



## Med-A report with or without missing data highlighted

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## Med-A report with or without missing data highlighted

### Introduction

The [*MergeMed-A*].zip file contains the necessary files and information to be able to obtain a copy of each Med-A submitted to the EBMT, with or without the missing items highlighted. The end result can be either a Word document or an Excel spreadsheet. If the Excel option is chosen, the macros available on all ProMISe downloads are also available in the spreadsheet. You can obtain [instructions](#) on the use of these macros in the EBMT website.

While for some users obtaining a missing data report is the main reason to use this procedure, other users may want to use any of the intermediate files or tables that are generated while obtaining the paper copy. It can also be used to print out the Med-A data requested for accreditation.

The zip file should contain the items listed below. Please, verify this is so before proceeding. Should any of the items not be there, inform the [ProMISe helpdesk](#).

### *Files present in the MergeMed-A.zip file*

<b>MergeMed-A 2009 Instructions[Office 2007]:</b>	Word document (this document)
<b>QueriesP2.mdb:</b>	Access module
<b>MED-A QP2 request form.doc:</b>	Word merge document
<b>MedAItems.xlsm</b>	Excel spreadsheet
<b>Med A QP2 Workbook.xls</b>	Excel merge spreadsheet

### *Overview*

The following are instructions for use in **Microsoft Office 2007**. By following the instructions, the user will generate source data files that can be used to merge onto the Med-A merge document/spreadsheet provided.

The data is downloaded directly from the EBMT database, which means it is as up to date as possible.

Depending on which macros are used for merging, the user can obtain a Med-A representing the information in the EBMT database exactly as it is, or a Med-A representing the same information but with the items that need updating or are missing highlighted.

End result

- Contains all Med-A items for a single transplant.
- Each transplant is one form in the merged Word documents.
- In Access there is one table called **Duplicates** which will catch transplants erroneously represented twice in the download, although this is very unlikely to happen. In the Appendix, you will find instructions on what to do when this happens.

## Procedure

Before you continue, we recommend:

### **PRINT THIS DOCUMENT NOW**

In the Windows system, all file names are followed by an extension which is related to the software used to handle it. For example, a Word document will have the extension **.doc** after the file name; an Excel file will have the extension **.xls**, and an Access file will have the extension **.mdb**. The Folder options of the Windows system allow these extensions to be hidden so that the user sees only the file name. This is the default in most systems.

Throughout this document, we have assumed that this is not the case and that the user can always see the full name of the file including the extension. If you are not very familiar with the system, to avoid confusion while reading this document, it is best that you ensure that the folder options allow you to see the extensions of all files. You will find instructions on how to do this at the end of this document: [Making file extensions visible](#)

