MiDatabank Version 3 Quick Start Guide

This quick start guide is not comprehensive and aims to introduce the main functionality of MiDatabank. Further documentation is available in the Users Manual.

MiDatabank consists of two modules, the Administration module and the Enquiry Manager module.

Section 1 - Using the Administration Module

- Login to the Administration module and configure the system.

From the Start button select Programs>MiDatabank 3>Administration.

Login using the following details:

Username: **Administrator**
Password: **Equinox**

Change the password if desired:

- Select File>Change my Password

Please note that there are two ‘layers’ of tabs available:

The top layer relates to global database configuration, whereas the second layer of tabs are pertinent to centre-specific data. Please note that the MiDatabank model allows for the database to contain more than one centre: The top layer tabs are for specifying data that is common to all centres, whereas the second layer tabs is for specifying data that is specific to each centre.

Using the top layer of tabs (Fig 1):

- Click on the “Organisations” tab and add organisations.
- Click on the “Individuals” tab and add individuals.
- Click on the “Sources Master List” tab and click on the button ‘Check for Resource Updates’ to update your sources master list from the list that is maintained centrally

  When updating the master list of resources, it is possible that the firewall or proxy settings of your organisation do not permit a connection to be made across the internet to the web-service that provides the master list. In the event of any problem, please see the Help section on www.midatabank.com

- Click on “MI Categories Master List” tab to configure the Categories available in your master list. This is a first step to configuring the Categories available in your centre, which is shown later in this document. However, it is important to note that it is only possible to select Categories for your centre if the Category already exists in the master list which is shown here.

Please note that each category has an associated Standard Search Pattern (SSP). A SSP is a ranked list of resources that are the most appropriate for a particular category of enquiry. MiDatabank is pre-configured with default SSPs for each core category which have been determined by the UKMI.

Information for Industrial Users of MiDatabank-*i*

Choosing master categories

When deciding the core list of categories for your company, you may wish to exploit the default SSPs that have been provided. Therefore it is important that before you start editing the categories, you determine which categories can be re-used by your company, and that you do not delete these categories.

Choosing Origins

>> to do - version 3.0.1

Choosing Routes

>> to do - version 3.0.1

Fig 1: Administration Module Top Layer Tabs

Organisations: add names, addresses & contact details of organisations that commonly use your service eg. GP surgeries, hospitals or members of the public

Sources Master List: A comprehensive list of all the available sources

MI Categories Master List

The categories that have been configured for your system

Reps (Industry Version):

Listing of Sales Representives

Individuals: build up a database of your frequent enquirers by adding their names & contact details here to save you typing them in every time they call.

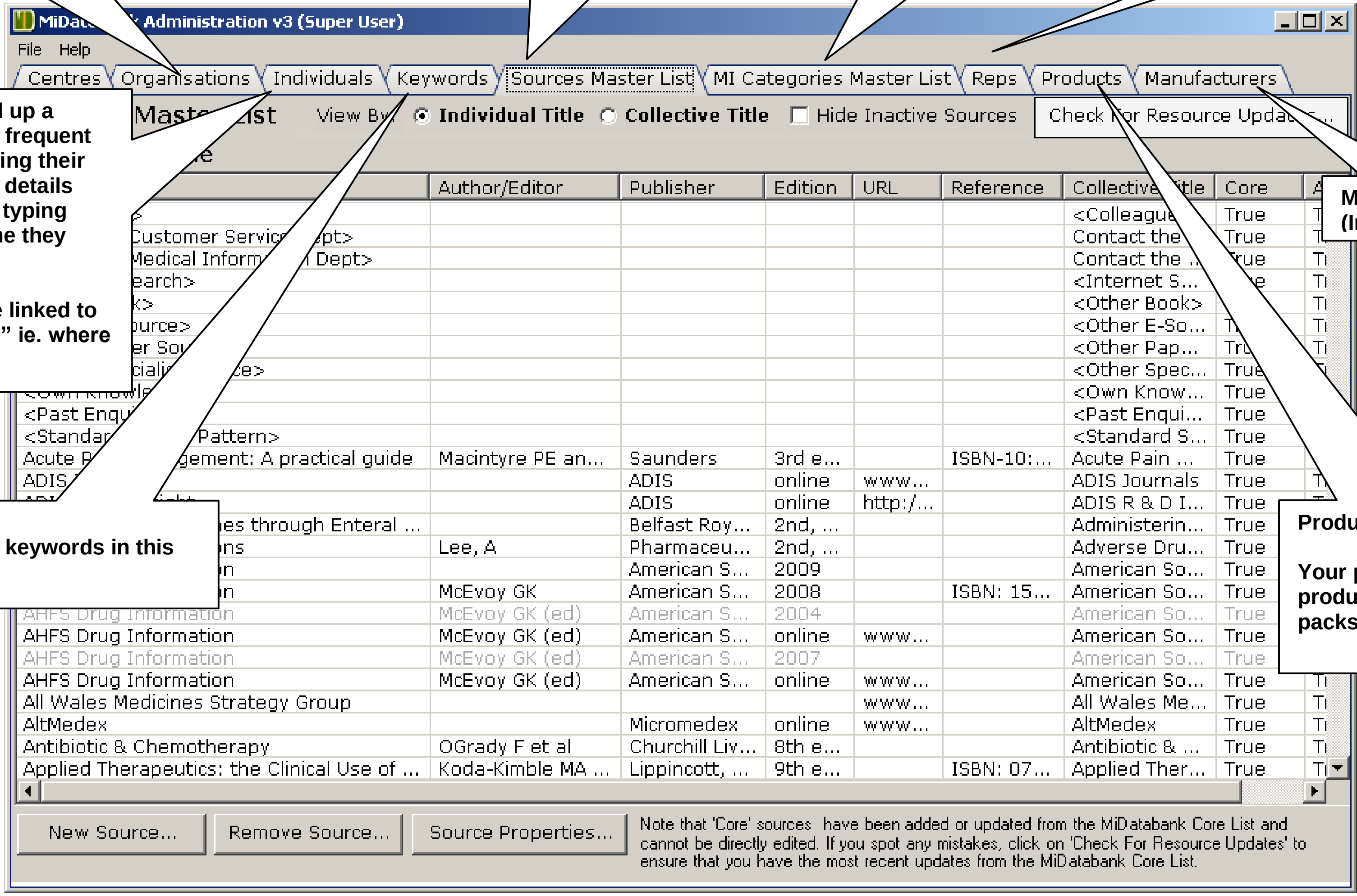
They can then be linked to an "Organisation" ie. where they work

