Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

User Guide – Data Mining

Contents

Data Mining in FLEX allows you to interrogate your patient database system to find specific data to analyse and interpret. To do this in FLEX, click to **Business Intelligence** and choose **Data Mining;** **(***Practice manager will need to give users access to the Business Intelligence and/or Data Mining sections of FLEX)*
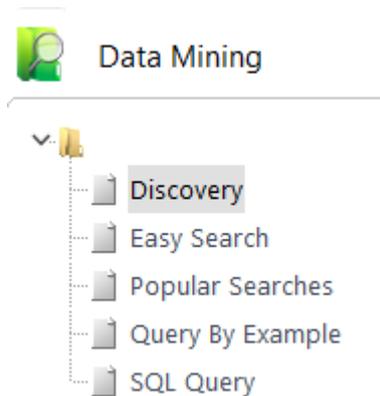
Discovery – Supersedes 'Easy Search', the ability to build your own queries and find matching records

Easy Search - the ability to build your own queries and find matching records

Popular Searches - a variety of popular requests, and using this section the "picking" is done for you - **_recommended_**

Query By Example – *this has been superseded by Discovery and Popular searches, but has been left in for Optinet Staff use.*

SQL Query - Never heard of SQL before? It stands for Structured Query Language and is used by database systems such as FLEX to extract data. If you have a request which the easy and popular searches don't cover, we can write an SQL for you which you can then save and run as needed.

Throughout these tabs, the buttons on the top row stay the same:

Searches can be **Saved** and re**Load**ed. Press "Pacman" (**Go**) to carry out a query, whilst the "**Send To**" button allows you to send correspondence to the selected patients.

In more detail the searches are as follows:

Discovery

Within the Discovery option there are five tabs.

- o   Using any of these tabs will generate reports by making various selections taken from the patient record, Sight Exam, Contact Lens, Dispense, orders till, correspondence/Appointment screens.

Example of patient search screen:

Example of a report:

Easy Search

o   Select fields from the left-hand table of Criteria and drag or double click them to the central table. Depending on what you wish to find,
o   Choose a database for the right-hand table (Select Table) and drag these entries across.
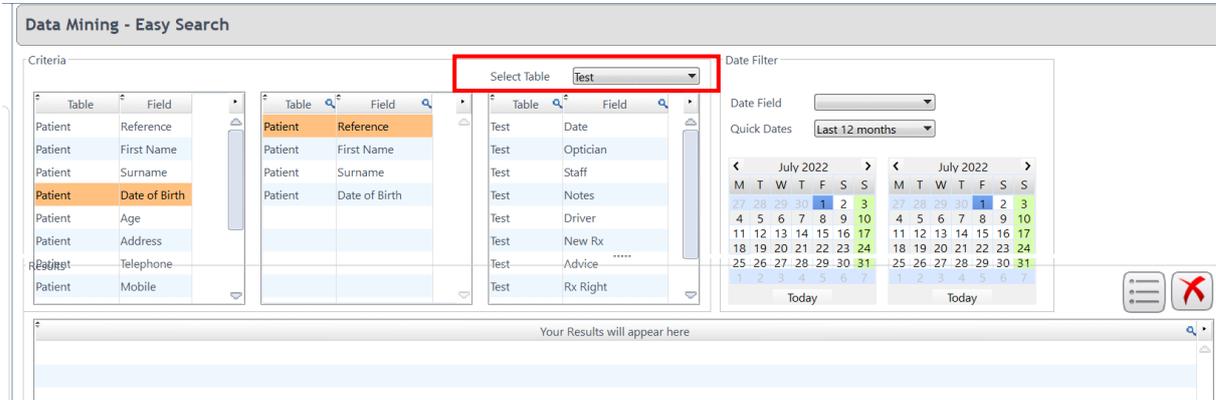
o   In the Date Filter, select the range of dates you would like.
o   Press Go (this process may take a couple of minutes
o   Matching Results will appear in the bottom half of the screen.
o   Send To... can then be used to email / print / SMS correspondence or pressing the > arrow at the top-right of the Results table allows the data to be exported.

Popular Search

The easiest method of mining data is to use the **Popular Search**

Criteria from one of the different sections of FLEX can be chosen
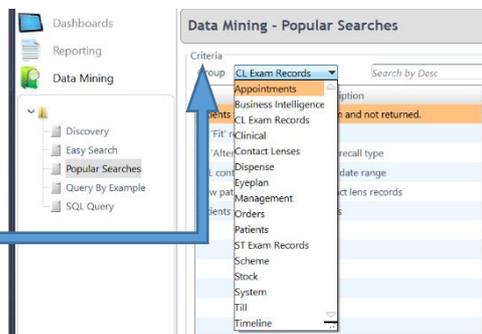
Group select the area of the system to report on, a list of available reports will be listed under "Description".

Dependant on the report chosen will depends on which additional search criteria will be available.

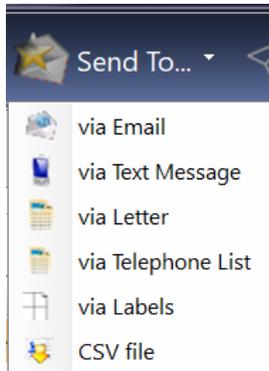When selections have been made, click on   [Go]   to execute the report.

Mailshot

To send Mail shots, at the top of the Data Mining screen, press **Send To** - this is shown below.

Dependant on the delivery method being used, FLEX will then ask you which template should be used, and you can edit it if necessary.

Once you are happy, this data will then go into the Timeline

*With **via Letter**, you also have the option to print the letters immediately.*

On the widget in the home-screen, you can then double-click on the "**Marketing**" row: the window shown below will open, with the drop-down of the **Type** being Marketing.