

## QWEB USER GUIDE

### **Code Groups: Saving, Checking In and Checking Out**

Once a Code Group is in your Library, it needs to be Saved and Checked In before it can be linked to a Project or Reviewed by another QWeb user. This Guide explains how to Save, Check In and Check Out a Code Group. It is a stand-alone Guide but you may also wish to refer to the accompanying Video, 'How Do I Save and Check In a Code Group?'

*Please note - you do not need to have Project Approval to build your Code Library, but Data will not be released until Approval has been granted.*

#### **Related Documents you may find useful:**

Building a New Code Group using ICD-10 Codes  
Building a New Code Group using SNOMED Codes  
Building a New Code Group using BNF Codes  
Building a Code Group using QWeb Code Group Libraries  
Linking Code Groups to Projects created by other QWeb Users  
Code Group Versions: An Overview  
Merging Code Groups  
Sharing Code Groups with other QWeb Users/Requesting a Review  
Reviewing someone else's Code Group  
How to make your own Code Groups visible to others  
Projects: An Introduction  
How to Make a Project Application  
Turning an Application Into a Project  
Using my Code Groups in Projects

QWeb is a regularly updated piece of software. The accompanying User Guides and Videos are frequently reviewed to ensure compatibility with the latest version of QWeb. It is important that you use the most recently published User Guides and Videos to ensure maximum accuracy. These can be found at:

<https://www.qresearch.org/qweb-guides>

QResearch welcomes feedback on these User Guides and Videos. If you have any suggestions or questions, please feel free to contact us here:

<https://www.qresearch.org/about/contact-us/>

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1. After building a Code Group, it can be Saved and Checked In for use in Projects or Review. To do this, in 'My Code Groups' select the Code Group that you wish to use by clicking on its **name** in blue text:

**My Code Groups** [\[Create a new group\]](#)

Found 1 Code Groups

Refine your results  All Group Types Sort By Name Show 20 Groups

ID	Name	Type	VarName	Version	Codes
15493	<a href="#">Heavy Cigarette Smokers</a>	SNOMED/Read		 (draft)	1

2. Then select the 'Save and Check In' option from the menu on the top right of the screen.

Overview **Save & Check In** Contents History Export Copy Link Delete

**Heavy Cigarette Smokers [ID:15493]**

Code Group Details [\[Edit Details\]](#)

**Heavy Cigarette Smokers** was created by alex@dancinghouse.co.uk  
The group is checked out for editing.

Checked out to **alex@dancinghouse.co.uk**  
Check in to unlock the "Review" options.

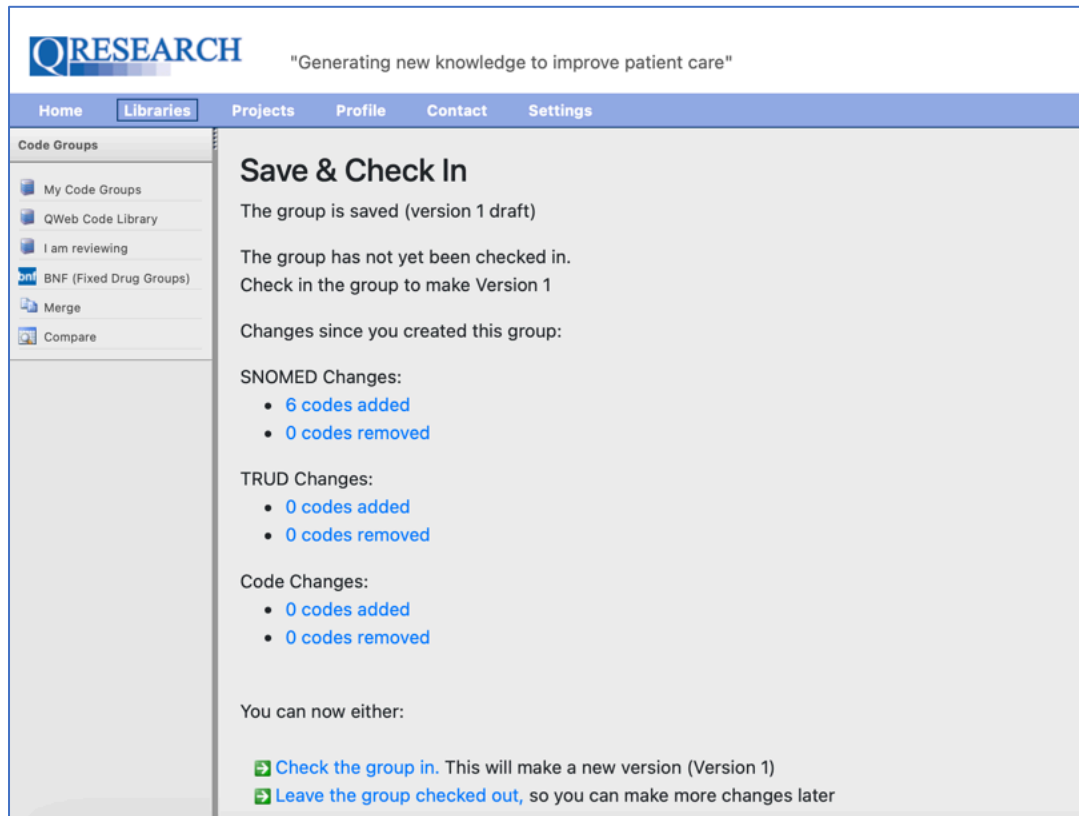
This group is **LOCKED to 3rd Parties**  
(If this group is shared via a project then project collaborators will not be able to edit the group)