Manufacturers (Industry Version):

Keywords: you can create keywords in this section.

Products (Industry Version):

Your product range, including product groups, products and packs



Using the MI Centres Resources tab (Fig 2):

- Select your centre in the list on the left-hand side
- Click on the “Users” tab and enter yourself as a user with a custom colour, a username, email and a password. Give yourself a full set of permissions for all documents types (Enquiries, FAQs and Projects)
- Check the boxes for ‘User is Med Info’ and ‘Can Create Keywords’
- Add another user e.g. a trainee with just the Edit permission for Enquiries, and check the boxes for ‘Hide Enquirer Database’ and ‘Always Show Helper’

Permissions for Documents:-

Permissions - Enquiries	
Edit:	Allows creation of enquiries and input of data. If this is not set, then the user will only be able to view enquiries read-only
Allocate:	Enables users to allocate enquiries to others or themselves.
Reply:	Allows users to reply to enquiries without them having to be authorised by someone else. It is recommended that trainees do not have this permission.
Can Authorise Reply:	The user (eg. senior MI pharmacist) is able to authorise trainee enquiries in the “Awaiting Authorisation” tray. Once authorised, enquiries move into the “Reply Authorised” tray.
Permissions - FAQs (Frequently Asked Questions)	
Edit:	Allows creation and editing of FAQs. It is recommended that trainees do not have this permission.
Allocate:	Enables users to allocate FAQs to others or themselves for editing purposes.
Permissions - Projects	
Edit:	Allows creation and editing of Projects. It is recommended that trainees do not have this permission.
Allocate:	Enables users to allocate Projects to others or themselves for editing purposes

Other User Permissions:

User is Med Info	Indicates that the user belongs to the Medicines Information Department
Can Create Keywords:	The user is able to create Keywords if they are not listed.
Centre Administrator	In the scenario where several centres are listed in MiDatabank, it is possible to allow a user to be able to login to the Admin application using their MiDatabank username and password,

	to change settings for their particular centre.
Permissions for New Users	
Hide Enquirer Database	The user is presented with a simplified user-interface that only allows the entry of First Names and Surname. The user is not able to choose an Enquirer from the database of individuals and organisations available
Always Show Helper	Enquiries are always displayed with the Helper Panel visible on the left-hand side. The Helper contains context-sensitive text that guides new users step-by-step through an enquiry

- Click on the "Sources" tab, and then select the 'Individual Title' radio-button. Click on the button "Choose from Master List" to add names of sources for your MI Centre. If a resource is not listed, then you will need to update your master list of resources – this is covered in the next section

- Click on the "Origins" tab and click "Add Node" to add origins appropriate to your centre.

One of the main reasons for using origins is to provide a cost centre for enquiries. In other words, you can associate an origin with an enquiry, so that at a later date it is possible to generate a report to determine who to invoice.

For users in the Pharmaceutical Industry

Origins can be configured as required. An example of origins used by one centre:

Code
Consultant
Dentist
Dietician
Editor/ journalist
GP
Hospital Pharmacist
Hygienist
Industry
Manufacturer
Medicines Information Pharmacist
Midwife
Nurse
Patient/relative/carer
Patient Organisation
Pharmaceutical/prescribing advisor
Retail/ Community Pharmacist
Student
University Lecturer
Veterinary Surgeon/ Nurse
Wholesaler

For Hospital users in the UK:

The UKMi root origins are pre-configured as shown below and not editable. However, you can add your own origins to these root origins, as desired. Please remember to keep the 'sub-tree' of each root origin as simple as possible.

Setting Origins:

National Code	**Examples of "Nodes" to add**
Base Organisation	Directorates & wards
Base Organisation Affiliates	Other hospitals within your Trust, including their directorates & wards
Primary Care	Local PCTs
Secondary Care	Other trusts/hospitals using your service
Other NHS	Walk-in Centres, Strategic Health Authorities
Non NHS	Social services, police, private hospitals, armed forces, universities
NHS Direct	NHS Direct centres in your area if applicable. Include Nurse Advisers & Health Information Advisers as separate "nodes"

For Hospital users outside the UK:

The root origins are pre-configured as shown below and not editable. However, you can add your own origins to these root origins, as desired. Please remember to keep the 'sub-tree' of each root origin as simple as possible.

Setting Origins:

Code	**Examples of "Nodes" to add**
Base Organisation	Directorates & wards for your organisation
Base Organisation Affiliates	Other hospitals or organisations that are affiliated with your organisation. Sub nodes could include their directorates & wards
Secondary Care	Other hospitals using your service
Primary Care	Primary Care organisations using your service
Private	Private hospitals using your service
Other	

Fig 2: Administration Module: Second Layer Tabs

Origins: set-up a list of origins for your enquiries for use in workload reporting e.g."Base Organisation" - add hospital directorates & even wards depending on your requirements

Users:
Set up your staff as "Users" with their access "permissions"

Sources: this is where you set up a list of sources that are available at your MI Centre for answering enquiries. These include books, web-sites and names of contacts who provide advice

The MI Categories tab enables you to choose the Categories available at your centre

Standard Paragraphs are short paragraphs or phrases that are commonly used within letters to enquirers.