File organisation; to be done only once

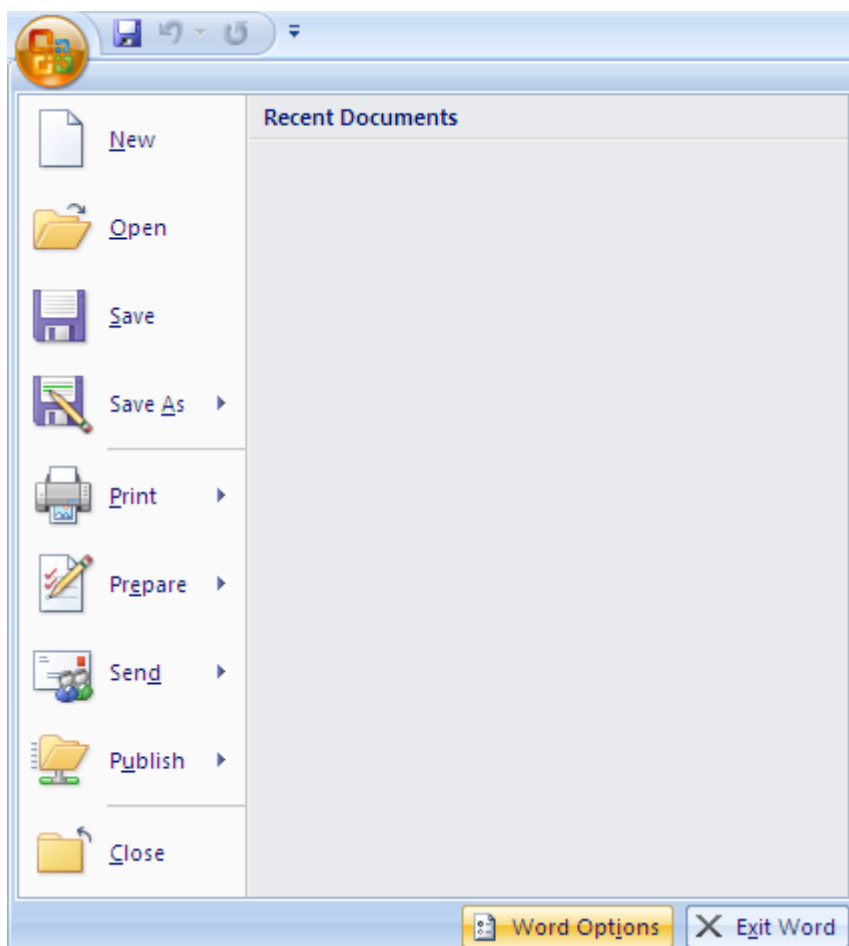
1. Unzip the **MergeMed-A.zip** archive.
2. Place all files it contains into a folder. Please note the **name and location** of this folder and ensure all files are in the same folder.

Enabling macros – setting a trusted location; to be done only once

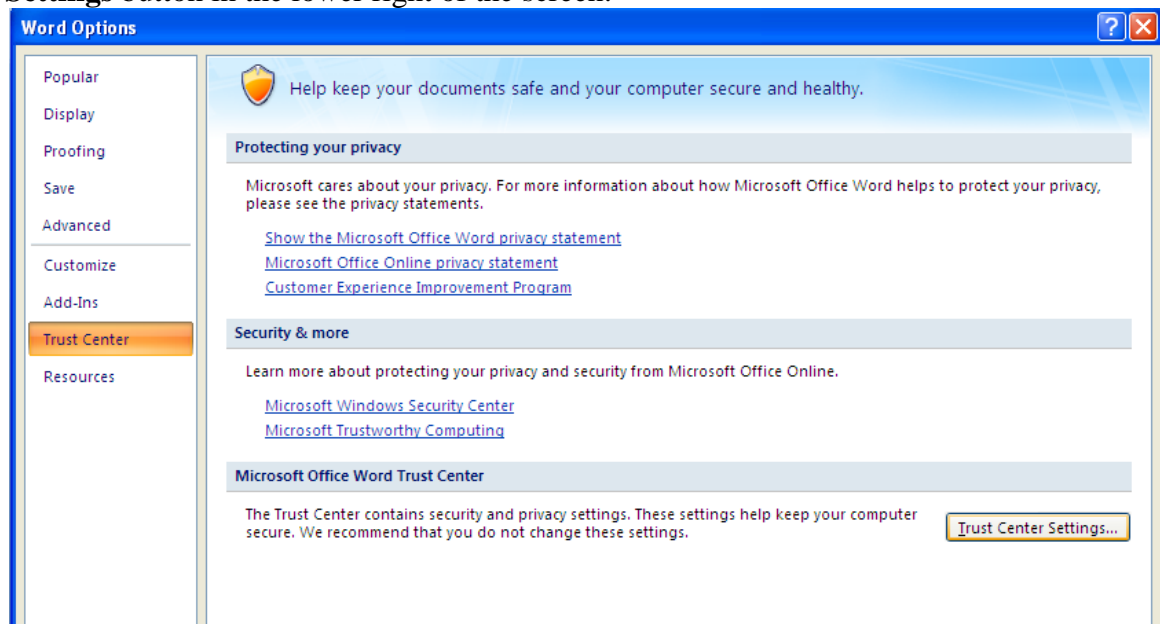
The folder the files from the MergeMed-A.zip file were extracted into should be set as a trusted location in Microsoft Word and Access. This deems the files as a trusted source for opening files and allows the macros contained in the documents to be able to run.

