

HCM Console Version 0.3

PRD

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Link to Figmas: [Link](#)

Link to user stories: [Link](#)

List of new features:

1. Dual Timeline view for campaign creation
2. Boundary Data management
3. Checklist Module Management
4. Adding/Editing Users for upcoming and ongoing campaigns
5. Adding/Editing Targets for upcoming and ongoing campaigns
6. Adding/Editing Facilities for upcoming and ongoing campaigns
7. Adding Boundaries for upcoming and ongoing campaigns
8. IRS enablement on Console
9. Campaign type dropdowns based on diseases (out of scope)
10. Edit product details
11. Block "Count" values in product selection pop should be disabled if we select a bednet type product.
12. Block "Number of Deliveries" on Rule Configuration screens for Household based campaigns.

Goal and overview of this release (Why do we need this release?):

This release will provide the users with the following capabilities:

1. **Manage Boundary Data** - We need enable boundary data management for 2 specific reasons:
 - a. **Giving the control to the country** - As a step towards building capacity and managing/creating their own data a new user is being created which would be solely responsible for managing all Master Data, starting with boundary data in this release - next releases will cover Facility Master, Product Master and Vehicle Master. All the master data configured here will be used by the whole HCM Stack - Microplanning, Campaign Creation through Console, HCM App and Dashboards.
 - b. **GIS based MicroPlanning** - To enable GIS based MicroPlanning in the upcoming quarter(s) which would need the capability to set up boundaries using ShapeFiles or GeoJSONs, this version will lay the groundwork for it.
2. **Edit data for an already existing campaign (either an upcoming or ongoing campaign)**: Under this capability the user will be able to edit the following set of data:
 - a. **Campaign and Cycle Dates**: Users will be able to edit campaign dates and cycle dates for campaigns that are in upcoming or ongoing state.
 - b. **Edit User Data**: The user will be able to add new app users/edit existing app users/delete existing users

- c. **Edit Target Data:** The user will be able to edit existing campaign target data for upcoming and ongoing campaigns
 - d. **Edit Facility Data:** The user will be able to add new/ delete existing /edit existing facility data for upcoming and ongoing campaigns
 - e. **Edit Boundary Data:** The user will be able to select new boundaries from the existing set of boundaries for a given campaign
3. **Checklist Management:** For every new campaign we need to configure checklists which are created for different users at different levels of boundary hierarchies. We need to provide the capability for System Admins, where the system admins can create their own checklists for specific users at specific levels of boundary hierarchy using forms engine capabilities.
4. **Dual Timelines for Campaign Creation Process**
5. **Integration with HCM Microplanning**
6. **Use Targets ingestion from Console in HCM Analytics Dashboards**
7. **IRS campaign enablement on HCM Console (In Development)**
8. **2 Roles for Console: MDMS Data Manager (can edit MDMS Data like Product types, Facility data on top of campaign creation) and Campaign Manager (can only create/edit campaigns using existing MDMS Data)**
9. **Show list of resources based on the campaign type selected**
10. **Allowing MDMS Data Manager user to edit product details -**
11. **HCM Console landing page enhancement - On basis of internal feedback**

The outcome expected from letting the users edit campaign data and configure campaigns on their own is to reduce dependency on our implementation team and reduce time taken for configuring campaigns from over a week to less than an hour. (This will be achieved with point 1 and 2)

The points 3 to 9 are needed to enhance Console's offerings compared to the overall landscape of tools that are available in the Health Campaigns space and also to support other existing/upcoming offerings on the overall HCM platform

Success Metrics:

The features under this release will be considered a success if we have the following outcomes post the release:

1. Time for campaign configuration for Post Intervention flows reduces **from 1 week to less than an hour**
2. Requests for our implementation team to edit the following data points for a campaign fall to zero:
 - a. **Edit Campaign and Cycle Dates**
 - b. **Edit User Data**
 - c. **Edit Target Data**
 - d. **Edit Facility Data**
 - e. **Edit Boundary Data**

3. Campaign Targets (Denominators) for DSS are pushed directly from the target sheet uploaded on console without engineering efforts
4. Support IRS campaign and go live on field for at least one of these 2 campaigns
5. All Checklists should be created through Console with no interventions from our Impel Team.

Who is the user of this release? (Persona)

This release is for any system administrator in the ministry of health or in our partner community who would be incharge of setting up campaigns on Digit HCM. They are responsible for making sure the campaign is running correctly on the system and keep the data updated as per the changes seen on ground during the campaign.

Timeline and Release Planning:

We plan to have the following timeline and dates:

1. PRD completion by 16th August
2. Scope walkthrough with Engineering Team between - 20th August
3. Capacity planning and gate preparation between 21st - 26th August
4. Gate 1 on 28th August
5. October last week/November 1st week Gate 2

Features and User Stories:

1. Editing campaign data for Targets, Facilities and Users for an ongoing or upcoming campaign state -

Prerequisites: Apart from Target, Facility and User data HCM Console will also allow the user to update the following:

- a. **Boundary Selection** - Once the campaign is live, the user should be able to select new boundaries from the existing boundary data set from the summary screen. De-Selecting already selected boundaries is not allowed.
- b. **Update Campaign and Cycle Dates**. Once the campaign is either in the upcoming or ongoing state the user can choose to update dates for the campaign where the

Objective - We have seen over several campaigns that before and during the campaign there are multiple requests to our impel team to update/create/delete Target/User/Facility data. With this feature we plan on reducing the dependency on the Implementation Team and allow the System Admin to take these actions directly through Console and reduce the time to make these changes.

How will the user do this?

The user experience will be as follows:

For Boundary Data Updates :

→ **Selecting New Boundaries for a campaign:** The user will be able to add new boundary data as follows:

i. **Go to My Campaign:** Users can select the campaign in which they want to add new boundary data. After clicking on the specific campaign, the user will see the campaign summary screen.

ii **Click on Edit Button for Boundary Data:** **NOTE: This requires engineering efforts where we create a separate card for boundary data and show the number of boundaries selected until the Admin Post level on the current summary screen.**

The user will be shown a popup where they will see the different levels of the boundary hierarchy and can select new boundaries from the dropdown, once the user has submitted the changes the user needs to mandatorily go through the Target, Facility and User data update screens. The screen for Target, Facility and User Updates will be as described below in scenarios where the user is trying to update Target, Facility or User Data directly without selecting new boundaries.

The only difference in user journey will be that instead of the user entering the update Targets, Users and Facility flow from the summary screen, the user will be directly pushed into the Target, Facility and User Update Screens after they have confirmed selection of new boundaries.

Once all the data points necessary for boundary updates are completed, the user is then redirected to the campaign creation summary screen - where the campaign creation timeline will be reloaded with the “Download User Credentials” button deactivated until new users are created. Once the new users are created, the “Download User Credentials” will be activated with a timestamp stating the latest user credentials create time.

For Target Data updates: If the user wants to edit Target Data that is already uploaded for an upcoming or an ongoing campaign the user will have to go through the following steps:

i. **Go to My Campaigns:** The user will first go to “My Campaigns” and select the campaign for which they want to edit the data for and arrive on the summary page.

ii. **Click on the Edit button for Target:** On the summary page of the campaign, the user will need to press the “Edit” icon for Target Data Upload and arrive on the Target Upload Screen.

iii. **Target Data Upload Page:** On the Target upload screen the “Download Template” button will now be disabled and the user will only have the last successfully uploaded file that was used to create Target Data for the campaign available for download on which new Target data can be added or existing data can be updated.

iv. **Editing Target Data when new boundary data is added for campaign:** If the user

has added new boundaries for the campaign, the user will see the new set of boundaries appended in the sheet after the existing set of boundaries with the columns for targets for the newly selected boundaries as empty.

The user can take the following actions in this step:

Edit Target data of existing boundaries

Add/Edit Target Data for newly added boundaries

vi. Uploading Excel Sheet to update data: Once the user has updated target data on all the sheets, the user will save the data on the Excel and upload it on the Target Upload Screen.

For Facility Data updates:

i. Go to My Campaigns: The user will first go to “My Campaigns” and select the campaign for which they want to edit the data for and arrive on the summary page.

ii. Click on Edit button for Facility Data: On the summary page of the campaign, the user will need to press the “Edit” icon for facility data and arrive on the Facility Data Upload Screen.

iii. Facility Data Upload Screen: On Facility Data Upload screen the “Download Template” button will now be disabled and the user will only have the last successfully uploaded file that was used to create Facility Data for the campaign available for download on which new Facility data can be added or existing data can be updated.

iv: Editing Facility Data when new boundary data is selected for campaign: If the user has selected new boundaries for the campaign, the user will see the updated set of boundaries appended in the “List of Campaign Boundary” sheet with their boundary codes. On the “List of Available Facility” sheet, the user will see all the list of facilities that are available in the system with the status as uploaded at the time of campaign creation. If the Console User fails to update the boundary codes while reuploading and uses the boundary codes of the deselected boundaries, we will throw an error saying “Error: Boundary Code for the Facility in line xx on sheet yy is invalid”

The user can take the following actions in this step:

– Edit data of existing Facilities i.e. Facility Status (**Set an Inactive Facility to Active Status - Vice Versa is not allowed**), Boundary Mapping (Add Boundary mapping to a facility based on the boundaries available in the “List of Campaign Boundary”. Removal of Existing Boundary Data is not allowed)

– Create new facilities by adding data at the end of the existing list of Facility data with all the required fields

v. Editing Facility Data when boundary data is unchanged: If the user has not added new boundaries for the campaign, the user will see the same set of boundaries in the “List of Campaign Boundary” sheet with their boundary codes. On the “List of Available Facility” sheet, the user will see all the list of facilities that are available in the system with the status as uploaded at the time of campaign creation.

The user can take the following actions in this step:

– Edit data of existing Facilities i.e. Facility Status (Active to Inactive or vice versa), Boundary Mapping (Add or Remove Boundary mapping to a facility based on the boundaries available in the “List of Campaign Boundary”)

- Create new facilities by adding data at the end of the existing list of Facility data with all the required fields
- **Deleting/Deactivating existing Facilities:** This will be done by our Impel Team as for deletion/deactivation of Facilities there are multiple checks like up-sync statuses which needs to be made before initiating removal of a user from the campaign. This data will not be available to the Console Users and should be done through the impel team.

vi. Uploading Excel Sheet to update data: Once the user has updated Facility data, the user will save the data on the Excel and upload it on the Facility Data Upload Screen.

For App User Data updates:

- Go to My Campaigns:** The user will first go to “My Campaigns” and select the campaign for which they want to edit the data for and arrive on the summary page.
- Click on Edit button for User Data:** On the summary page of the campaign, the user will need to press the “Edit” icon for App User data and arrive on the App User Data Upload Screen.
- User Data Upload Page:** On App User Data Upload screen the “Download Template” button will now be disabled and the user will only have the last successfully uploaded file that was used to create App User Data for the campaign available for download on which new App User data can be added or existing data can be updated.
- Editing User Data when new boundary data is selected for campaign:** If the user has selected new boundaries for the campaign, the console user will see the updated set of boundaries appended in the “List of Campaign Boundary” sheet with their boundary codes. On the “Create List of Users” sheet, the user will see the same set of App Users that they had successfully uploaded during the campaign creation process with the same boundary mapping as before.

Note: If an app user is assigned to a boundary that is now deselected by the Console User the app user will still be mapped to the same boundary as done previously and it is up to the Console User to update the mapping with the new Boundary Codes for those App Users. If the Console User fails to update the boundary codes and uses the boundary codes of the deselected boundaries, we will throw an error saying “Error: Boundary Code for the user in line xx on sheet yy is invalid”

The Console user can take the following actions in this step:

- **Edit data of existing App Users:** The Console User can update Boundary Codes, Roles, Employment Status, Name and Phone Number of existing app users that were already present in the sheet
- **Create new app users** by adding data at the end of the existing list of App users data with all the required fields
- **Deleting existing users:** This will be done by our Impel Team as for deletion/deactivation of users there are multiple checks like up-sync statuses which

needs to be made before initiating removal of a user from the campaign. This data will not be available to the Console Users and should be done through the impel team.

v. Editing App Data when boundary data is unchanged: If the Console user has not added new boundaries for the campaign, the user will see the same set of boundaries in the “List of Campaign Boundary” sheet with their boundary codes. On the “Create List of Users” sheet, the user will see the same set of Users as they had successfully uploaded during the campaign creation process.

