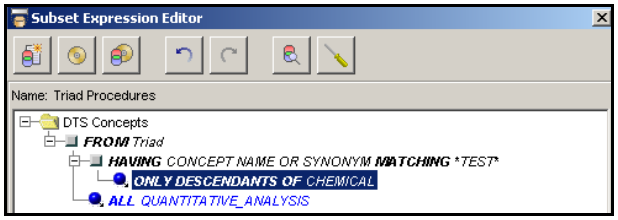
   Right-click the role or association you dropped into the *Subset Expression Editor* window (the role ***ALL*** *CHEMICAL* is used in this example). Click **Change Modifier to** in the displayed option list.



   Click the modifier **ONLY** to include only the associated concept in the filter. The filter node displayed in the *Subset Expression Editor* window changes (the modifier ***ALL*** is removed) to reflect that only the single associated concept will be selected for the subset.



   Click the modifier **ONLY DESCENDANTS OF** to include only the associated concept's descendants in the subset. The filter node changes to reflect that only descendants of the associated concept will be included in the subset (***ONLY DESCENDANTS OF*** *CHEMICAL* is shown in the illustration).



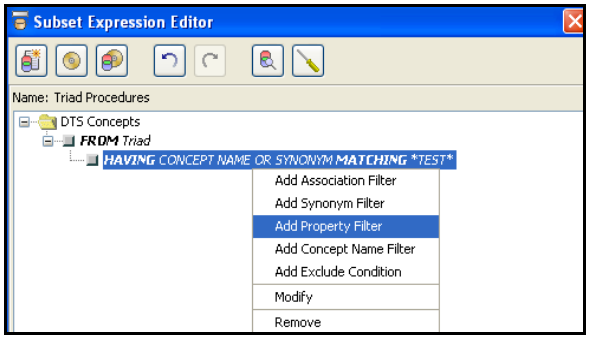
Add a Property Filter to the Subset Expression

Create a New Property Filter

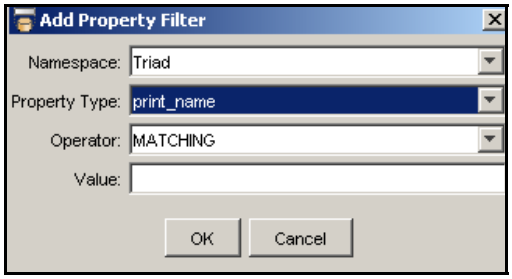
Follow this procedure to create a property filter for the subset expression. This filter defines the property criteria by which concepts will be selected (from the specified namespace) to populate the subset.

1. To filter concepts selected for the subset based on matching property criteria, right-click on the desired filter node, then click **Add Property Filter** when the option list displays. You can add the property filter directly to the namespace node, or add it as an additional filter to another existing filter node.

   In the following example, the property filter is being added to the **concept name** filter node (***HAVING*** *CONCEPT NAME OR SYNONYM* ***MATCHING*** **TEST**).



   The *Add Property Filter* window displays.



2. From the *Namespace* field dropdown list, select the namespace in which the property type for this filter resides. Only concepts from the namespace that is designated in the namespace filter, that also have the property type that was created in the namespace selected in the *Namespace* field, will be retrieved.

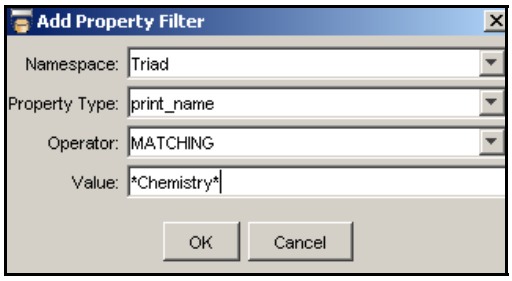
3. From the *Property Type* field dropdown list, select the property type for this property filter (**print_name** in this example). Only concepts in the selected namespace that have this property type will be retrieved for the subset.

4. In addition to filtering the concepts' property type in the namespace, you can establish a more specific filter that returns only concepts with property **values** that contain the text string you specify. From the *Operator* field dropdown list, select **MATCHING** to further filter retrieved namespace concepts based on the property value text you enter in the *Value* field.

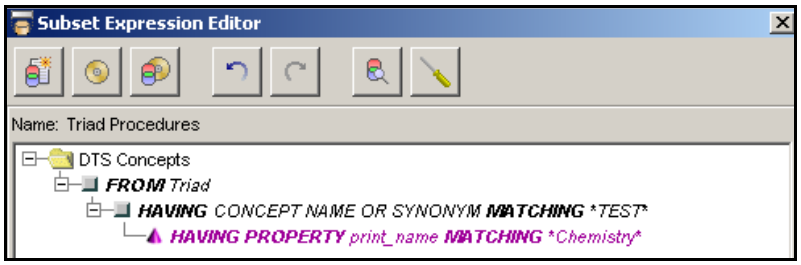
   Select **NONE** from the dropdown list if you will not filter properties based on property value.

5. The *Value* field is enabled only if you selected **MATCHING** in the *Operator* field to indicate you want to match a property value as well as type. Property value text string matching is case insensitive; you may use **wild cards**, as needed.

   Enter the text string (e.g., ***Chemistry***) for the property value to be matched. The concepts retrieved from the namespace designated in the namespace filter must have both the designated property type (i.e., the property type that resides in the namespace specified in the *Namespace* field) **and** this property value text (in upper or lower case).



6. Click **OK** to add the property filter node to the tree (the display format is ***HAVING PROPERTY*** *print_name* ***MATCHING*** <*property Value*>). Note that the color and icon of the property filter match those that represent properties on other displayed panels (e.g., *Concept/Term Details*, *Concept Tree*, etc.).

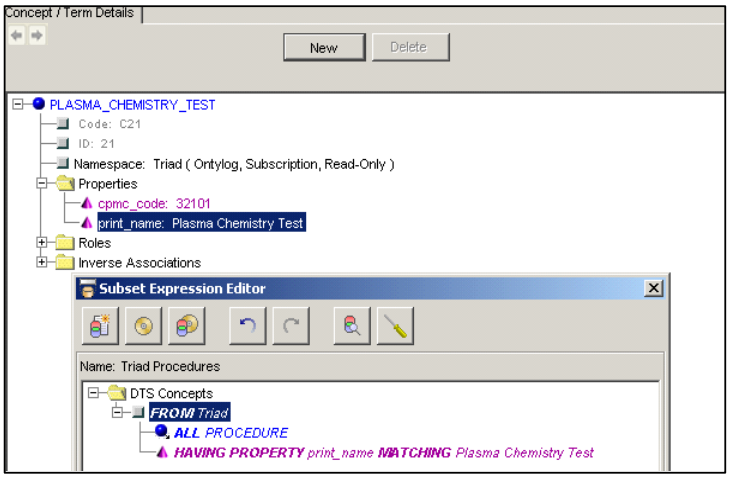


Add a Property Filter Using Drag/Drop

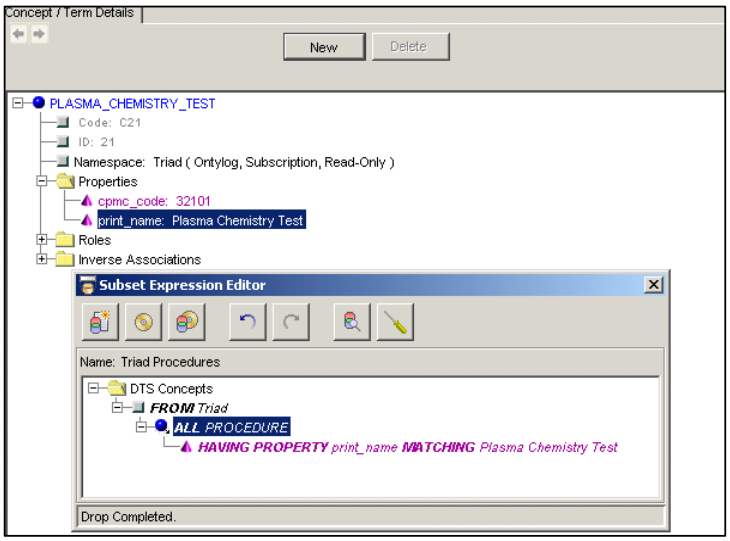
Follow this procedure to drag a property (with a property type established in the selected namespace) from another displayed window or panel, then drop it into the subset expression as a property filter.

1. Drag the desired property from another displayed panel or window (e.g., *Concept/Term Details* panel) and drop it into the *Subset Expression Editor* window. You can add the property filter directly to the namespace node, or add it as an additional filter to another existing filter node.

   In the next illustration, the property/ value **print_name: Plasma Chemistry Test** was dragged from the *Concept Term/Details* panel to the namespace filter node.

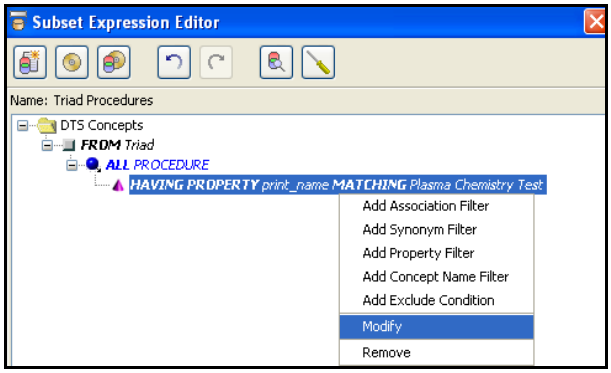


   In the next illustration, **print_name: Plasma Chemistry Test** was dragged from the *Concept Term/Details* panel to a concept filter node.

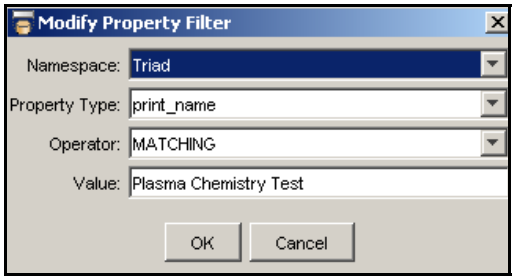


Drop Completed displays in the *Subset Expression Editor* window **Status Bar** to indicate a successful copy.

2. When you copy a property to a subset expression using drag/drop, both the property type **and** value are established as the default for the property filter. You have the option to change the value against which matching will occur, or to modify the property filter so that the property type is the only criterion for matching. Right-click on the property filter node, then click **Modify** when the option list displays.



The *Modify Property Filter* window displays.



To match against the property type only, select **NONE** from the *Operator* field dropdown list. The *Value* field is enabled only if you select **MATCHING** as the *Operator* field value (which indicates that you want to select concepts from the namespace designated in the namespace filter that have both the specified property type **and** property value text).