In Microsoft Word and Excel 2007:

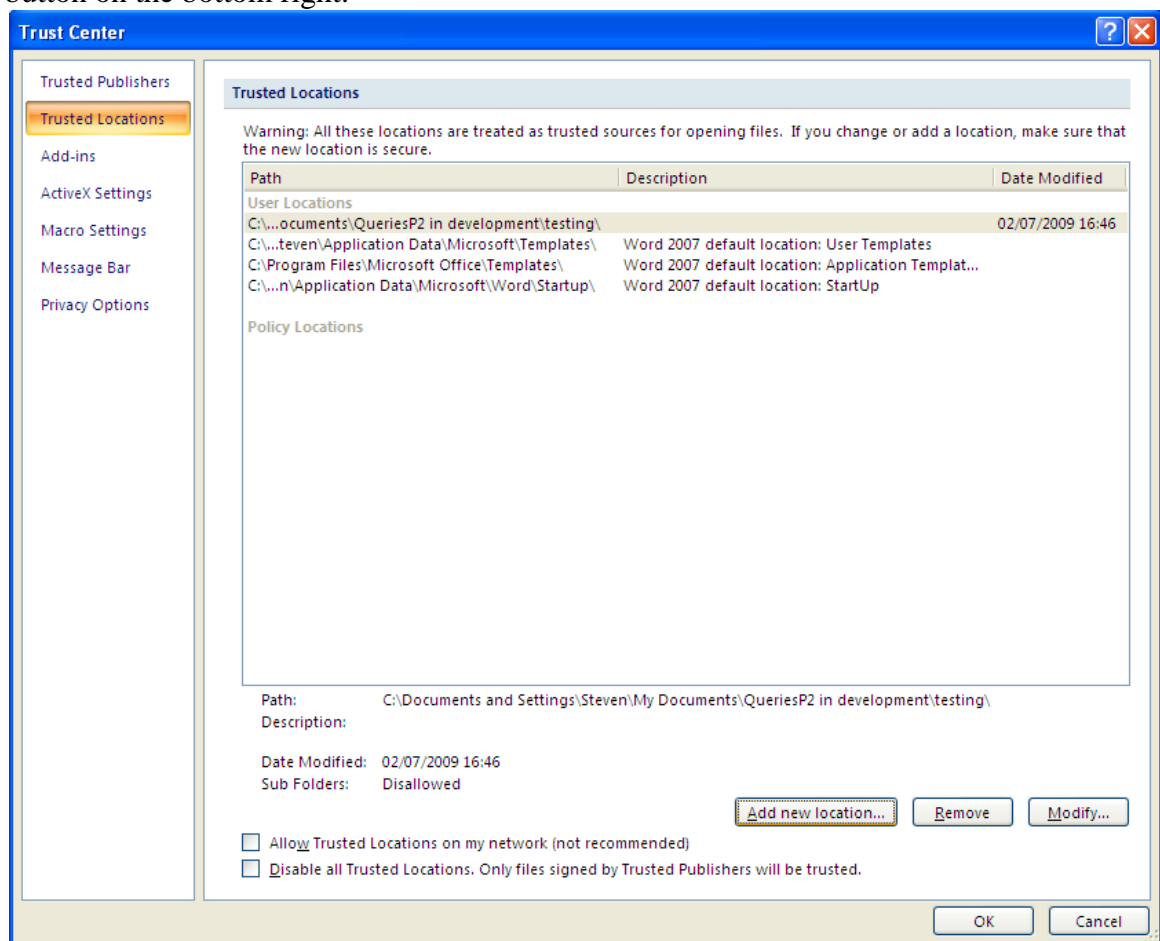
1. Click the **Office** button in the top left of the screen, and then click the **Word Options** button.