**Project Usage**

This codegroup is not currently used in any projects

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This will Save the Code Group as Version 1. You then have the option to Check it In for use in Projects or Reviews, or keep it Checked Out to add or remove more Codes:



The screenshot shows the QRESEARCH web application interface. The top navigation bar includes links for Home, Libraries, Projects, Profile, Contact, and Settings. The main content area is titled "Save & Check In" and displays the following information:

- The group is saved (version 1 draft)**
- The group has not yet been checked in. Check in the group to make Version 1**
- Changes since you created this group:**
  - SNOMED Changes:**
    - 6 codes added
    - 0 codes removed
  - TRUD Changes:**
    - 0 codes added
    - 0 codes removed
  - Code Changes:**
    - 0 codes added
    - 0 codes removed
- You can now either:**
  - [Check the group in.](#) This will make a new version (Version 1)
  - [Leave the group checked out,](#) so you can make more changes later

- If you select '[Leave the Group Checked Out](#)', you will be returned to the Code Group Details and can edit them if you wish:

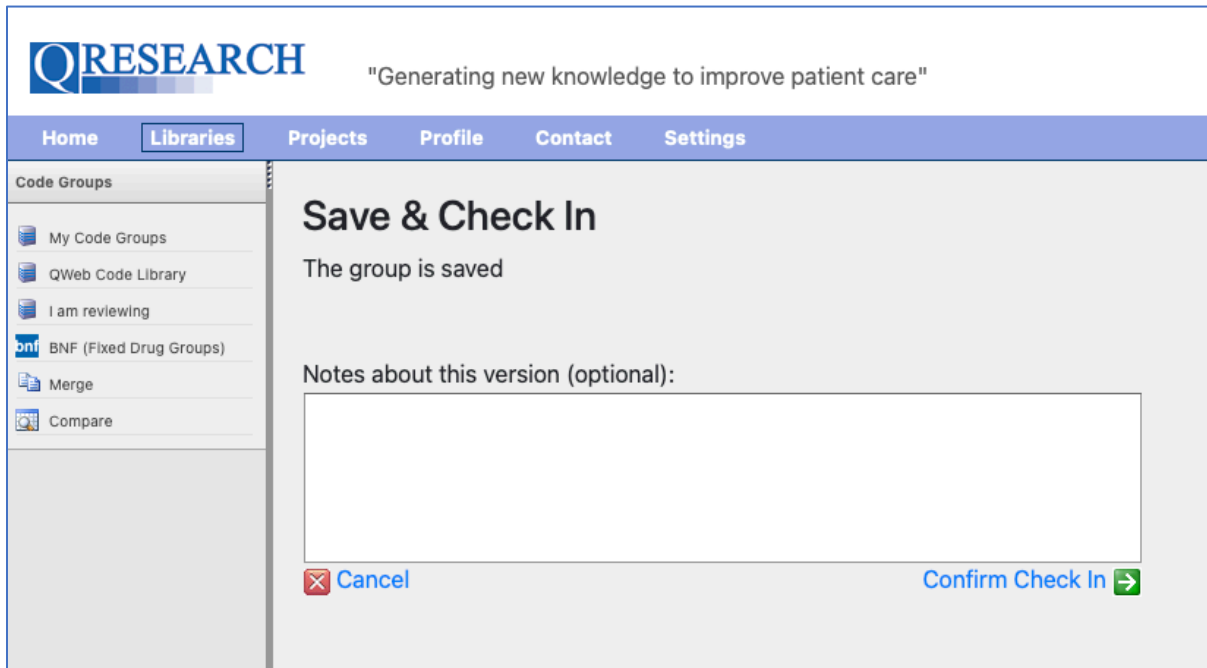


The screenshot shows the "Heavy Cigarette Smokers [ID:15493]" Code Group Details page. The page is divided into sections:

