

# Learner's guide to Program Access Levels

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***Perform Exercise 1 and 2 within the "DEMO" system.***

***Perform Exercise 3 with the "CONFIGURATION" system***

## What is this guide?

This guide contains all ungraded exercises and detailed steps to perform them related to program access levels for the Tracker Config Level 1 academy. Please perform each of the exercises when prompted to by your instructors

## Learning objectives for this session

- Describe what program access levels are
- Describe the 4 types of program access level available in DHIS2
- Apply program access levels to your own tracker programs

## Exercise 1

***Perform this exercise within the "DEMO" system.***

### Part 1 - Register a new TEI

Log in as a user who has access to register an tracked entity within the entire organisation unit. Select **Parrot District Hospital** and proceed to register an individual in the [TB Treatment card program](#).

Registration and Data Entry

Reports

Trainingland

Animal Region

Bird District

Cardinal Hospital Gateway PHC

Crow Health Centre

Hawk Primary Health Centre

Ostrich Health Centre

Owl Dispensary

**Parrot District Hospital**

Peacock Dispensary

Pigeon Primary Health Centre

Robin Primary Health Centre

Woodpecker Health Centre

Cat District

Dog District

Fish District

Game District

Insect District

Food Region

TB Treatment Card

Lists

Search

Register

### Enrollment

Enrolling organisation unit	Parrot District Hospital
Report Date	2022-01-26

### Profile

TB Registration Number	IA2674480
First Name	Michelle
Last name	James
Sex	Female
Date of Birth	1991-01-03
Age	31
Family Address	456 Lake Rd
Phone number	34532423

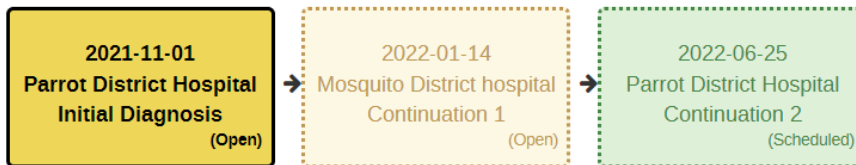
Save and continue

Save and add new

Print form

Cancel

After registration, quickly fill in some of the first stage data.



Report date \*

2021-11-01

**Type of Patient**

TB Patient Type

New

**Disease Site**

TB Disease Site

Extra-Pulmonary

EPTB Site

Pleura

**Type of Treatment for Initial Phase**

Type of Treatment

Community-based DOT

**Sputum Examination Results**

Sputum Smear Result

1-9/100HPF

Culture Result

&lt;10 colonies

GeneXpert Result

TB confirmed, not Rifampicin (T)

**Weight**

Weight (in kg)

58

***Take note of the details of the person that you registered!***

Part 2 - Find this TEI by breaking the glass

Log out and log back in again as a user with the following details:

Username : breakglass Password : District1#

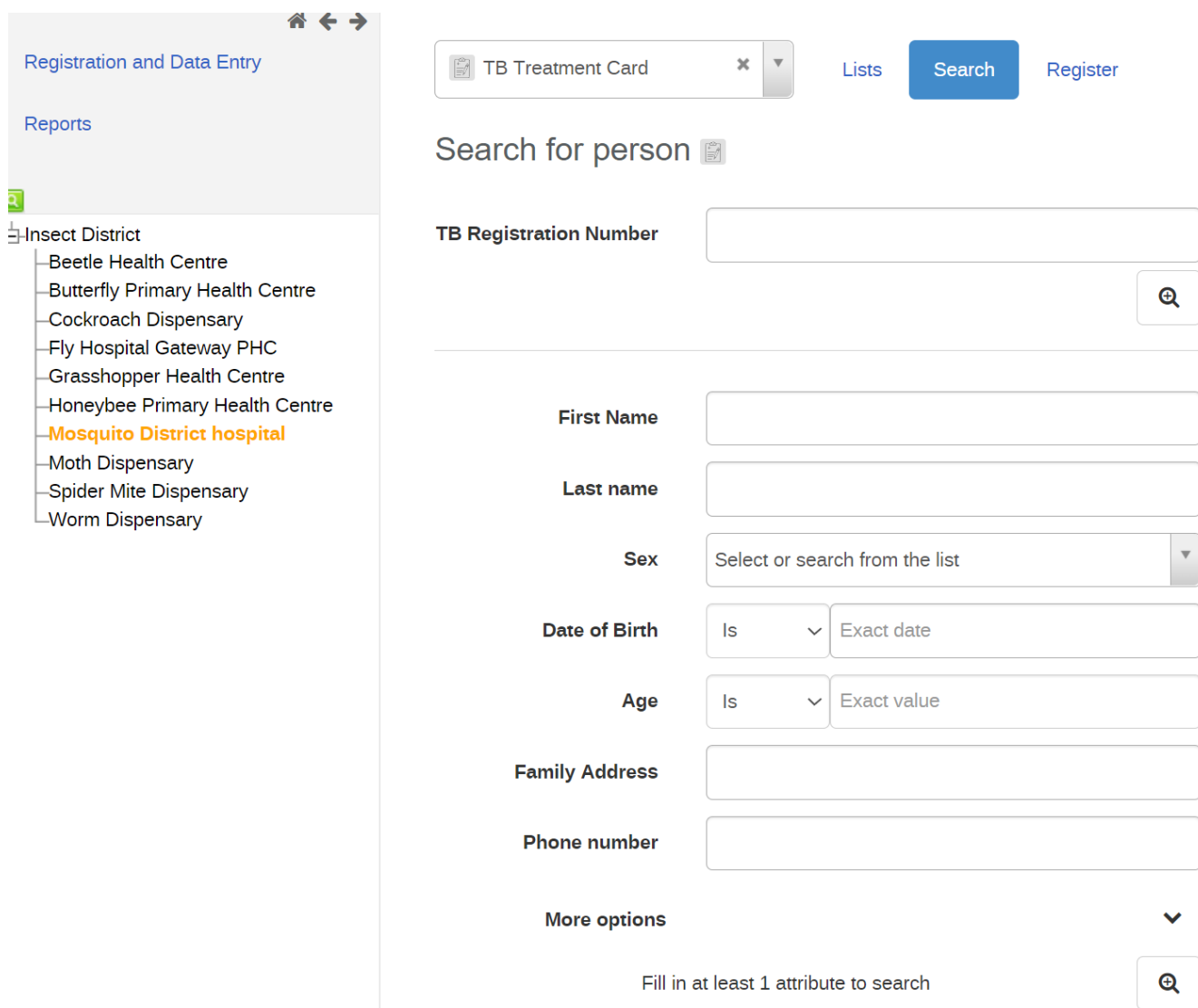
After logging in, clear your cache and go to tracker capture.