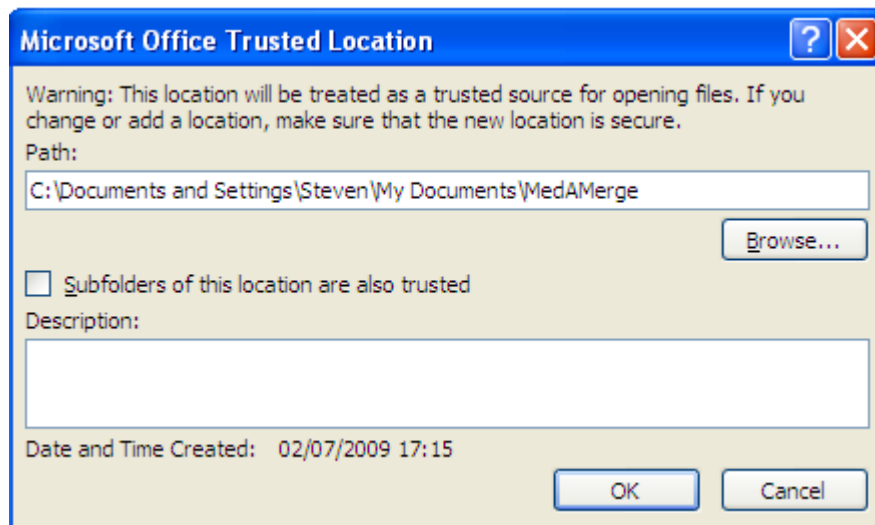
2. Click on the **Trust Center** tab on the left, and then click on the **Trust Center Settings** button in the lower right of the screen.



3. Click the **Trusted Locations** tab on the left and then click the **Add new location** button on the bottom right.



4. Enter the location of the folder the files in MergeMed-A.zip were extracted into the **Path** field and click **OK**. For example, if I copied the files into C:\MyMergeFiles\, then I type C:\MyMergeFiles\ into the Path field and click OK.



5. Click [ok] in the Trust Center window
6. Click [ok] in the Word Options window

The process is almost identical in Microsoft Access 2007:

1. Click the **Office** button in the top left of the screen, and then click the **Access Options** button.
2. Click on the **Trust Center** tab on the left, and then click on the **Trust Center Settings** button in the lower right of the screen.
3. Click the Trusted Locations tab on the left and then click the Add new location button on the bottom right.
4. Enter the location of the folder the files in MergeMed-A.zip were extracted into the Path field and click OK. For example, if I copied the files into C:\MyMergeFiles\, then I type C:\MyMergeFiles\ into the Path field and click OK.
5. Click [ok] in the Trust Center window
6. Click [ok] in the Access Options window
7. Close Microsoft Access.

Downloading the data: to be done as often as necessary

1. Logon to the EBMT database through ProMISe as usual.
2. Go to **Export** (if you have never used this facility before, please see Exports in the Data Retrieval Training Summary which can download from <http://www.ebmt.org/registry/data-retrieval>)
3. Under **STORED EXPORT JOBS** -> **Public**, you will see a folder (in blue) called **Med-A 2008 SQL 007**. Inside this folder, there is a report:  
Full MED\_A Access
4. Select **Full MED\_A Access** and load it.
5. Customise the export to have:
  - a. The delivery mode you want (link or e-mail)
  - b. MS Access as the database type (default option) **must** be selected
  - c. IMPORTANT. If using delivery mode e-mail, you **must** password protect your file
  - d. The population you want by applying a population filter. For example to extract only transplants for the last 2 years, apply the population filter  
**Public:Transplant::Year::Within the last 2 years.**
  - e. By default, the export will select all transplants included in the CIC you are currently in. If you are a registry, you can switch centres to obtain separate downloads for each centre if you so wish
6. If applicable, save the export job for future use.
7. Click on **Execute Export Job** (you may need to generate a Preview first, if this is so follow the instructions on the screen and **Execute Export Job again after the preview has run**); the job will be queued, and then executed.
8. When the job has been executed it will appear under **Success**. Do not attempt to download the output until the job appears under this heading.
9. Click on the job to download the zip file to your computer, or you can wait until it comes by e-mail if you selected that option. The name of the exported zip file will start with your username and end with a long series of random numbers.
10. The downloaded zip file contains a folder, which in turn contains an Access module. Both the folder and the Access module will have as name your username.
11. Extract the Access module (not the folder) contained in the exported zip to the same folder where you placed the **QueriesP2.mdb** module and associated files. Rename the