- Code Group Details:**
  - Heavy Cigarette Smokers** was created by alex@dancinghouse.co.uk
  - The group is checked out for editing.
  - Checked out to alex@dancinghouse.co.uk
  - Check in to unlock the "Review" options.
- Locking:**
  - This group is **LOCKED to 3rd Parties**
  - (If this group is shared via a project then project collaborators will not be able to edit the group)
- Project Usage:**
  - This codegroup is not currently used in any projects

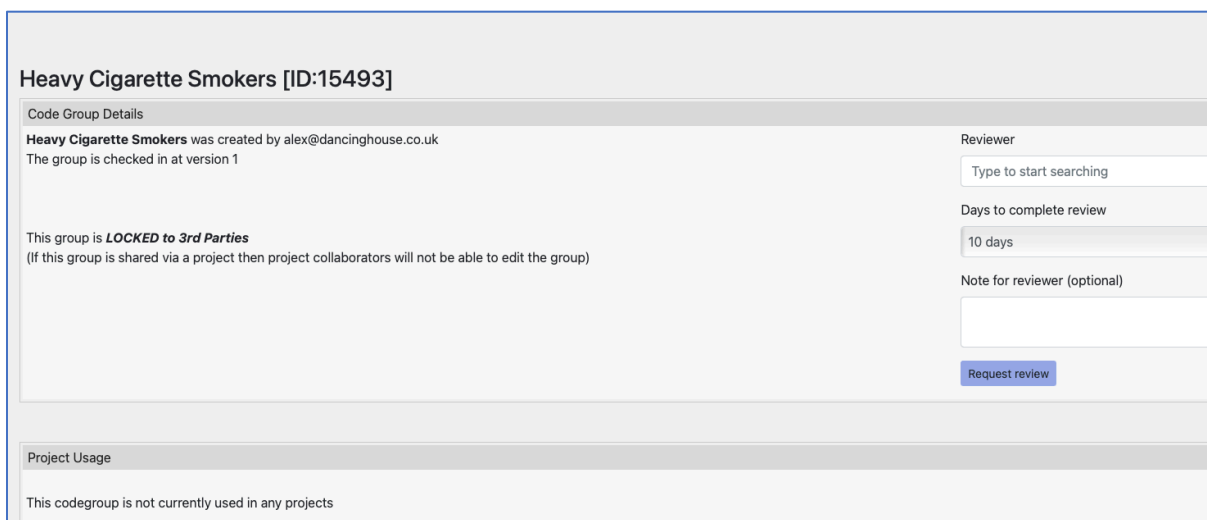
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- You need to select the '[Check the Group In](#)' option for the Code Group to be Checked In, enabling its use in a Project or Review. You also have the option to make Notes about the Code Group prior to Check In (these can help to provide information for you and/or for any other Users you decide to share the Group with):



The screenshot shows the QRESEARCH web interface. At the top, the QRESEARCH logo and tagline "Generating new knowledge to improve patient care" are visible. Below this is a navigation bar with links: Home, Libraries (selected), Projects, Profile, Contact, and Settings. The main content area is titled "Save & Check In" and displays the message "The group is saved". Below this, there is a section for "Notes about this version (optional)" with a large text input field. At the bottom of the form, there are two buttons: "Cancel" (with a red X icon) and "Confirm Check In" (with a green arrow icon). On the left side, a sidebar menu under "Code Groups" lists options: My Code Groups, QWeb Code Library, I am reviewing, BNF (Fixed Drug Groups), Merge, and Compare.

