

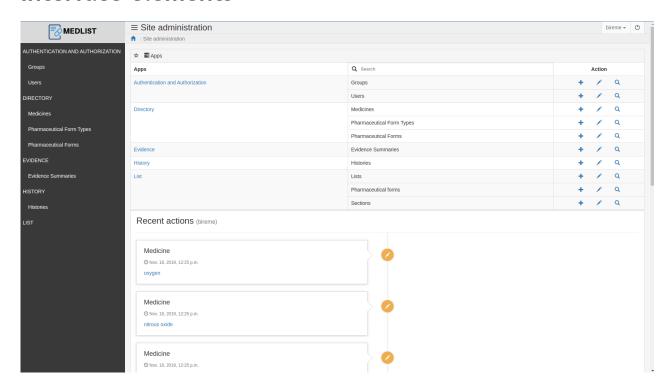




### **BIREME/PAHO/WHO**

# MEDLIST 2.0 user's guide

## Interface elements



## **Authentication and Authorization**

It relates to Users and user Groups rights and permissions within the system. It is possible to include, modify and/or delete users, make them active/inactive, create and/or associate them to specific groups to inherit permissions and change their attributes and properties. Groups can be created, modified and/or deleted. All changes are effective immediately to associated users.

There are two user types: super users whose scope comprises system administration and staff. According to the access level required the administrator can set up different permissions for groups and users.

## **Directory**

It manages the Medicines, Pharmaceutical forms and Pharmaceutical form types directories.

In the Medicines directory users are allowed to add and/or modify medicine names, make them active/inactive, create, modify and/or delete translations to that medicine, associate and/or create Pharmaceutical forms and Pharmaceutical form types and make them active/inactive, and associate and/or create Evidence summaries related to that medicine.

Notice that it is not possible to delete/exclude medicines within the scope of the interface.

In the Pharmaceutical form types directory it is allowed to add, modify and/or delete items as well as to create, modify and delete translations related to that Pharmaceutical form type. All changes made to this data are effective immediately to all associated medicines and medicine forms previously set in the system.

In the Pharmaceutical form directory one can add, modify and/or delete forms, make them active/inactive, associate to a Pharmaceutical form type and specify their properties. Notice that the field composition is presented for translation to all languages defined by the Pharmaceutical form type chosen.

## **Evidence**

It links to Evidence subjects on specific Medicines by a given Context. The evidences are identified by a number that is going to be used in Medicines data entry form. It is more suitable for user to fullfil information on evidences through Medicines data entry form other than in Evidence summaries data entry form (Evidence group).

## History

It collects information on each and every adding, editing and deleting record operations made by the user of the system. History group comprises all information collected whilst History button on editing panels have only relevant information to that data type.

## List

It identifies lists of medicines either by a PAHO/WHO area or from countries' health ministries and organisms. These lists are later used to link Pharmaceutical forms (in the scope of a specific list) via sections of the list.

The Sections describe portions of a list by Medicine types. There can be similar Medicine types for distinct Lists provided that each list is independent in terms of classification and the system makes it possible by creating a unique identification by mixing section IDs with pharmaceutical form IDs.

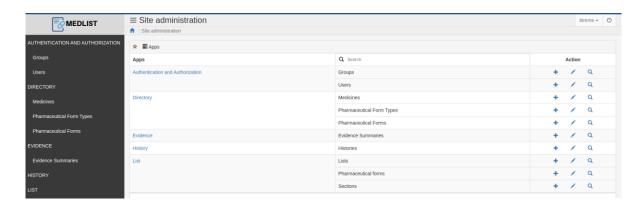
### **Operational elements**

This section is intended to explain the basic elements comprising the Django interface that is all based in panels and simple/intuitive buttons and options.