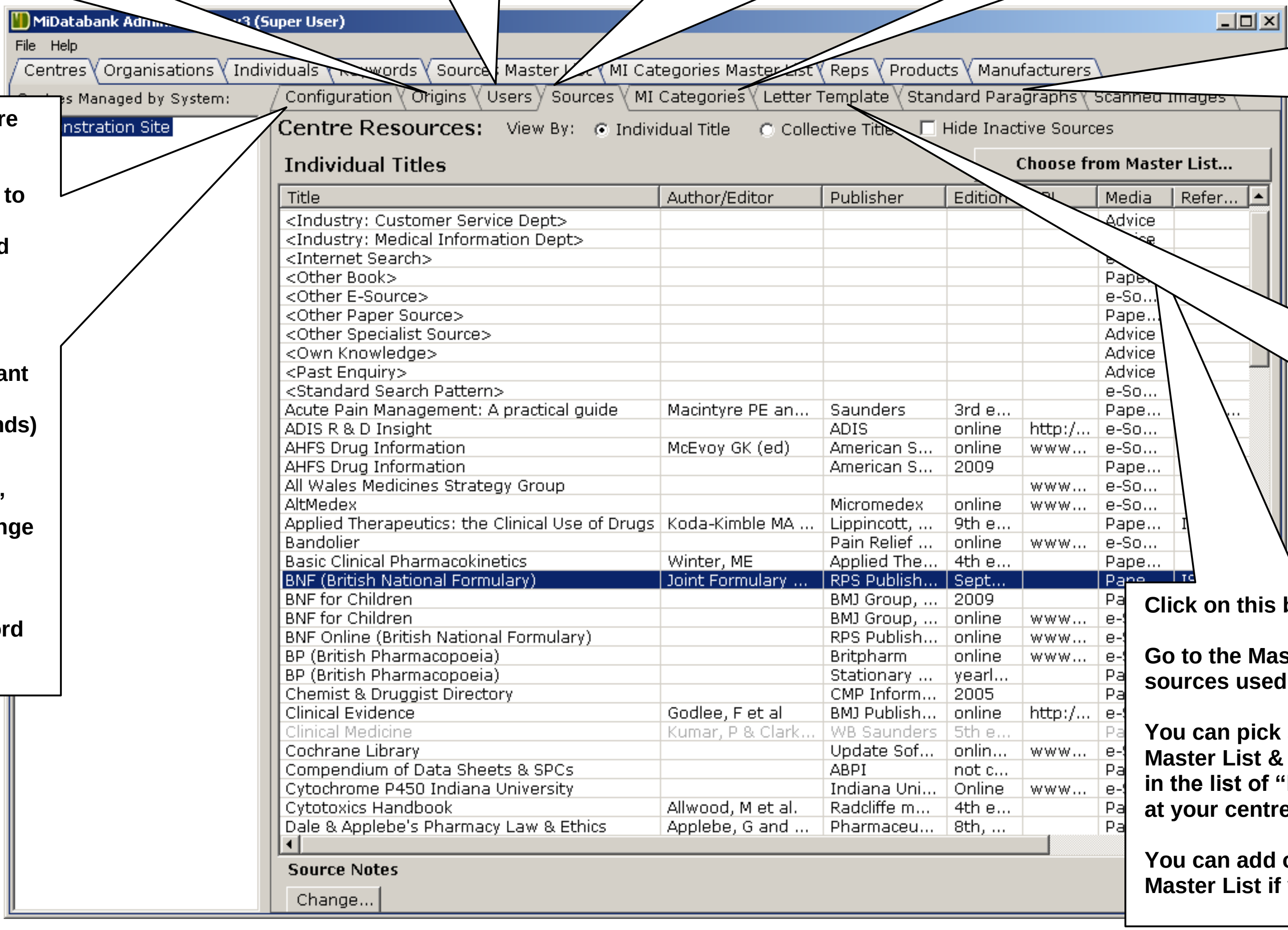
Configuration - Click here to:

Specify where you want to store electronic attachments (this should not be changed once attachments have been added)

Set-up how often you want the system to autosave data (default is 30 seconds)

Set the number of days before the "due by date" when enquiries will change from green to amber (default is 5 days)

Turn off the Auto-keyword facility



The Letter Template tab enables the creation and editing of standard document templates (eg headers and footers) for the different departments in your organisation

Click on this button to:

Go to the Master List of names of sources used to answer enquiries

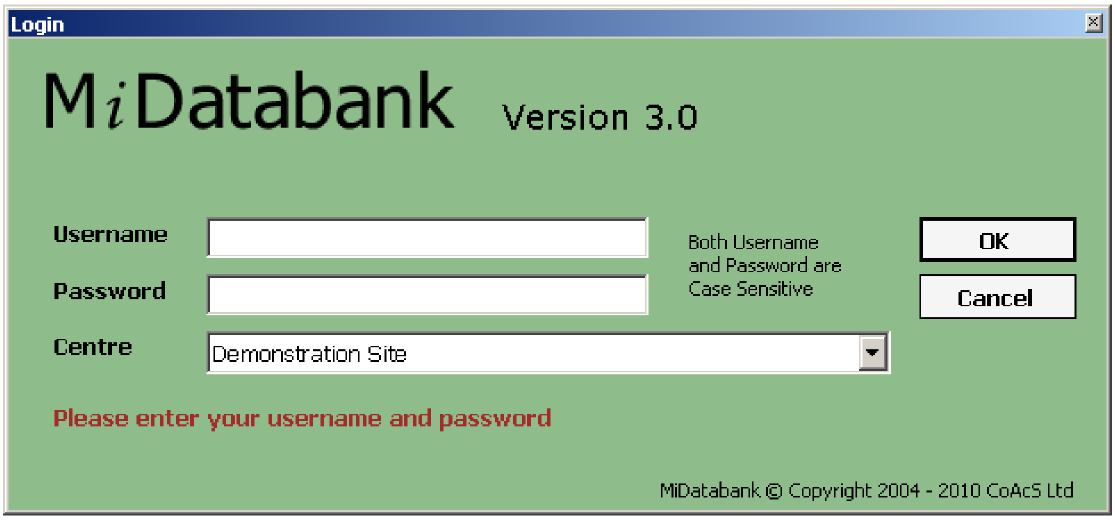
You can pick sources from the the Master List & they will then appear in the list of "Resources" available at your centre.

You can add other sources to the Master List if you need to

Section 2 - Using the Enquiry Manager Module

- Login to the Enquiry Manager module

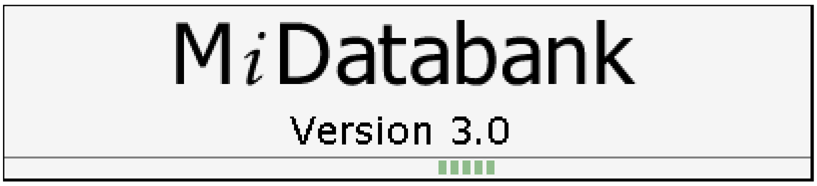
From the Start button select Programs>CoAcS>MiDatabank 2>Enquiry Manager.



Login as yourself using the following details:

Username: as set-up in the Administration Module.
Password: as set-up in the Administration Module.

There is a short delay while MiDatabank initialises:



The Work In Progress window is displayed (Fig 3 below)

- Maximise the "Work In Progress" screen to help you use the system effectively.

Creating an Enquiry

Using the example enquiry (see end) or one of your own, enter a new enquiry.

- Click the "New Enquiry" button to create a new enquiry.

Enter all the details for a new enquiry, and work through the tabs corresponding to the stages of the process:

- Input (Fig 4)
- Research (Fig 5)
- Answer (Fig 6)
- Completion (Fig 7)

Authorising and Allocating

- Once you have an enquiry from a trainee waiting to be authorised, click on the “Awaiting Authorisation” button in the Work In Progress window.
- Click on “Open Reply for Authorisation” in the title bar. This opens the enquiry in a special mode to allow you to authorise the enquiry, or not. However, if you wish to make actual changes to the text of an enquiry done by a trainee, you must allocate the enquiry to yourself, and then later reallocate the answer back to the trainee

Searching

- From the Work In Progress window, perform a quick search of pending enquiries.
- From the Search window (click on the Search button on the top panel), perform some searches of archived enquiries.
- From the Advanced Search window (click on the Adv. Search button on the top panel), to perform some advanced searches of archived enquiries.

Reporting

From the File menu choose “Reporter” and try running different types of report, these are:

- Workload Report
- Enquiries Summary
- Staff Report

Try the options on the right-hand side for Workload and Enquiries Summary reports.

Adding Notes

Notes can be added to pending and archived enquiries. Try using these facilities to add notes to:

- a pending enquiry
- an archived enquiry

Fig 3: Enquiry Manager Module

New Enquiry button: click to open a new screen & enter enquiry details

You can easily open up new enquiry screens while you are working on others

Reporting facilities are available from the File menu

Search button:
use to search for past enquiries, FAQs and projects

Click these buttons to show the different enquiry displays which are available

Timer: this records time spent on an enquiry

Click to stop the timer if your work is interrupted

Make sure you maximise the "Work In Progress" screen to help you use the system effectively

When Research has started, the enquiry is 'In Progress'

Awaiting Authorisation tray: enquiries waiting to be authorised eg. trainee/ technician enquiries are held in this tray