The user can take the following actions in this step:

- **Edit data of existing App Users:** The Console User can update Boundary Codes, Roles, Employment Status, Name and Phone Number of existing app users that were already present in the sheet
- **Create new app users** by adding data at the end of the existing list of App users data with all the required fields
- **Deleting/Deactivating existing users:** This will be done by our Impel Team as for deletion/deactivation of users there are multiple checks like up-sync statuses which needs to be made before initiating removal of a user from the campaign. This data will not be available to the Console Users and should be done through the impel team.

vi. Uploading Excel Sheet to update data: Once the user has updated App user data, the Console user will save the data on the Excel and upload it on the User Data Upload Screen

2. Configuring Checklist based on user roles and checklist type:

Prerequisites: In any campaign the people involved at various levels of the campaign are supposed to fill different checklists (a list of questions and answers) based on their roles everyday. Each checklist can have a different set of questions that they need to answer. Based on the role selected and the checklist type - the Console User should be able to create a Checklist from scratch. These checklists will then be made available to all users based on their respective roles.

User flow for checklist creation:

Step 1: Checklist Home Page - Once the campaign data is submitted and the campaign creation has started on our system the user will move to App Configuration which will be one step on the horizontal timeline. In the app configuration step (Horizontal Timeline) the user will see the Checklist Creation step as the first on the vertical timeline.

The user will see a table having 5 column having the following headers:

- i. **Name of the checklist:** Will have the name of the checklist
- ii. **Role:** The selected role for which the checklist was configured (Type of roles are defined later)
- iii. **Checklist Type:** The type of checklist selected for the given role (Type of roles are

defined later)

iv. Status: The “Active”/“Inactive” toggle will define whether a checklist will be shown on the HCM Mobile app or not for a given user. If a given Checklist is set to active - it will be available for the Mobile App user. If set to inactive - it will be saved on HCM Console but will not be available for the HCM App user.

IF the Console User drops off during the checklist creation flow and does not press on “Create New Checklist” button on the bottom right to finalize the checklist - given the name of the checklist name is unique the checklist will be saved with “Status” set as draft

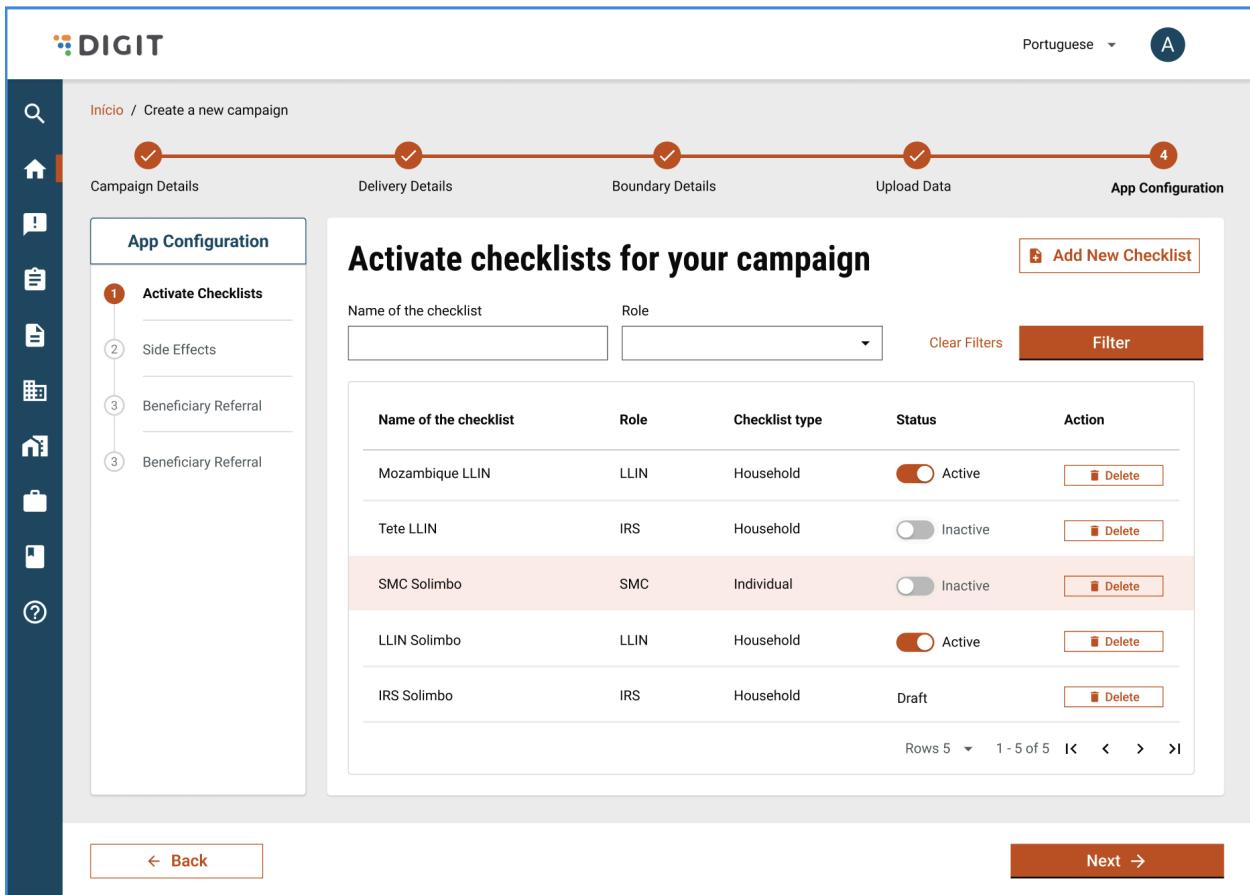
v. Action: Delete checklist is the only option available in this column for this release

The user will also see a “Add New Checklist” at the top right corner of the homepage which when clicked will trigger the checklist creation flow.

The user can click anywhere along the line item for a given checklist to open the selected checklist

Filters and Search: The user can search checklists using the name of the checklist where a minimum of 2 letters are needed to trigger a search.

Users can filter checklists by roles where the user can see all the available roles in the “Roles” dropdown and then can select multiple roles at once and press on the “Filter” button to trigger the selected filter.



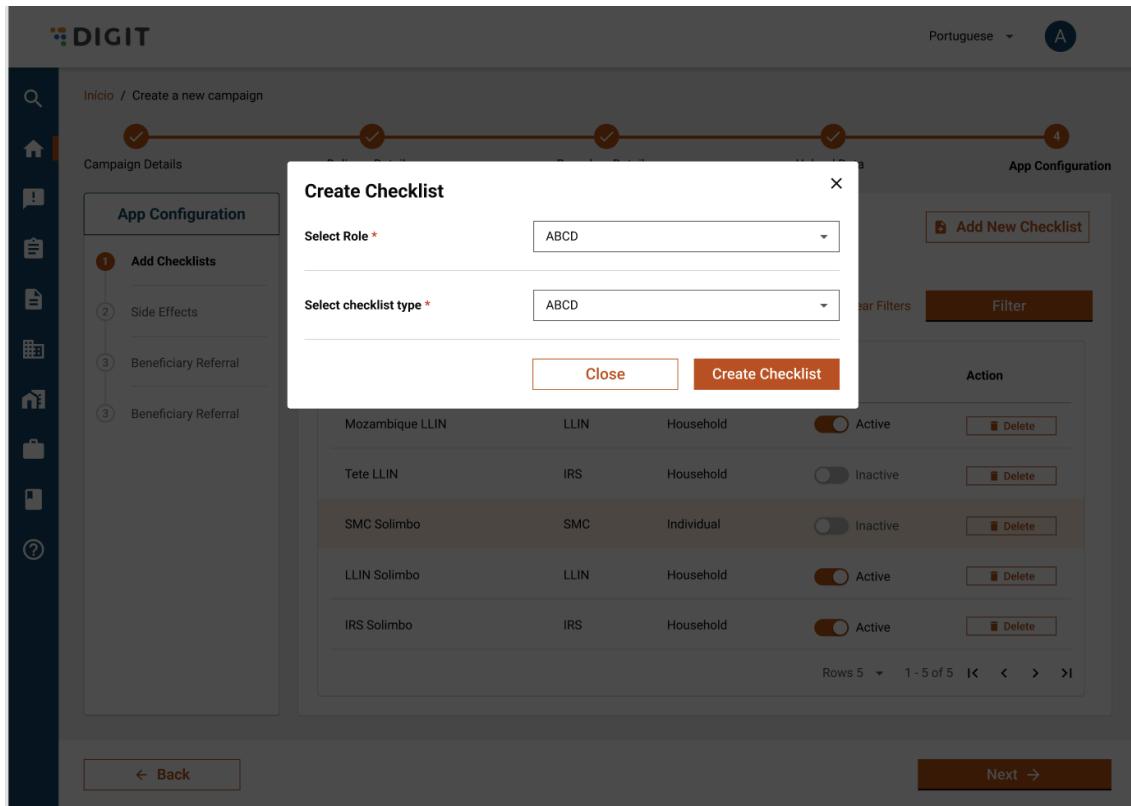
Step 2: Clicking the “Create New Checklist” button: On the homepage of the checklist creation step, on the top right corner of the homescreen a CTA named “Add New Checklist” which the user needs to click the new checklist creation flow. On Clicking this button, the user will see a popup screen which will ask these 2 questions:

- i. **“Select Role”:** The answer to this question will define the user role for which the Checklist is being created. The answer to this question will be available in the form of a single select dropdown where the available options will be: National Supervisor, District Supervisor, Local Monitor, District Warehouse Manager, Provincial Warehouse Manager. We need to keep the list of options available in the dropdown configurable.
- ii. **“Select Checklist Type”:** Under this question the user will see a single select drop down option where the list of all checklist types for the selected user type will be available - this means that if I select the user role as National Supervisor (for e.g.) - The user will see on the Checklist types that are applicable for a National Supervisor in the given country - For the purpose of the Product Engineering version the following mapping of User Roles to Checklist Types can be followed:

User Roles	Checklist Types Available
1. National Supervisor	District Warehouse Supervision

	Satellite Warehouse Supervision
	Local Monitor Training
	Registration and Distribution Supervision
	Registration and Distribution Training
	Social Mobilization Checklist
2. Provincial Supervisor	District Warehouse Supervision
	Satellite Warehouse Supervision
	Local Monitor Training
	Registration and Distribution Supervision
	Registration and Distribution Training

iii. Close or Create Checklist: On the bottom of this popup the Console user will see two options - either to close the popup or to move to the next step of the checklist creation process by clicking “Create Checklist” Button. If the Console User misses to select either the Role or Checklist Type and presses the “Create Checklist” Button the user will see an error message.



Adding Checklist Name: Once the Console User has selected the Role and the Checklist Type in the previous step the Console User now needs to give a name to their checklist and this has to be a unique name for a given user type.

City Municipal Corporation

Portuguese A DIGIT

Home / Create checklist

Create new checklist

Role Role A
Type of checklist Checklist ABCD
Campaign start date 13 August 2023

Name of the checklist * ABCD

Question 1

What is your ABCD Type? **Multiple Choice**

Option 1 Add Comment (or) Link Nested Checklist

[+ Add Option](#)

Step 3: Adding Questions and Answers for a Checklist - Once the user has selected the User and the Checklist type, the user can first add a name to the checklist and then start adding questions in the checklist as follows:

i. **User Clicks on “Add New Question”** - When the user clicks on the “Add New Question” button, the user will see a white section open up with a header as “Question 1” and a Text Box below it where the user can define what the question will be. The text added in this textbox will be shown as the question in the Checklist on the HCM Mobile App for the Selected User.

ii. **Add Option:**

iii. **User Selects the Answer Type** - Irrespective of whether the user has added their question in the textbox - the user can select type of answer for the question being created from the “Answer Type” dropdown - The allowed answer types are:

→ **Multiple Choice (Single Select):** This will be used when the Console User wants to set up answers in a radio button format where the App user can select only one out of the total set of answers the user wants to set up.

