USER GUIDE

Contents

Form Forge is a DHIS2 application designed to facilitate the creation of custom data entry forms based on the FHI360 DATIM template.

Dashboard

Authorized users can access the application from the DHIS2 installed applications list. The homepage of the application displays a variety of projects, allows for the creation of new projects, and presents various actions that can be performed on a project.
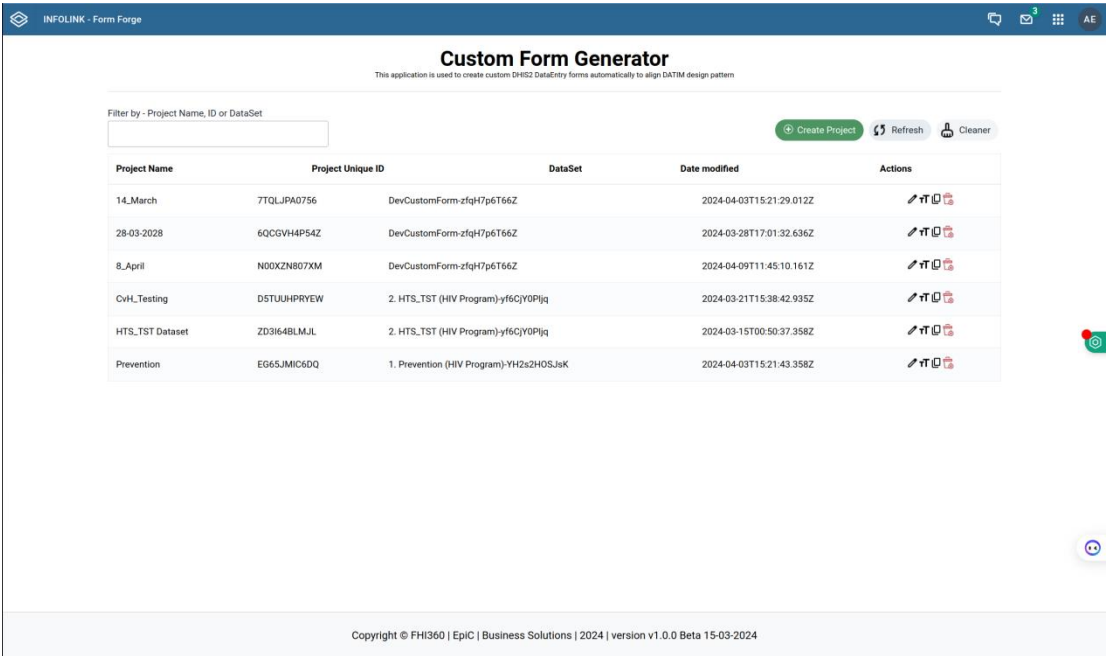
Creating Project

Click on **Create Project** button to initiate the addition of a new project. In the open dialog that appears, provide a name for the project and select the corresponding Data Set from which the project is derived.
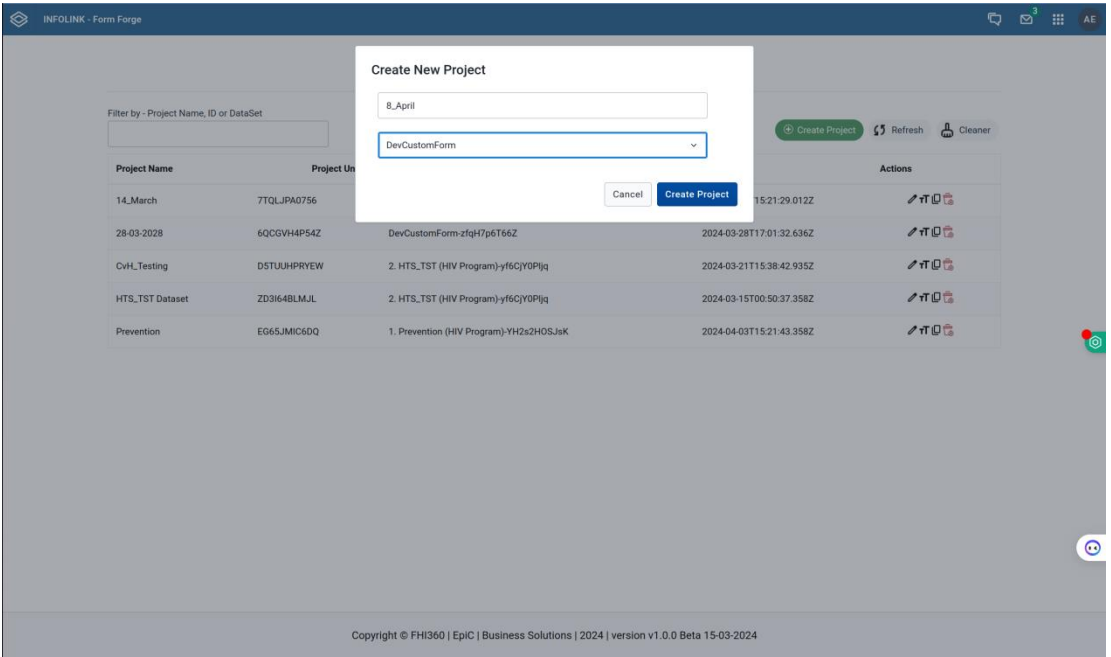
Each project must have a unique name.

Click on **Create Project** button to complete the process.

Delete Project

Each project is accompanied by four action icons: the delete icon, used to remove the project; the copy icon, employed to duplicate the project; the rename icon, utilized for renaming a project; and finally, the edit icon, which allows for configuration of the project parameters.
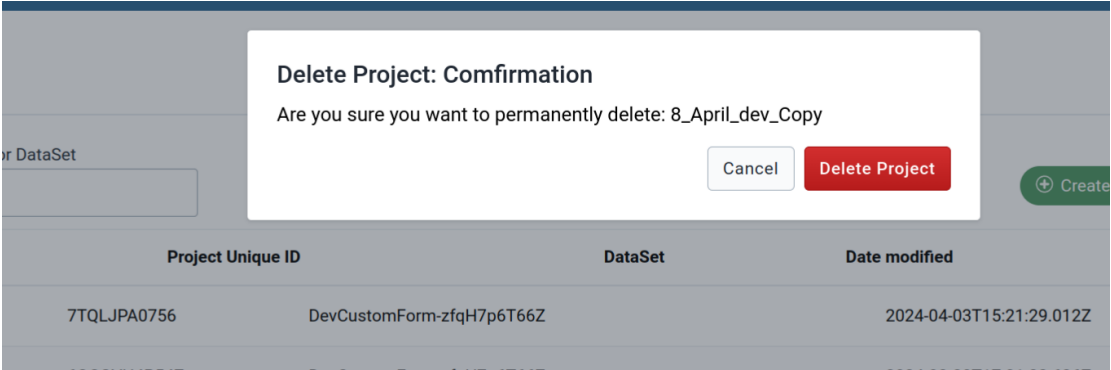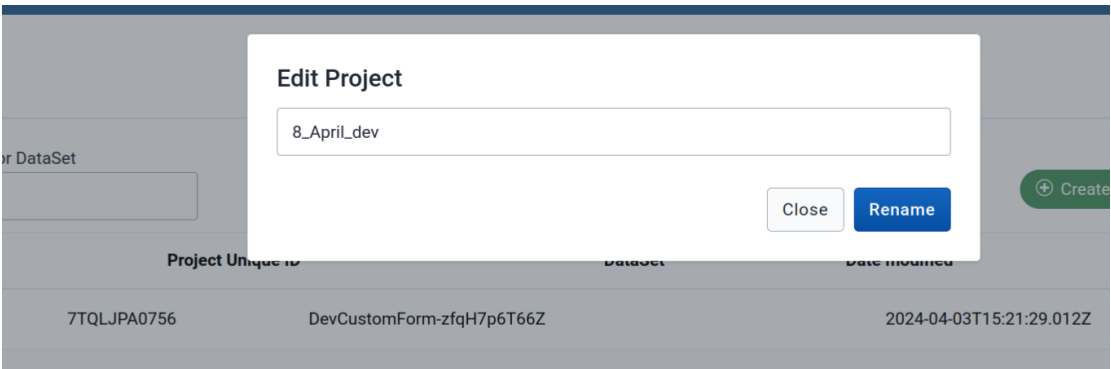