Modify the text string in the *Value* field to create a modified property text value for the filter, then click **OK**. The property filter node changes to reflect your edit.

In the following illustration, the filter was modified so that the property type (*print_name* in this example) will be the only property filter criterion.

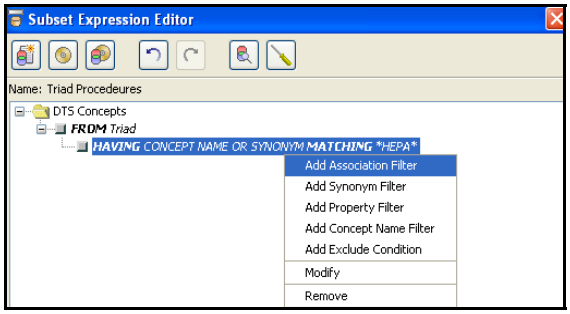
Add an Association Filter to the Subset Expression

Create a New Association Filter

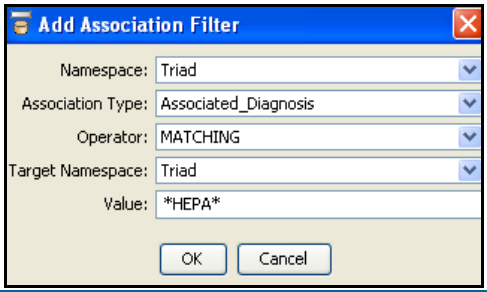
Follow this procedure to create an association filter for the subset expression. This filter defines the association criteria by which concepts will be selected from the specified namespace(s) to populate the subset.

1. To filter concepts selected for the subset based on matching association criteria, right-click on the desired filter node, then click **Add Association Filter** when the option list displays. You can add the association filter directly to the namespace node, or add it as an additional filter to another existing filter node.

   In the following example, the association filter is being added to the **concept name** filter node (***HAVING*** *CONCEPT NAME OR SYNONYM* ***MATCHING*** **HEPA**).



   The *Add Association Filter* window displays.



2. From the *Namespace* field dropdown list, select the namespace in which the association type for this filter resides. This is the **Source** (i.e., **From** namespace) in the association; you must also define a **Target** (i.e., **To**) namespace for the association. Only association types created in the Source namespace will be available for this association filter.

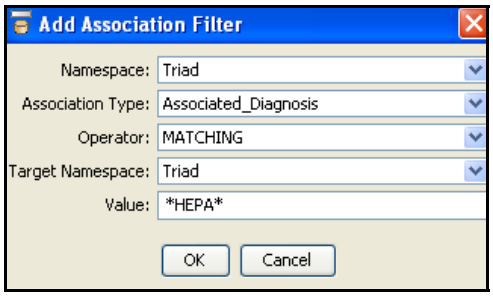
3. From the *Association Type* field dropdown list, select the association type for this association filter (**Associated_Diagnosis** in this example). Only association types from the (**Source**) namespace selected in the *Namespace* field are listed. The resulting subset will include concepts that are associated (within a namespace, or between two namespaces) based on this association type.

4. In addition to filtering the concepts' association type in the namespace, you can establish a more specific filter that returns only concepts with association **values** that contain the text string you specify. From the *Operator* field dropdown list, select **MATCHING** to further filter retrieved namespace concepts based on the association value text you enter in the *Value* field. Select **NONE** from the dropdown list if you will not filter concept associations based on an association value.

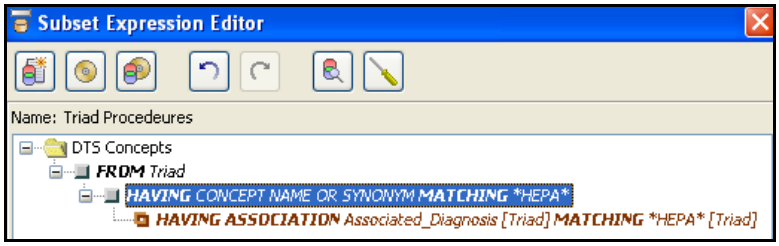
5. From the *Target Namespace* field dropdown list, select the **Target** (i.e., **To**) namespace in the association for this filter. The resulting subset will include concepts for which an association exists between the **Source and Target** namespaces (an association that uses the *Association Type* you selected).

6. The *Value* field is enabled only if you selected **MATCHING** in the *Operator* field to indicate you want to match an association value as well as the designated association type. The text string matching for the association value is case insensitive; you may use **wild cards**, as needed.

   Enter the text string (e.g., ***HEPA***) for the association value to be matched. The concepts retrieved from the **Source and Target** namespaces you designated for the association filter must have both the designated association type (i.e., the association type that resides in the namespace specified in the *Namespace* field) **and** this association value text (in either upper or lower case).



7. Click **OK** to add the association filter node to the tree (the display format is ***HAVING ASSOCIATION*** *Associated_Diagnosis* ***MATCHING*** *<association Value>*). Note that the color and icon of the association filter match those that represent associations on other displayed panels (e.g., *Concept/Term Details*, *Concept Tree*, etc.).



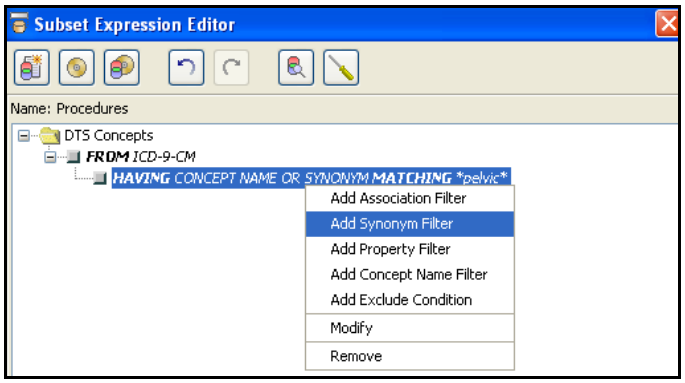
Add a Synonym Filter to the Subset Expression

Create a New Synonym Filter

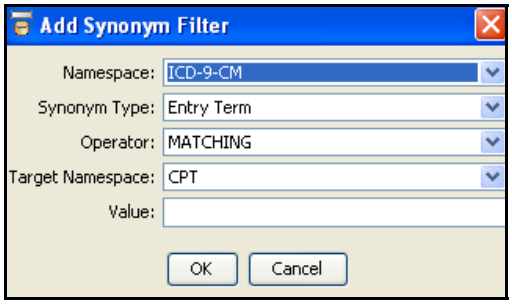
Follow this procedure to create a synonym filter for the subset expression; the procedure is similar to the one you follow to create an association filter. The synonym filter defines the association criteria by which concepts or synonyms will be selected from the specified namespace(s) to populate the subset.

1. To filter concepts selected for the subset based on matching synonym criteria, right-click on the desired filter node, then click **Add Synonym Filter** when the option list displays. You can add the synonym filter directly to the namespace node, or add it as an additional filter to another existing filter node.

   In the following example, the synonym filter is being added to the **concept name** filter node (***HAVING*** *CONCEPT NAME OR SYNONYM* ***MATCHING*** **pelvic**).



   The *Add Synonym Filter* window displays.



2. From the *Namespace* field dropdown list, select the namespace in which the synonym's association type resides. This is the **Source** (i.e., **From** namespace) in the association for this synonym; you must also define a **Target** (i.e., **To**) namespace for the association. Only association types created in the Source namespace will be available for this synonym filter.

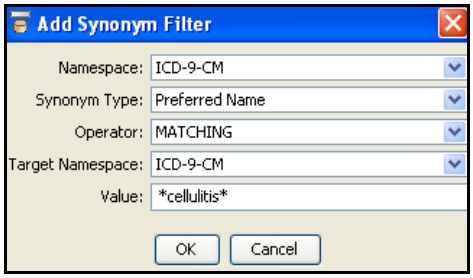
3. From the *Synonym Type* field dropdown list, select the association type for the synonym for which you are creating a filter (**Preferred Name** in the illustration that follows). Only association types from the (**Source**) namespace in the *Namespace* field are listed, and only those that represent a connection between concepts and synonymous terms, or between terms. The resulting subset will include concepts that are associated with synonymous terms (within a namespace, or between two namespaces) based on this type.

4. In addition to filtering the concepts' association type in the namespace, you can establish a more specific filter that returns only concepts that have associations with synonyms that contain the text string **value** you specify. From the *Operator* field dropdown list, select **MATCHING** to further filter retrieved namespace concepts based on the synonym value text you enter in the *Value* field. Select **NONE** from the dropdown list if you will not filter synonymous associations based on the synonyms' value.

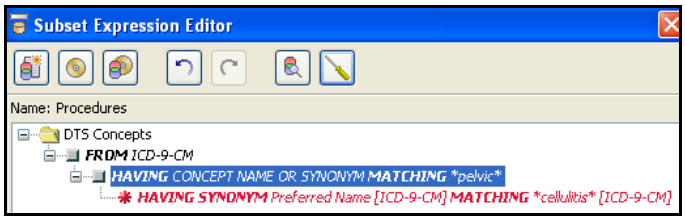
5. From the *Target Namespace* field dropdown list, select the **Target** (i.e., **To**) namespace in the synonymous association for this filter. The resulting subset will include concepts for which a synonymous association exists between the **Source and Target** namespaces (based on the *Association Type* you selected).

6. The *Value* field is enabled only if you selected **MATCHING** in the *Operator* field to indicate you want to match a synonym value as well as the designated association type for the synonym. The text string matching for the synonym value is case insensitive; you may use **wild cards**, as needed.

   Enter the text string (e.g., ***cellulitis***) for the synonym value to be matched. The concepts retrieved from the **Source and Target** namespaces you designated for the synonym filter must have both the designated association type for the synonym (i.e., the association type that resides in the namespace specified in the *Namespace* field) **and** this synonym value text (in either upper or lower case).



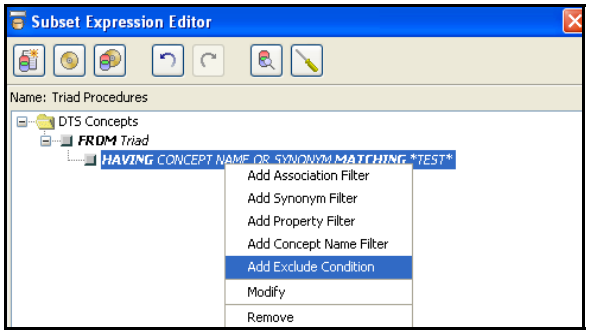
7. Click **OK** to add the synonym filter node to the tree (the display format is ***HAVING SYNONYM*** *Preferred_Name* ***MATCHING*** *<association Value>*). Note that the color and icon of the synonym filter match those that represent synonyms on other displayed panels (e.g., *Concept/Term Details*, *Concept Tree*).