When the Console User selects the Answer Type as “Multiple Choice” from the dropdown, the user will automatically see the first option created with “Option 1” as a placeholder name for the first option which can be edited by the user. Console Users can add new options by clicking on the “Add New Options” button and the second option will be created with a placeholder name for the option as “Option 2” and so on.

Non Functional Specs for Multiple Choices:

- o Maximum Number of options the users can add - 10

- Character limit for each option - 100
- Character limit for each question - 1000 (special characters are allowed)
- **Multiselect (Checkboxes):** This will allow the Console user to set up a multi-select list of answers where the app users can select multiple answers from the total list of answers.

When the Console User selects the Answer Type as “Multiselect” from the dropdown, the user will automatically see the first option created with “Option 1” as a placeholder name for the first option which can be edited by the user. Console Users can add new options by clicking on the “Add New Options” button and the second option will be created with a placeholder name for the option as “Option 2” and so on.

Non Functional Specs for Multiselect:

- Maximum Number of options the users can add - 10
- Character limit for each option - 100
- Character limit for each question - 1000 (special characters are allowed)
- **Dropdown (Single Select):** This will allow the Console user to set up a multi-select list of answers where the app users can select a single answer from the total list of answers.

When the Console User selects the Answer Type as “ Dropdown” from the dropdown, the user will automatically see the first option created with “Option 1” as a placeholder name for the first option which can be edited by the user. Console Users can add new options by clicking on the “Add New Options” button and the second option will be created with a placeholder name for the option as “Option 2” and so on.

Non Functional Specs for Dropdown:

- Maximum Number of options the users can add - 5
- Character limit for each option - 30
- Character limit for each question - 1000 (special characters are allowed)

→ **Short Answer:** This will allow the Console user to set up a Text Box for the HCM App User for entering descriptive answers where the app users can enter text in the textbox and with Special Characters. The Maximum limit of characters allowed by the HCM App Users for a short answer type question will be 1000 characters with special characters allowed.

→ **Add Comment (Optional Checkbox):** In the case of **Multiple Choice (Single Select) and Dropdown (Single Select)** the Console user can define if they want the HCM App User to add comments if a specific answer is selected. For example: Out of 4 Multiple Choice single select answers, if an app user selects option 4 as their answer to a question, If the Add Comment option is selected for option 4 the App User will see a 200 Character limit Textbox open up on the Mobile App right below the selected option. This will only happen if the “Add Comment” checkbox is selected for a given answer.

→ **Delete Answer/Question:** For every question added to the checklist or an answer added to a given question will have a delete icon associated to it on the right hand side of that question/answer which when clicked will delete that specific question/answer.

NOTE: For any Multiple Choice or Dropdown type question the Console User can either have Add Comment Option or a Linked Nested Question for a given option. Both cannot be selected for the same option

City Municipal Corporation

Portuguese A DIGIT

Home / Create checklist

Create new checklist

Role Role A
Type of checklist Checklist ABCD
Campaign start date 13 August 2023

Name of the checklist * ABCD

Question 1
 What is your ABCD Type? Multiple Choice
 Option 1 Add Comment (or) Branching Question Delete
 Option 2 Add Comment (or) Branching Question Delete
 Option 3 Add Comment (or) Branching Question Delete
[+ Add Option For Question 1](#)

Question 2
 What is your ABCD Type? Multiselect
 Option 1 Add Comment Delete
 Option 2 Add Comment Delete
 Option 3 Add Comment Delete
[+ Add Option For Question 2](#)

Question 3
 What is your ABCD Type? Short Answer
 [Empty text area]

Question 4
 What is your ABCD Type? Dropdown
 Drop down selection 1 Add Comment (or) Branching Question Delete
 Drop down selection 2 Add Comment (or) Branching Question Delete
 Drop down selection 3 Add Comment (or) Branching Question Delete
[+ Add Dropdown Selection](#)

+ Add Question

Step 4: Creating Linked Questions (Optional Step): For a Multiple Choice Question

with single selection (Radio Button Selection) - based on the answer selected by the App User, the Console User might want to create a list of linked questions.

What this means is that if in the Parent Checklist, question #1 has 4 options and the App User selects option #1 - the Console can link a new set of questions, (call it the Child Checklist) which the App User has to answer because the app user selected option #1 of this Parent Checklist.

User Behavior: Consider there is a parent Checklist with 5 questions, with Question 2 having 4 options where a Child Checklist is linked to Option 1 of Question 2.

To create a Child Checklist linked to Option 1 of Question 2 the Console user needs to check the “Linked Nested Checklist” checkbox in front of option 1 of the parent checklist as soon as the Console User clicks on the Checkbox a Child Checklist will open as a new card under Option 1 as shown below:

City Municipal Corporation

Portuguese A DIGIT

Home / Create checklist

Create new checklist

Preview Checklist

Role: Role A

Type of checklist: Checklist ABCD

Campaign start date: 13 August 2023

Name of the checklist *: ABCD

Question 1

What is your ABCD Type? Multiple Choice

Option 1 Add Comment (or) Link Nested Checklist

Question 1.1

What is your ABCD Type? Multiple Choice

Option 1 Add Comment (or) Link Nested Checklist

+ Add Options for Question 1.1.1

Option 2 Add Comment (or) Link Nested Checklist

Option 3 Add Comment (or) Link Nested Checklist

+ Add Options for Question 1.1.1

Option 2 Add Comment (or) Link Nested Checklist

Option 3 Add Comment (or) Link Nested Checklist

+ Add Options for Question 1.1.1

+ Add Question

NOTE: This process can be nested for 5 levels (including the top parent checklist) where every option created in the parent checklist can have a child checklist . This means that if the Parent Checklist has 4 options, all 4 options can have a child checklist associated with them going down 4 more levels.

If a given option on any level has the “Add Comment” checkbox checked against it, the “Linked Nested Checklist” option cannot be created for it.

How will the questions be rendered to HCM App Users in the case of Linked Nested Checklists?

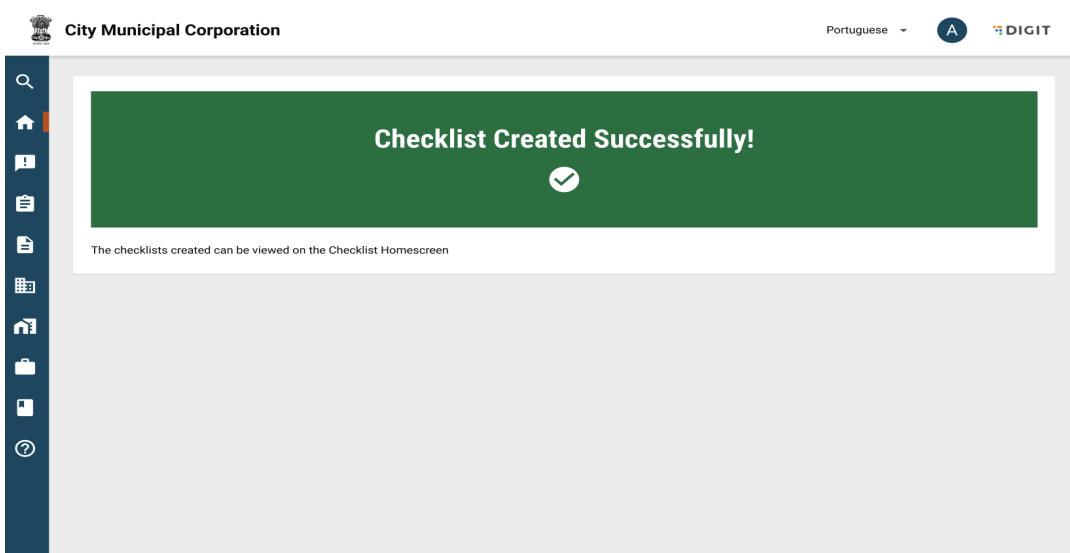
Everytime a Linked Nested Checklist is triggered by selecting an option to a question that has a Child Linked Nested Checklist associated with it - we first need to render all the questions in the Child Linked Nested Checklist till the lowest level until the user selects an option where there is no Linked Nested Checklist.

Once all the Linked Nested Checklist till the lowest level are over the HCM App User will come back to the parent checklist and continue with the flow of the checklist

Step 5: Trigger Checklist Creation - Once the user has added all the questions and the answers for each question the user can click on the “Create Checklist” button on the bottom right corner of the screen to create the Checklist on the system. We need to trigger a validation to check if all the questions are defined and not left empty at the time of Checklist Creation.

Note: If the user in the process of creating a checklist navigates away from the checklist creation screen (once the user has added the name to a checklist) without clicking on the “Create Checklist” button the checklist being created will be saved as draft.

Success Screen: After the user has submitted the list of questions and responses for all question by clicking on “Create Checklist” button the user will see a temporary success screen which will disappear after 5 seconds and redirect to the Checklist Home screen as shown below:



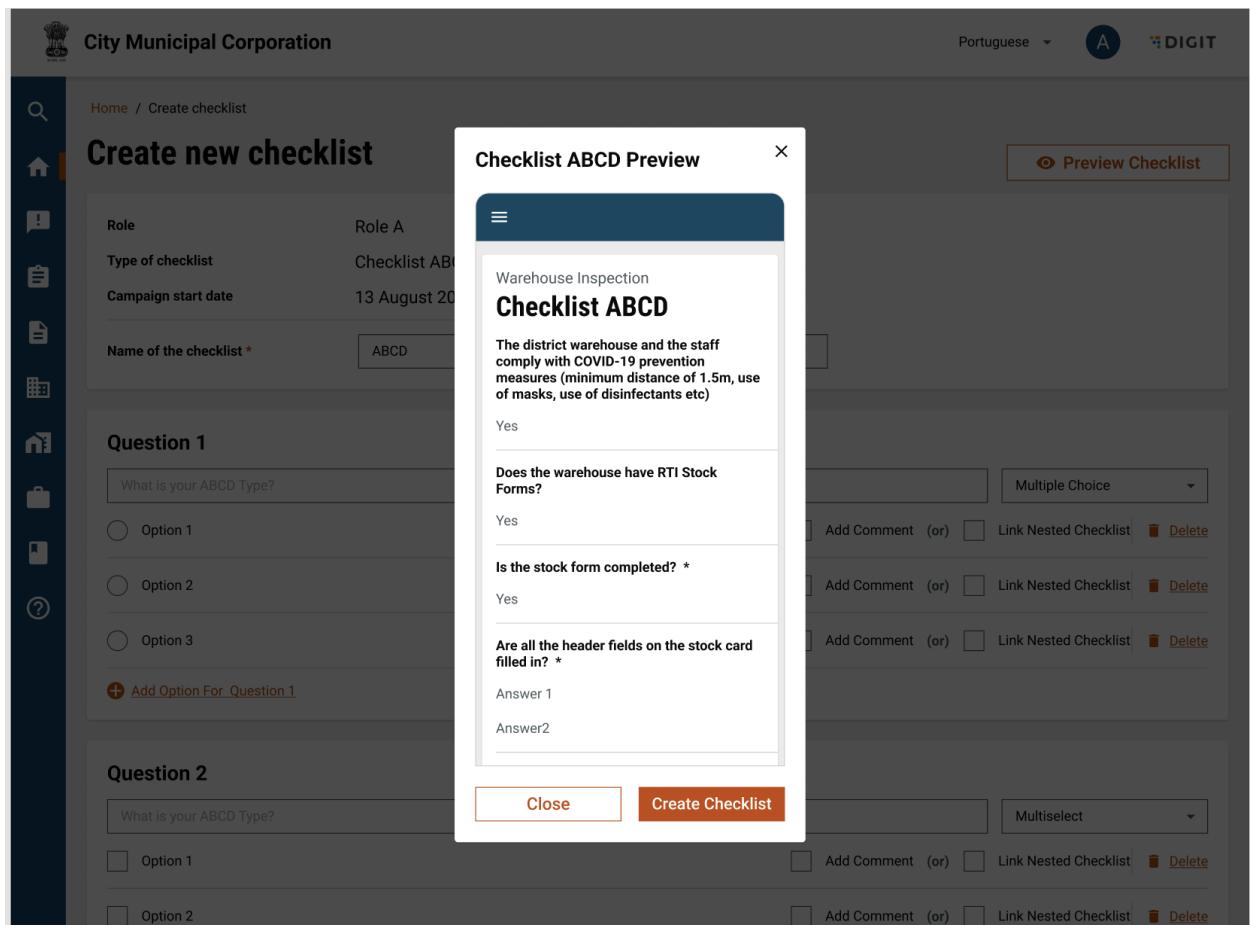
A screenshot of a digital application interface for creating a new campaign. The top navigation bar shows 'Início / Create a new campaign'. Below it, a progress bar indicates five steps: 'Campaign Details' (step 1), 'Delivery Details' (step 2), 'Boundary Details' (step 3), 'Upload Data' (step 4), and 'App Configuration' (step 5). Step 4 is currently active. On the left, a sidebar titled 'App Configuration' lists four items: 'Activate Checklists' (selected), 'Side Effects', 'Beneficiary Referral', and 'Beneficiary Referral'. The main content area is titled 'Activate checklists for your campaign' and contains a table of existing checklists. The table has columns: Name of the checklist, Role, Checklist type, Status, and Action. The data in the table is as follows:

Saving Checklists as Draft: For any Checklist to be saved in draft state the user should have added a unique name to the checklist for that specific user role. If a user navigates away from the screen or closes the screen the user will see the status of this checklist as draft.