- Select '[Confirm Check In](#)' to confirm the Code Group Check In. You will then see that Version 1 is Checked In. You can also see that the default option for a Code Group is 'locked to third parties', which means other people will not be able to make changes to your Code Group if you later share it through a Project:



The screenshot shows the details for a code group named "Heavy Cigarette Smokers [ID:15493]". The page is divided into two main sections: "Code Group Details" and "Project Usage". In the "Code Group Details" section, it states: "Heavy Cigarette Smokers was created by alex@dancinghouse.co.uk" and "The group is checked in at version 1". Below this, a warning message says: "This group is **LOCKED to 3rd Parties** (If this group is shared via a project then project collaborators will not be able to edit the group)". On the right side, there is a "Reviewer" section with a search input field labeled "Type to start searching", a "Days to complete review" dropdown set to "10 days", and a "Note for reviewer (optional)" text area. At the bottom right of this section is a "Request review" button. The "Project Usage" section at the bottom states: "This codegroup is not currently used in any projects".



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The Code Group can now be used in an approved Project or Reviewed by another QWeb User. (You may wish to refer to the User Guides 'Using My Code Groups in Projects' and 'Sharing Code Groups with other QWeb Users/Requesting a Review' for information on how to do this.)

6. Once Checked In, you can also Check the Code Group Out again to add or remove Codes (unless it is currently under Review which Checks the Group Out to the Reviewer). Follow the same process as before by selecting the Code Group you want to Check Out:

**My Code Groups** [\[Create a new Group\]](#)

Found 1 Code Groups

Refine your results

ID	Name	Type	VarName	Version	Codes
15504	Heavy Cigarette Smokers	ICD10_DIAG		1	1

7. This takes you to the Code Group Details. Select 'Check Out' to Check Out the Code Group (Version 1) for editing:

**Heavy Cigarette Smokers [ID:15504]**

Code Group Details [\[Edit Details\]](#)

Heavy Cigarette Smokers was created by alex@dancinghouse.co.uk  
The group is checked in at version 1

People who smoke more than 40+ cigarettes per day

This group is **LOCKED to 3rd Parties**  
(If this group is shared via a project then project collaborators will not be able to edit the group)

Reviewer

Type to start searching

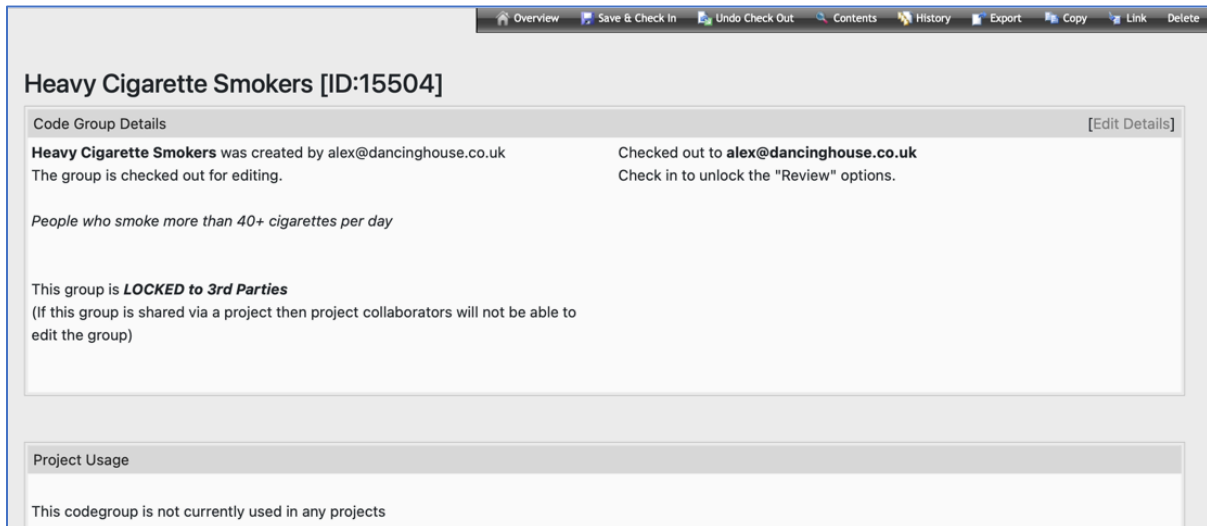
Days to complete review

10 days

Note for reviewer (optional)

