Trainers Guide: Getting to Know DHIS2

Familiarisation with the system, navigation, data entry

# Introduction to this guide

This guide is part of a support package for trainers who are teaching participants to use the Sudan FMOH DHIS2 platform. The main objective of this session is to familiarise all participants with the DHIS2 platform (it’s basic functions) and how to navigate around the system.

This guide will help the trainer prepare and deliver a demonstration of the key parts of DHIS2, with an emphasis on the organisation unit tree, data entry, and data analysis. The purpose of this session is to outline these functions at a very high level, and provide an opportunity for participants to navigate around the system using their user logins.

It also provides an outline for delivering two exercises to participants.

The ‘demonstration’ is outlined as a Quick Guide (a list of steps or ‘cheat sheet’) while the exercises are also described in some detail. The participants can either download the exercises from DHIS2 once they have logged in or the trainer can hand them out separately.

Trainers can use the exercise walkthrough to help them plan the session, and use the Quick Guide as a reminder prompt while delivering the training.

# Learning objectives for this session

1. Become familiar with navigating around DHIS2.
2. Understand the key conceptual components that make up DHIS2
3. Become familiar with the Organisation Unit tree.
4. To become familiar with how to get to the Data Entry and Analysis Apps.

Time needed

Introductory demonstration: 20 minutes

Hands­on exercises: 15 minutes

# Quick Guide - overview of steps for the demonstration

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| 1. Log into the system |  |
| 1. Explain the concept of the Dashboard as a ‘blank canvas’ on which users can ‘pin’ items of interest. Some of those items will be available more that one person (e.g. a common State level EPI item), while some of them may be personal (e.g. a data completeness report for the facilities in that users locality). |  |
| 1. Demonstrate how to get to the Dashboard:    1. Via the header    2. Via the Apps menu item |  |
| 1. Explain (and demonstrate) how that with the Dashboard one can ‘page through’ different TAB’s. In most cases a TAB on the Dashboard will represent a theme, in which a number of different visualisations and reports are ‘collated’ or ‘brought together’ under a single area of interest (e.g. a EPI coverage table, EPI state-level map, EPI coverage charts etc.) | Placeholder for image |
| 1. Demonstrate navigating through the TAB’s to get to the Documentation TAB. Explain that:    1. All the exercises for the training will be visible on this TAB; and    2. The Documentation TAB will be available for all users as part of the production system. It is part of the custom ‘help’ that users can refer to if they forget how to do a specific function. |  |
| 1. Explain that in one of the later sessions, they will learn how to ‘pin’ their own items to the Dashboard and create their own thematic TAB’s. |  |
| 1. Explain that DHIS2 basically provides 2 functions:    1. Capture of data from facilities (via forms); and    2. Analysis of data from facilities (via charts, tables, reports and maps) |  |
| 1. Explain that for both Data Capture and for Analysis, make use of a ‘facility tree’. A facility tree is the hierarchy of facilities … by State and Locality. In DHIS all leaves (or nodes) in the facility tree are known as Organizational Units. It is important to note that:    1. Users see different parts of the tree, depending on their permissions.    2. Users may see different parts of the tree for data entry vs. analysis. |  |
| 1. Demonstrate how to get to the first key functional area, i.e. Data Entry. Remind the participants that:    1. If they are logged in as a Programme Manager trainee user (e.g. TR\_045\_PM), they will not see the Data Entry option.    2. If they are logged in as a Data Capture trainee (e.g. TR\_045\_DE), they will see the Data Entry option. |  |
| 1. Open up the Data Entry App to demonstrate the facility tree. Highlight that:    1. Participants will only see part of the tree.    2. The use of the forms will be covered in a later session.    3. That the Programme Manager role is designed specifically NOT TO have access to data entry as insurance against ‘cooking the data’. Programme Managers can run data quality reports, can query unusual values, and run analysis, but cannot enter data. |  |
| 1. Demonstrate how to get to the second key functional area, i.e. Analysis (charts, tables, reports and maps) |  |
| 1. Click into the area. Highlight that:    1. Different types of charts are available in this area    2. That organisational units (facility tree) are accessible from here    3. Charts will be covered later. |  |
| 1. Click into the area. Highlight that:    1. That organisational units (facility tree) are accessible from here    2. Pivot Tables will be covered in a later session. |  |
| 1. Click into the area. Note that:    1. Maps may or may not be visible depending on connectivity and bandwidth.    2. That ‘boundary’ layers for States and Localities have been loaded.    3. That Maps will be covered in a later session |  |
| 1. Demonstrate that it is possible to switch between Maps, Charts and Tables, and highlight that if a specific analysis is being worked on (i.e. a set of values), it is possible switch the view of that data. |  |
| 1. Click into the area. Highlight that:    1. A number of standard reports, completeness reports, data approval functions, and custom reports are available in this area.    2. Some of these may or may not be available to all users (e.g. Data Approval is likely to be with someone at a higher level than Data Entry).    3. That the use of the reporting area will be covered in a later session. |  |
| 1. At this point, it is time to give users the opportunity to become familiar themselves with navigating to the key areas of DHIS2. Have participants download and work through Exercises 2.1, 2.2 and 2.3. |  |

# Exercises

## Exercise 2.1 – Data Entry and the Facility Tree

**The goal of this exercise is for each user to login to the system as a Data Entry user, and become familiar with the Facility Tree.**

*Note: that the first account is a data entry user type, and each account will have a different Locality across various States. These accounts will be able to enter facility level data for the health centres and hospitals in their locality.*

## Exercise 2.2 – Data Analysis

**The goal of this exercise is for users to successfully navigate to, and switch between the different data analysis views (charts, tables and maps).**

*Note: the exercise asks users as the last step to login as Program Manager user so they can see the different level of analysis access they have (i.e. State level rather than Locality level).*

## Exercise 2.3 – Reporting

**The goal of this exercise is for users to successfully navigate to the Reporting Area.**

Note: Some users may click into some of the reporting interfaces … that is OK, however at this time, try not to get into any details of the what the reports are, as they will be covered later.