Preview: On the “Create New Checklist” screen there will be a preview button that will always be available on the top right hand corner which when clicked opens a pop with all

the questions in their existing state in the HCM App View. This will be useful for the Console user to understand how the Checklist will look like in the HCM App for the App User.

We need to preview the question already configured (irrespective of whether the checklist is saved as draft or created completely) in the HCM App view inside the pop up with 2 CTAs which are “Close” and “Create Checklist”. The user can directly trigger the checklist creation by clicking on “Create Checklist” button directly from the preview screen.



3. Managing Boundary Data through Console:

User Persona: The user for this capability will be a programme manager (Role name on our system will be MDMS Data Manager) who can login and manage boundary data for a given programme for e.g. Malaria and would ideally be someone at the national level.

There will be 2 user roles on HCM Console now:

- i. MDMS Data Manager (can edit MDMS Data like Boundary Data, Facility data on top of campaign creation)
- ii. Campaign Manager (can only create/edit campaigns using existing MDMS Data)

Prerequisites:

- o We need to create a user (Programme Manager) for each programme who can login to HCM Console and manage boundary data only.
- o This user will be a single point of contact for a given disease area (for eg. one POC for Malaria). The user will update boundary data for all campaigns under one disease - for eg: The programme manager can set up/manage boundary data once in Console for Malaria and this boundary data will be used across the platform for all Malaria based campaigns - i.e. SCM, Bednet and IRS for Microplanning, App and Dashboards.
- o Each disease will maintain their own boundary data which will be used by different campaigns under a given disease. For e.g. - Malaria programme can set up boundary data for only malaria through console at the national level

o Boundary creation can encounter 3 major use cases:

- **Case 1:** Import Boundary Data from GeoPoDe (with Boundary Hierarchy) and the user appends the data that is not available on GeoPoDe (lower level Hierarchies) through Excel or their own ShapeFiles.
- **Case 2:** Boundary Data does not exist on GeoPoDe for the given country and the user create their own Boundary Hierarchy and Boundary Data through excel upload or their own ShapeFiles
- **Case 3:** Boundary Data Exists on GeoPoDe but the user doesn't want to use this data - and then proceeds to create their own Boundary Hierarchy and Boundary Data as mentioned in Case 2

NOTE: If Boundary Data is edited for a certain disease type while a campaign is ongoing - the ongoing campaign's boundary data will not be changed and this campaign will keep running on the boundary data that was selected at the time of boundary creation. For all the campaigns created after the boundary data changes are made for a specific disease type the campaigns related to that disease type will be use the updated boundary data

User Actions available for this persona:

The user would be able to set up Boundary Hierarchy and Boundary Mapping for Digit HCM instances. This could be done in two ways:

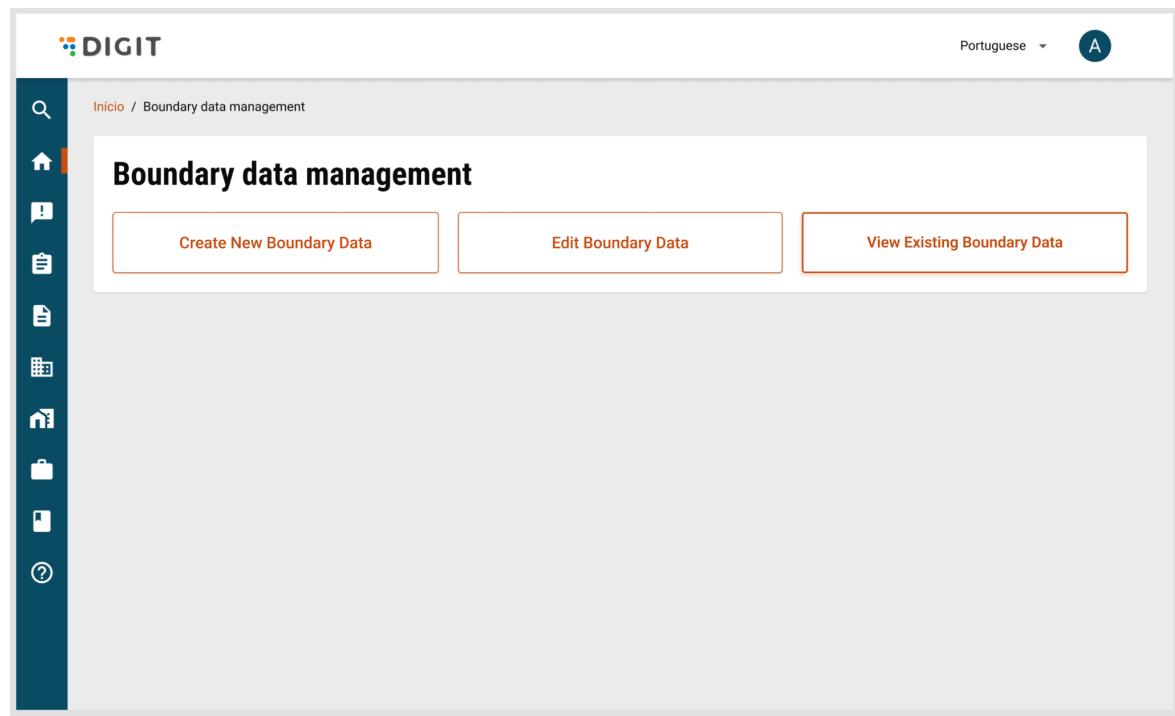
- a. **Using GeoPoDe Data:** If a given country has boundary data available on GeoPoDe - the programme manager for a given disease will have the option to use the Boundary Data that is available for their country until the Boundary Level

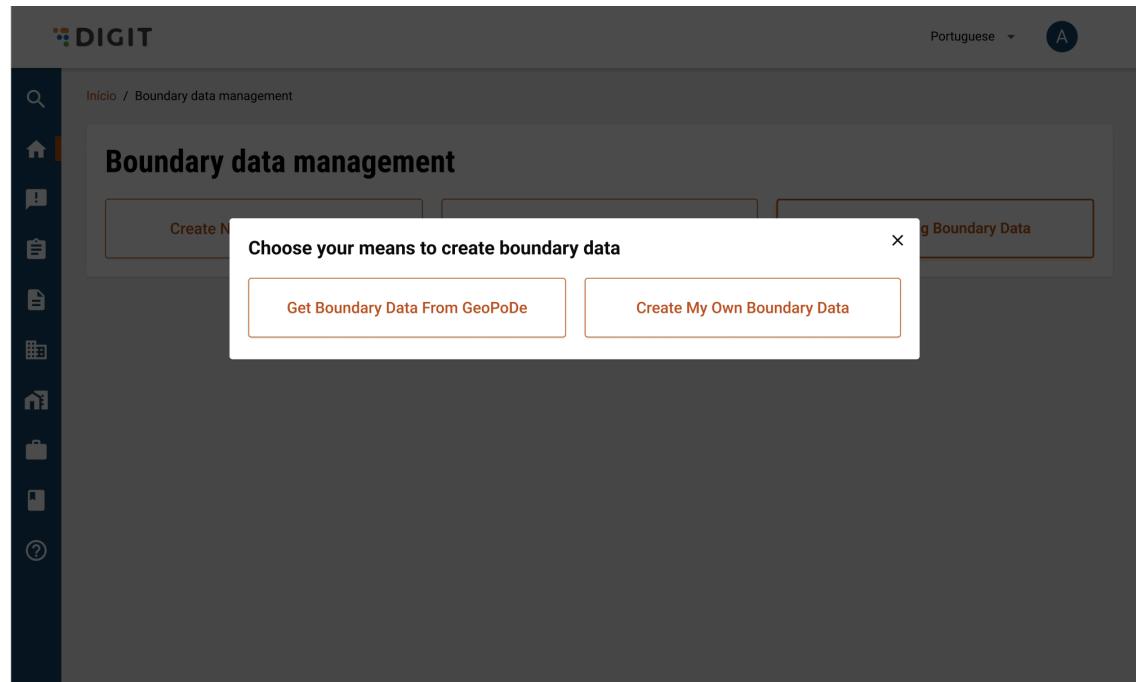
it is available.

Case when there is Partial Boundary Data available on GeoPoDe: Partial Boundary Data means that in a country that has 5 levels of boundary hierarchy - only 3 levels of boundary data are available on GeoPoDe.

How do we use this data: The user will have the option to use GeoPoDe Boundary Data from the Homescreen of the Boundary Management Screen, the Boundary Hierarchy available on GeoPoDe along with the ShapeFile for these levels of Boundaries (Available on GeoPoDe) will be fetched at this point. For the missing levels of data - the user can create the missing level of hierarchy first and then choose to add the boundary mapping for the missing levels either through their own ShapeFiles or through a simple Excel upload.

Step 1: Choosing Boundary Creation Process - When the Console User clicks on the “Create Boundary Data” button on the Boundary Data Management homescreen they will first be asked if they want to use GeoPoDe Data or create their own boundary data. If the Console User clicks on the “Get Boundary Data from GeoPoDe” - our system will fetch the Boundary Hierarchy Structure (Country, Province, District etc.) available for the country along with ShapeFile for each level. If the data is not available - we will show a message that GeoPoDe does not have data





Step 2:Checking for Data on GeoPoDe: If GeoPoDe has boundary hierarchy structure and boundary data for all the levels the Console User can choose to accept that data and move to the next step.

In the case where the boundary data is only partially available - which means we only have boundary data till let's say Admin Post - the Console User will have to create the remaining levels of Boundary Hierarchy and add their own Boundary data for each level.

This will be done once the Boundary Hierarchy Structure and ShapeFiles containing the boundary data is fetched from GeoPoDe. The user will click on Add Boundary Hierarchy Level Button as shown in the screenshot below which will open a pop up.