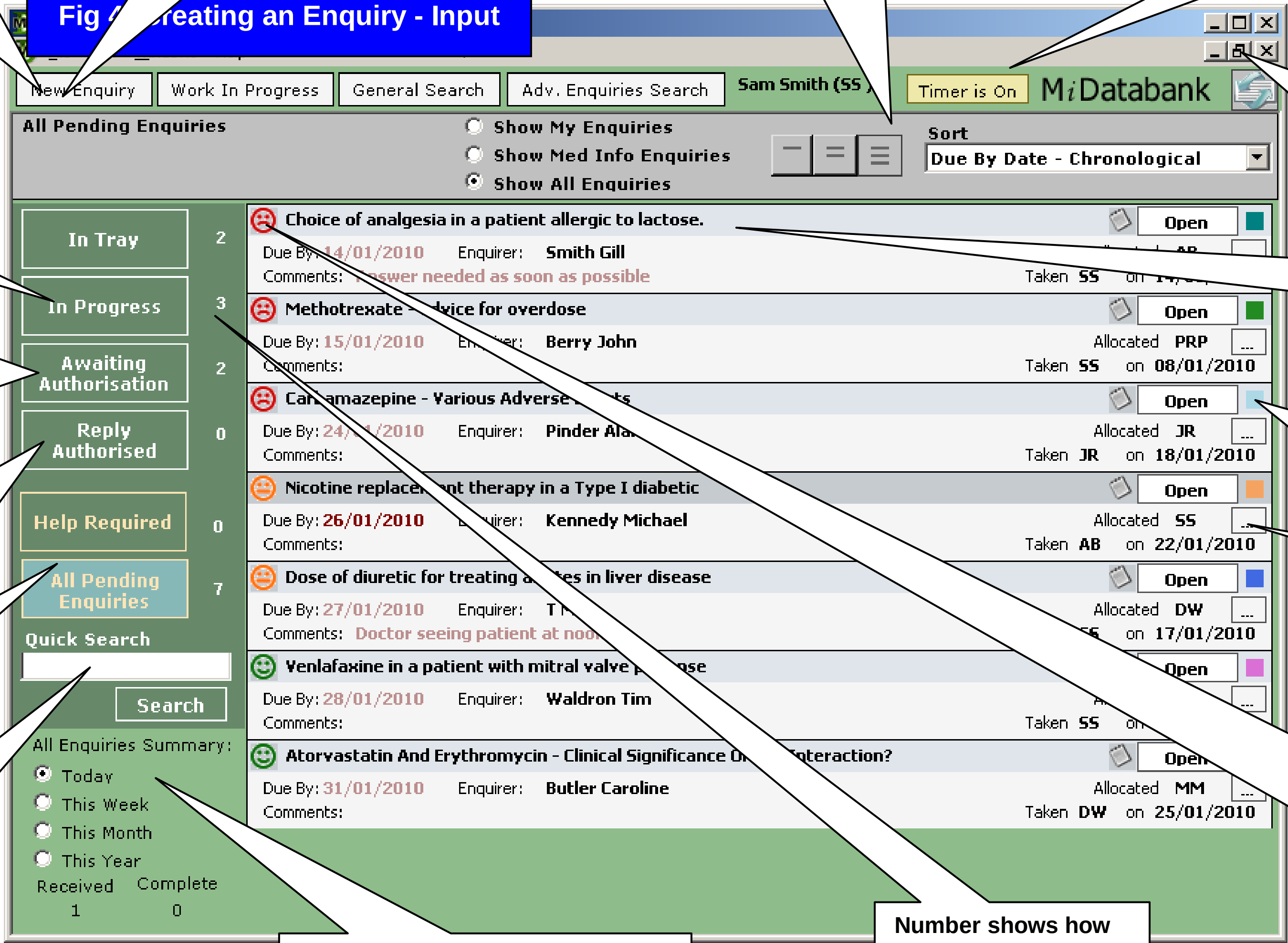
Reply Authorised tray: enquiries that have been authorised go in here.

Trainees can then open the enquiry & give their answer

Help Required tray: Enquiries where the user has requested help

Quick Search: use to search for any in-progress enquiries using words in title, question or enquirer's name

Fig 4: Creating an Enquiry - Input



Double click to open enquiry, or right click to display a context menu

Coloured squares identify who enquiries are allocated to

Click here to allocate an enquiry to yourself or someone else

Coloured Faces:

Green = Non-urgent enquiries

Amber = enquiries close to due by date

Red = overdue enquiries

Summary of Workload: helps to see how many enquiries you've done that day/week/month/year

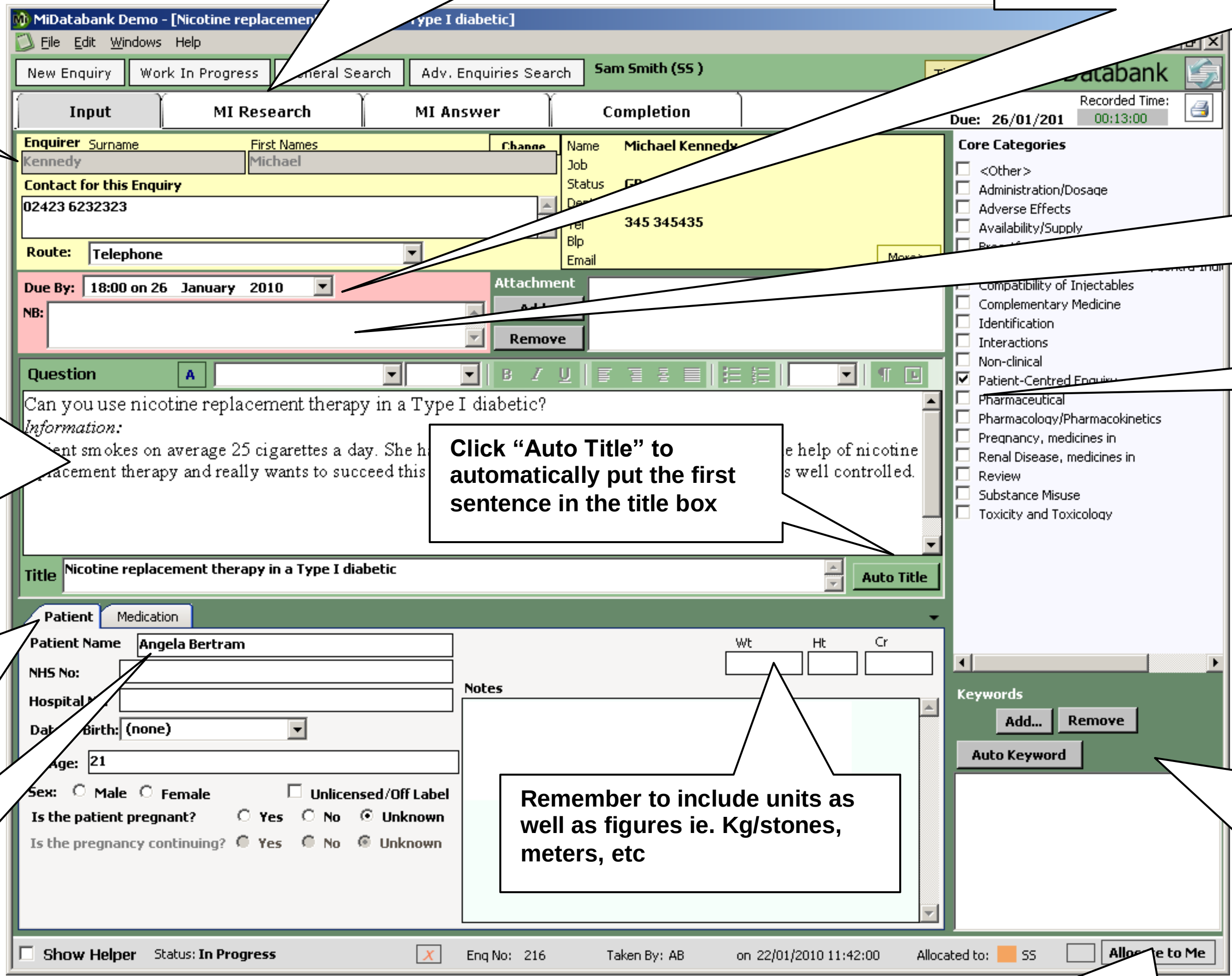
Number shows how many enquiries are in each tray