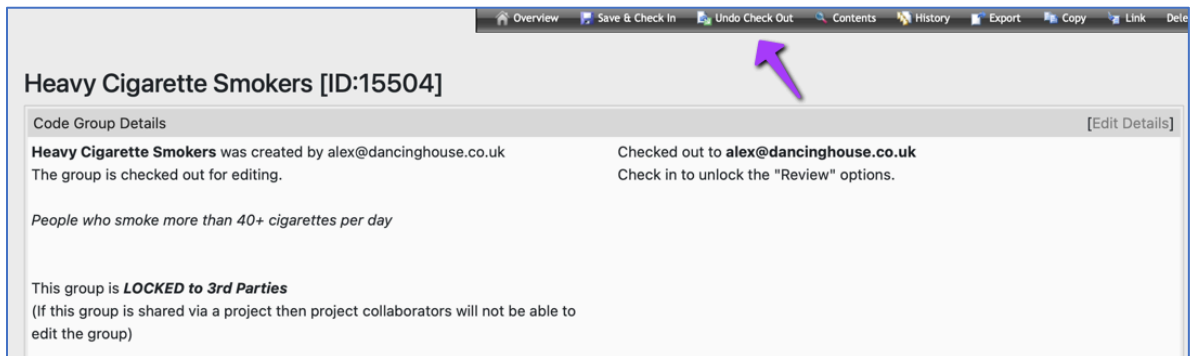
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Version 1 of the Code Group is now Checked Out:



The screenshot shows the 'Heavy Cigarette Smokers [ID:15504]' page. The top navigation bar includes 'Overview', 'Save & Check In', 'Undo Check Out', 'Contents', 'History', 'Export', 'Copy', 'Link', and 'Delete'. The main content area is titled 'Heavy Cigarette Smokers [ID:15504]' and contains a 'Code Group Details' section. This section includes the text: 'Heavy Cigarette Smokers was created by alex@dancinghouse.co.uk', 'The group is checked out for editing.', 'Checked out to alex@dancinghouse.co.uk', 'Check in to unlock the "Review" options.', and 'People who smoke more than 40+ cigarettes per day'. Below this, it states: 'This group is **LOCKED to 3rd Parties** (If this group is shared via a project then project collaborators will not be able to edit the group)'. At the bottom, there is a 'Project Usage' section stating: 'This codegroup is not currently used in any projects'.

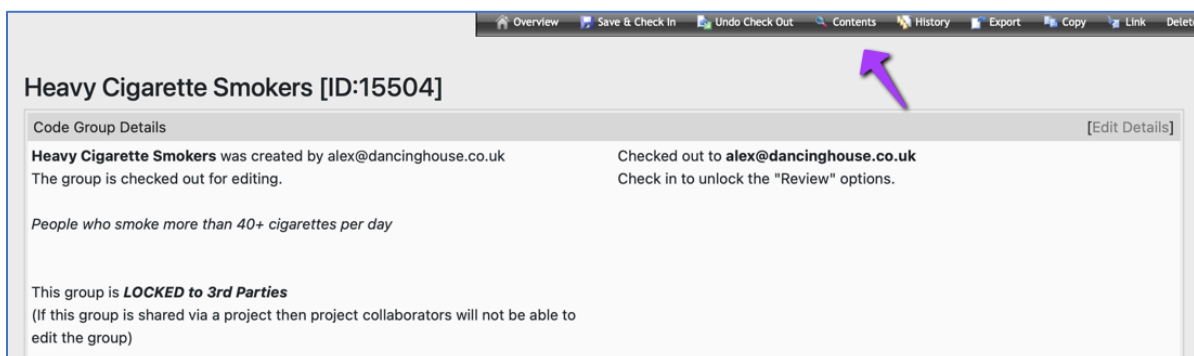
8. You have the option to 'Undo Check Out' by selecting from the menu in the top right of the screen:



This screenshot is identical to the previous one, but with a purple arrow pointing to the 'Undo Check Out' button in the top navigation bar.

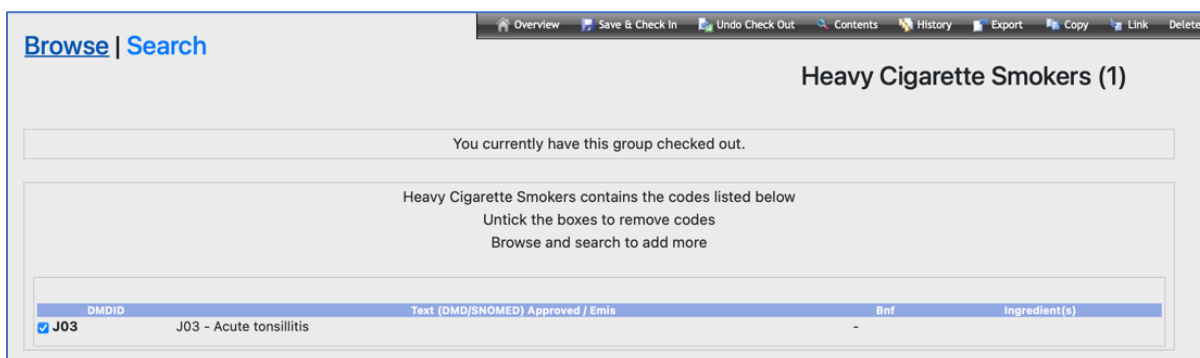
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9. To add or remove Codes, select '*Contents*':