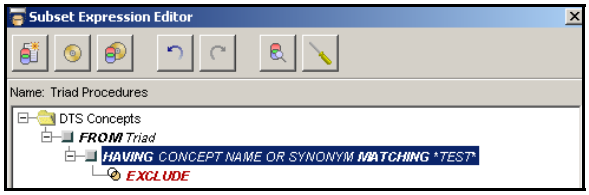
Add an Exclude Condition to a Subset Expression Filter

You can define an **exclude** condition node for a node that exists already in the expression tree (except for the root node, **DTS Concepts**). Note that you can add a condition to exclude an Ontylog concept only if the concept has an attached modifier (absence of a modifier indicates that only a single concept is desired, so that the exclude condition would not apply).

1. To add an exclude condition to a node, right-click on the specific node (***HAVING*** *CONCEPT NAME OR SYNONYM* ***MATCHING*** **TEST** in the example), then click **Add Exclude Condition** when the option list displays.

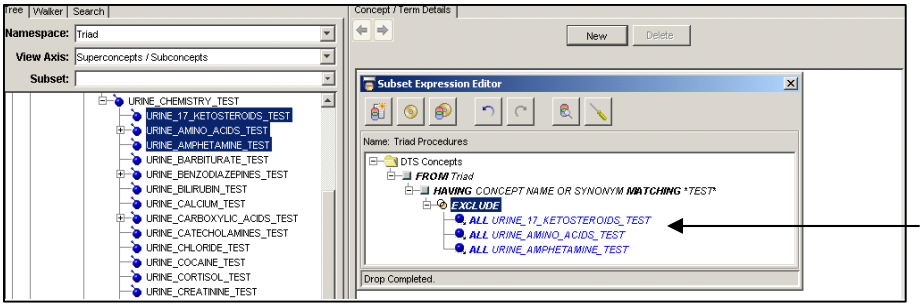


The ***EXCLUDE*** condition displays for the node you selected.



2. You can exclude individual concepts by dragging and dropping one or more concepts from other displayed windows or panels and dropping the concept(s) onto the ***EXCLUDE*** condition for the appropriate node. You also can define an exclude filter for a specific node.

   In the following illustration, three concepts were dragged from the *Tree* panel and dropped onto the ***EXCLUDE*** condition.

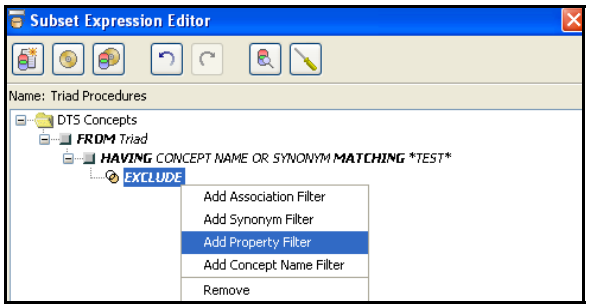


   Based on this illustration, all concepts with names or synonymous terms that include **TEST** (i.e., all concepts selected based on the concept filter ***HAVING*** *CONCEPT NAME OR SYNONYM* ***MATCHING*** **TEST**) will be selected for the subset **except for** the three concepts dropped onto the ***EXCLUDE*** condition (as well as the descendants of the three concepts).

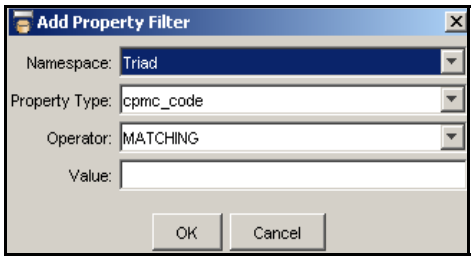
   The default is to specify in the exclude condition each selected concept **and** all of its descendant concepts (i.e., the default modifier is ***ALL***). For an exclude condition in a filter, this would **exclude** from the subset the selected concept **and** its descendants.

   You have the option to specify in the exclude filter only the selected concept (without its **descendants**) or only each selected concept's descendants (without the **selected concept**). Right-click the concept you dropped into the *Subset Expression Editor* window, then click **Change Modifier to** in the displayed option list. Click **ONLY** to specify only the selected concept in the filter.

   To add a concept or property filter to the ***EXCLUDE*** condition, right-click on the displayed ***EXCLUDE*** condition. When the option list displays, select the filter you want to add (either **Add Property Filter** or **Add Concept Name Filter**).



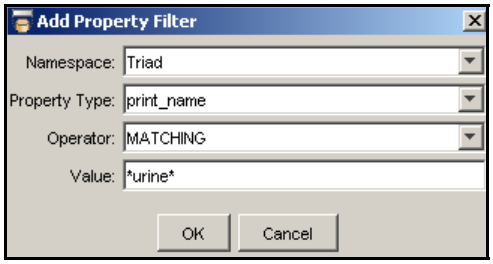
In the example, a property filter is being added for the ***EXCLUDE*** condition. The *Add Property Filter* window displays.



From the *Namespace* field dropdown list, select the namespace in which the property type for this filter resides. From the *Property Type* field dropdown list, select the type for the property filter (**print_name** in the example); concepts in the selected namespace with this property type will be excluded.
In addition to filtering the concepts' property type, you can establish a filter that excludes concepts with a specific property **value** that indicates the text string you specify. From the *Operator* field dropdown list, select **MATCHING** to further filter excluded concepts based on the text you enter in the *Value* field (select **NONE** from the *Operator* field dropdown list if you will not filter properties based on property value).

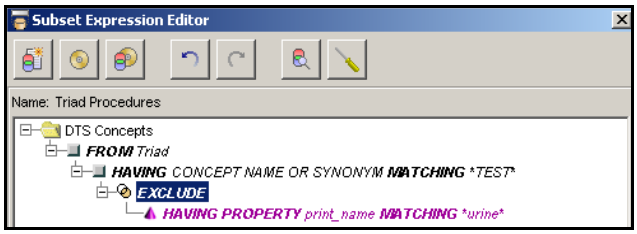
The *Value* field is enabled only if you selected **MATCHING** in the *Operator* field to indicate you want to match a property value as well as a property type. Property value text string matching is case insensitive, and you may use **wild cards**, as needed.

Enter the text string (e.g., ***urine***) for the property value to be matched.



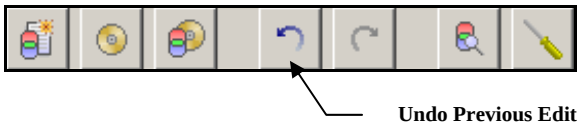
Concepts from the namespace designated in the namespace filter that have both the designated property type (i.e., the property type in the namespace specified in the *Namespace* field) **with** this property value text (in upper or lower case) will be excluded from the subset.

3. Click **OK** to add the property filter node to the ***EXCLUDE*** condition.



Undo and Redo Expression Filter Additions and/or Edits

The **Undo Previous Edit** icon on the *Subset Expression Editor* window becomes enabled when you add to or modify an expression (i.e., when you add or modify a filter node). Click **Undo Previous Edit** to disregard each **individual** addition or edit to the expression, in reverse order (the last individual edit is **undone** first, then the previous one, etc). Note that the **Undo Previous Edit** icon becomes disabled when you save the expression.

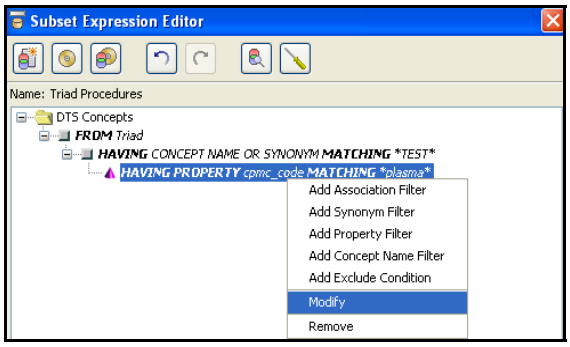


The **Redo Previous Edit** icon is enabled only **after** you perform the Undo function. Click **Redo Previous Edit** to restore the most recently undone addition or edit.

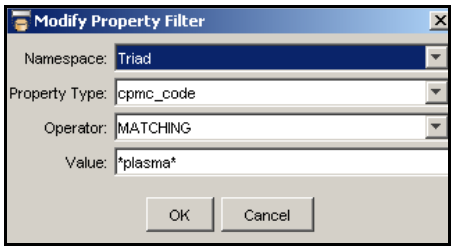
Modify a Subset Expression Filter

Follow this procedure if you want to modify an existing concept name or property filter.

1. To modify a filter, right-click on the existing concept name or property node that you want to edit (a property filter is selected for edit in the example). Click **Modify** when the option list displays.

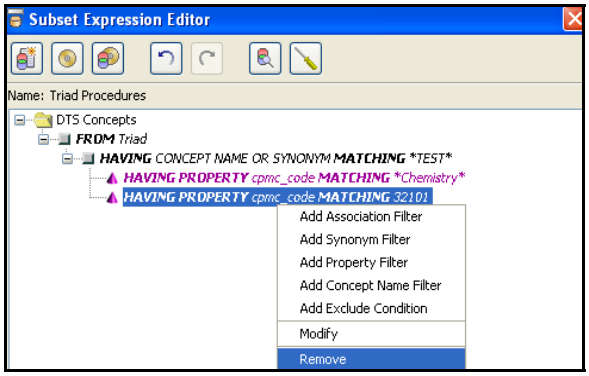


The *Modify Property Filter* window displays (if you chose to edit a concept name filter, the *Modify Concept Name Filter* window displays instead).

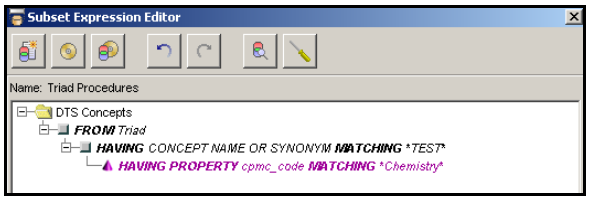


Remove a Filter from the Subset Expression

You can remove an individual unwanted filter by right clicking it, then clicking **Remove** in the displayed option list.



The unwanted filter is removed from the expression.