DIGIT

Portuguese A

Início / Boundary data management

Boundary data from GeoPoDe

Country

Filename.shp

Province

Filename.shp

District

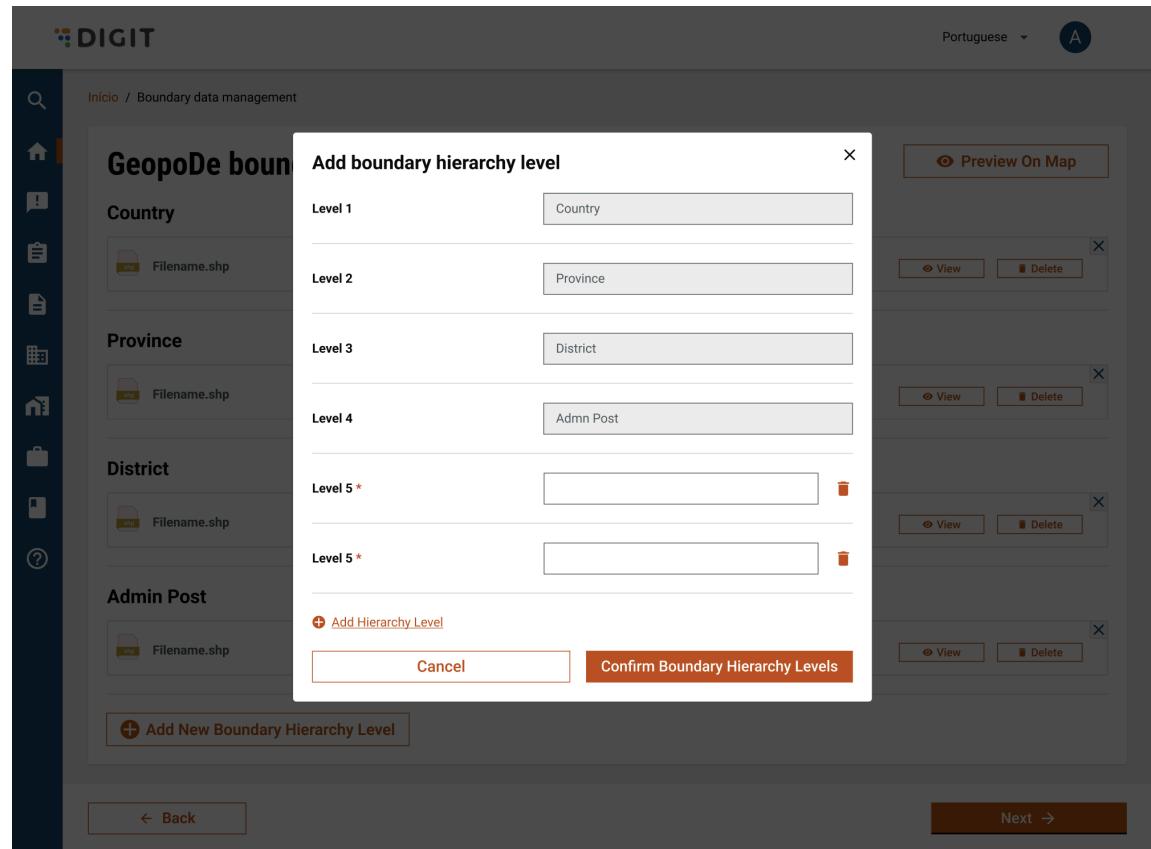
Filename.shp

Admin Post

Filename.shp

Add New Boundary Hierarchy Level

Back **Next**



This pop up will have all the existing hierarchy levels from GeoPoDe and the “Add Hierarchy Level” button which will add new levels below the existingGeoPoDe levels for the user to add. The user can add names of the level in the textbox next to each level. The character limit for each level will be 25 characters.

The user can click on the delete icon to delete any level if they want.

Note: *In this flow where the user has chosen to use GeoPoDe boundary data the Console User cannot delete Boundary Hierarchy Levels which are fetched from GeoPoDe. They can only add levels below what is already available on GeoPoDe*

Step 3:Creating Boundary Data for Missing Levels: For all the Hierarchy levels which are fetched from GeoPoDe - the ShapeFiles for those boundary hierarchy levels will be fetched from GeoPoDe along with them (which cannot be removed).

For the hierarchy levels created by the Console User below the GeoPoDe hierarchy levels - the Console User will add the boundary either through Excel or through ShapeFiles.

The screenshot shows the DIGIT platform's 'Boundary data management' section. On the left is a vertical sidebar with icons for search, home, help, etc. The main content area has a header 'GeopoDe boundary data'. It lists four hierarchy levels: 'Country', 'Province', 'District', and 'Admin Post', each with a file input field labeled 'Filename.shp' and a 'Delete' button. Below this is a section titled 'Newly added boundary data' with fields for 'Locality' and 'Village', both with 'No File Selected' and 'Upload ShapeFile' buttons. There is also a button to 'Add New Boundary Hierarchy Level'. At the bottom are 'Back' and 'Next' buttons.

Adding Data through Excel: For adding data through excel the Console User will first have to download the Excel template by clicking on “Download Excel Template” button.

This Excel template will have row wise data for all the boundary levels that are fetched from GeoPoDe and the levels created by the user will remain empty for the Console User to fill. The user can add Lat and Long (These will be optional columns). The final column will be the Boundary Status Column where the user can set a given boundary “Active” or “Inactive” which will be later used in the edit boundary data flow.

District (Do not edit)	Administrative Post (Do not edit)	Locality (Do not edit)	Village (Do not edit)	Boundary Code (Hidden)	Latitude	Longitude	Boundary Status
Nampula	Nihessiue	Nihessiue	Cavina 1	X123			Active
Nampula	Nihessiue	Nihessiue	Maupula	X124			Inactive
Nampula	Nihessiue	Nihessiue	Ratane	X125			Active

If the user chooses to map remaining boundary data through Excel they will only have to download one Excel template, fill remaining boundary data in it and upload it.

One Excel to Map all boundary data which is not a part of the GeoPoDe boundary data set

Adding Data through ShapeFiles: If the Console User chooses to map the remaining boundary data through ShapeFiles, they will have to upload one ShapeFile for each of the newly created boundary hierarchy.

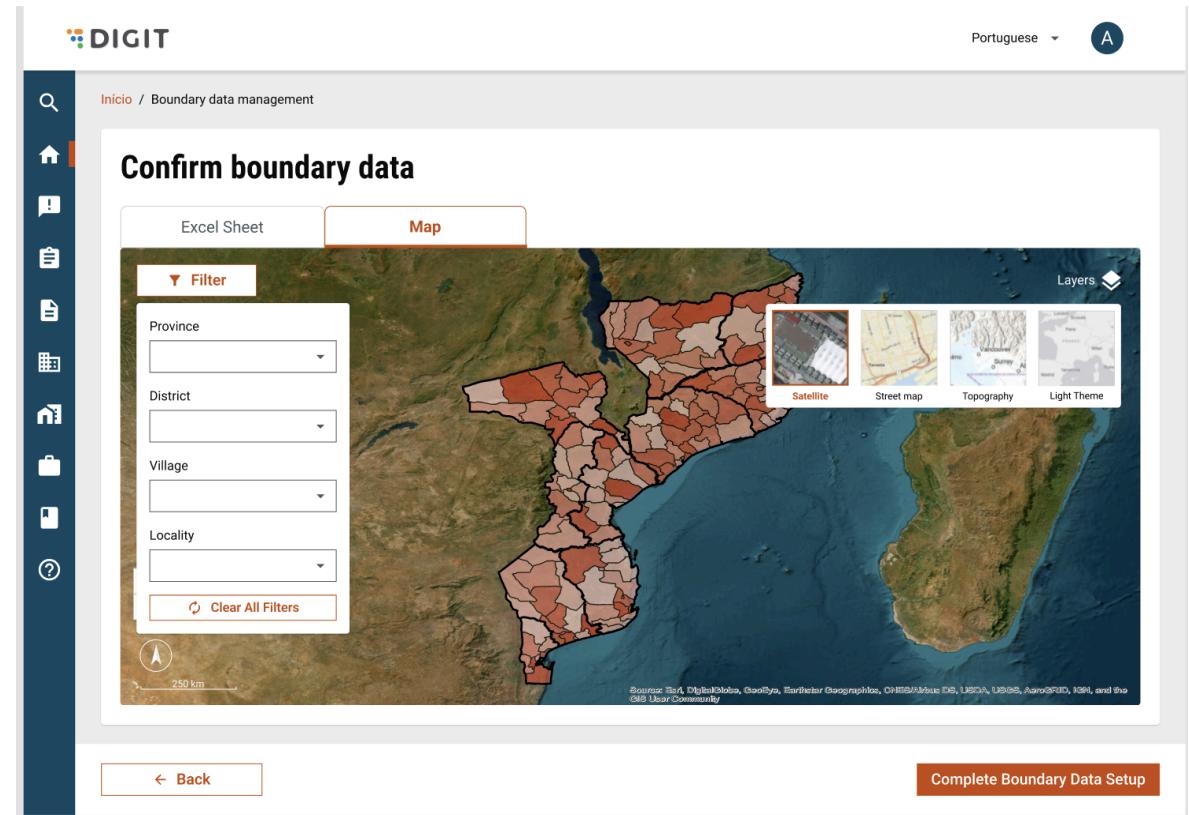
The ShapeFile uploaded by the Console User must have the same Schema as the ShapeFiles Imported from GeoPoDe and one more field in the Schema named “Boundary Status” with the allowed values as “Active” or “Inactive”.

The screenshot shows the GeopoDe boundary data management interface. On the left is a vertical sidebar with icons for search, home, help, and other functions. The main area has a header with the DIGIT logo, language selection (Portuguese), and a user icon. The title is "GeopoDe boundary data". Below it, there are four sections for "Country", "Province", "District", and "Admin Post", each with a file upload input field containing "Filename.shp" and a "Delete" button. A "Preview On Map" button is located at the top right of the main content area. Below these sections is a section titled "Newly added boundary data" with "Locality" and "Village" fields, both with "No File Selected" and "Upload ShapeFile" buttons. There is also a "Download Excel Template" link. At the bottom are "Back" and "Next" buttons.

Step 4: Preview Boundary Data - Once the boundary data for remaining levels are added through ShapeFile or Excels and presses the “Next” button, we take the user to the confirm boundary data screen which is a preview screen with 2 tabs: Excel Sheet and Map.

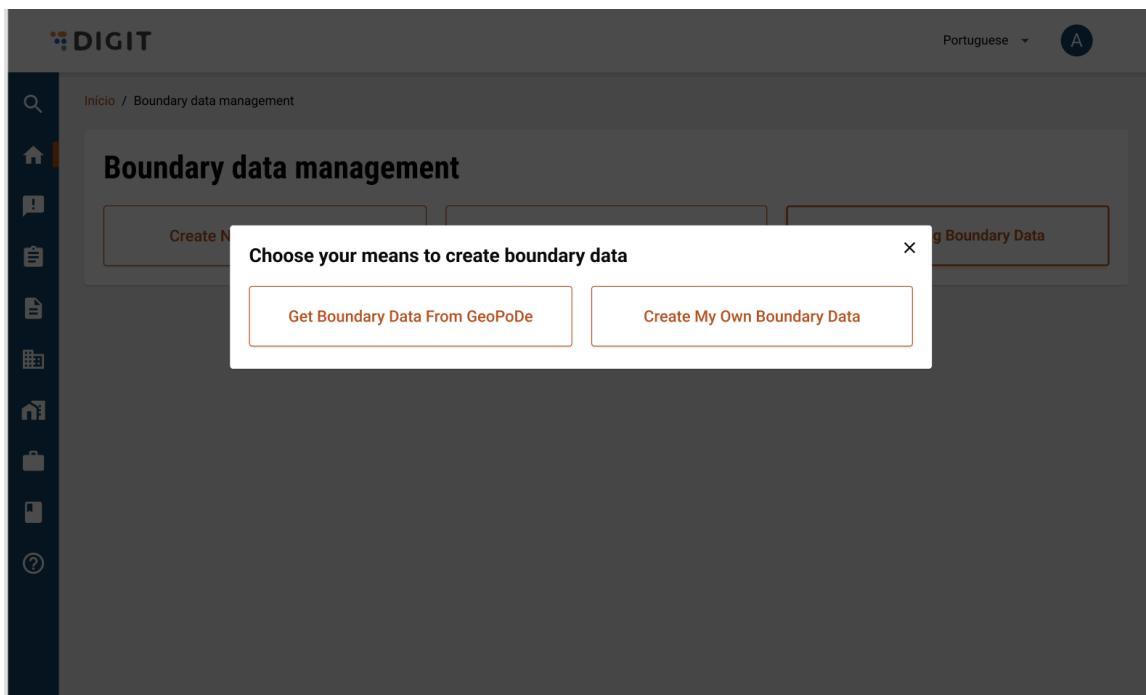
The tab with the map view will have 2 types of filter:

1. **Boundary Filters:** In this filter the user will see a Boundary Level filter where when they check a specific boundary hierarchy level the shapefiles for that level will be shown on the map. If a given hierarchy level is unchecked the user will not see the shapefile of that level on the map.
2. **Layers:** These are nothing but the base maps that are available in Open Street Maps which can be selected at a time. The 4 options available are: Satellite, Street Map, Topography and Light Theme.