Deleting a project

Duplicating Project
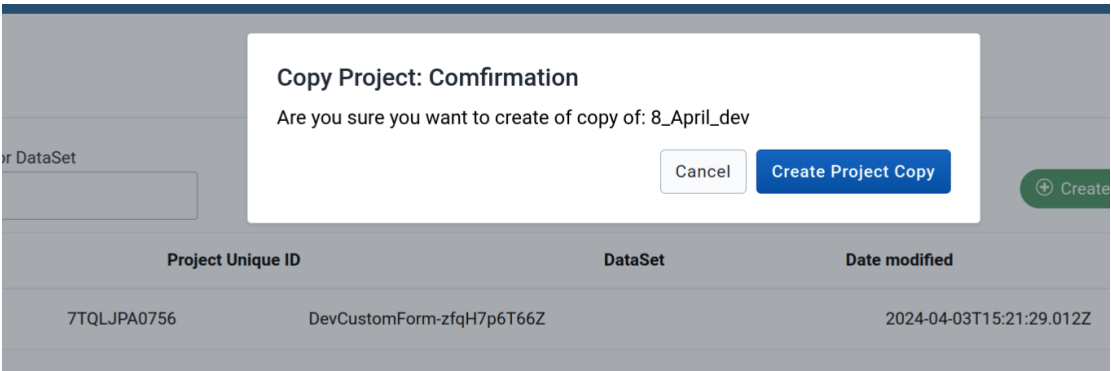
Copying a project

When a project is duplicated, it replicates all configurations from the original source project to the new one. The new project name is suffixed with **_copy**. If a project with the same name already exists, a numerical suffix is added to ensure uniqueness.
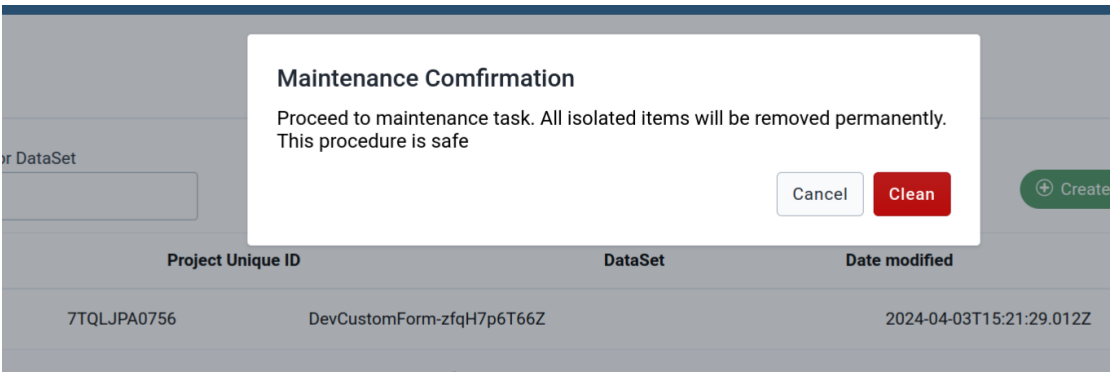
Renaming Project
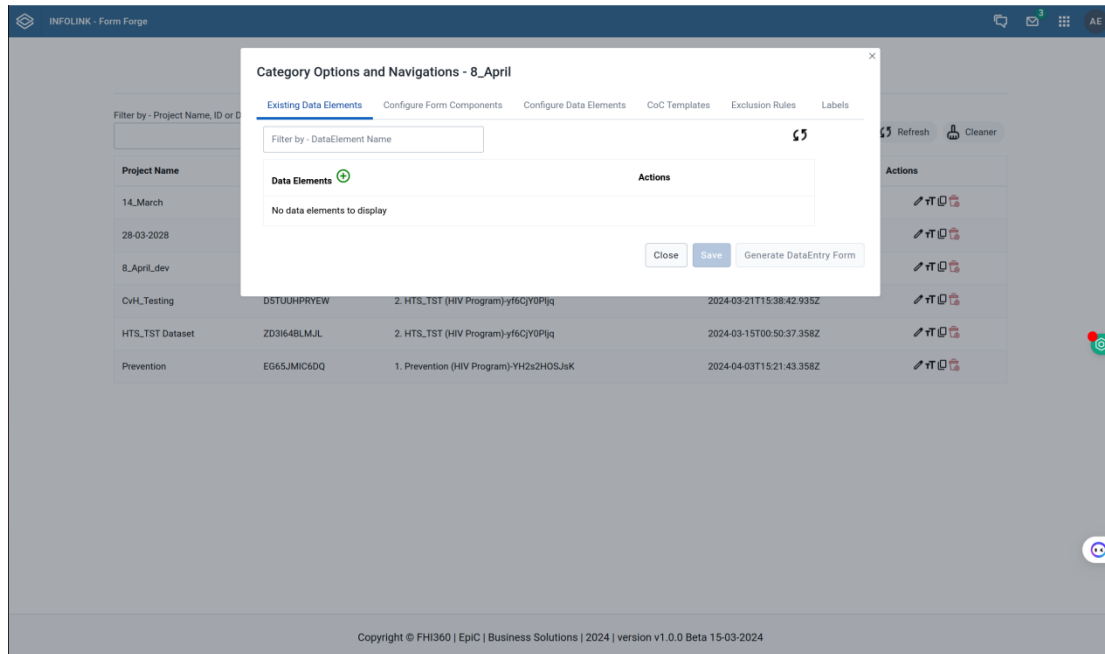

Renaming a project

Maintenance

The **Cleaner** button serves maintenance purposes by clearing the application of any residual artifacts remaining from deleted projects.