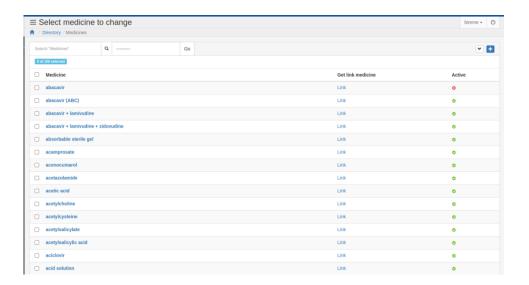
### **Panels**

There are three basic panels:

• a main panel - site administration - that concentrates all possible data that can be added, modified, associated and deleted;

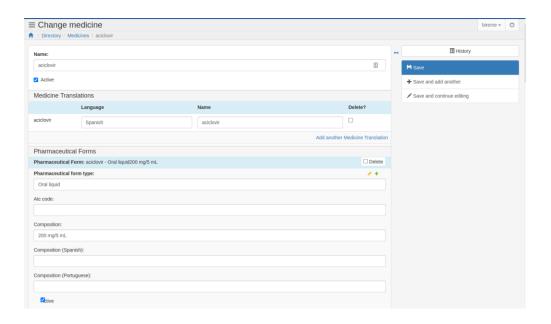


• a selection panel - select data to change - used for searching and selecting data records to be edited, appended, deleted, printed and some group operations depending on the data type;



and

• an editing panel - change data - that allows adding and/or modifying data recordsThe structure for all data operations follows these three panels. The data refers to the record type being selected and/or edited.



#### **Buttons**



It adds a new record of a particular data type and is available only in the main panel for each group item such as Medicines, Pharmaceutical forms, Lists etc.



It performs a search within the data type previously entered in that field data type. If it is found, user can select data and transfer IDs into the current form making the link to other types of record (e.g. in List group, the Pharmaceutical form editing panel has Section and Pharmaceutical form fields linking their contents by ID to other record types).



These navigation buttons indicate the amount of pages that spam current data records being displayed. They only appear in selection panels if the amount of data records exceeds 100 items.



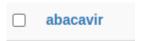
Save – It saves data from current edition and leaves the page returning to the Selection panel.

Save and add another - It saves data from current edition and adds another record of the same data type. Useful when entering great amount of records such as Medicines or Pharmaceutical Forms.

Save and continue editing – It saves data from current edition and continues editing the same record. Useful when user needs to pause operation briefly.

Delete - It excludes current record from database. This operation also unlinks the record being deleted to any other associated record.

### **Options**



It is available in editing panels for many data types and makes it possible to make that record active or inactive to the system. In the case of Medicines directory it is the only way to control if either Medicines are displayed or not in the system, provided Medicines cannot be deleted.



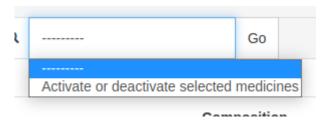
Filters are available in Selecting panels and are very useful to restrict scope within current search or browsing operations. They also allow multiple filter types depending on data being displayed.



It is intended to help user selecting individual records for performing specific actions within the scope of the current Selecting panel. It is also possible to use this option to select all records of current view (page) by clicking on the option field in the column title of the form.

Additionaly, it can be set to a checked status in order to perform a deletion on the record being displayed. This applies specially to many Translations options in the system.

### **Actions**



Depending on the data type being selected, it is possible to perform various actions such as:

- delete selected data;
- activate/deactivate\* selected data;
- index selected data
- create a archive copy of selected lists\*\*
- •publish/unpublish selected lists\*\*
- \* Provided it is a flag type operation it must be used wisely or the active/inactive status of selected records will be inverted causing undesired effects.
- \*\* Options available on the Lists selection panel only. The publish/unpublish action is also a flag

type operation, therefore requiring careful selection of data.

### **Navigation tasks**

### In the Administration interface

In selection panels the item itself has a link to its corresponding editing panel by clicking its name/title/ID. Other fields also perform actions depending on their data types:

### In Medicines directory

The Get link medicine shows the Medicine's information as published in the public web site.

### In List section

The Get link list shows the List contents in hierarchical form as published in the public web site.