Once the user presses on the “Confirm Boundary Data” button we need to show a 5 second success screen and move the user back to the homescreen of boundary data management. **The Create boundary button now will be disabled**

- b. **Users setting up their own boundary data (Create my own boundary data flow):** In the scenario where there is no boundary data available for a country on GeoPoDe, the programme will have to set up boundary hierarchy and boundary data for their own programme by first creating the boundary hierarchy and then creating boundary data under the boundary hierarchy by adding ShapeFiles for each level or through a simple Excel Upload.
- The Console Users can choose to add shapefiles for some levels of data and Excel for the rest.



Step 1: Creating your own Boundary Hierarchy Levels - As soon as the user clicks on the “Create My Own Boundary Data” button in the previous step, the user comes to the “Create a Boundary Hierarchy” step. Here the user can keep adding levels of hierarchy by clicking on the “Add New Boundary Hierarchy” button and name the Hierarchy Level by adding text in the text box next to each level. User can delete a level by clicking on the delete icon next to each level. The user can add a max of 10 levels. The user then presses next.

Início / Boundary data management

Create a boundary hierarchy

Add your boundary hierarchy levels by clicking on the “Add New Boundary Hierarchy Level” button. If you want to remove a level, click on the delete icon next to level you want to delete.

Level 1 *	<input type="text"/>	
Level 2 *	<input type="text"/>	
+ Add New Boundary Hierarchy Level		

[← Back](#) [Next →](#)

Step 2: Adding Boundary Data - In this step the user can add boundary data either by adding either ShapeFiles for each level or one excel for all levels of the boundary data.

If the Console User chooses to add ShapeFiles for 3 out of the 6 levels and plans to use Excel for the rest, when the user downloads the Excel Template the user should see all the boundary data from the shapefile in a line by line manner as shown in GeoPoDe case.

This Excel template will have row wise data for all the boundary levels that are fetched from GeoPoDe and the levels created by the user will remain empty for the Console User to fill. The user can add Lat and Long (These will be optional columns). The final column will be the Boundary Status Column where the user can set a given boundary “Active” or “Inactive” which will be later used in the edit boundary data flow.

District (Do not edit)	Administrative Post (Do not edit)	Locality (Do not edit)	Village (Do not edit)	Boundary Code (Hidden)	Latitude	Longitude	Boundary Status
Nampula	Nihessiue	Nihessiue	Cavina 1	X123			Active
Nampula	Nihessiue	Nihessiue	Maupula	X124			Inactive
Nampula	Nihessiue	Nihessiue	Ratane	X125			Active

If the user chooses to map remaining boundary data through Excel they will only have to download one Excel template, fill remaining boundary data in it and upload it.

Note: if there are 6 levels of hierarchy and the user chooses to add ShapeFiles until the 3rd level and uses Excel to Map boundary data from the 4th level onwards, they cannot use ShapeFiles again till the lowest level. For e.g:

Country: Shapefile

Province: Shapefile

District: Shapefile

Admin Post: Excel

Locality: Shapefile

Village: Excel

This Case is an invalid case.

Início / Boundary data management

Create a boundary hierarchy

You can choose to upload one Shapefile for each level of boundary hierarchy or create boundary data completely through Excel. Alternatively, you can also choose to use both Shapefiles and Excel sheet for boundary mapping as well.

Upload Shapefile

Country *	No File Selected	<input type="button" value="Upload ShapeFile"/>
Province *	No File Selected	<input type="button" value="Upload ShapeFile"/>
District *	No File Selected	<input type="button" value="Upload ShapeFile"/>
Admin Post *	No File Selected	<input type="button" value="Upload ShapeFile"/>

Upload Excel

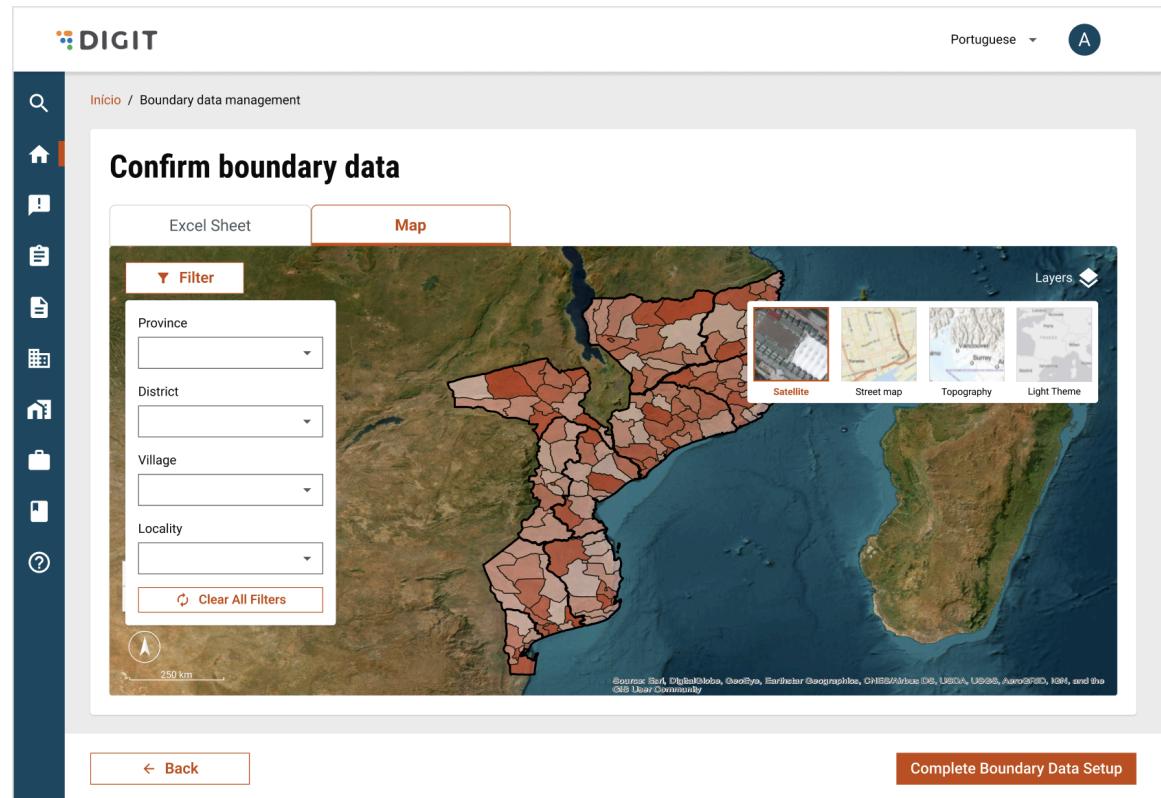
Upload Excel for all boundaries	No File Selected	<input type="button" value="Upload Excel"/>
---------------------------------	------------------	---

[Download Excel Template](#)

Step 4: Preview Boundary Data - Once the boundary data for remaining levels are added through Shapefile or Excels and presses the “Next” button, we take the user to the confirm boundary data screen which is a preview screen with 2 tabs: Excel Sheet and Map.

The tab with the map view will have 2 types of filter:

1. **Boundary Filters:** In this filter the user will see a Boundary Level filter where when they check a specific boundary hierarchy level the shapefiles for that level will be shown on the map. If a given hierarchy level is unchecked the user will not see the shapefile of that level on the map.
2. **Layers:** These are nothing but the base maps that are available in Open Street Maps which can be selected at a time. The 4 options available are: Satellite, Street Map, Topography and Light Theme.



Once the boundary data for remaining levels are added through ShapeFile or Excels we need to show a 5 second success screen and move the user back to the homescreen of boundary data management. **The Create boundary button now will be disabled**

Preview Capability: In both cases where the user is importing Boundary Data from GeoPoDe or setting up their own boundary data using ShapeFiles - We need to give the ability to preview the data on each step of the process.

Preview on Maps: This will be only available if the user has uploaded ShapeFiles on our system. If the user has uploaded ShapeFiles for only 3 out of the 6 levels the user will see only those 3 levels on the map. If there are no shapefiles added, the user will see preview only in Excel.

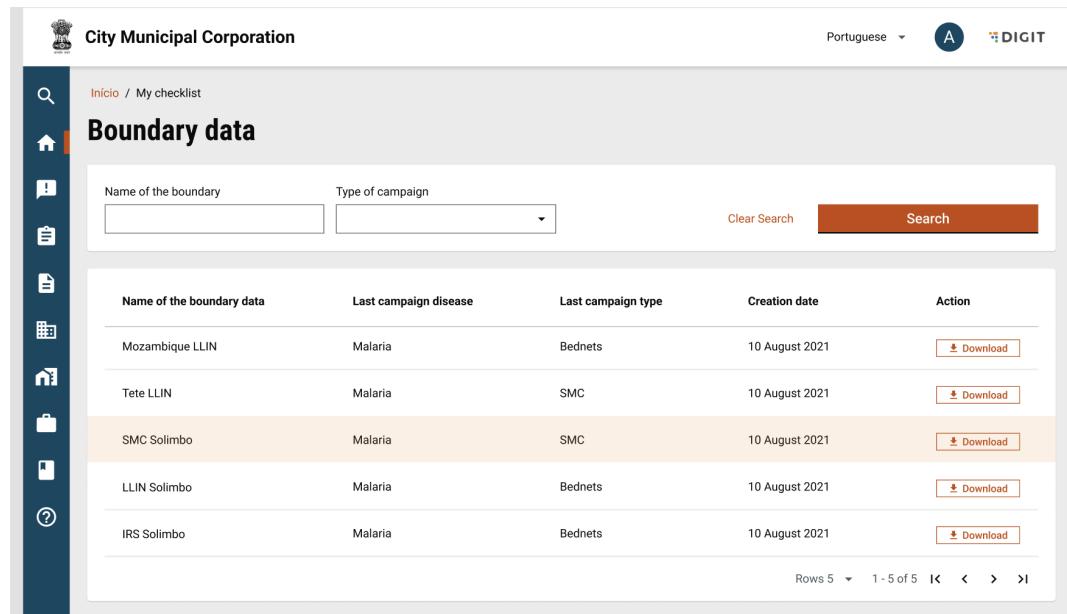
Previewing capabilities need to be built by using open street maps with the option of filter on the left hand side where the filter will consist of the various levels of hierarchies. If the user checks first 3 levels of the hierarchy - the user will see the shapes of those 3 levels only (if the shapefiles for those 3 levels have been uploaded by the users)

c. Users Viewing Existing Boundaries: For users who want to view existing boundaries the Console users can click on the “View Existing Boundaries” option on the Boundary Management Home screen and the user will see a list of all the boundaries that exist on the instance for that country in a table format. The table will have the following headers:

1. Boundary Name
2. Disease Type
3. Last campaign usage
4. Creation Date
5. View and download buttons -

These will be 2 separate buttons where the user can click on the “View” button and will be able to see the boundary data either on Maps or on Excel.

For Download Button - When the Console user clicks on the “Download” button if the user has created boundary data using ShapeFiles then the download should be a zip file having the following file types: .shx, .shp, .prj and .dbf. If the user also used Excel in the process, then the zip files should have one Excel File in the template format defined above.