Access module (not the folder) just downloaded to **MedAMerge1.mdb**. Ensure there is only one file with the prefix of MedAMerge in the directory.

Merging the data: to be done as often as necessary

**Word document**

1. Open the **Med-A merge** Word document (**MED-A QP2 request form.doc**).
2. If you have previously generated Med A Forms using this document you may come across a message box with the following –or similar- statement:

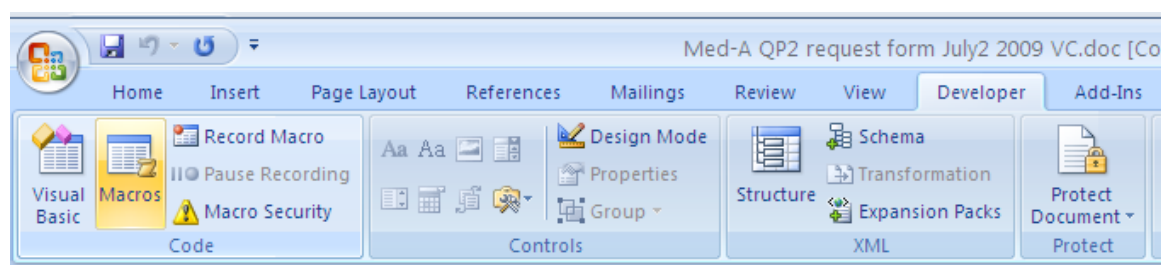
**Opening this document will run the following SQL command:**

**SELECT \* FROM *your datasource***

**Data from your database will be placed in the document. Do you want to continue?**

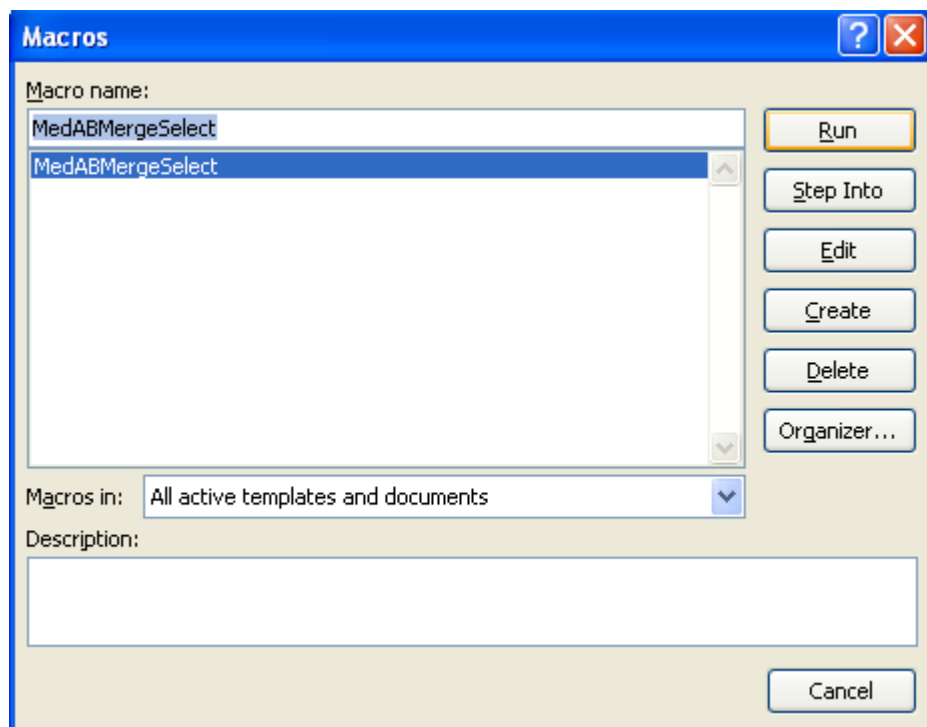
Always select “No” to generate a new data source for the mail merge (\*).