### In all Selection panels

The selection option at the title bar selects all records from current page. After its completion, a message appears allowing users to select all records across pages.

### Data entry

The administration panel of the system displays all groups of information that can be managed by the interface, such as:

- Auth
- Directory
- •Evidence
- History
- •List
- Sites

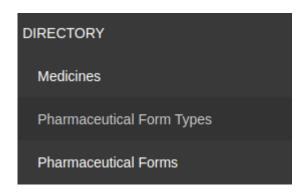
For general information on those items please see the Interface elements chapter.

The following sections of this document will provide information on how to entry data on the

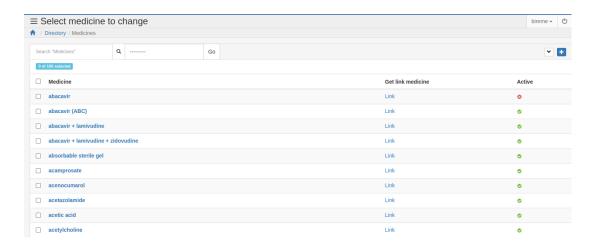
forms for each type of information.

## Managing directories

## **Medicines directory**



This directory is a core element of the system. Therefore, it is going to be explained first and it makes sense that user always start by checking the existence of medicines prior to creating and/or modifying a List. In the Administration panel click the Medicines option below Directory group to enter the Medicines directory.



This Selection panel presents Medicine names, Get link medicine and their activity status.

### Checking the existence of medicines

In the Medicines directory type in the medicine name intended to check out and click the Search button. If it exists, verify if the Pharmaceutical form also exists. If not, create a new one by clicking on the Add another pharmaceutical form option. It is recommended to click on the Save and continue editing button in case that Pharmaceutical form is going to be used again.

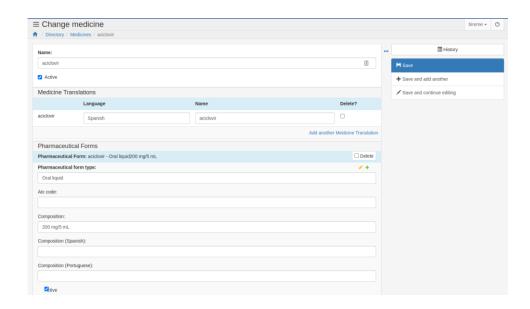
In case the medicine is not found use the Add medicine option to include it or redo the search on a new term or root of word.

Avoid special characters such as dash (-), specially when copying from documents saved in different formats like PDFs, DOCs, HTML pages etc. Those characters may be converted to question mark (?) by the administrative interface and sometimes can even crash the data entry. If this happens, stop the browser page, list the medicines again, click on the medicine name that was on edition and check that all pharmaceutical forms are correct.

### Adding/modifying medicines

In the Medicines directory fill in the medicine name to be modified or browse the list until the medicine can be selected (with selection option) and/or have its name clicked.

By clicking a medicine name the user can edit its Name and attributes, make it Active/inactive, add, modify and/or delete Translations, Pharmaceutical forms and Evidence summaries and see the History of changes for that particular item.



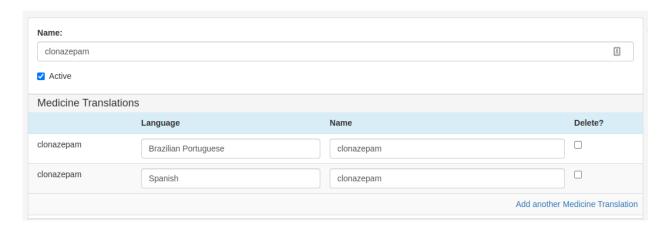
Make sure to avoid period (.) and other special marks at the end of Composition field and medicine names.

Click on Active option to enable or disable the medicine in the lists.

In case the medicine requires a Name translation, use the section Medicine translations and click the Add another Medicine translation option to add a new translation. It is required to choose the Language and fill in the Name field in that idiom.