Configuring a Project

To configure a project, click on the edit button (depicted as a pen). This action will prompt a dialog box to appear, granting access to various configuration sections.
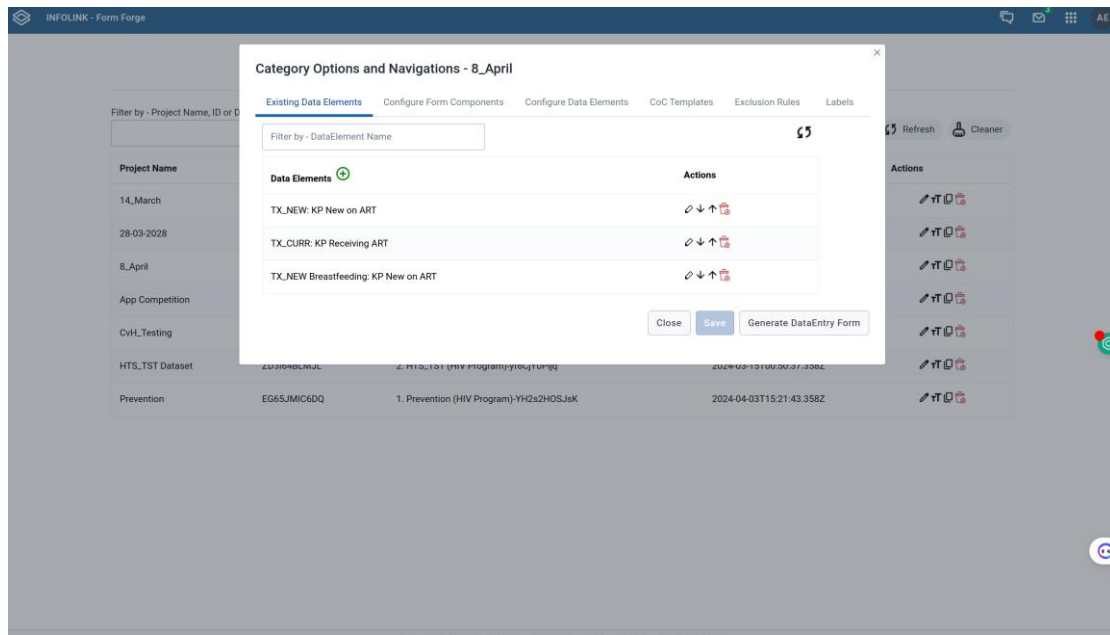

The project configuration includes the following sections, which will be elaborated on in subsequent pages:

1. Existing Data Elements
2. Configure Form Components
3. Configure Data Elements
4. COC Templates
5. Exclusion Rules
6. Labels

Existing Data Elements

1. The *Existing Data Elements* tab lists data elements that have been configured for the project

The filter text box facilitates searching for a data element instead of manually scrolling through the list.

The *Actions* lists actions that can be performed on a configured data element:
◆ The *Pen* icon edits a data element.
◆ The *Up* and *Down* arrow icons order data elements within the same *Form Component*
◆ The *Delete* icon removes a data element from the list of configured data elements.

Configure Form Components

2. The *Configure Form Components* tab allows for the grouping configuration of data elements within the final template.

The *Side Navigation* corresponds to the Vertical navigation section of the EpIC DHIS2 data entry template, while the *Form Component* corresponds to the collapsible grouping of similar data elements.
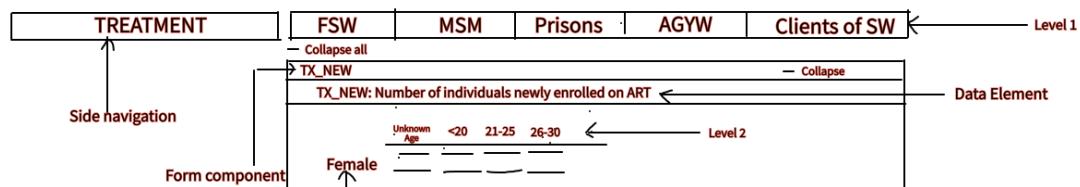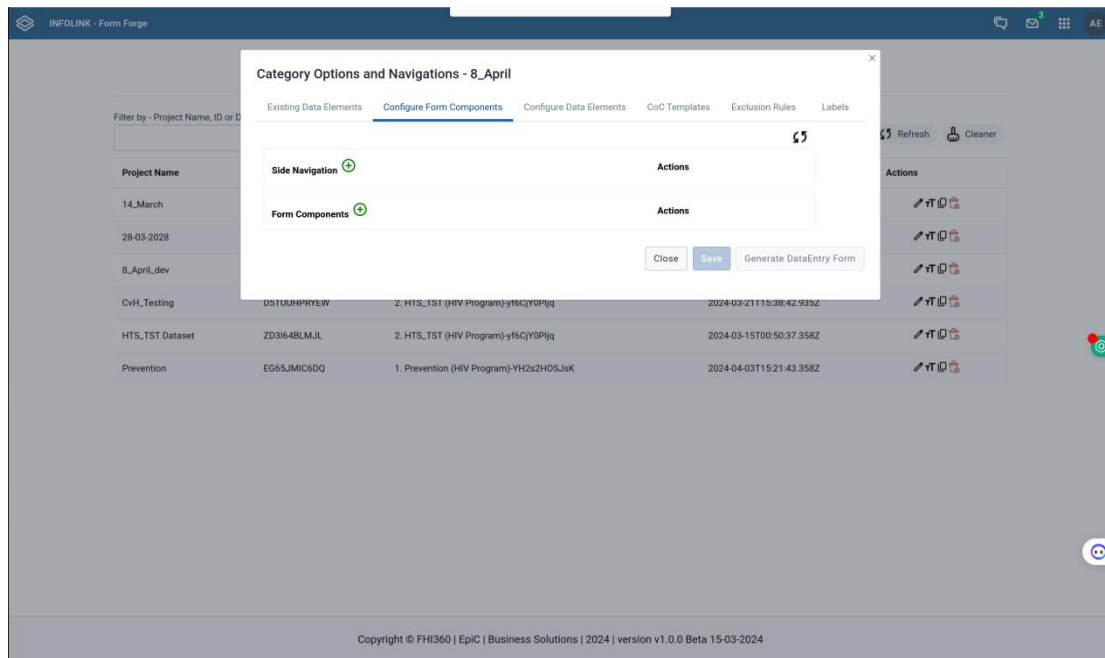
Side Navigation

To create a *Side Navigation*, click on the (+) button beside *Side Navigation.* In the open dialog, provide a name and click the **Create Side Navigation** button to save

Create Form Component

To create a *Form Component,* click on the (+) button beside *Side Navigation.* In the open dialog, provide a name and click the **Create Form Component** button to save.

This step is necessary before configuration of data elements.