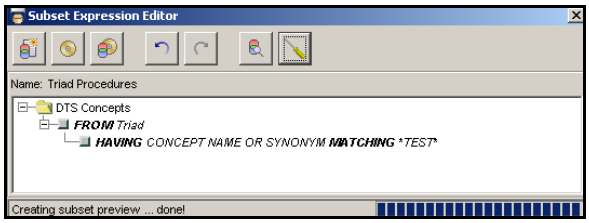


Preview Subset Expression Results

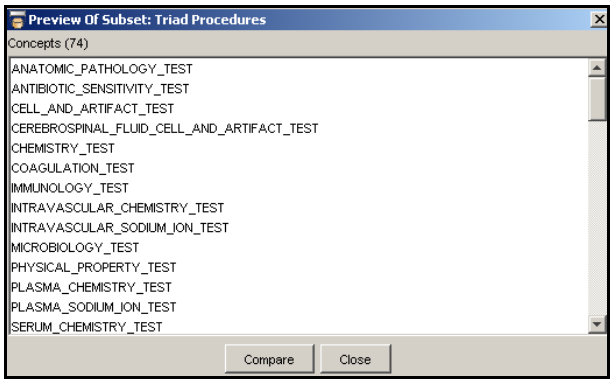
Before you save the new expression, you can preview which concepts will be chosen from the selected namespace based on the expression criteria you have entered so far.

1. Click the **Preview Subset** icon on the *Subset Expression Editor* window to list concepts that will be included in the subset. Note that you cannot preview a subset expression that includes only a namespace filter; the **Preview Subset** icon is enabled only if at least one additional filter is included in the expression.

The **Status Bar** indicates subset preview creation progress.

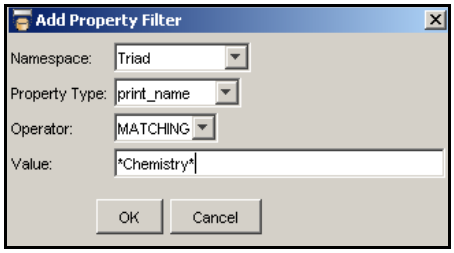


The *Preview of Subset* window then displays the concepts selected based on the expression criteria.

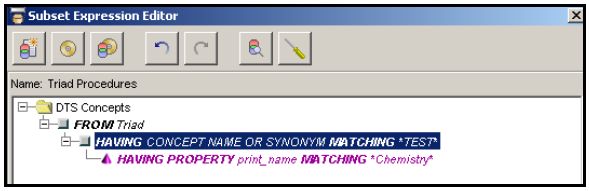


The number of concepts selected based on the current expression criteria is indicated (74 in the illustration); up to 1,000 concepts are displayed in the *Preview* window, sorted alphabetically. You can resize the *Preview of Subset* window, as desired (this size setting is retained for future sessions).

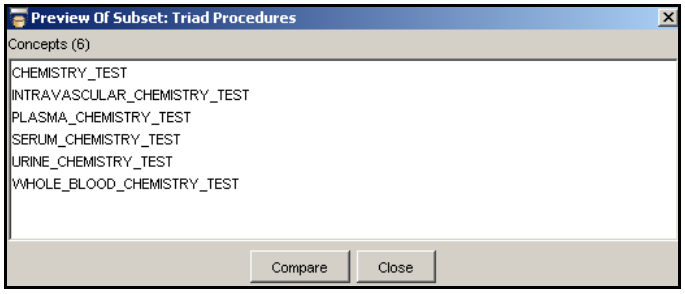
2. Click **Close** after viewing the preview results. Based on the preview results, you may want to modify one or more expression filters, delete filters, or add additional filters. Note the additional filter being added to the illustrated expression.



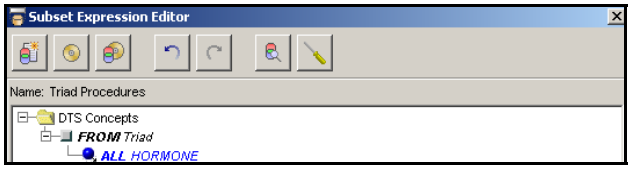
The new filter is added to the expression in the *Subset Expression Editor* window.



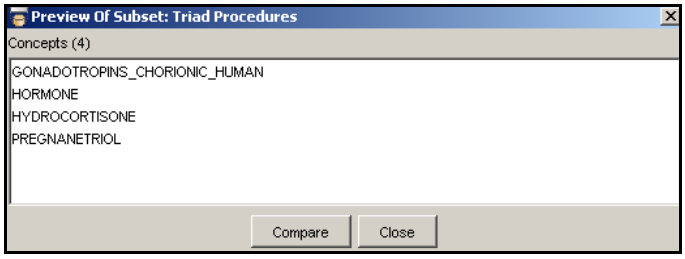
3. Click the **Preview Subset** icon again to view the revised concept selection. Note that as a result of the additional filter that was added, a more select set of concepts was returned for the subset.



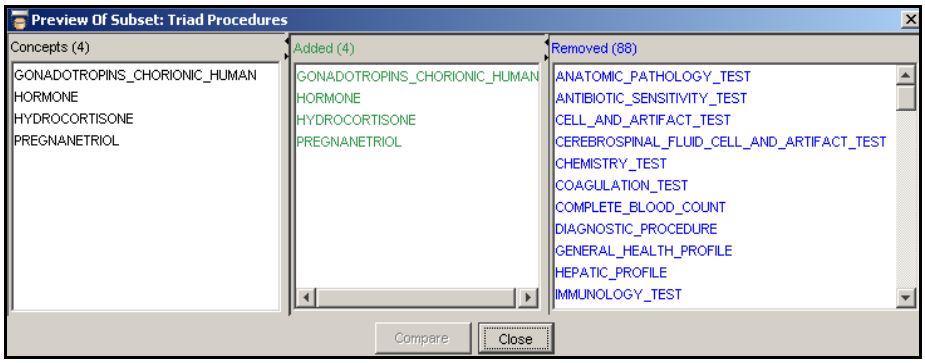
4. If your expression includes a concept filter stating that all descendants of the concept be selected for the subset, the descendant concepts are reflected in the *Preview of Subset* window.



In the illustration, the concept **HORMONE** and all of its descendants are included in the *Preview of Subset* window list.



5. The **Compare** function indicates the differences between the preview results from the current (unsaved) modified expression, and the results of the previous, saved version of the expression. Click **Compare** to indicate the differences between the two versions.



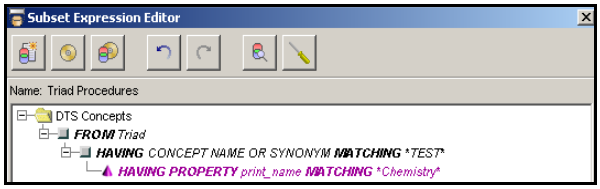
The left pane of the *Comparison* window reflects the version of the subset based on the (unsaved) expression criteria modifications you just made. The center pane lists all concepts (in green) that will be added to the subset if you save the expression modifications. The right pane lists the concepts (in blue) that will be deleted from the subset if you save the expression modifications.

The number of concepts in each list (**Concepts**, **Added**, **Removed**) is indicated in the header for the pane; up to **1000** concepts can be listed in each pane. You can resize the *Comparison* window, as well as the panes within, as needed.

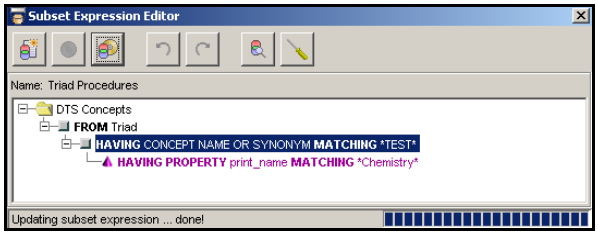
Click **Close** when you finish viewing. When the *Subset Expression Editor* window redisplays, you can make the desired expression criteria edits based on your views of the *Preview of Subset* window and *Comparison* window.

Save a New Subset Expression and Build a Subset Concept Hierarchy

After you preview, and are satisfied with, the results of the new subset expression, you have two options. If you **Save** the expression, the database is updated with the new expression and the criteria within.



The **Status Bar** indicates the progress of the update, and also indicates when the update is completed. After the expression is updated, the expression filters no longer display in italics, indicating that this is a saved expression.

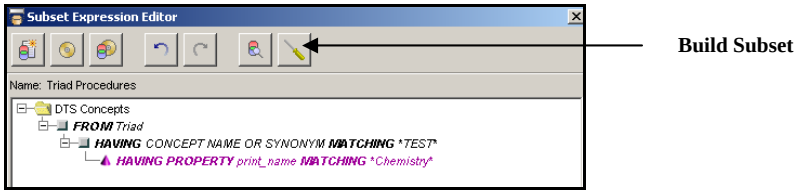


While the **Save Subset** function updates the database with the new expression, it does **not** actually create the new subset and build the subset concept hierarchy (based on the expression selection criteria). Creation of the subset and hierarchy may require considerably more time than the save of the expression.

A separate **Build Subset** option is provided that allows you to create (i.e., **Save**) the subset now, then create (**Build**) the hierarchy at a later time. The **Subset Build** function is discussed next.

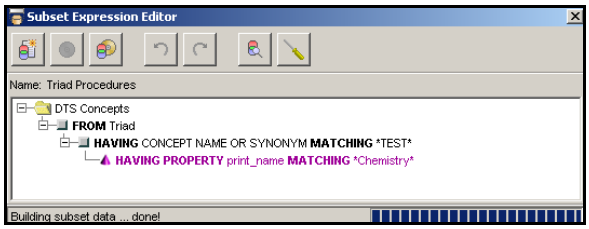
Build a New Subset Based on Expression Criteria

Click the *Subset Expression Editor* window **Build Subset** icon to create the subset – and for subsets of Ontylog namespaces, build the subset concept hierarchy – based on the expression criteria. For a new (i.e., unsaved) subset expression, or an existing expression that has been modified, you can click **Build Subset** to save the new/modified subset expression, create/update the subset contents, and build the subset hierarchy (there is no need to select **Save Subset** first).



Note that you cannot build a subset for an expression that includes only a namespace filter. The **Build Subset** icon is enabled only if at least one additional filter in addition to the namespace filter is included in the expression.

The **Status Bar** indicates build progress, and also indicates when the subset build is completed. When the build process is finished, the filters in the expression no longer display in italics, indicating that this is a saved expression for which the subset has been built.



If you attempt to close the *Subset Expression Editor* window without either saving the expression criteria or building the subset based on that criteria, the following window displays.

If you click **OK**, the *Subset Expression Editor* window closes, no subset is created, no hierarchy is built, and the new subset expression criteria is not saved.

Click **Cancel**, then click the **Build Subset** icon on the *Subset Expression Editor* window to initiate the new concept hierarchy build.

Search For and View Expressions Using *Subset List* Window

Using the *Subset List* window you can search for all existing subsets, or for subsets created for a selected namespace. You also can enter criteria to search for subset names that match a specified text string.