All translation options can be modified and/or deleted as required. To modify a translation, just change the Name field accordingly. To delete a translation check the Select option Delete?.

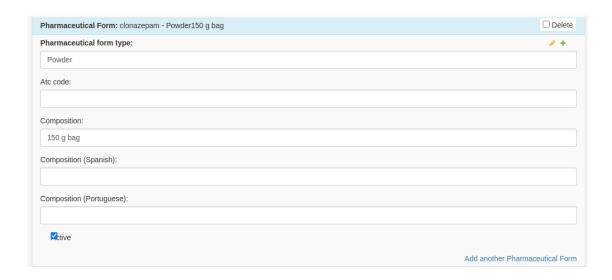
Deletions will occur when saving the record.



The Pharmaceutical forms section of data entry form asks the user to select from a list of Pharmaceutical form type, the ATC code, the Composition in three language forms and the Active option.

Notice that Composition master field is always in English. User can delete current Pharmaceutical form by checking the Select option Delete.

The user can also add a new Pharmaceutical form by clicking the "Add another Pharmaceutical Form" link.



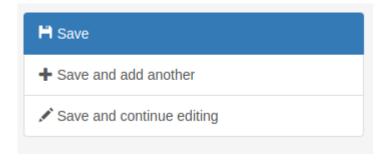
The Evidence summaries section of data entry form allows user to add Evidence summaries previously recorded. Evidence already set in the current form can be deleted by checking the Select option Delete in the Evidence summary section.



Use the Save and continue editing button in case more information is going to be added after a short pause on the operation (eg.: in case user needs to make a phone call).

Use the Save and add another button in case the system is being systematically feeded with new medicines. Notice this option assumes the user already checked medicine names to avoid duplicities.

The Save button records current changes and returns to Medicines Selection panel.



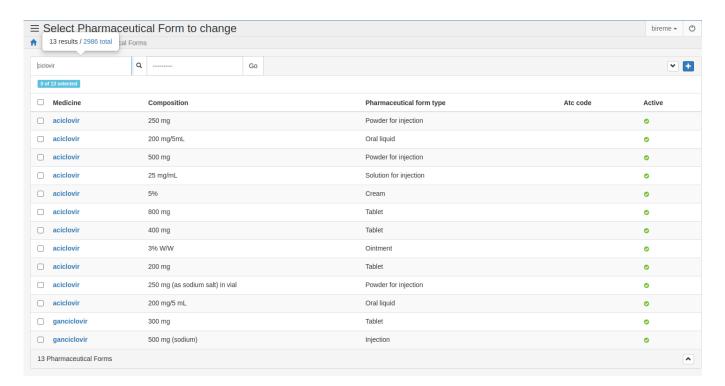
### Checking Medicines in the public web site interface

In the Medicines Selection panel click the Link option associated to the medicine the user wants to display. It will open the Medicines information published in the public web site.

## Pharmaceutical forms directory

In the Administration panel click the Pharmaceutical forms option below Directory group to enter the Pharmaceutical forms directory.

The directory displays Medicine names, Compositions, Pharmaceutical form types, ATC codes and activity information.



Checking the existence of a Pharmaceutical form

In the Pharmaceutical forms directory type in the Pharmaceutical form name or root intended to check out and click the Search button. If it exists, click on the desired name and in the Pharmaceutical form data entry form check if the Pharmaceutical form type is already available to be selected. Otherwise, add a new Pharmaceutical form type according to directions of the Pharmaceutical form type section.

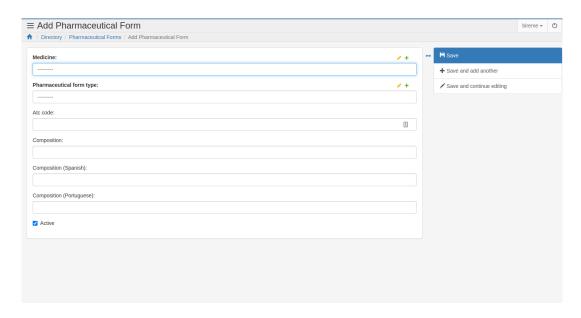
In case the Pharmaceutical form is not yet recorded, add a new one according to directions in the next section.