3. The document has a Footer which you should edit before proceeding. It has been prepared so you can write the name and address of the person the forms should be returned to, if applicable, and the date the data was downloaded. Although you may completely erase the footer, or change it to something different, we strongly recommend you do add the date the data was downloaded; it will help you in the future when assessing inconsistencies between data received and data requested, or when you are checking error corrections in your own centre.
4. Click on **the Developer tab**, and then click the **Macros icon**.

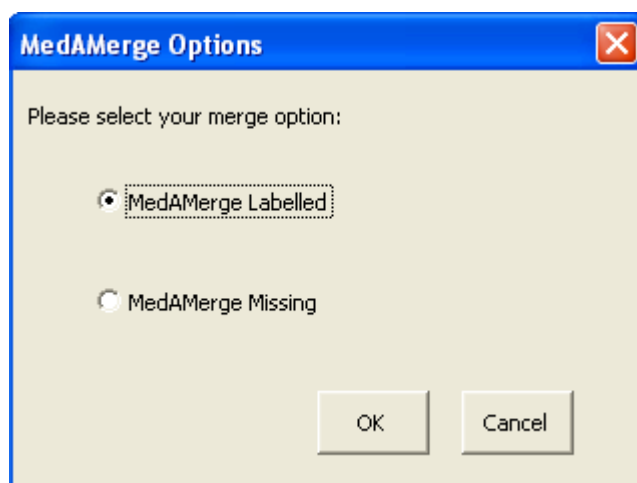


(\*) Should you actually want to repeat your last merge, select “Yes” to use the previously generated data source.

5. In the Macros window select **MedAMergeSelect** macro and Click **Run**.



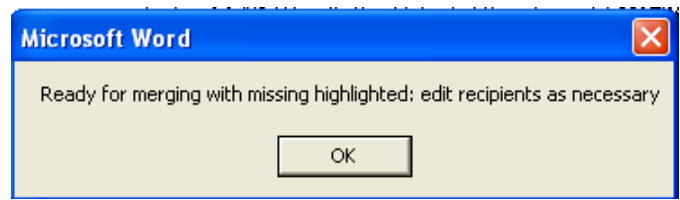
6. The following window appears, giving you the choice of merging the data as it is in the database, or merging the data with missing items highlighted.



The instructions to do the actual merging are the same once you have selected one of the two options.

7. Select **MedAMerge Labelled** or **MedAMerge Missing** and click OK.
8. During the running of the Macro, Microsoft Access is opened and a series of windows may flicker into view. Ignore them and wait for the process to end.