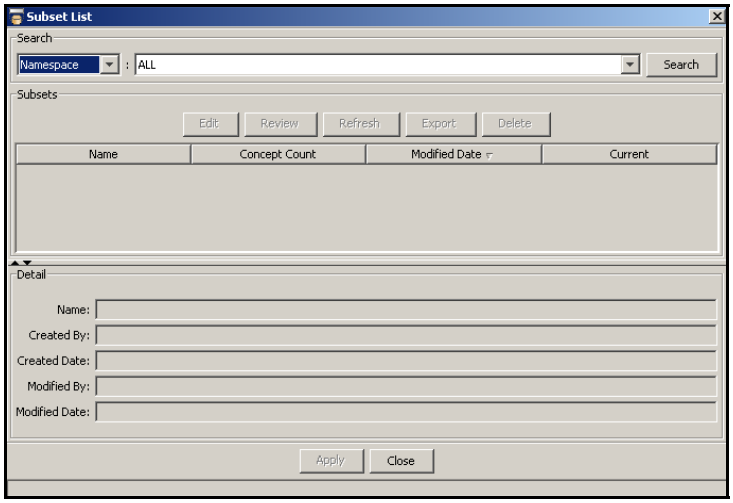
For each retrieved subset you can view the users who created and last modified the subset content, and the dates the subset was created and last modified. You can view the concepts within a selected subset, or delete a selected subset.

You can select a subset to modify its subset expression (on the *Subset Expression Editor* window). You also can use the **Subset Export Wizard** to export the contents of a selected subset to a text file, or to a new or existing namespace.

View Subset List

Follow this procedure to search for and list subsets of all namespaces, or a specific namespace. You also can search for subset names that match the text string you specify.

1. Click **New Subset List** in the **Tools** menu, or the **Open Subset List Panel** icon in the *DTS Editor Main* window toolbar. The *Subset List* floating window displays.

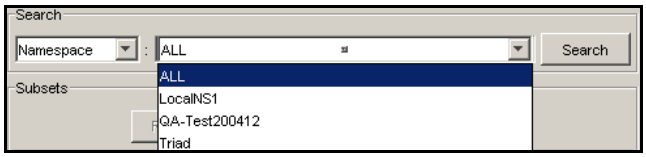


   You can resize the *Subset List* window, as desired. The window size setting is retained for future sessions.

2. From the dropdown field list, select to search by **Namespace** (the initial default) or by subset **Name Matching**.

   The search option you choose will be retained for future DTS Editor sessions.

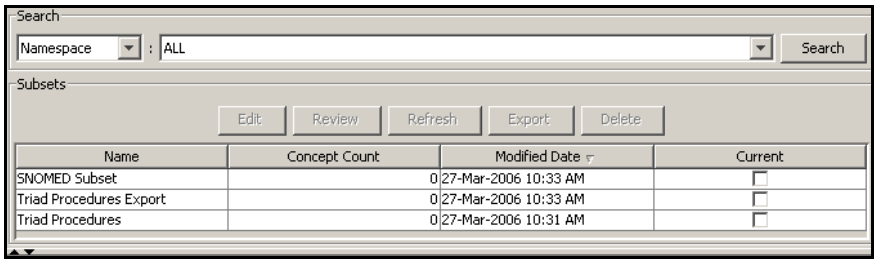
3. If you chose **Namespace** as your search option, you can search **All** namespaces for subsets (the default) or select an individual namespace from the dropdown list.



If **Name Matching** is your search option, enter the text string on which you want to base the search (e.g., **proced***) in the adjoining field. You can use wild cards in your search string; your text string is not validated for case.

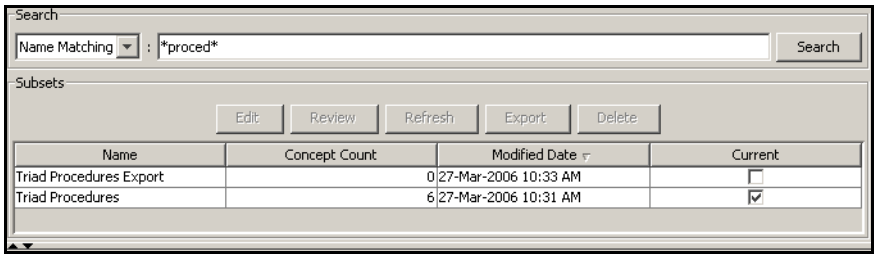
4. Click **Search**. The **Status Bar** indicates search progress and completion.

If you selected the **Namespace** search, subsets retrieved from the selected namespace(s) are listed in the **Subsets** section on the *Subset List* panel.



Click the **Expand** icon (▲) to expand the list area of subsets retrieved from the search. Click the **Collapse** icon (▼) to restore the original view.

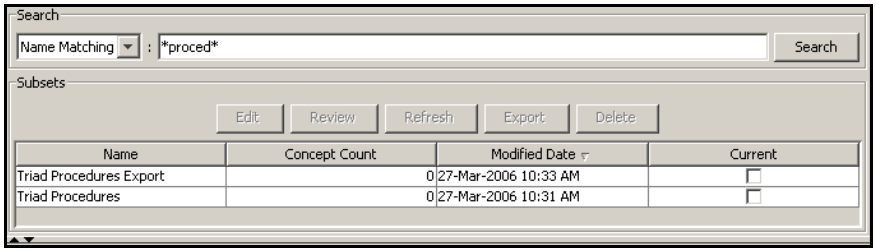
If you selected the **Name Matching** search option, subsets with names matching your search string are listed in the **Subsets** section on the *Subset List* panel.



The number of concepts in each listed subset is listed under **Concept Count**. The **Modified Date** reflects the date and time the subset expression criteria (i.e., the parameters by which the subset is populated with concepts) were last modified.

A check mark in the **Current** checkbox indicates that a new or modified subset's concept hierarchy has been built, based on the most recent (i.e., **current**) criteria in the subset expression. In the illustration shown, the check mark indicates that a hierarchy was built based on the current subset expression criteria for **Triad Procedures**.

Absence of the checkmark indicates that the most recent set of subset expression criteria was saved, but that no build was performed to create a concept hierarchy. The next illustration indicates that the most recent expression criteria for **Triad Procedures** was saved, but that no updated hierarchy was built.

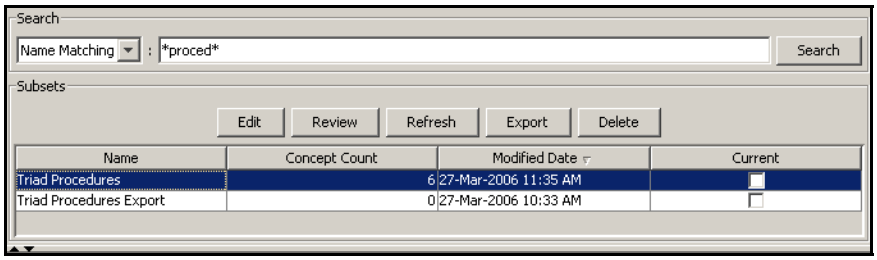


Refer to the *Build a New Subset Hierarchy Based on Expression Criteria* discussion earlier in the guide for more on building a subset hierarchy.

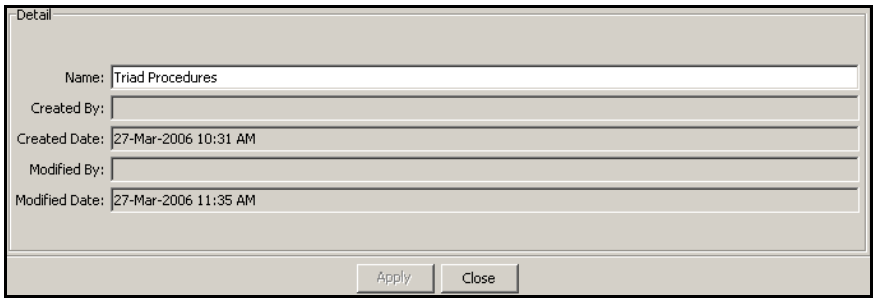
View Creation and Edit Dates for a Subset

Follow this procedure to view the dates a selected subset was created and last edited. For a subset created or edited by a user who was connected to the DTS Editor through a Secure Socket connection, you also can view the user who created (i.e., saved) the subset expression, and the user who performed the last modification to the expression.

1. In the **Subsets** list, click the subset for which you want to view creation and edit information.



The **Subset Details** section displays creation and modification information for that subset.



The following information is listed for each subset.

Name - The name of the subset you selected from the **Subset List** section. You can modify the subset name, as needed (the **Apply** option becomes enabled if you edit the name; click **Apply** to update the subset name).

Created By - If the user who created the subset was connected to the DTS Editor through a Secured Socket connection, the name of that user displays (view only).

Created Date - The date the subset was created (view only).

Modified By - If the user who last modified the subset **expression** was connected to the DTS Editor through a Secured Socket connection, the name of that user displays (view only).

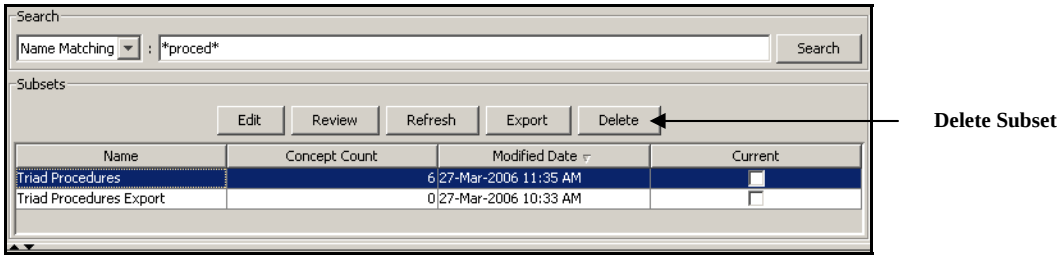
Modified Date - If the subset **expression** was modified, this is the date the last modification occurred (view only).

2. Click **Close** to exit the *Subset List* window.

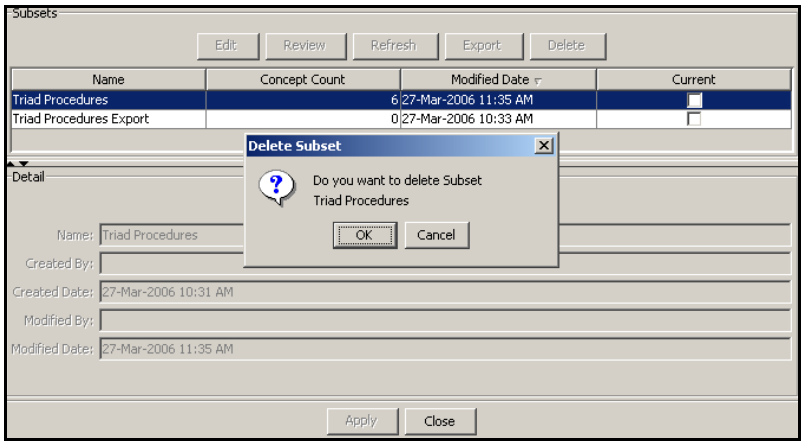
Delete a Subset

Follow this procedure to delete an existing subset.