The screenshot shows a web-based application for managing boundary data. The header includes the logo of the City Municipal Corporation, a search bar, and language options (Portuguese). A sidebar on the left contains various icons for navigation. The main content area is titled "Boundary data". It features a search bar with fields for "Name of the boundary" and "Type of campaign", and a "Search" button. Below the search bar is a table listing five entries of boundary data, each with a "Download" button. The table columns are: Name of the boundary data, Last campaign disease, Last campaign type, Creation date, and Action. The entries are:

Name of the boundary data	Last campaign disease	Last campaign type	Creation date	Action
Mozambique LLIN	Malaria	Bednets	10 August 2021	<button>Download</button>
Tete LLIN	Malaria	SMC	10 August 2021	<button>Download</button>
SMC Solimbo	Malaria	SMC	10 August 2021	<button>Download</button>
LLIN Solimbo	Malaria	Bednets	10 August 2021	<button>Download</button>
IRS Solimbo	Malaria	Bednets	10 August 2021	<button>Download</button>

At the bottom of the table, there are pagination controls: "Rows 5", "1 - 5 of 5", and arrows for navigating through the data.

d. Editing Boundary Data using Console: Console users for a specific programme can only edit boundary data for the boundary data they have created. Each programme(disease type) will have their own boundary data which they need to use for all campaigns under a given disease.

Editing boundary Data can only be done at the lowest level of the boundary hierarchy and not above that.

To add new villages into the data set - In the case of the data coming through

a ShapeFile, the user will have to edit the ShapeFile for the specific boundary level the new boundary is being added to and set the boundary status for the newly created boundary as “Active”

Adding new boundaries through Excel would also involve a similar process where the user can add the new boundary as a new line item in the Excel sheet starting from the topmost level until the lowest level of the boundary is being created. The user will have to set the Boundary Status of this newly created boundary as “Active”

Removing Villages from data set - If a given boundary needs to be removed from the boundary data set, the user will have to just go the line item where that specific boundary exists in either the ShapeFile or Excel and set the status for that specific boundary as “Inactive”

Combining 2 (or more) Villages in the Data Set to Create a new Village - The user can add a new line item on the ShapeFile or the Excel defining the name of the new village (combined entity) and set the boundary status for this village has “Active” and the 2 (or more) villages being combined as “Inactive”

Splitting a Village into 2 or more villages: The Console User can choose to split an existing village into 2 or more villages. To do this via ShapeFiles: The user simply needs to set the “Boundary Status” column of the village being split in the shapefile as “Inactive” and the new villages can be added in the ShapeFile for that specific level with the appropriate mapping and set the “Boundary Status” column as “Active”

For Excel a similar approach will be followed - where the village being split will have its “Boundary Status” set to Inactive and the Console user will add new line items for the new villages where they will have their mapping from the top most level and the “Boundary Status” will be set to “Inactive”

NOTE: Any time there is a change in Boundary Data made by the programme manager for a given disease - the campaigns which are live will not see a change in their boundary data. The Campaigns will keep running on the boundary data with which the campaign was created in the first place. The cutoff for boundary data changes is as follow:

Until microplanning is finalized and approved on HCM - Boundary Data edits will be allowed (merging of boundaries, removal of existing boundaries, adding new boundaries, splitting of boundaries). Once the Microplan is finalized - in the campaign creation flow the User can only add existing boundaries from boundary registry which might not have been selected during microplanning process.

4. Dual Timeline view for campaign creation:

Prerequisites: For the users who will use Console - the campaign creation process is an end to end process of setting up Campaign MetaData (Like Campaign Start and End Date, User data, Facility Data and Target Data etc.) as well as configuring all the other modules available in the app. In the mind of the Console User there is no difference between campaign data setup and app configuration. The steps will be broken down into 2 timelines - A Horizontal Timeline on the top and a Vertical Timeline on the left.

What will comprise of the Horizontal Timeline:

The horizontal timeline at the top will comprise of the following steps:

1. Campaign Details
2. Boundary Details
3. Delivery Details
4. Upload Data
5. App Configuration

Each step here will have substeps that will be represented on the vertical timeline on the left.

All the 5 steps on the horizontal timeline will have a summary screen which will be shown every time a user clicks on any of the 5 steps on the horizontal timeline on the top.

What will comprise of the Vertical Timeline:

Each step of the 5 steps on the horizontal timeline on the top will have its own vertical timeline which will define substeps of each step on the horizontal timeline. A breakdown of each of the horizontal steps are as follows:

1. Campaign Details:

- i. Campaign Type
- ii. Campaign Name
- iii. Campaign Dates
- iv. Summary

Campaign Details

1 Campaign Type
2 Campaign Name
3 Campaign Date

What is the type of campaign you want to run?

Type of campaign *

← Back Next →

2. Boundary Details - No vertical timeline needed

Início / Create a new campaign

Campaign Details Delivery Details **Boundary Details** Upload Data App Configuration

SMC (12/02/2024 - 12/03/2024)

Select the boundaries where you want to run the campaign

Boundaries are the Administrative Areas defined that you want to run a campaign in. Start selecting boundaries from the first level so that the boundaries available in the next level are available for selection

Province *
District *
Locality *
Village *

← Back Next →

3. Delivery Details:

- i. Cycles and Deliveries
- ii. Delivery Rules
- iii. Summary

Início / Create a new campaign

1 Campaign Details 2 Delivery Details 3 Boundary Details 4 Upload Data 5 App Configuration

Delivery Details

SMC (12/02/2024 - 12/03/2024)

Mozambique - Tete - Seasonal Malaria Chemoprevention Campaign

The number of cycles and deliveries in each cycles are pre loaded for SMC Campaign

Number of cycles * [-] [+]

Number of deliveries in each cycle * [-] [+]

Add your Start and End dates for cycles

Cycle 1	<input type="text"/> From Date	<input type="text"/> To Date
Cycle 2	<input type="text"/> From Date	<input type="text"/> To Date
Cycle 3	<input type="text"/> From Date	<input type="text"/> To Date

Frame 1044

[← Back](#) [Next →](#)

DIGIT

Início / Create a new campaign

1 2 3 4 5

Campaign Details Delivery Details Boundary Details Upload Data App Configuration

SMC (12/02/2024 - 12/03/2024)

Mozambique - Tete - Malaria Campaign

Cycle 1 Cycle 2 Cycle 3

Delivery 1 Delivery 2 Delivery 3

Configure Conditions for Delivery

The Conditions of delivery you configure on this step will decide eligibility criteria for your beneficiaries. You can configure multiple Conditions for Delivery based on different eligibility criteria being followed in the campaign. Each eligibility criteria should be created as a separate Delivery Condition. Each Condition for an Individual Type of beneficiary can be created by using 4 Attributes i.e. Age, Weight, Height and Gender.

Delivery Condition 1

Attribute	Operator	Value
Age (in Months)	Equal to	Input
+ Add More Attributes		
Dolo 650 SPAQ 1 SPAQ 2 Elbendazol		
+ Add Products To Be Delivered		

Delivery Condition 1

Attribute	Operator	Value
Age (in Months)	Equal to	Input
+ Add More Attributes		
Dolo 650 SPAQ 1 SPAQ 2 Elbendazol		
+ Add Products To Be Delivered		

+ Add More Delivery Conditions

← Back **Next →**

4. Upload Data:

- Upload Targets
- Upload Facility Data
- Upload App User Data
- Summary
- Success Screen which will go in 5 seconds (This will stay for 5 seconds and move to App Config step automatically)

DIGIT

Solimbo ▾ Portuguese ▾ A

Home / Create a new campaign

Help ?

Campaign Details Delivery Details Boundary Details **Upload Data** App Configuration

Upload User Data

Please populate the downloaded template with boundary data and upload the sheet.

Download Template

Upload Targets
Upload Facility Data
Upload User Data
Summary

Drag and drop your filled excel sheet or [browse in my files](#)

Data Upload Guidelines

1. The mandatory fields such as total population and target population data must be a whole number (For example, population can be 1234 and not 123.5)
2. The Latitude & Longitude fields should have data in Degree Decimal and Degree Minute Seconds (Value should be 12.3455 & not 12° 20' 43.7994")

← Back Next →

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Solimbo ▾ Portuguese ▾ A

Home / Create a new campaign

Help ?

Campaign Details Delivery Details Boundary Details **Upload Data** App Configuration

Data upload summary

Target

filename.xlsx Re-Upload Download

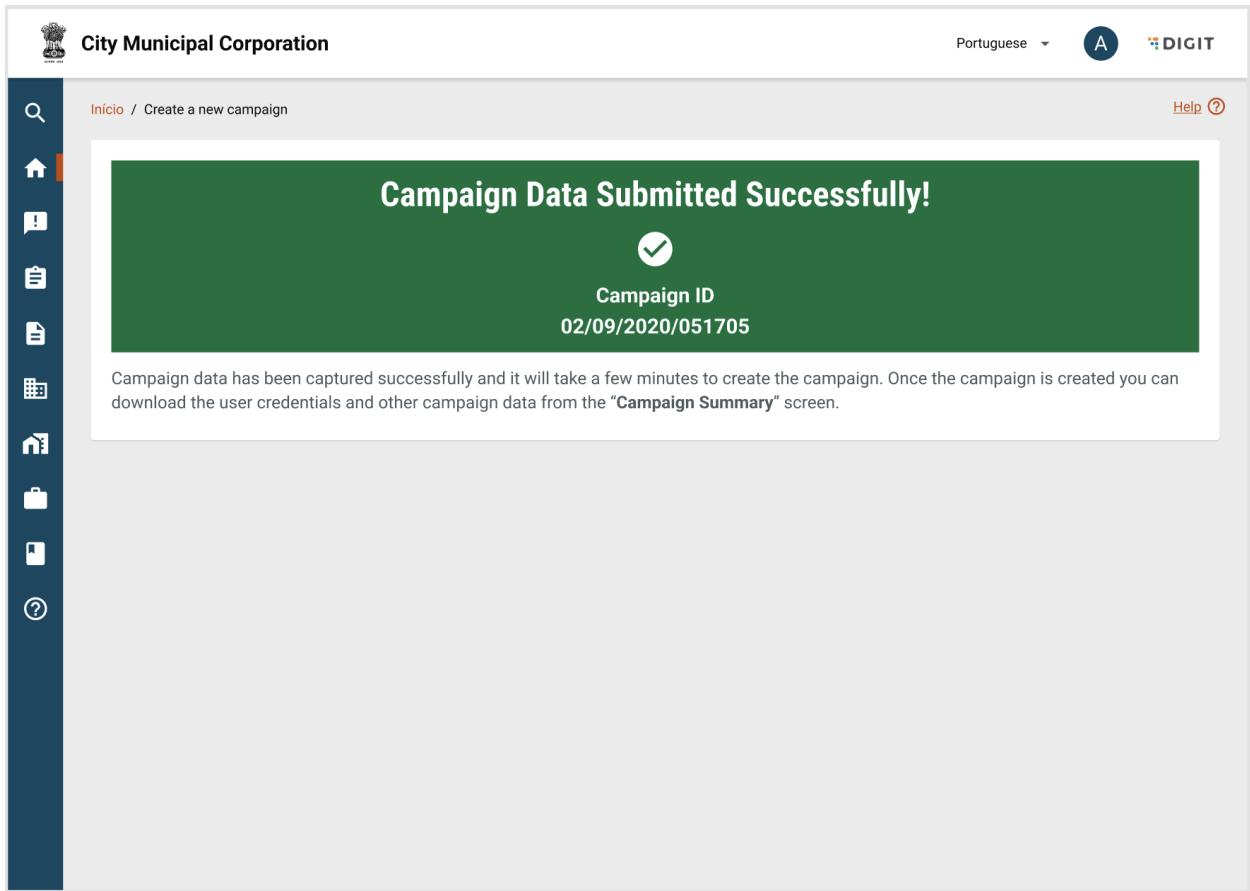
Facility Data

filename.xlsx Re-Upload Download

User Data

filename.xlsx Re-Upload Download

← Back Next →



5. App Configuration:

- i. Manage Checklist

The screenshot shows the DIGIT platform interface for creating a new campaign. The top navigation bar includes the DIGIT logo, language selection (Portuguese), and a user profile icon. On the left, a vertical sidebar contains icons for search, home, help, and other system functions.

