

# Quick Reference Guide for Order Set Builders in AuthorSpace 2.0

## A. Drag and Drop:

- a) To Drag-and-Drop a Section to a Different Location:
  - In the “Order Set” section at the top left of the page, point to the section to be moved and hold down the left mouse key.
  - Drag the mouse until the “arrow with the + sign” cursor points to the section under which you want the item to drop.
  - Release the mouse key. The section and all its children will be repositioned.
- b) To Drag-and-Drop an Item to a Different Location:
  - Point to the item to be moved on the order set and hold down the left mouse key.
  - Drag the mouse until the “arrow with the + sign” cursor points to the line under which you want the item to appear.
  - Release the mouse key. The item will be repositioned.

## B. Deleting:

- a) To delete a single line:
  - Click the down-arrow icon to the right of the item to be deleted.
  - Select the “Delete” command from the menu (or use the keyboard shortcut command Ctrl + D).
- b) To undo the deletion of any item:
  - Click the “Undo Delete” command at the left, under “Commands.”
- c) To delete an entire section:
  - Select the section name from the “Order Set” section at the left
  - Click the red “X” to the right of the section name
- d) To flag multiple items for deletion:
  - Click the “Flag” icon next to the desired items.
- e) To unflag a single item:
  - Click the “Flag” icon next to the flagged item.
- f) To unflag multiple items:
  - Click the “Unflag All” command at the left, under “Commands.”
- g) To flag an entire section or sub-section:
  - Click the “Flag” icon next to the section or sub-section name.
- h) To delete flagged items:
  - Click the “Delete Flagged” button.
  - Click the “Yes” button in the dialog box.

## C. Adding:

### a) To Add a Section:

- Click “Insert Top Level Item” (at left, above “Commands”).
- Select the radio button next to the word “Section” (if keyboard shortcut not used).
- Click the “Browse” link to the right of the “Catalog” field. The “AuthorSpace Catalog” browser opens.
- You may search the “Custom Catalog” (terms you have added), the “Zynx Catalog” (the terms used in our templates), or the “Zynx + Custom Catalog” terms (both). Enter the all or part of the desired section name, into the “Term Name” field and click the “Search” button. . The results list is displayed.
- Select the desired section name from the list and click the “OK” button at the bottom of the dialog box. The “AuthorSpace Catalog” browser closes.
- Click either the “Save” or the “Save and Hide” button on the workspace.

### b) To Add a Sub-sections, Orderables, or Medications:

- Click the down-arrow icon to the right of the section or sub-section that will contain the item.
- Select the “Insert” command from the drop-down menu (or use keyboard shortcut command Ctrl + I). The workspace opens.
- Select the radio button next to the desired item (if keyboard shortcut not used).
- Click the “Browse” link to the right of the “Catalog” field. The “AuthorSpace Catalog” browser opens.
- You may search the “Custom Catalog” (terms you have added), the “Zynx Catalog” (the terms used in our templates), or the “Zynx + Custom Catalog” terms (both). Enter the all or part of the desired section name, and click the “Search” button. The results list is displayed.
- Select the desired item name from the list and click the “OK” button at the bottom of the dialog box. The “AuthorSpace Catalog” browser closes.
- Click either the “Save” or the “Save and Hide” button on the workspace.

### c) To Add a Detail to an Orderable or Medication:

- Click the down-arrow icon to the right of the item to which the detail is to be added.
- Select the “Insert” command from the drop-down menu (or use keyboard shortcut command Ctrl + I). The workspace opens.
- Click the radio button next to the desired detail (if keyboard shortcut not used).
- Select the desired detail from the appropriate pull down menu. You may choose a term from each of the menus if desired.
- Click either the “Save” or the “Save and Hide” button on the workspace.

### d) To add a Reminder to a section or sub-section:

- Click the down-arrow icon to the right of the section or sub-section to which the reminder is to be added (or use keyboard shortcut command Ctrl + I).
- Select the “Insert” command from the drop-down menu (if keyboard shortcut not used). The workspace opens.
- Select the radio button next to the word “Reminder.”
- Enter the reminder text in the “Text” field on the workspace.

- Click either the “Save” or the “Save and Hide” button on the workspace.
- e) To Add Linkable Content or Virtual Linkable Content to a Section:
- Click the down-arrow icon to the right of the section or sub-section to which the reminder is to be added (or use keyboard shortcut command Ctrl + I).
  - Select the radio button next to the words “Linkable Content.”
  - Click the “Browse” link to the right of the “MAP” field. The linkable content browser opens.
  - Select a folder from the tree structure at the left.
  - Select the desired linkable plan of care from the list located on the right.
  - Click the “OK” button at the bottom of the dialog box.
  - For “Virtual Linkable Content” only, check the box next to the words “Virtual Linkable”.
  - Click either the “Save” or the “Save and Hide” button on the workspace.
- f) To Insert an Order Set into a Section:
- Click the down-arrow icon to the right of the section or sub-section to which the reminder is to be added (or use keyboard shortcut command Ctrl + I). The workspace opens.
  - Select the radio button next to the word “Content.”
  - Click the “Browse” link to the right of the “Contents” field. The “Insert Order Set” browser opens.
  - Select a folder from the tree structure at the left.
  - Select the desired order set from the list at the right.
  - Click the “OK” button at the bottom of the dialog box.
  - Click either the “Save” or the “Save and Hide” button on the workspace.

#### **D. To Close or Check In an Order Set:**

- a) To Close an Order Set:
- Click the “Close” button in the upper right corner.

*Note: When you close the plan of care, it is still checked out to you, unable to be edited by anyone else, until you check it back in.*

- b) To Reopen an Order Set:
- Find the folder containing the order set on the content tree.
  - Select the order set from the list.
  - Click the “Edit” link.
- c) To Check an Order Set In:
- Click “Check In” at the left, under “Commands”.