1. When the results of your subset search display in the **Subsets** list, click the subset you want to delete. The option buttons (**Edit**, **Review**, **Refresh**, **Export**, and **Delete**) become enabled.



2. Click **Delete**. The *Delete Subset* confirmation window displays.

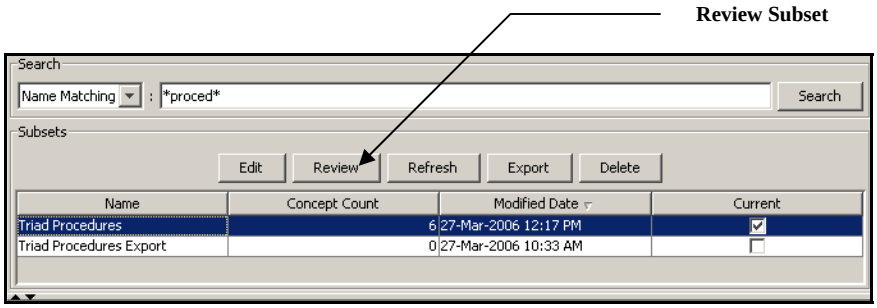


3. Click **OK** to confirm deletion of the subset. Click **Cancel** to ignore the deletion. The **Status Bar** indicates deletion progress, and when deletion is completed.

Review Subset Contents

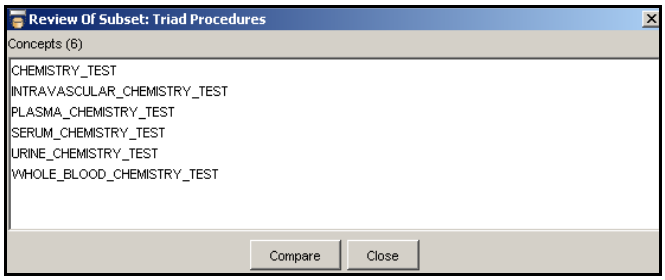
Follow this procedure to review the concepts included in a selected subset.

1. When the results of your subset search display in the **Subsets** list, click the subset for which you want to review content. The option buttons (**Edit**, **Review**, **Refresh**, **Export**, and **Delete**) become enabled.



2. Click **Review**. The **Status Bar** indicates subset review creation progress.

   The *Review of Subset* window then displays the concepts currently included in the subset you selected (up to 1000 are listed). The total number of concepts in the subset is indicated.



You can resize the *Review of Subset* window, as desired. This size setting is retained for future sessions.

3. Click **Close** after your review.

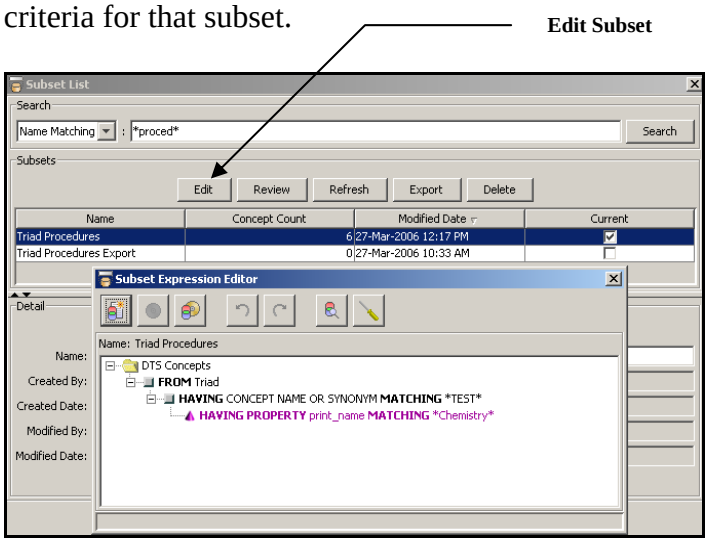
   If based on this review you want to modify the content in the subset, you can edit the subset expression in the *Subset Editor* window. Note the *Modify a Saved Subset Expression* discussion that follows.

> The **Compare** function lets you contrast subset preview results that are based on an edited set of subset expression with preview results from the most recent set of **unsaved** subset expression criteria. The Compare function is discussed in more detail in the *Modify a Saved Subset Expression* discussion that follows.

Modify a Saved Subset Expression

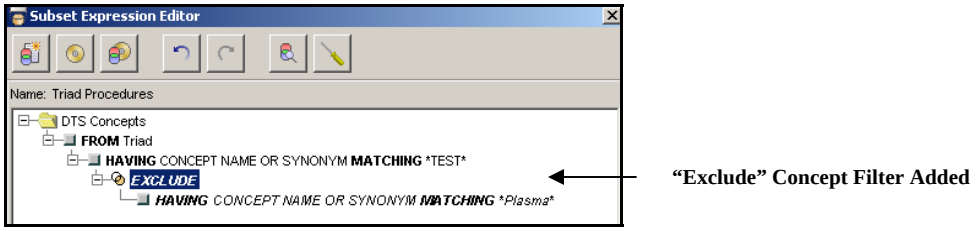
Follow this procedure to modify the content in an existing subset by editing the subset's expression.

1. When the results of your subset search display in the **Subsets** list, click the **Edit** button, or double-click the subset for which you want to modify expression criteria. The *Subset Expression Editor* window displays, reflecting the expression criteria for that subset.



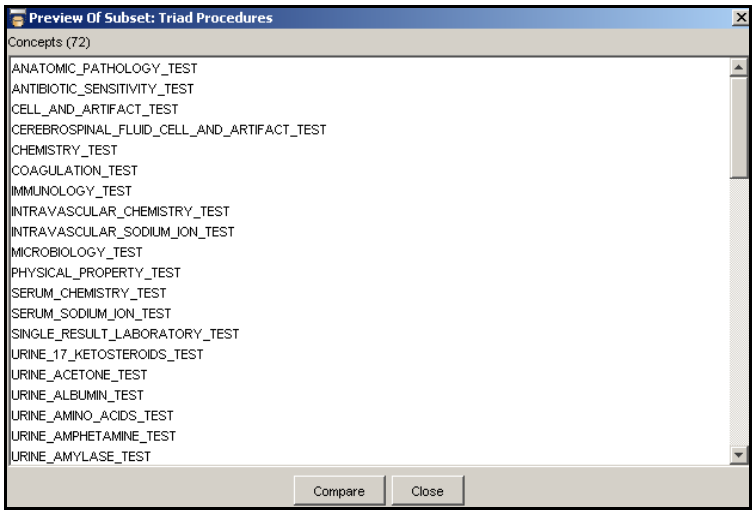
2. Make the desired modifications to the subset expression. Refer to the discussions in the *Add/Modify Expressions - Subset Expression Editor Window* section earlier in the guide for procedures on adding, deleting, and/or modifying expression filters.

   In the following illustration, the property filter from the previous (i.e., saved) version of the subset expression was removed, and an **exclude** condition was added to filter out concept names or synonyms that contain the string ***Plasma***.

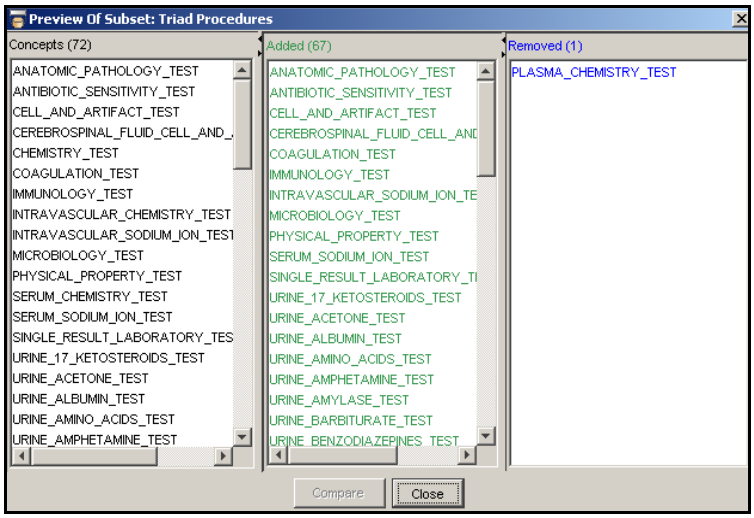


3. Click the **Preview Subset** icon. The **Status Bar** indicates subset preview creation progress.

   The *Preview of Subset* window displays the concepts in the modified (but unsaved) version of the subset. The number of concepts selected for the subset based on the modified expression is indicated.



4. Click **Compare** to compare these pending results to the results generated from the last build of the subset's expression criteria. The *Comparison* window displays.

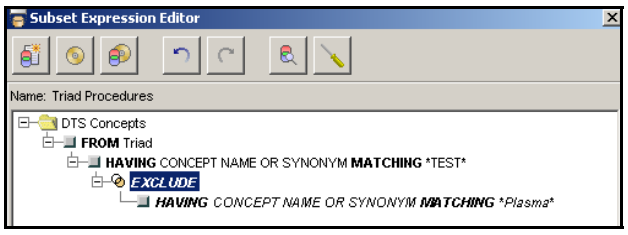


The left pane of the window reflects the pending version of the subset based on the unsaved subset expression modifications you just made (the same results listed in the *Preview of Subset* window). The center pane lists concepts (in green) that will be added to the subset if you perform a new build based on the modified expression criteria. The right pane lists concepts (in blue) that will be deleted from the subset when you perform a new build based on the modified expression criteria.

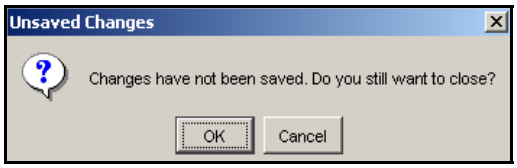
The number of concepts in each list (**Concepts**, **Added**, **Removed**) is indicated in the header for the pane; up to **1000** concepts can be listed in each pane. You can resize the *Comparison* window, as well as the panes within, as needed.

Click **Close** when you finish viewing.

5. When the *Subset Expression Editor* window redisplays, you have several options.



If you close the *Subset Expression Editor* window without saving your subset expression criteria modifications, the following window displays.

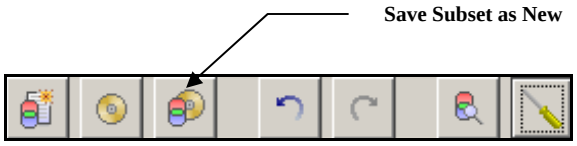


If you click **OK**, the *Subset Expression Editor* window closes; none of your expression criteria modifications will be saved, and no changes will be made to the subset. Click **Cancel** if you want to choose a different option for your expression modifications.