Configure Data Elements

3. The **Configure Data Elements** tab facilitates the configuration of a data element's COC and navigation elements.
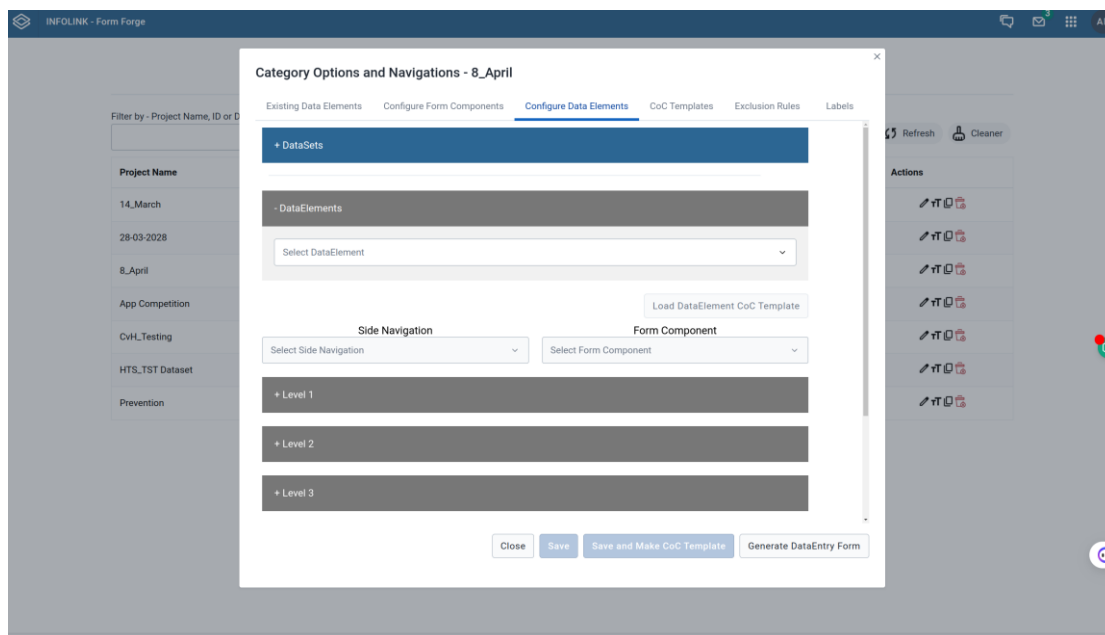
The initial section is designated for selecting a data element to configure. This list exclusively comprises data elements from the project's dataset that have not yet undergone configuration.
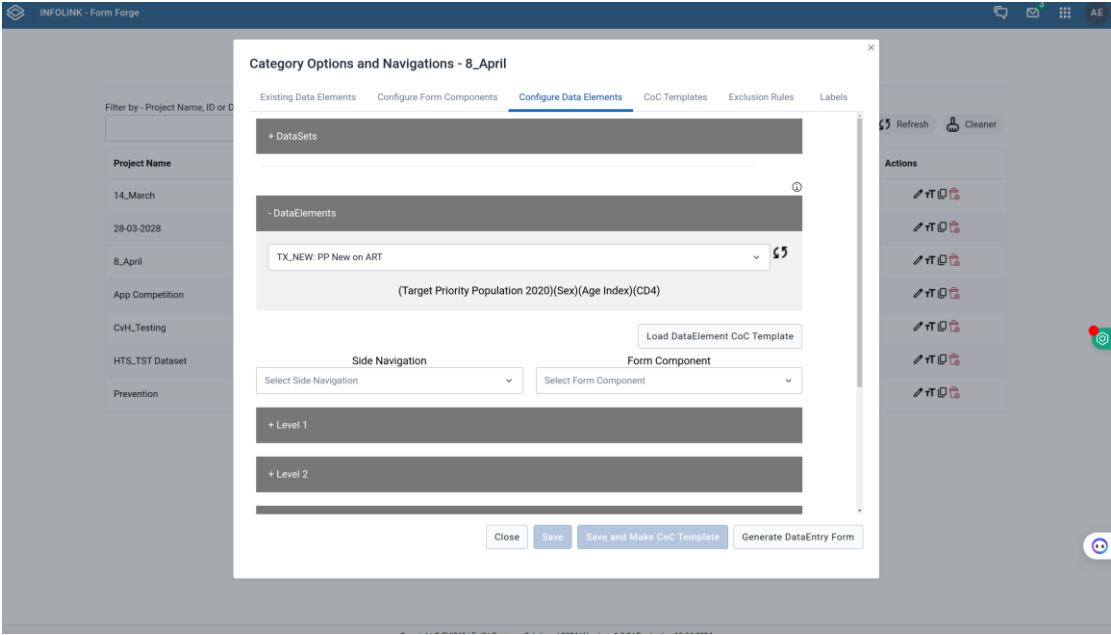
The corresponding COC for the data element is displayed. If there is a *COC Template* that aligns with the COC for this data element and you wish to utilize it, click on ***Load DataElement COC Template***.
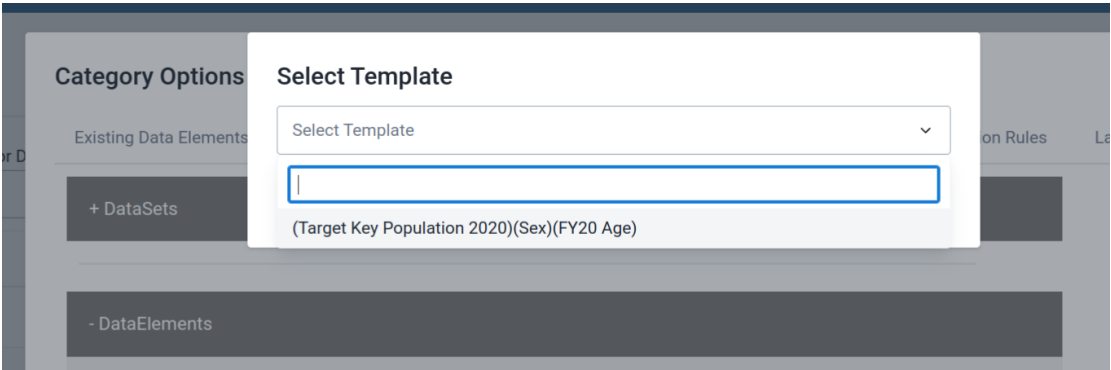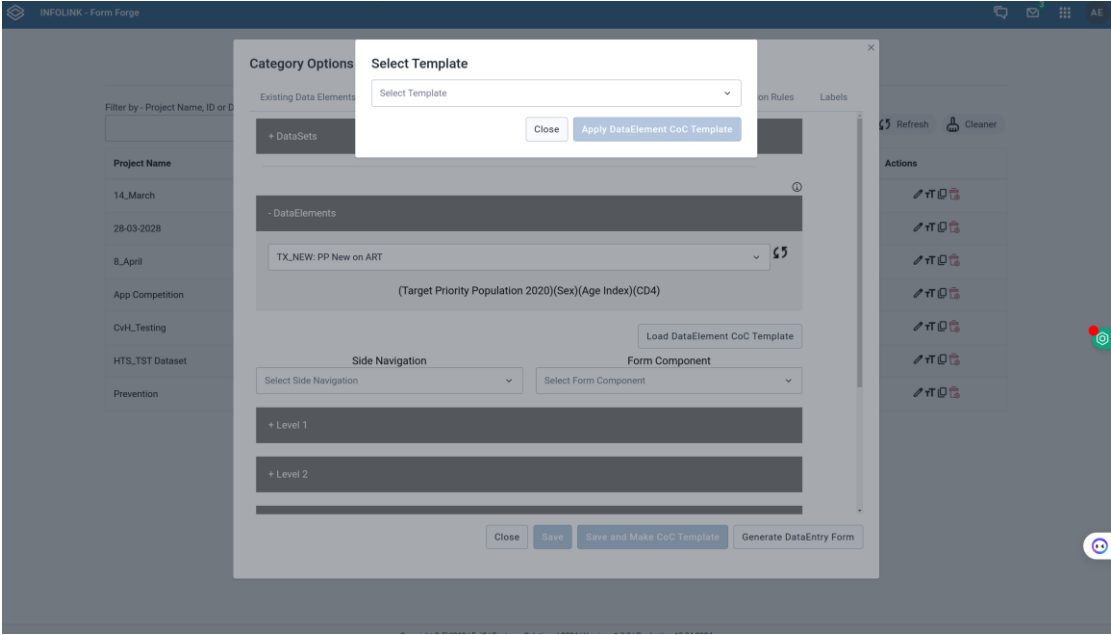
Select the template and click **Apply DataElement COC Template.** This will apply the navigation and COC configuration from the selected template to the current data element being configured.

To manually configure the data element, proceed without loading the data element COC template. The COC beneath the selected data element indicates the number of levels available for configuration. This form engine currently supports a maximum of 6 levels in the COC.