### Adding a Pharmaceutical form

Choose the Medicine in the Selectable field (or add [+] another Medicine according to direction of the Medicines section).

Select a Pharmaceutical form type from the list (or add a new one according to directions of the Pharmaceutical form type section).

Place the ATC code (if it is available) and fill in the Composition in three languages. Select the Active option as necessary.



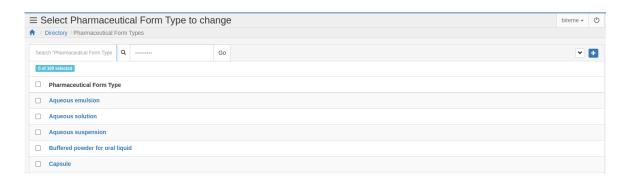
Notice that Pharmaceutical forms can only be deleted from the scope of Medicines directory.

Therefore, once created they can only be inactivated.

## Pharmaceutical form types directory

In the Administration panel click the Pharmaceutical form types option below Directory group to enter the Pharmaceutical form type directory.

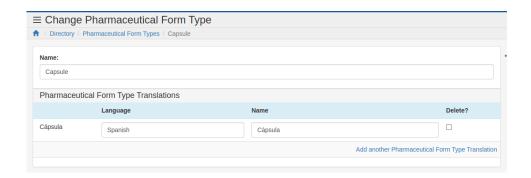
This selection panel displays only the Pharmaceutical form types already set. Users can Search, Add new data or change current one by clicking the Pharmaceutical form type Name.



### Operations allowed on Pharmaceutical form types

In the Pharmaceutical form type directory type in the Pharmaceutical form type name or root intended to check out and click the Search button. If it exists, click on the desired name to enter the Pharmaceutical form type data entry form in change mode. Otherwise, add a new Pharmaceutical form type.

In the data entry form user can type in or change the Name field, according to the operation being performed. It is also allowed to add, modify and/or delete Pharmaceutical form type translations as required.



Notice that Pharmaceutical form types can be deleted with (x Delete) option at the bottom of the panel. Once they are associated to Pharmaceutical forms they should be created and maintained sparingly to avoid inconsistences.

## **Managing Evidences**

Evidence summary records provide sensitive information about Medicines and Pharmaceutical forms in order to help list users.

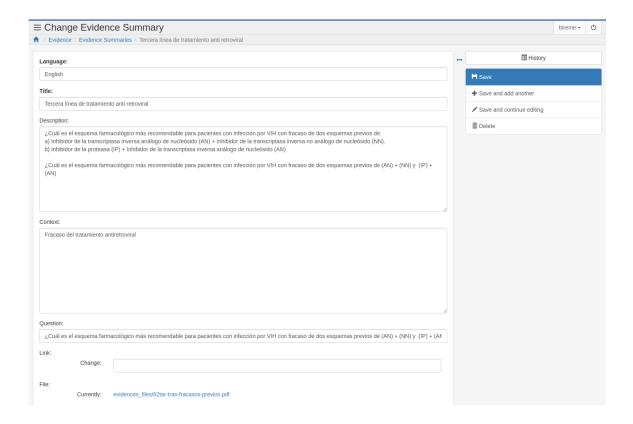
In the Administrative panel click the Evidence summaries to enter the Evidence summary selection panel.

The Evidence selection panel displays the unique ID associated to the Evidence summary name and provides information on the creation and last change dates and times.



Perform the search by entering a term or root of word and clicking in the Search button. Although search can be performed with words on the Evidence summary Name, all information linked to Medicines is done only by IDs.