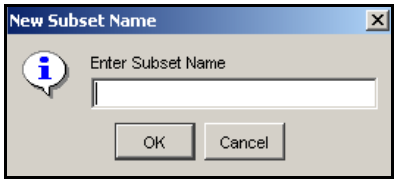
Click the **Save Subset** icon on the *Subset Expression Editor* window to update the original subset expression with your criteria modifications.

The **Status Bar** indicates subset update progress. The **Save** function updates the database with the modified expression, but does not save the updated list of concepts in the subset or recreate the subset concept hierarchy based on the modified expression criteria. The subset concepts will be saved and the concept hierarchy will be recreated when you initiate a subset **Build** (click **Build Subset**).

To save this subset expression as an entirely **new** expression (including the modified concept selection criteria), click the **Save Subset As New** icon.



The *New Subset Name* window displays.



Enter the name of the new subset in the *Enter Subset Name* field, then click **OK**. The new subset name is indicated on the *Subset Expression Editor* window. The concept selection criteria from the original subset expression are left intact.

Like the **Save Subset** function, the **Save Subset As New** function updates the database with this new expression, but does not create a subset or build the subset concept hierarchy. The subset, and the hierarchy in the case of subsets based on Ontylog namespaces, will be created when you initiate the subset **Build**.

6. To build a subset concept hierarchy for either a new subset or an updated subset (using the **Save Subset** or **Save Subset As New** function) click the *Subset Expression Editor* window **Build Subset** icon.

For a subset of a thesaurus namespace, the **Build Subset** function updates the database with the modified expression and saves the updated list of concepts in the subset. For subsets of Ontylog namespaces, the **Build Subset** function updates the database with the modified expression, recreates the concept list in the subset, and creates the new subset concept hierarchy based on the modified expression criteria.

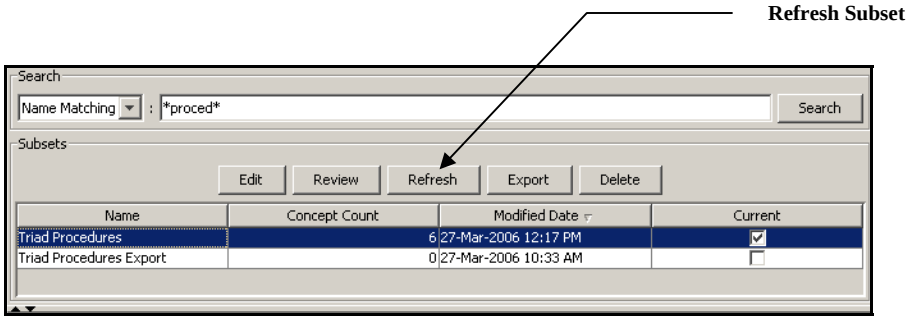
The *Subset Expression Editor* window **Status Bar** indicates the progress of the subset build, and completion of the build.

Refresh a Subset

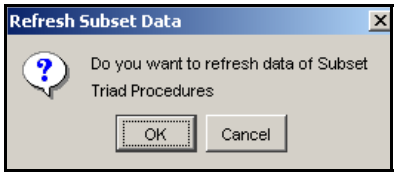
Subscription namespace updates may drive changes to the namespaces' subset(s). For example, if concepts that existed prior to the subscription update no longer exist. parent/child relationships may be broken.

To insure that an updated subscription namespace concept hierarchy is synchronized with the concepts and hierarchy in its subsets, you should **Refresh** each of these subsets. The Refresh action uses the existing subset expression criteria to rebuild the subset list. For an Ontylog or Ontylog Extension namespace, the Refresh action rebuilds the subset list, and also recreates the subset hierarchy after the Ontylog namespace hierarchy update.

1. When your subset search results display in the **Subsets** list, click the subset to refresh. The **Edit**, **Review**, **Refresh**, **Preview**, **Export**, and **Delete** options become enabled.



2. Click **Refresh**. The *Refresh Subset Data* window displays.



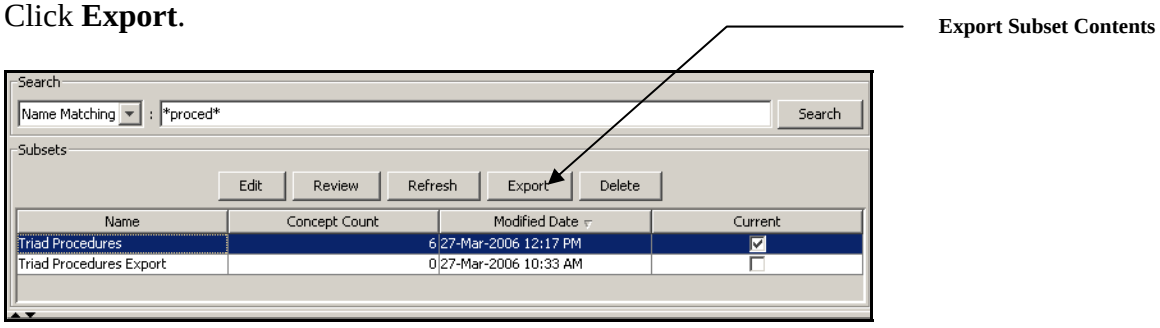
3. Click **OK.** The *Subset Expression Editor* window **Status Bar** indicates the refresh progress, and completion of the refresh. The subset is rebuilt; for subsets of Ontylog namespaces, an Ontylog or Ontylog Extension hierarchy is recreated based on the existing expression criteria.

Export Subset Contents

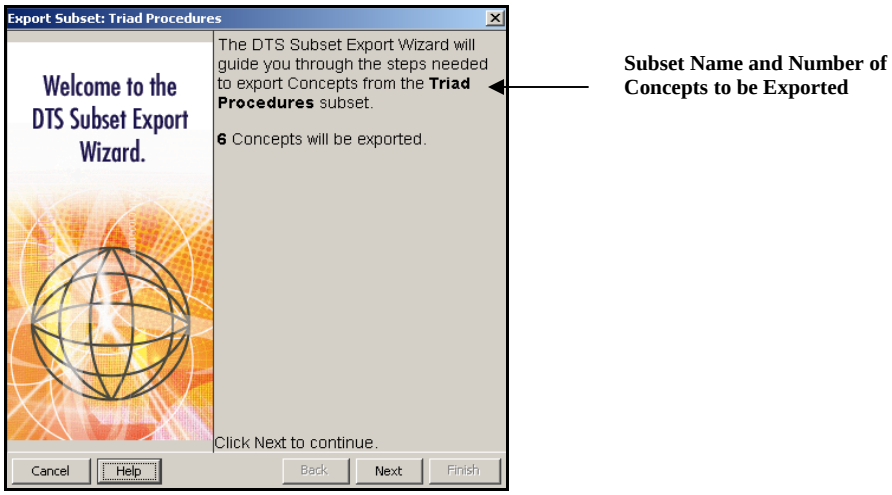
The DTS Subset Editor includes a **Subset Export Wizard** that allows you to export the contents of a subset to a text file, to a new local thesaurus namespace, or an existing local thesaurus namespace.

1. When the results of your subset search display in the **Subsets** list in the *Subset List* window, click the subset you want to export to highlight it. The option buttons (**Edit**, **Review**, **Refresh**, **Export**, and **Delete**) become enabled.

2. Click **Export**.



The **Subset Export Wizard** *Welcome* window displays.



3. The name of the subset you selected for export is referenced in the window, as well as the number of subset concepts to be exported.

   Click **Next** to proceed. The following window displays.

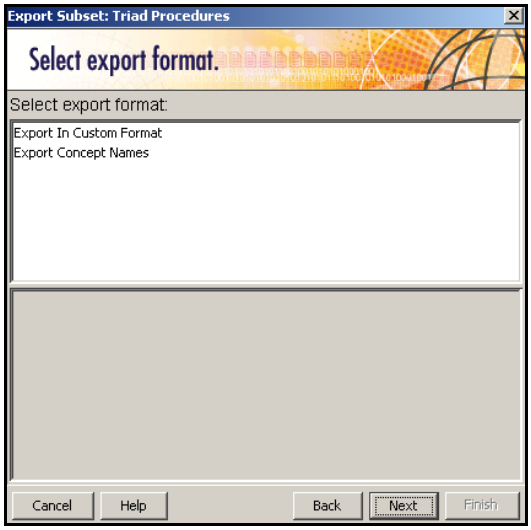
You can export the subset content to a **text file** (the default) as a comma-delimited list of concept/term names, or in a custom TAB-delimited format that includes the concept name, code, and ID. You also can export subset contents to a **new or existing local thesaurus namespace**. Procedures for performing an export of the selected type are included in the following discussions.

You can click **Help** on any of the **Subset Export Wizard** windows to display Subset Editor task procedures. Click **Cancel** on any window to terminate the export procedure.

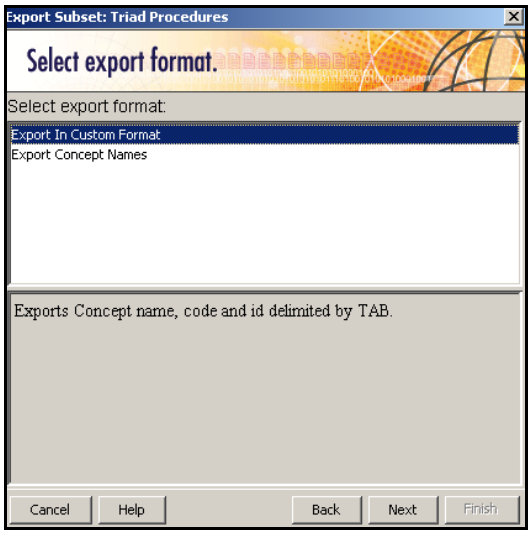
Export Subset Contents to File

Follow this procedure to export the subset content to a new or existing text file.

1. If you select **Export to File** as the export type and click **Next**, the following window displays.



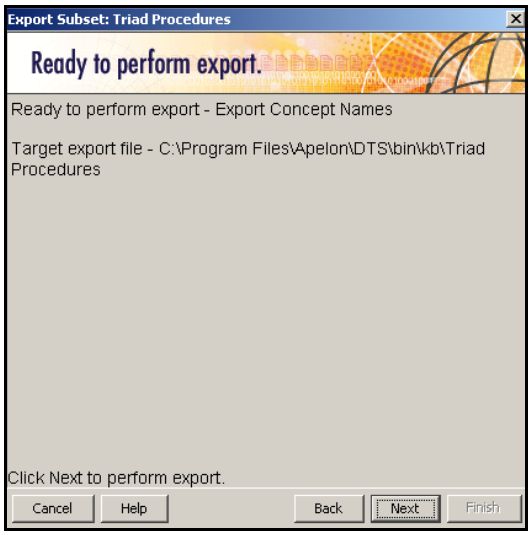
You can choose to export only **Concept Names** to the file, or export the subset content in **Custom Format** (concept **Name**, **Code**, and **ID**, delimited by TAB).