You can use the **Up** and **Down** arrow keys to sort the rendering of the *category option* in the final template. The middle section arrow keys can be used to select some or all of the *options* in the *category.*
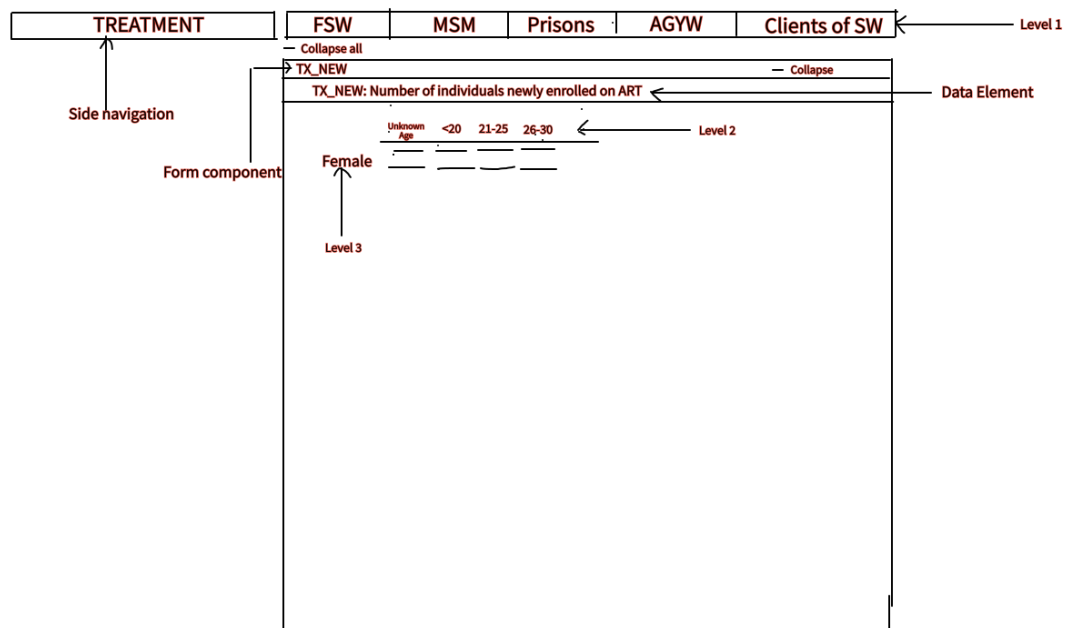
After configuring all the categories for the COC in the data element, you have the option to either click the **Save** button or the ***Save and Make COC Template*** button to preserve the configuration. The former will only save the configuration, while the latter will save it and provide the opportunity to create a COC Template based on your current configuration.

Opting to click the ***Save and Make COC Template*** button prompts a dialog to appear, allowing you to furnish a name for the template to be created alongside the save action.
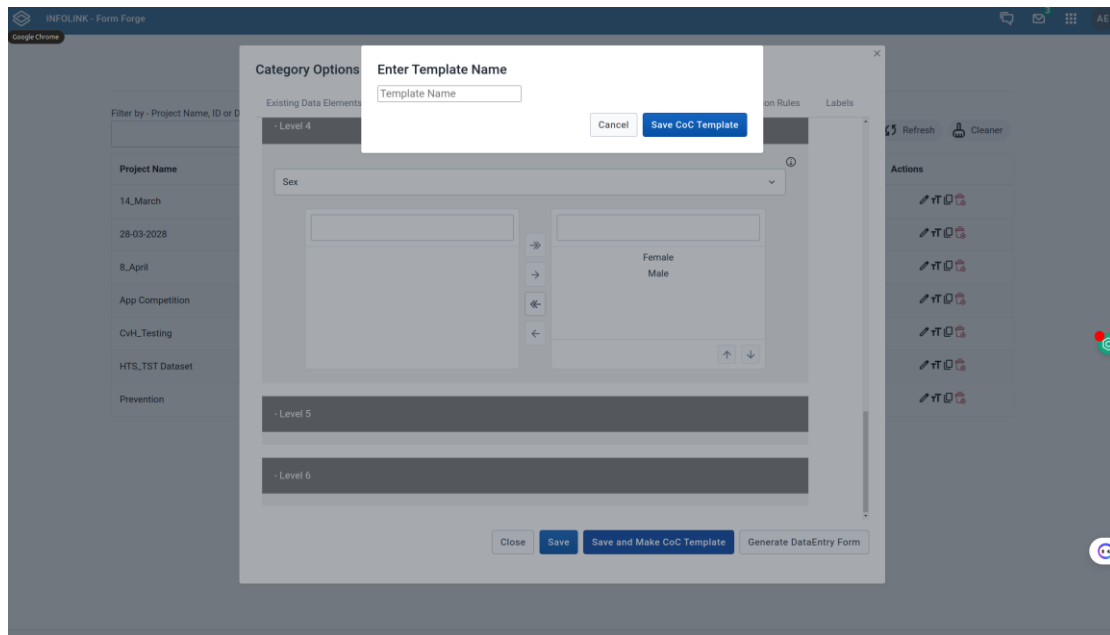
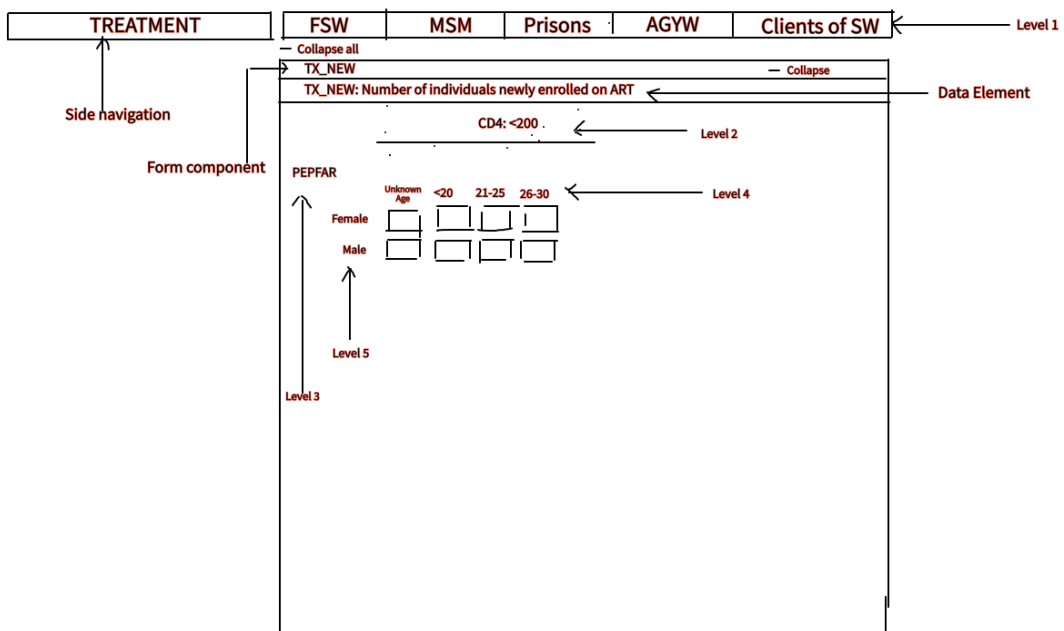For COC with levels 3 to 6, the following final layout options are available in the template.
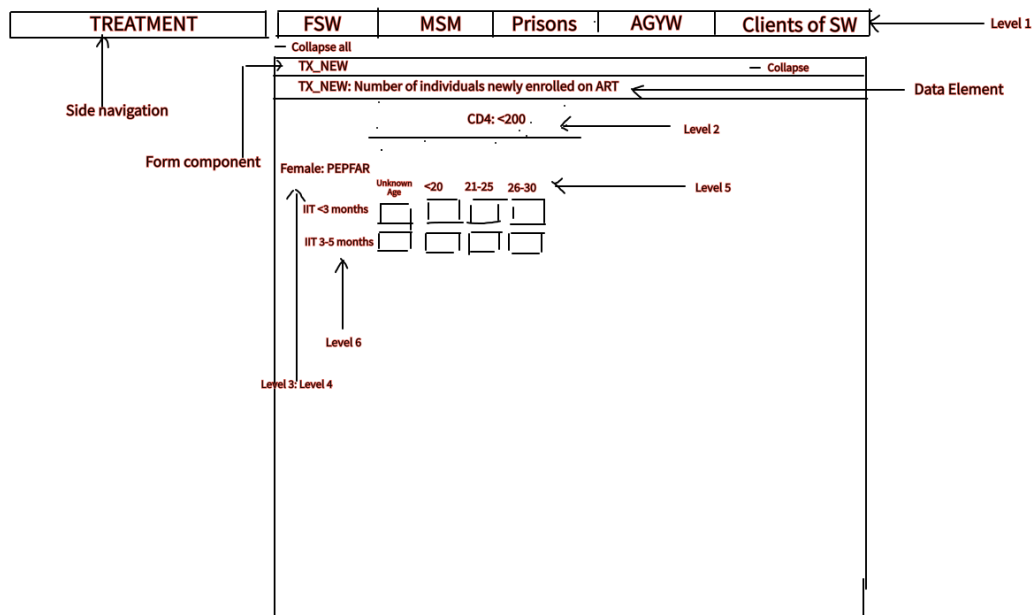
3 Levels