The main content area displays a progress bar with five steps: Campaign Details, Delivery Details, Boundary Details, Upload Data, and App Configuration. The 'App Configuration' step is currently selected, indicated by a red circle with the number '4' and a checkmark.

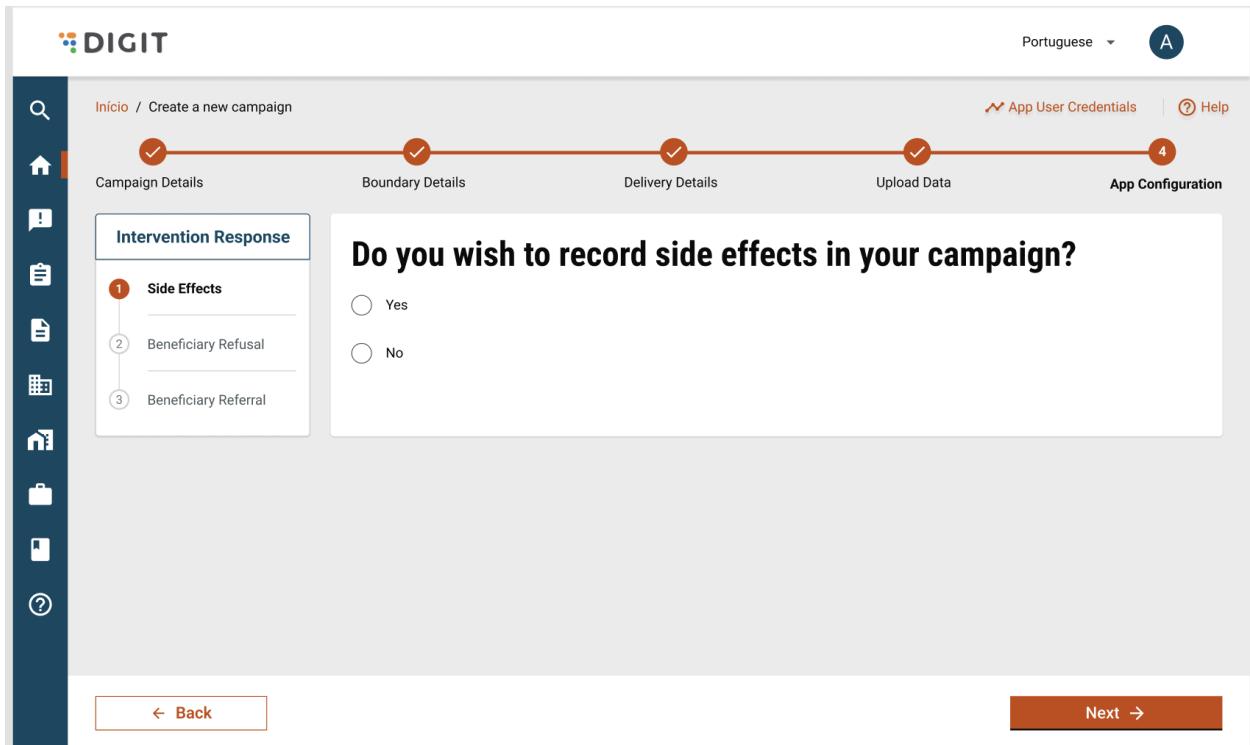
The 'App Configuration' section is titled 'Activate checklists for your campaign'. It features a button to 'Add New Checklist' and a search/filter interface with fields for 'Name of the checklist' and 'Role', along with 'Clear Filters' and 'Filter' buttons.

A table lists existing checklists:

Name of the checklist	Role	Checklist type	Status	Action
Mozambique LLIN	LLIN	Household	<input checked="" type="checkbox"/> Active	Delete
Tete LLIN	IRS	Household	<input type="checkbox"/> Inactive	Delete
SMC Solimbo	SMC	Individual	<input type="checkbox"/> Inactive	Delete
LLIN Solimbo	LLIN	Household	<input checked="" type="checkbox"/> Active	Delete
IRS Solimbo	IRS	Household	Draft	Delete

At the bottom of the page are 'Back' and 'Next' buttons.

Managing timeline for steps of campaign creation: For timeline of campaign creation, once the upload data step is completed and we provide a “user credentials” CTA as shown here:



This button will be made available right after the user has added the app user credential successfully and when clicked will open a side drawer as shown in the screenshot. The side drawer will be available for opening through the “App User Credentials” CTA all the time once the “App User Credentials” CTA is activated.

Início / Create a new campaign

Campaign Details Boundary Details Delivery Details Upload

Intervention Response

1 Side Effects
2 Beneficiary Refusal
3 Beneficiary Referral

Do you wish to record side effects in your campaign?

Yes
 No

Upcoming.....

Current Status
18 / 02 / 2023
View Details

Completed
18 / 02 / 2023
"Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's"

Download User Credentials

View Past Events

Back Next

Change History:

[Figma Link](#), [Change Request Ticket](#)

[2nd September 2024 - CHANGE UPDATE] User flow for uploading Facility Data: We plan to split the Facility data upload process into 2 steps:

Step 1: Uploading Facility Excel without boundary data - The user needs to upload the facility data through the Excel Template. The Excel Template when downloaded will have the following columns:

Validations (no user inputs needed) - The system will do all the currently existing validations that it is doing for the data fields being uploaded in the sheet by the users, and only once the validations are completed will the user be allowed to move onto the next step by clicking on the "Next" button

Facility Code (No user input needed for new facility creation and will be hidden)	Facility Name (Mandatory and to be filled by the user for new facility creation)	Facility Type (Mandatory and to be filled by the user for new facility creation)	Facility Status (Mandatory and to be filled by the user for new facility creation)	Capacity (Optional)
---	--	--	--	---------------------

Step 2: Assigning Boundaries and Facility Usage for each Facility - Once the user has uploaded the list of facilities for the campaign on the Excel Template in the previous step and

presses on the “Next” button, all the columns with the data point uploaded on the Excel will be shown in a UI format as shown below with 2 additional columns which are Boundaries and Facility Usage

In the Boundary Column - each line item will have its own boundary selection dropdown like how we have in the campaign creation flow and in the Facility Usage Column - it will be having 2 dropdown options i.e. “Active” and “Inactive”.

Add New Entry Button: If the Console user has missed out any entries - the Console User can add another line with the same headers as for the rows above with empty selections and add relevant data for each column in that line item before pressing next and moving to the next step

Validations in this step: In this step we need to make sure the user adds Boundary selection and Facility Usage selection for all line items before they press next.

The screenshot shows the DIGIT application interface. At the top, there's a navigation bar with the DIGIT logo, a search icon, and language settings (Portuguese). Below the navigation bar is a horizontal progress bar with five steps: Campaign Details (checkmark), Boundary Details (checkmark), Delivery Details (checkmark), Upload Data (step 4), and App Configuration (step 5). On the left, a sidebar lists steps: Upload Targets (checkmark), Upload Facility Data (checkmark), Map Facility Data (step 3), Upload User Data (step 4), Map User Data (step 5), and Summary (step 6). The main content area is titled "Facility Data Mapping". It contains a table with columns: Facility, Facility type, Facility Status, and Boundary. There are five rows in the table, each with input fields for Facility name, Facility type (dropdown), Facility Status (dropdown), and Boundary (dropdown). At the bottom of the table is a red "Add New Entry" button. Below the table, there are pagination controls: "Rows 5" and "1 - 5 of 5" followed by navigation arrows. At the very bottom of the screen are "Back" and "Next" buttons.

This will be the default view on when the user lands on this screen. There is a horizontal scroll on the right.

Facility Name	Facility type	Facility Status	Boundary	Facility Usage

Rows 5 ▾ 1 - 5 of 5 | K < > >I

Full list of columns with horizontal Scroll

[2nd September 2024 - CHANGE UPDATE] User flow for uploading App User Data: We plan to split the App User data upload process into 2 steps:

Step 1: Uploading App user data Excel without boundary data - The user needs to upload the **App user data** through the Excel Template. The Excel Template when downloaded will have the following columns:

Name of the Person (Mandatory and to be filled by the user)	Phone Number (Mandatory and to be filled by the user)	Role (Mandatory and to be filled by the user)	Employment Type (Mandatory and to be filled by the user)
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Validations (no user inputs needed) - The system will do all the currently existing validations that it is doing for the data fields being uploaded in the sheet by the users, and only once the validations are completed will the user will be allowed to move onto the next step by clicking on the “Next” button

Step 2: Assigning Boundaries and User Status for each App user - Once the user has uploaded the list of App Users for the campaign on the Excel Template in the previous step and presses on the “Next” button, all the columns with the data point uploaded on the Excel will be shown in a UI format as shown below with 2 additional columns which are Boundaries and User Status

In the Boundary Column - each line item will have its own boundary selection dropdown like how we have in the campaign creation flow and in the User Status Column - it will be a simple dropdown with 2 options i.e. “Active” and “Inactive”.

Add New Entry Button: If the Console user has missed out any entries - the Console User can

add another line with the same headers as for the rows above with empty selections and add relevant data for each column in that line item before pressing next and moving to the next step.

Validations in this step: In this step we need to make sure the user adds Boundary selection and User Status selection for all line items before they press next.

The screenshot shows the DIGIT application interface for creating a new campaign. The top navigation bar includes the DIGIT logo, a search icon, and a language dropdown set to Portuguese. A progress bar at the top indicates five steps: Campaign Details (step 1, completed), Boundary Details (step 2, completed), Delivery Details (step 3, completed), Upload Data (step 4, in progress), and App Configuration (step 5, not yet started). The main content area is titled "User Data Mapping". On the left, a sidebar lists the steps: Upload Data (completed: Upload Targets, Upload Facility Data, Map Facility Data, Upload User Data; in progress: Map User Data; not yet started: Summary). The main table displays five rows of user data mapping:

Name of the person	Phone Number	Role	Employment type
ABCD	84984984984		
EUBJBD	3985895959		
DKBhh	84984984984		
JKBDKBK	84984984984		
EJ JBD	84984984984		

At the bottom of the table are buttons for "Add New Entry", "Rows 5", "1 - 5 of 5", and navigation arrows. Below the table are "Back" and "Next" buttons.

This will be the default view on when the user lands on this screen. There is a horizontal scroll on the right.

Name of the person	Phone number	Role	Employment type	Boundary	Status

Rows 5 ▾ 1 - 5 of 5 | K < > I

Full list of columns with horizontal Scroll

Managing Edits for Facilities and Users: In the flow for editing the Console User will go to “My Campaigns” and click on Edit Facility Data/App User Data and directly arrive on the following screens:

For Facility: The user can directly edit through UI as shown below and edit the following fields: Boundary selection and Facility Usage

Out of Scope:

5. Configuring HCM App flow for Post Intervention flows for Refusal, Referral and Side Effects

Prerequisites: For any medicine based campaign, the programme based on the human resources available to them can choose to capture these 3 types of data regarding the medicinal intervention. These are:

- i. **Referrals:** Definition - Referrals are the cases of severe illness which can happen due to the medicinal intervention during the campaign or because of other causes such as malaria or other diseases. In the case of a referral, the beneficiary is referred to a health facility and is not provided with the medicinal intervention in that given cycle.
- ii. **Refusal:** In any campaign there is a possibility that the beneficiary refuses a given medicine/bednet and that would require the programme to record the reason for refusal.
- iii. **Side Effects:** In all medicine based campaigns, there are cases where a beneficiary takes a medicine and the medicine shows side effects for the beneficiary which disqualifies the beneficiary for subsequent doses in a given cycle and hence delivery should be blocked. The field worker needs to capture the side effects that were observed for a given beneficiary as well

Why do we need to make referrals, refusals and side effects configurable?

Each programme decides whether to have referrals/refusals/side effects enabled or not for a given campaign based on the amount of people resources available for a campaign. Hence, for every new campaign, currently our Implementation team has to provide engineering support to configure the app for enabling or disabling these flows as well as configure the reasons for referrals/Reason for refusals/side effects observed a given campaign needs. To reduce this engineering dependence we will provide the Console user with the capability to configure if referrals/refusals/side effects flows are needed or not.

6. Campaign type dropdowns based on diseases