Adding, modifying or deleting an Evidence Summary record



Filling in the information on Evidence Summaries implies that user is providing an outsource information to the system. Therefore, a minimum information on that external source is required such as Language of the source, Title, a brief Description, the Context in which the evidence occurs. The Question field is used in combination with the Context to qualify the Evidence information. The Link field and the Choose file button make possible to inform a link where the Evidence full record exists or attach a PDF file to an Evidence record describing it accordingly.

It is also allowed to change previously recorded information by adding, modifying or deleting field contents and even the record itself with the option (x Delete).

Notice that deleting Evidence records unlink their IDs to the associated Medicines.

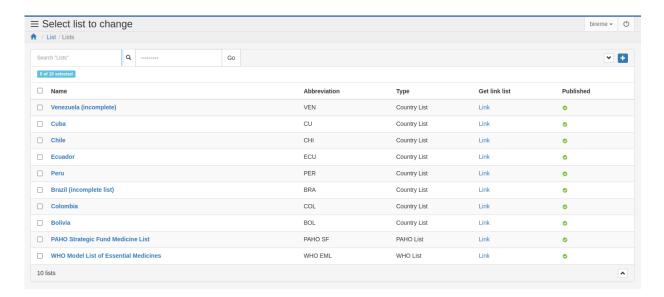
## Managing Lists

Lists allow user to group Medicines and their Pharmaceutical forms within Sections according to a classification system useful for either a country specialized area or a PAHO/WHO organization area.

There are three record types in this group: Lists directory, Pharmaceutical form and Sections.

## List directory

In the Administration panel click the List option below List group to enter the List directory.



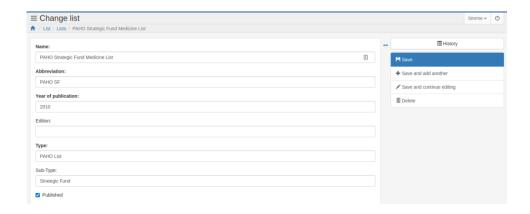
In this panel are presented basic information on the existing lists such as List name, Abbreviation, List type, Get Link list and Publishing status.

As in other cases, users can perform Search to check the existence of a List, enter change mode by clicking the List name or add a new List record.

By selecting records with the Selection option it is possible to perform the following actions:

- Create an archive copy of selected lists;
- Change the publishing status\* of the selected records;
- Delete selected records.
- \* Notice that Published field is a flag type. Therefore, selecting multiple records can cause undesired effects provided it will switch (on/off) Published current status.

### Adding, modifying and deleting a List record



The editing panel asks the user to fill in the List name, its Abbreviation (used to create Section names), Year of publication, Edition, List Type, List Sub-type, Publishing status and Observation.

A list can be of three basic types: WHO List, PAHO List or Country List. Sub-types depend on the selected Type.

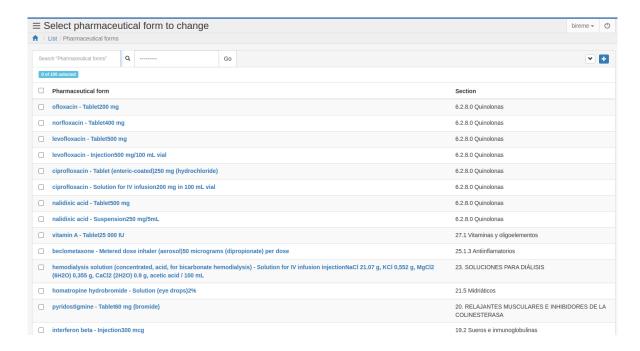
There can be List translations and the operation is the same as described in Medicines directory.

Lists can also be completely deleted and this action unlinks List to its associated Pharmaceutical forms and Sections records.

## Pharmaceutical form directory

In the Administration panel click the Pharmaceutical form option below List group to enter the Pharmaceutical form directory.