The screenshot shows the 'Heavy Cigarette Smokers [ID:15504]' group page. The 'Contents' tab is selected in the top navigation bar, indicated by a purple arrow. The page displays group details, including the creator (alex@dancinghouse.co.uk), the group's description ('People who smoke more than 40+ cigarettes per day'), and a note that the group is 'LOCKED to 3rd Parties'.

You will then be returned to the Search or Search/Browse area, where you can Search or Browse for Codes and also have the option to remove Codes:

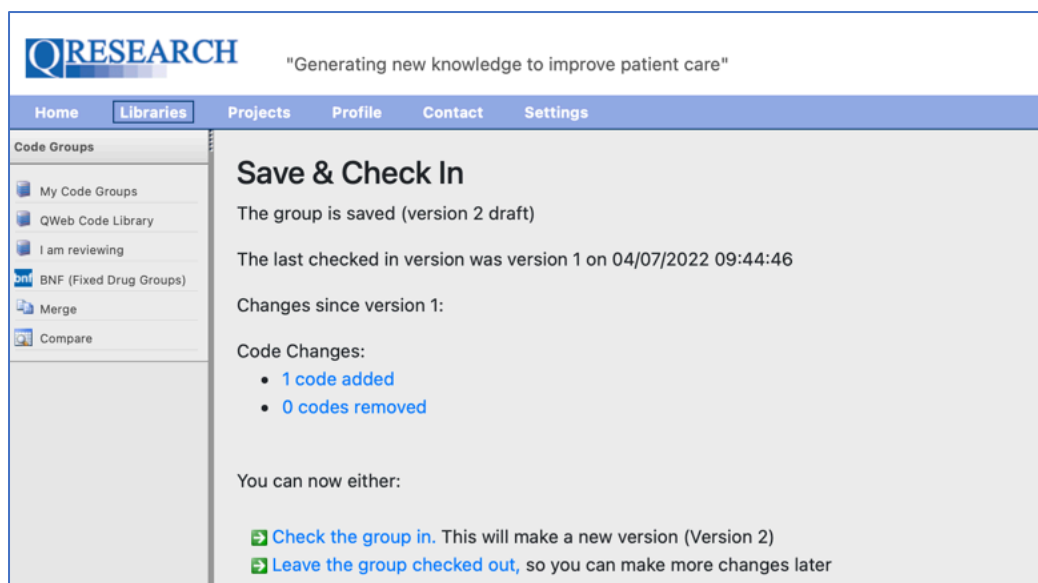


The screenshot shows the 'Browse | Search' area for the 'Heavy Cigarette Smokers (1)' group. The page indicates that the group is currently checked out and contains a list of codes. A table of codes is displayed below, with columns for DMDID, Text (DMD/SNOMED), Approved / Emis, Bnf, and Ingredient(s). The first code listed is J03 - Acute tonsillitis.

DMDID	Text (DMD/SNOMED)	Approved / Emis	Bnf	Ingredient(s)
<input checked="" type="checkbox"/> J03	J03 - Acute tonsillitis		-	

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10. Once you have made the required changes to the Code Group, return to 'My Code Groups' and select the Group by name. You can then choose the Save & Check In option. This will Save a new Version of your Code Group:



The Code Group is now Saved as a new Version (Version 2) and, as before, can be left Checked out for editing or Checked In for use in a Project or Review.

For more information on Versions, refer to the User Guide '*Versions: An Overview*' and/or the accompanying Video Guide.

Groups are sometimes Checked In and Out multiple times when used in a Project. Again you may wish to refer to the User Guides *Using Codes groups in Projects* and *Sharing Code Groups with other QWeb Users/Requesting a Review* once your Code Group is ready to share. Corresponding Video Guides are also available on the QResearch website.