Add enquirer details here: you can add them manually or select their details from the Individuals/Organisations database

Research button: click here once all the Input data has been added.

Set a "Due by" date for the enquiry: click the arrow to view calendar or type in shortcuts - H (hour), D (day), W (week), M (month), T (today)

You can overwrite the date & time manually as well



Enter the enquiry details here: put the title at the top & this will automatically appear in the Title box when you click "Auto Title"

Important Note: The patient name and clinical details should not be entered in this section. These details should only be entered in the Clinical section below.

Add notes here so that all users know why a due by date has been assigned to an enquiry eg. GP seeing patient on Friday 24th June

Select as many enquiry categories as required

Click "Auto Title" to automatically put the first sentence in the title box

Add patient details in this section.

Important Note: The patient details should only appear in this section, and should never appear in any other place in the enquiry

Use "Auto Keyword" to automatically add keywords to your enquiry or click "Add" to add them individually. You can delete any irrelevant keywords if you wish.

Keywords are also needed to search for past enquires

It is important to add keywords in preparation for the next stage, doing Research

Remember to include units as well as figures ie. Kg/stones, meters, etc

The full national drug dictionary (DM+D) is available in the Medication tab.

Drugs can be found using their chemical name, or trade name.

Click the 'Show Helper' to display the Helper Panel that displays context-sensitive help relevant to the type of enquiry being recorded

Allocate to Me: click here if you need to open someone else's enquiry & add information

Fig 5: Creating an Enquiry - Adding Research

The Research process consists of discovering suitable Research item(s), adding these to the Research Listing (shown on the left hand side) and then adding additional information describing why each item is relevant to the enquiry. The diagram below provides an overview of how Research is discovered.

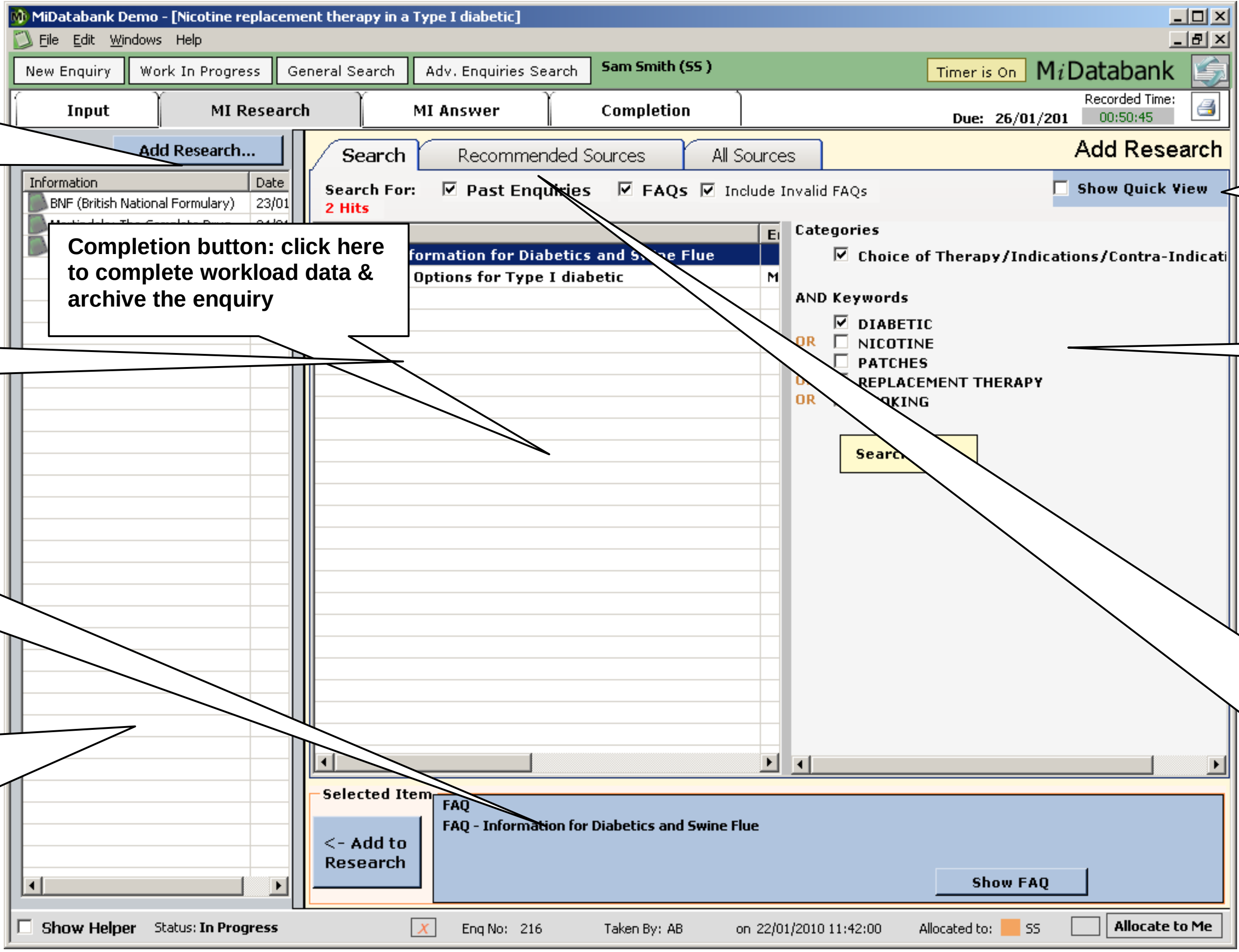
1. Clicking the 'Add Research' button causes a search to be done on the entire database, using the category and keyword data.