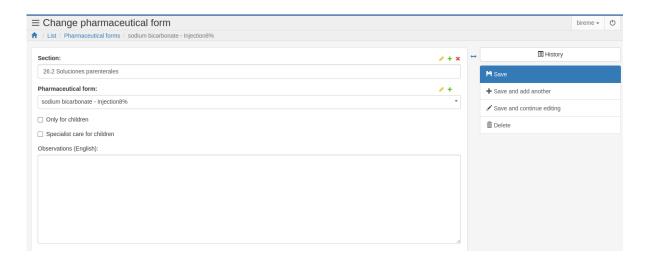
This panel displays basic information on the existing forms: ID, Pharmaceutical form name and Section.



Operations allowed here are Search, enter change mode by clicking the ID or Add a new Pharmaceutical form.By selecting records with the Selection option it is possible to perform the following actions:

- Index pharmaceutical forms;
- Delete selected records.

### Adding, modifying or deleting Pharmaceutical form records



The editing panel asks the user to fill in:

- •Section: by searching the Section directory and selecting the Section ID to be added to the field.
- •Pharmaceutical form: by searching the Pharmaceutical form and selecting the Pharmaceutical form, the application adds the Pharmaceutical ID to the field.

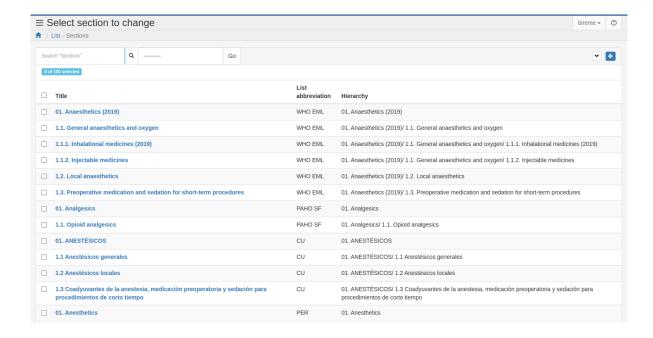
This two fields connect a Medicine with an existing List section, therefore adding the Medicine to that List.

- •Only for children option: Click if this is the case.
- •Specialist care for children: Click if this is the case.
- •Observation (in three languages): Can be fullfiled with any relevant information.
- •Restriction age or weight (in three languages): Informs restrictive information related to age and/or weight.•The best evidence for effectiveness and safety: Click if this is the case.
- Complementary list: Click if this is the case.
- •Pharmaceutical form records in the scope of Lists can be completely deleted and this action unlinks List sections and Pharmaceutical forms, therefore excluding the second from a given List.

## **Sections directory**

In the Adminstration panel click the Sections option below List group to enter the Sections directory.

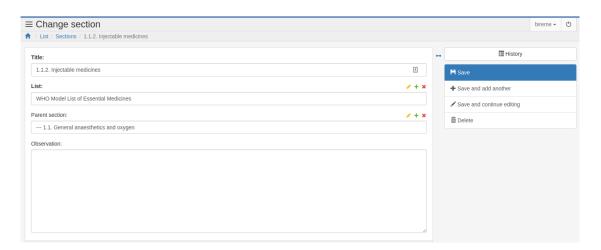
This panel displays basic information on the existing Sections and their associated Lists.



All sections comprise ID, Title, List abbreviation and Hierarchy fields. Sections can be searched by their Title contents, edited by clicking the ID number of a Section or have a new Section added.

By selecting records with the Selection option user can delete them at once.

### Adding, modifying or deleting Section records



Section title fields must be filled carefully provided they will be hierarchically positioned in the associated List. Titles can be also modified later if required.

List field allows to select from a list or Add a new one and associate with current Section.

Parent section field must be selected from the list according to the hierarchy in the List.

Observation allows for further descriptive information on the Section.

Sections are able to have Translations in three languages as required and comprise three fields:

Language, Name and Observation.

Pharmaceutical forms can be also added here by selecting the Pharmaceutical form ID. The filling of these records types are as described in Pharmaceutical form directory in the scope of Lists group.