4 Levels

| TREATMENT | | FSW | MSM | Prisons | AGYW | Clients of SW | ← Level 1 |

— Collapse all

> TX_NEW — Collapse

TX_NEW: Number of individuals newly enrolled on ART ← Data Element

Female

	Unknown Age	<20	21-25	26-30	← Level 3
CD4: <200	☐	☐	☐	☐	
CD4:>=200	☐	☐	☐		

Side navigation

Form component

Level 4

Level 2

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5 Levels

| TREATMENT | | FSW | MSM | Prisons | AGYW | Clients of SW | ← Level 1 |

— Collapse all

> TX_NEW — Collapse

TX_NEW: Number of individuals newly enrolled on ART ← Data Element

CD4: <200 ← Level 2

PEPFAR

	Unknown Age	<20	21-25	26-30	← Level 4
Female	☐	☐	☐	☐	
Male	☐	☐	☐	☐	

Side navigation

Form component

Level 5

Level 3

6 Levels

NOTE: For 6 Levels, level 3 and level 4 are separated by a colon **:**

COC Templates

4. The **COC Templates** tab displays saved COC templates that can be utilized in data element configuration. This streamlines the process of configuring multiple data elements that have the same COC setup.
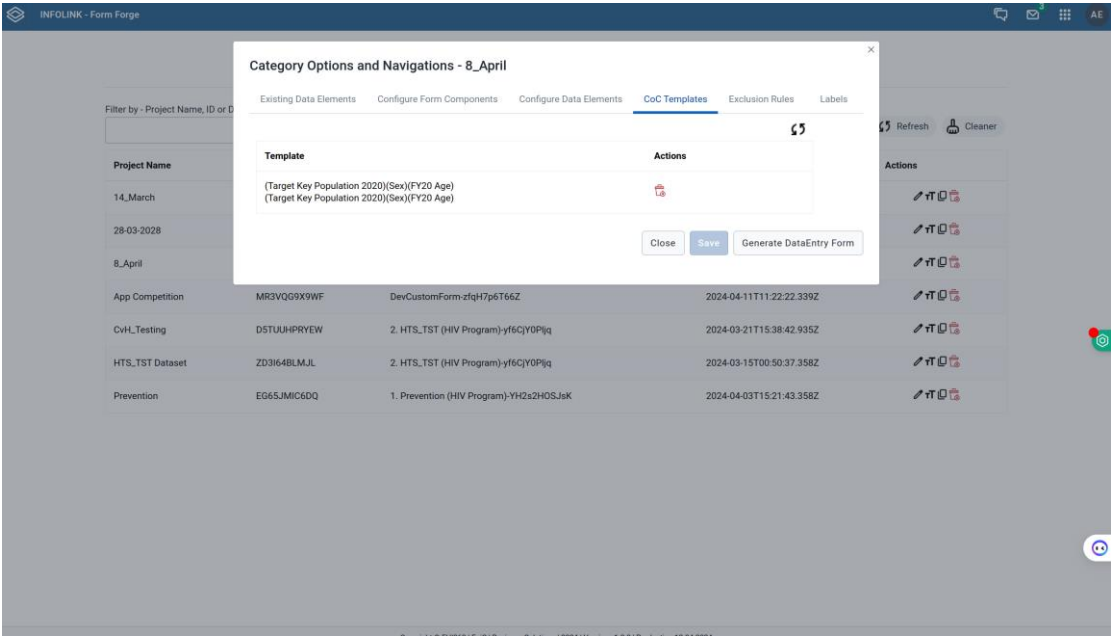
The critical aspect here is the COC from which the template originates. This template can exclusively be applied to data elements that share the same COC.
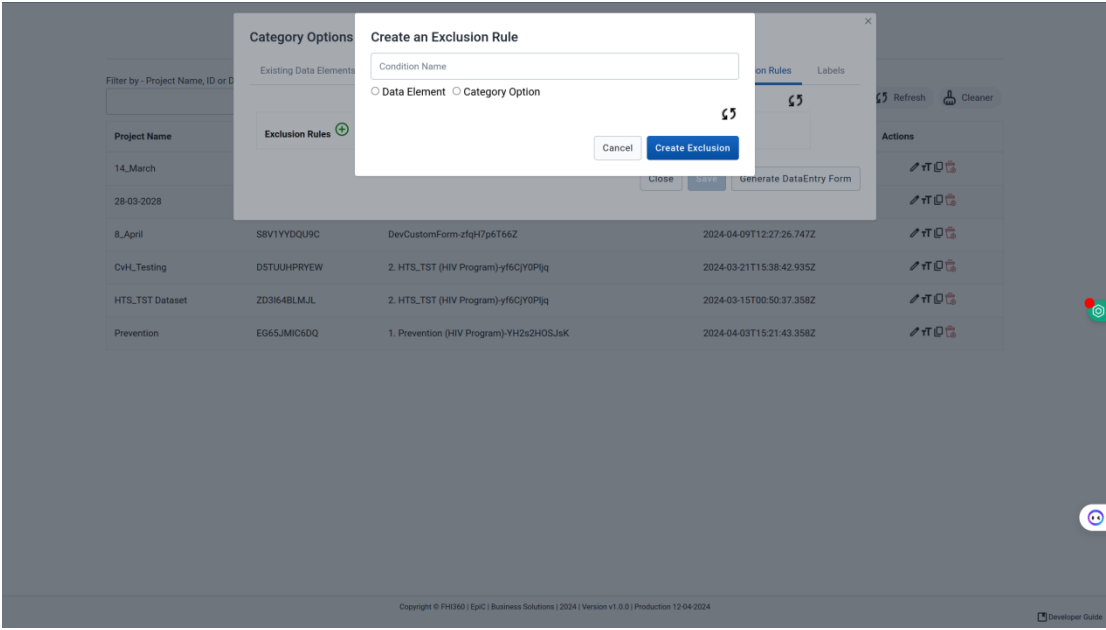
Exclusion Rules

5. The *Exclusion Rules* tab is utilized to configure the exclusion of Data Elements or Category Option(s) that meet specified exclusion criteria.