9. When one of the following messages appear:

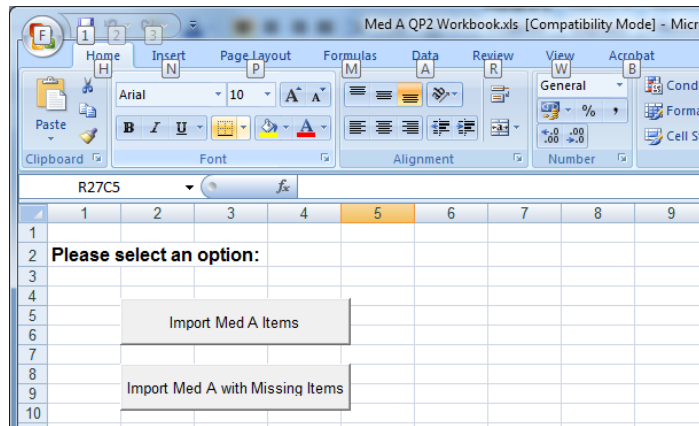


Click *OK*

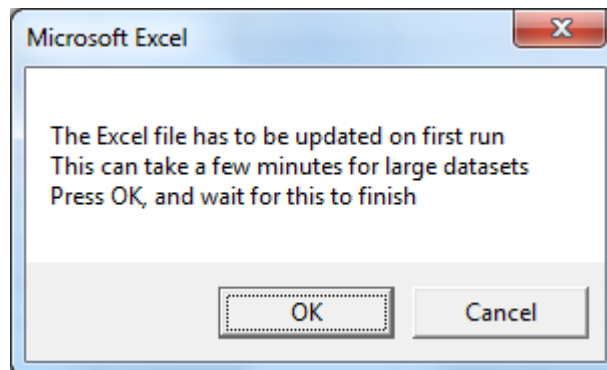
10. You can now proceed to merge the records. Please refer to Word Merge instructions for your own particular version of Microsoft.
11. Once the merge has ended, save the file **Letters1** with an adequate name so it reflects what you have just done.
12. Exit the **Med-A merge** Word document without saving. If it asks whether you want to save data copied into the clipboard, answer *No*.

### Excel spreadsheet

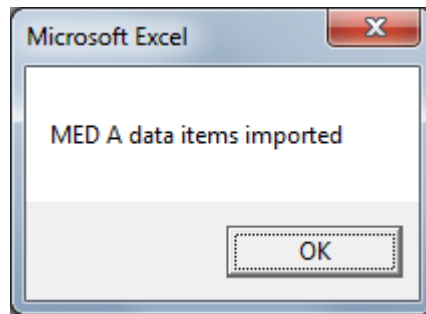
1. Open the **Med-A merge** Excel spreadsheet (**Med A QP2 Workbook.xls**) and the following options will appear.



2. Select an **Option** according to what you want to do and a macro will run in the background.
3. During the running of the Macro, Microsoft Access is opened and a series of windows may flicker into view. Ignore them and wait for the process to end.
4. When the following window appears click OK and wait for the process to end



5. When the following window appears click OK.



The data is stored in spreadsheet **Data 0**. Save the spreadsheet with an adequate name so it reflects what you have just done.

6. Close the **Med A QP2 Workbook.xls** without saving.

## Appendix

### Duplicates

If while running the Macro **MedABMerge**, a double entry is found for a transplant, an error message will appear on the screen and you will be taken to the **QueriesP2.mdb** Access module.

Do the following:

- click on the Tab **Tables**
- open the table **Duplicates**, make a note of the database identification (ID, IDAA) for all patients present and send the [RegistryHelpdesk](#) that information by e-mail
- Clean **MedAMerge1.mdb**
  - open table **0**
  - find the duplicate entry and remove one of them
  - open table **1**
  - find the duplicate entry and remove one of them
  - exit **MedAMerge1.mdb**
- close everything
- restart from *Merging the data: to be done as often as necessary* above.