2. Any matching FAQs or Past Enquiries are displayed

3. The selected item is displayed in the bottom blue box, ready to be added to the Research Listing if desired.

The Research Listing shows the research done in chronological order.

Research can comprise of Past Enquiries, FAQs and Sources



Completion button: click here to complete workload data & archive the enquiry

Quick View enables details of the selected item to be quickly perused

Search Criteria

The Recommended Sources tab contains a ranked list of Sources (eg books and web-sites) that are suitable for this category of enquiry.

This is the Standard Search Pattern (SSP) for the chosen enquiry category

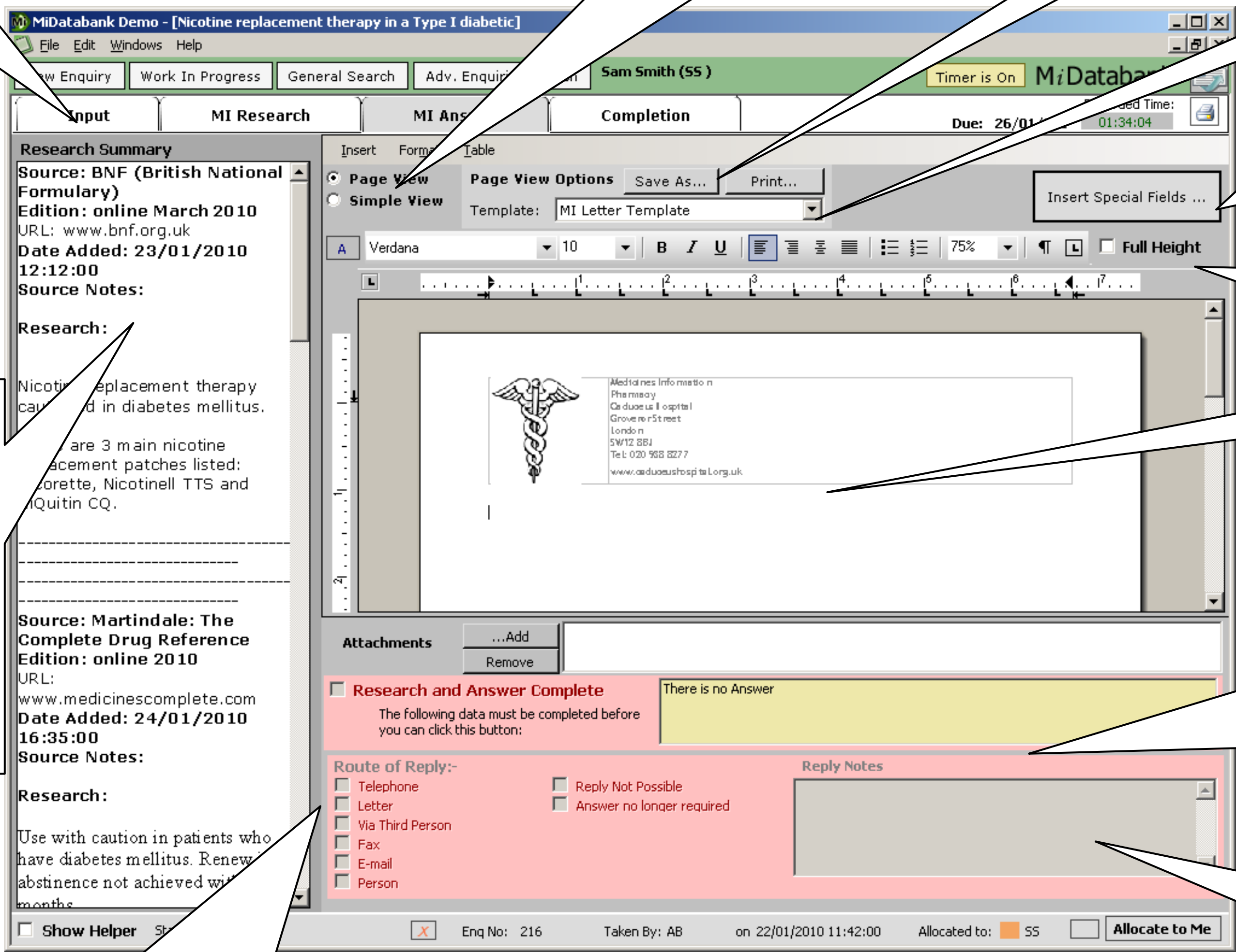
Fig 6: Creating an Enquiry - Answer

Click here if you want to see the original question when you are writing your answer

Page View enables you to view the Answer, as it would appear on the printed page

The Answer can be printed or saved

Choose from the list of pre-defined Letter Templates (header and footer)



Insert Special Fields, such as the Enquirer Contact Address, Date, Your Signature and pre-defined Standard Paragraphs

Click 'Full Height' to maximise the display of the letter.