To create an Exclusion Rule click (+) next to the Exclusion Rules label
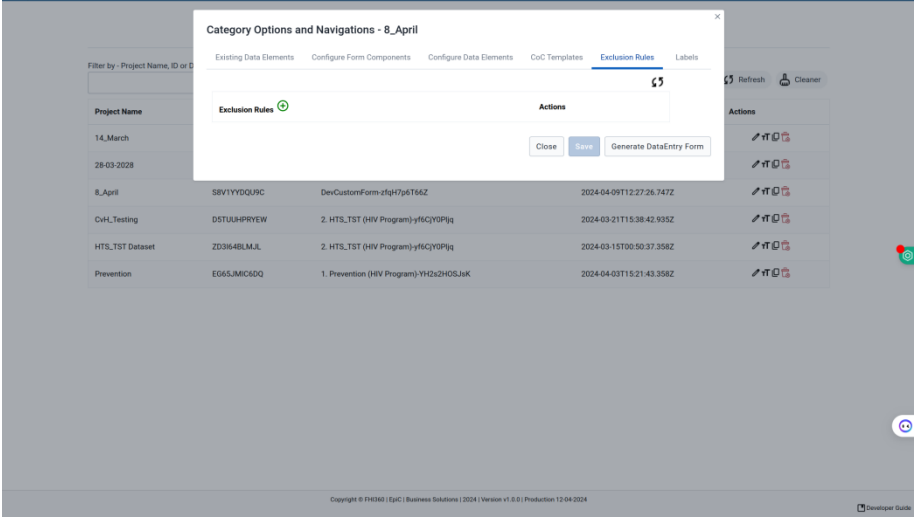
In the next screen, you can configure either for Data element or Category Option.

For Data Element exclusion, provide a name for the Exclusion rule and select the button for Data element
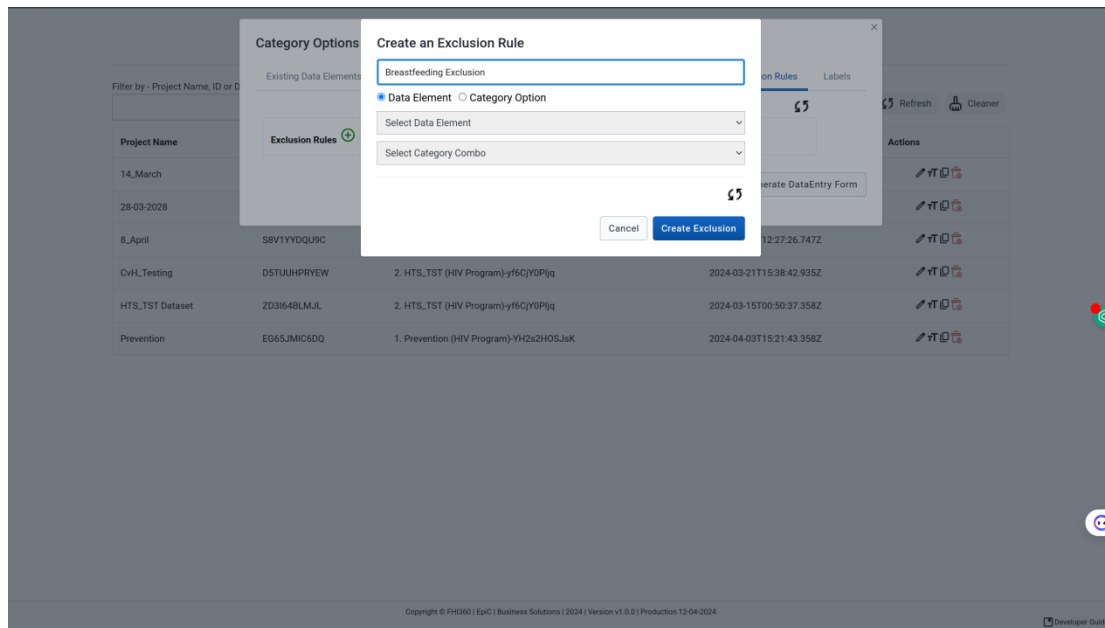
Select the data element and applicable Category Option Combo
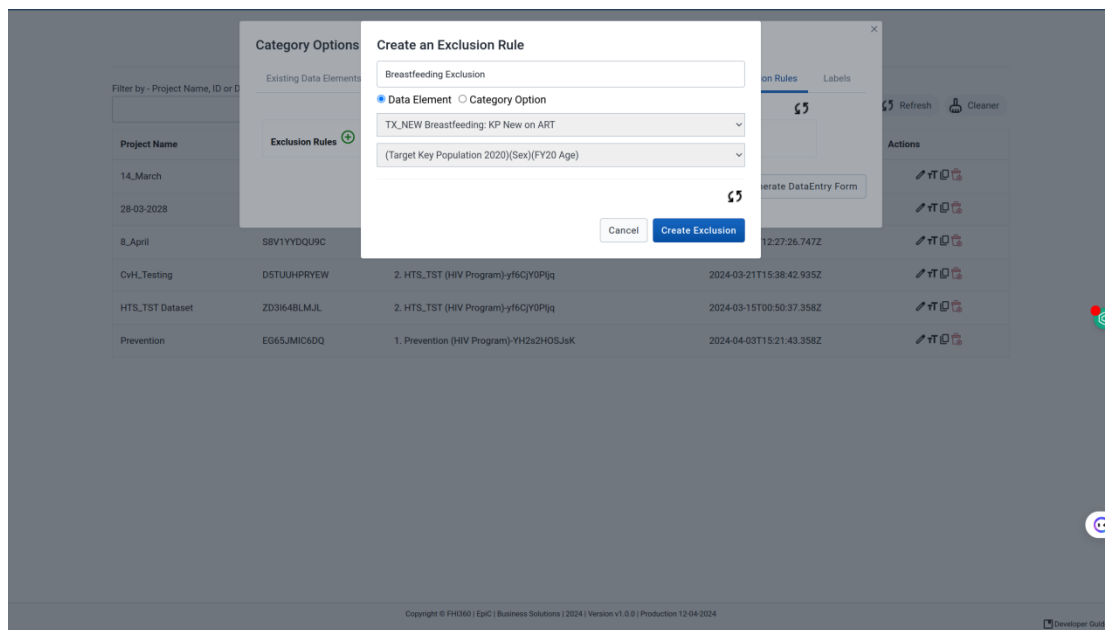
Click the refresh button to populates the category options.

For data elements, only the corresponding Level 1 Category option, as configured in the Data Elements tab for the selected data element, will be taken into account for the exclusion criteria. Any other Category option setups will be disregarded.

Click on *Create Exclusion* to finalize the process

For category option(s) exclusion, from the second screen, select Category Option, provide a name

If a data element is selected, the exclusion will only apply within the selected data element.

Click on the refresh button to populate the categories

After configuring the first condition, a plus button becomes available to allow for the configuration of a second condition, if required.

Selecting multiple category options implies that any of them within the configured condition will constitute a match.

The final part is to configure the actual category option(s) you want to exclude

Click on **Create Exclusion** to finalize the process

Labels

6. The *Labels* tab is utilized to rename how data elements or category options appear on the final template, differing from their originally configured names.

Click on the (+) to start.

When modifying a data element, first select the desired data element and then specify the new label. You can utilize the *<span>* tag to apply additional styling, such as color highlighting, to the configured label. Ensure that the *<span>* tag is correctly closed after application.

Click on *Set Label* to save the label

For category option, starting from the add button, select *Category Option*

For category options, there exists the concept of inclusion, signifying conditions that must be met before the new label is applied. To implement this, you can select a data element, an inclusion condition, or both.

First select a target *Category Combo* and click the refresh button.

Select the target *Category* and *Category Option*

If you want to include an *Inclusion condition,* click on *Add Inclusion 1* and configure the *Category* and *Category Option* as necessary


Once *Inclusion 1* has been configured, you may add *Inclusion 2* if necessary

Click on **Set Label** to save the label

Generating Data Entry template

Upon finalizing data elements configuration, *Exclusion Rules (*if applicable) and *Labels,* you can now proceed to generate a Data Entry template that will be published for the the Data Set.