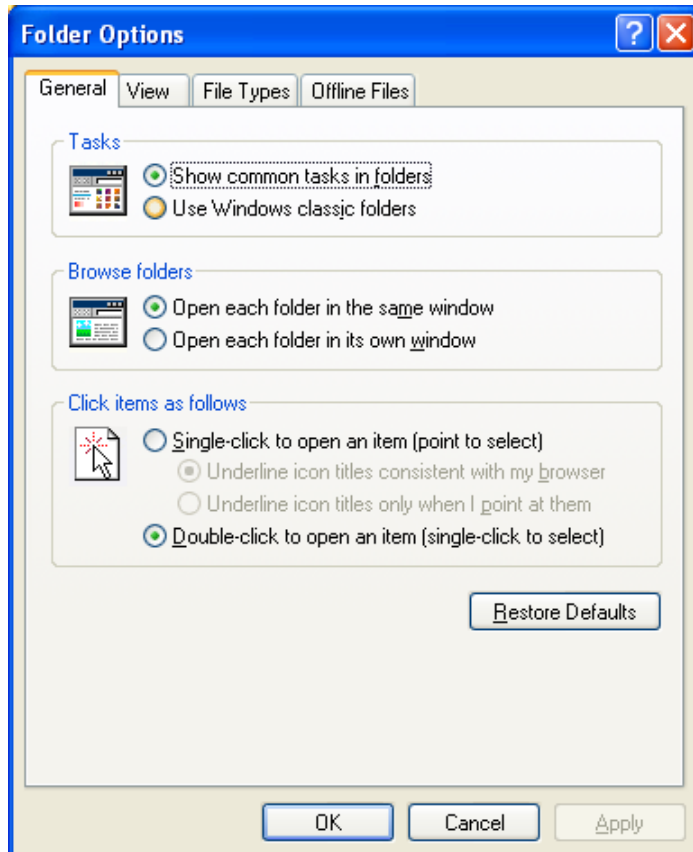
### Fields contained in the Med-A

The table **ReportITEMS** contains a description of all items in the Med-A. If the column **TAG** is empty, these are items generated by the **SQL 007** report which do not exist with that name in the EBMT database.

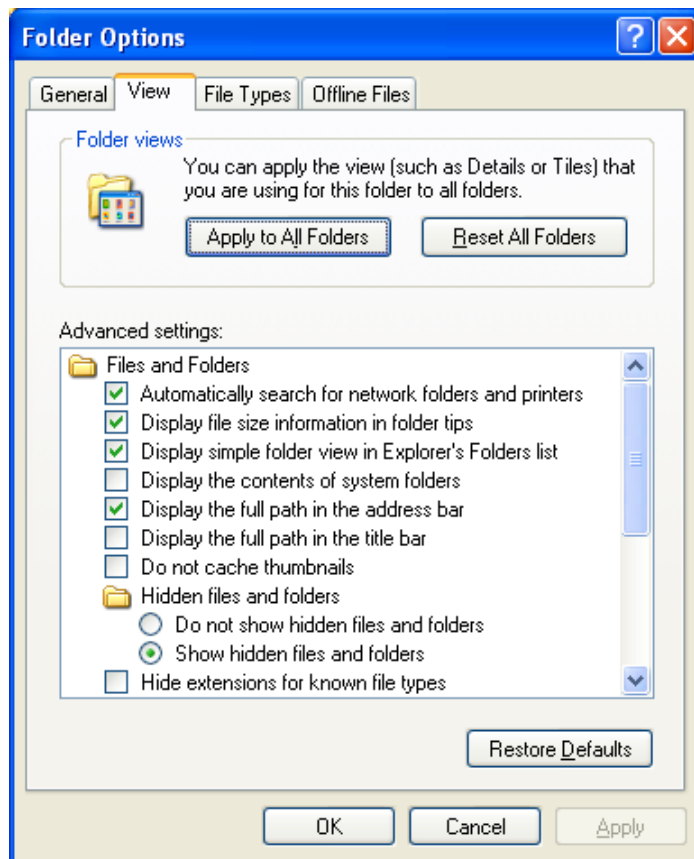
Making file extensions visible

In order to do this, while using the Windows Explorer:

- 1) Click on **Tools** and select **Folder options** from the pulldown menu.
- 2) Click on the tab **View**



- 3) Do not scroll down: the last item that you can see in the screen will be *Hide extension for known file types*. This option should not be highlighted.



4) Once you make sure the option is not highlighted, close the **Folder options** screen by clicking **OK**