After you select the desired format, click **Next**. The following window displays.

2. At this point you must specify the name of the file to which you will export the subset contents. Click **Browse** to select the location to which the file will be written; if you use Browse to select an **existing** file name, the contents of that file will be overwritten.

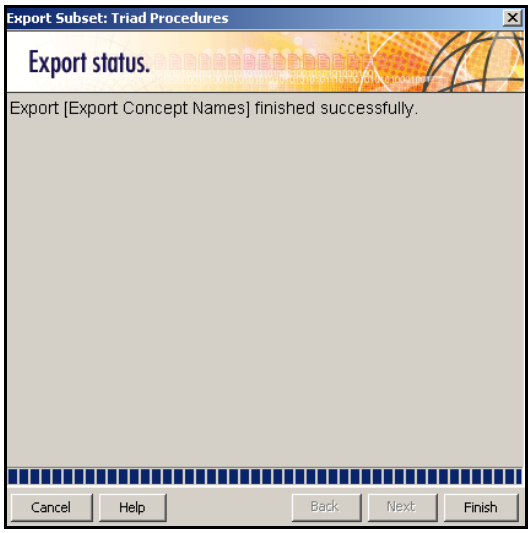
   Click **Next**. The following confirmation window displays.



The window references the export format (**Custom Format** or **Concept Names**) and export file name you selected.

3. Click **Back** to modify the export file name and/or location.

   Click **Next** to proceed with the export. The following confirmation window displays to indicate a successful export.



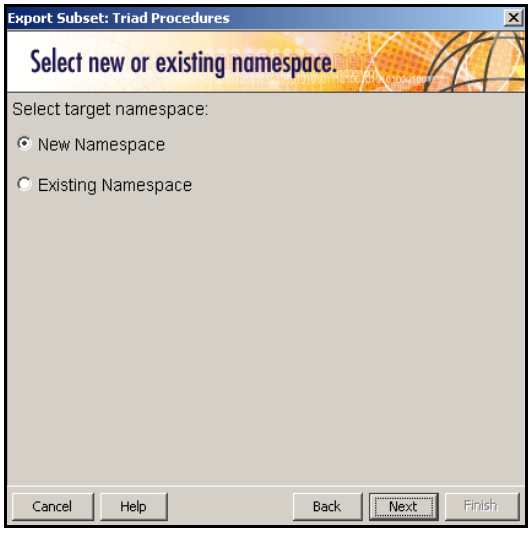
4. Click **Finish** to return to the *Subset List* window.

Export Subset Contents to a Local Thesaurus Namespace

Follow this procedure to export the subset content to a new or existing local thesaurus namespace. **Note:** if the DTS Editor is connected to the Apelon DTS Server using a **Secure Socket Connection**, you can export subset content only to an **existing** local thesaurus namespace; the option to export to a new local thesaurus namespace will not be available.

Select **Export to Namespace** as the export type, then click **Next**.

The following window displays.



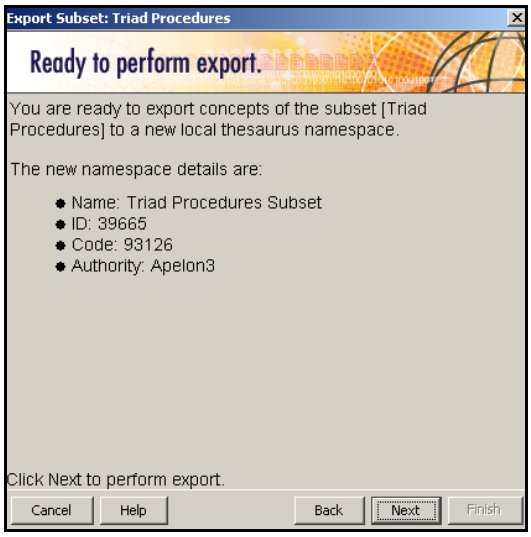
You can choose to export the subset contents to a new namespace (the default), or an existing namespace.

Export Subset to a New Local Thesaurus Namespace

1. If the DTS Editor is **not** connected to the Apelon DTS Server through a Secure Socket Connection, the **New Namespace** option is available. If you select **New Namespace** and click **Next**, the following window displays.

2. At this point you must specify the *Name*, *ID*, and *Code* for the local thesaurus namespace you are creating for subset export. From the *Authority* field dropdown list, select the authority for the new namespace.

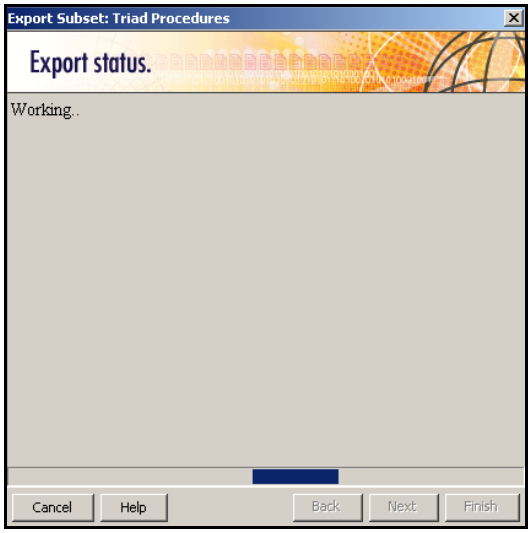
3. Click **Next**. The following window displays.



The window references the subset for which you are exporting content, as well as the information for the new namespace you are creating.

4. Click **Back** to modify the new namespace information.

   Click **Next** to proceed with creation of the new local thesaurus namespace and the export of subset content to it. The following status window displays to indicate that the export is in progress.



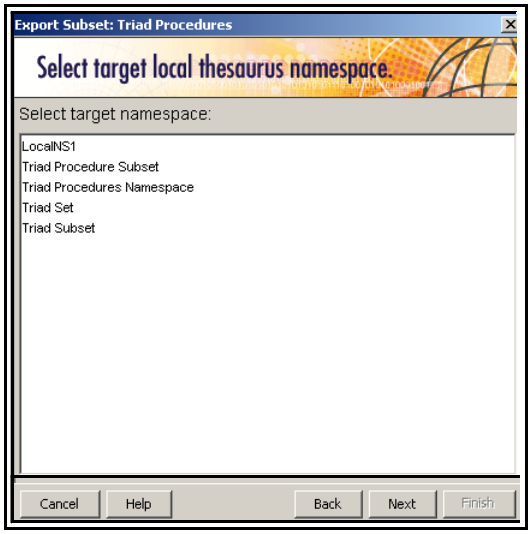
   A confirmation message then displays to indicate a successful export.

5. Click **Finish** to return to the *Subset List* window.

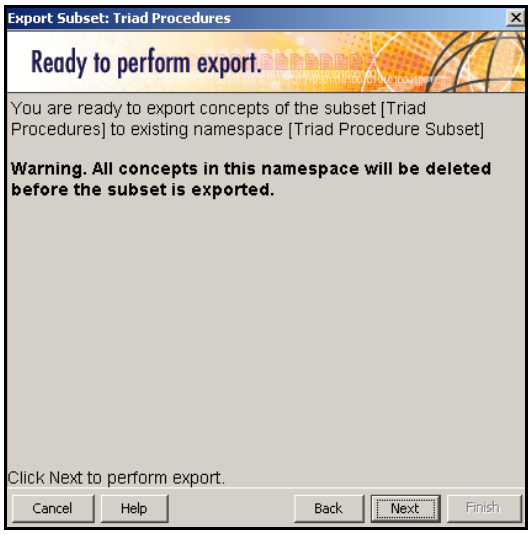
Export Subset to an Existing Local Thesaurus Namespace

1. If you select to export subset contents to an existing local thesaurus namespace, previous content in the existing namespace will be overwritten. Click the **Existing Namespace** option, then click **Next**.

The following window displays, listing all existing local thesaurus namespaces.



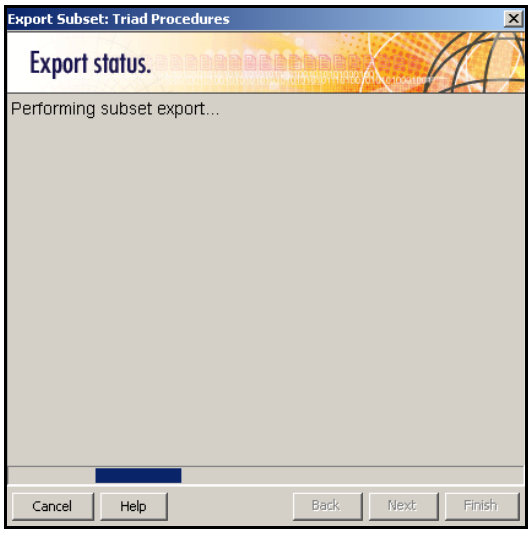
2. At this point you must select the target local thesaurus namespace to which to export the subset contents. Click on the desired namespace name to highlight it, then click **Next**. The following confirmation window displays.



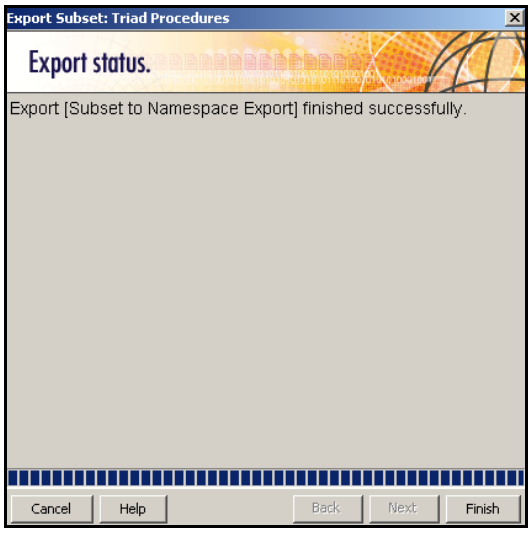
The window references the subset for which you are exporting content, as well as the existing namespace you selected to which to export the content. Note that the existing content in the selected namespace will be overwritten.

3. Click **Back** to select a different local thesaurus namespace for export.

   Click **Next** to proceed with export of subset content to the selected local thesaurus namespace. Note that the content of the existing local thesaurus namespace will be overwritten. The following status window displays to indicate that the export is in progress.



A confirmation message then displays to indicate a successful export.



Note that if you clicked **Cancel** to terminate the subset export to the existing local namespace, the changes to that existing namespace are rolled back (i.e., the existing contents are not overwritten).

4. Click **Finish** to return to the *Subset List* window.

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