Click **Generate DataEntry Form** button
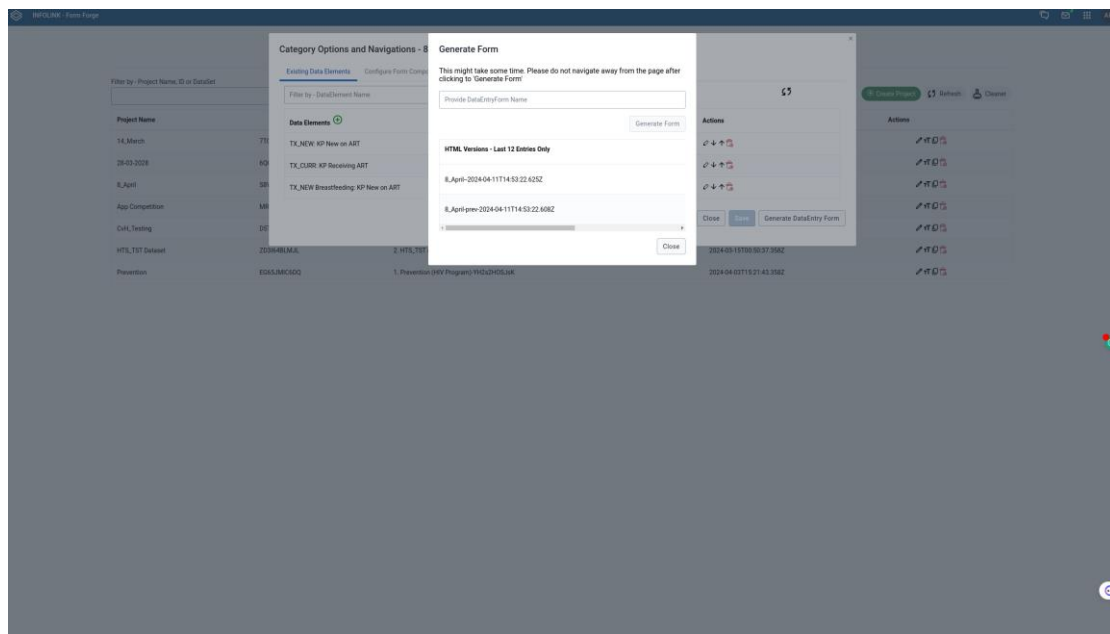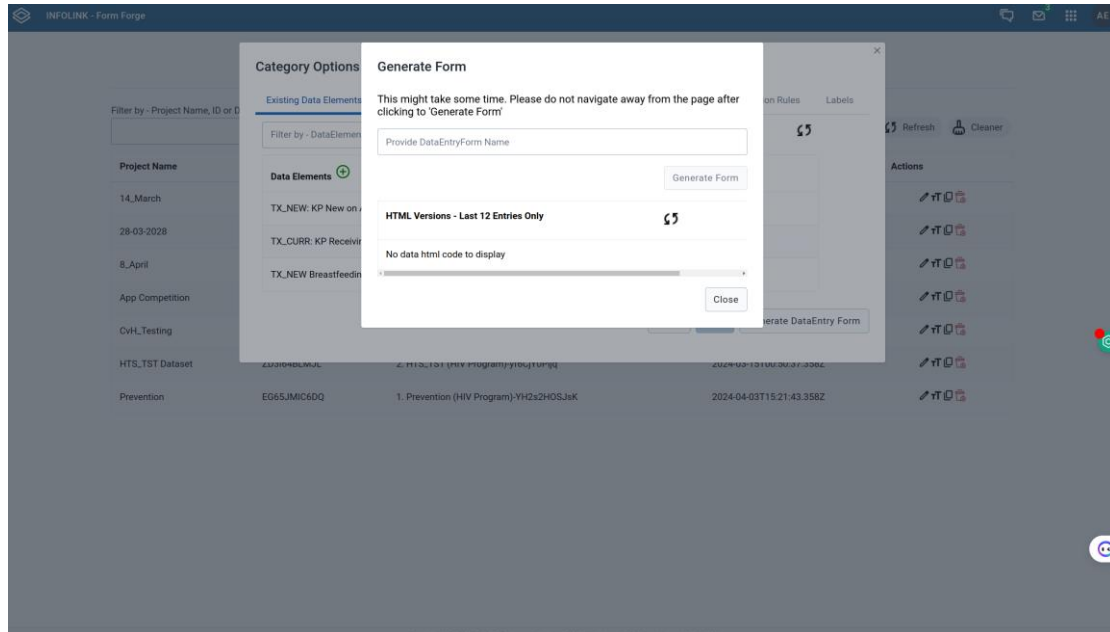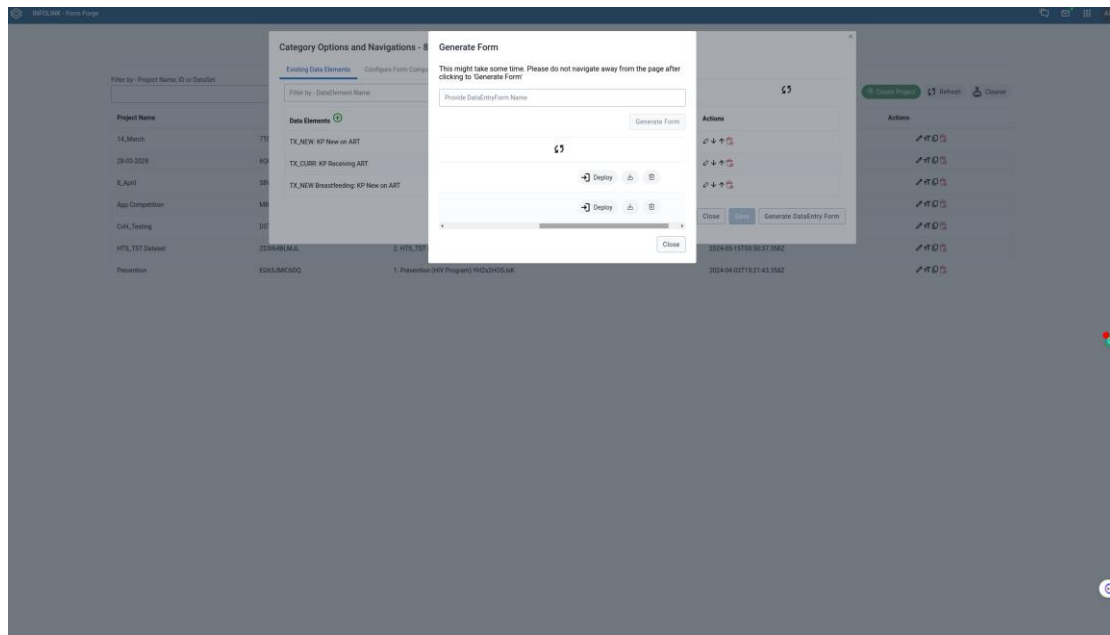
The application maintains a version history for data entry forms associated with each project. Upon generating a new form, it is automatically added to the project's form list. Additionally, the previously deployed form (the one in use before the new version) is also included in this list for potential rollback purposes.

This list has a maximum capacity of twelve entries. To ensure efficient storage management, the system automatically removes the oldest form whenever a new form or the previously deployed form needs to be added.

Each form can be deployed, downloaded for manual edit or deleted. Currently deployed form is by the *Checked* icon beside the form name