Write your answer here

Use the "Research Summary" to help you write your answer.

You can copy and paste from the Research Summary section into the Answer if you want to.

Use right click to copy and paste, or the keyboard shortcuts <Ctrl + C> and <Ctrl + V>

The pink area is to document when and how you have given your answer to the enquirer.

The enquiry moves into the "Reply Authorised" tray for completion of workload data later

Add additional notes about your reply here Eg. answer also given to Jan Smith (clinical pharmacist) 24/6/10

Click & drag your mouse over here to alter the size of the left and right panels

Fig 7: Creating an Enquiry - Completion

Workload Data

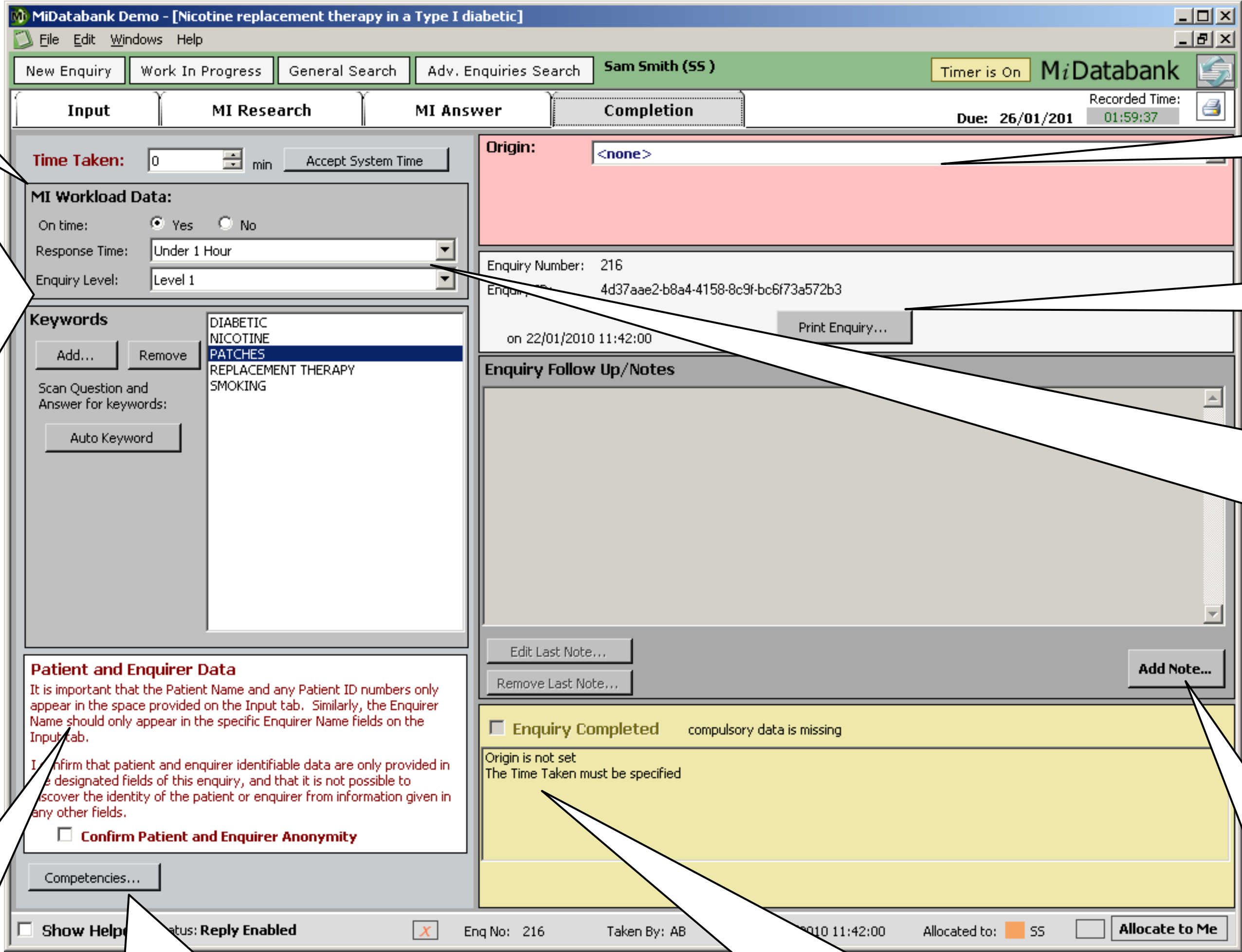
To help give a better picture of workload, assign a level according to the complexity of the enquiry

Level 1: Data. Information only, from one or two sources.

Level 2: Searches. Multiple database and/or textbook searches. Little or no interpretation. Minimal advice given

Level 3: Interpretation. Primary literature retrieval required. Interpretation & advice given. Specialist personal knowledge. Analysis/ evaluation of data. Most written answers.

The Patient Anonymity Panel signifies that any data that uniquely identifies a patient has been entered into the designated fields, and that this data does not appear in any other field.



Select enquiry Origin from the drop down list

Click here to display a printable form of the enquiry

Click on the arrow to record the time taken to reply to the enquirer

This is different than the time spent processing & answering the enquiry which is recorded using the timer

Use "Add Note" facility to add any new information after the enquiry has been answered.

e.g. "Enquirer phoned back to say not due to tetracycline. Patient was secretly taking diclofenac 200mg per day Sam Smith 05/07/2010 16.24**."**

Competencies for individual users can be added to this enquiry to enable personal development to be recorded.

Check this box when you have completed the enquiry. This box will not be active until all compulsory fields have been set. Any missing data is indicated below the check-box.