Note on user permissions: In our example, the current user that is logged in has access to register and search for people within the TB Treatment card tracker program. They also have the ability to edit/update the information within the program stages of this program.

Though they are only assigned one district for data capture, they can search for individuals within this program across the entire organisation unit hierarchy (note that this is configured on a per user basis as we can select which organisation units a user has access to search).

In this example, in the event this user needs to search for AND access an individual's record that was not registered within their data capture organisation unit(s), they will have to enter a reason as to why they are accessing this record.

Search for the record that was previously registered (select an orgunit at the facility level, then the TB program, then search).



The screenshot displays the 'Registration and Data Entry' interface for the TB Treatment Card tracker. On the left, a sidebar shows a hierarchy of organisation units under 'Insect District', with 'Mosquito District hospital' highlighted. The main area features a search form titled 'Search for person'. At the top, there's a breadcrumb 'TB Treatment Card' and buttons for 'Lists', 'Search', and 'Register'. The search form includes a 'TB Registration Number' field with a search icon. Below this, there are fields for 'First Name', 'Last name', 'Sex' (with a dropdown menu), 'Date of Birth' (with a date picker), 'Age' (with a value picker), 'Family Address', and 'Phone number'. A 'More options' section is collapsed. At the bottom, a message states 'Fill in at least 1 attribute to search' next to a search icon.

Enter the details and search for the person.

# Search for person

**TB Registration Number**



**First Name**

Michelle

**Last name**

James

**Sex**

Female



**Date of Birth**

Is



Exact date

**Age**

Is



31

**Family Address**

**Phone number**

**More options**



Fill in at least 1 attribute to search



Select the record after you find it.

# Person search results

No person found in the selected program. Showing results from other programs

Registering unit	Registration date	Inactive	First Name	Last name	Sex	
Parrot District Hospital	2022-01-26	No	Michelle	James	Female	Flag possible duplicate

Go to dashboard

When we try to access the record, we will have to enter a message as to why we are accessing a record outside of our assigned data capture organisation unit. For example:

This person has attended our facility to continue their TB treatment; however they have initiated their treatment in a facility outside of our district. In this case, it seems a referral was not performed directly and we need to update the record with their latest treatment details

## Tracked entity instance belongs to another organization unit

This tracked entity instance belongs to another organization unit. Please fill in a reason for accessing. Your action is being monitored.

This person has attended our facility to continue their TB treatment; however they have initiated their treatment in a facility outside of our district. In this case, it seems a referral was not performed directly and we need to update the record with their latest treatment details

Cancel

Add audit message

Only after we enter this information can we be allowed to access the record by selecting "Add audit message."

This access control is dependent on how the program is set up and if this feature is configured. If there is no need to have them enter a reason for accessing a person's information outside of their data entry organisation unit(s) this prompt does not have to be displayed. This can also be configured to not allow them to access tracked entity records outside their own data entry org unit within a certain program at all, which we will discuss shortly.

If the program is configured to allow this type of access, when the user enters a reason for entering the record they will then subsequently be taken to the person's tracker dashboard.

You can see this individual can enter data for a new stage, as it is attached to their data capture organisation unit, but can not edit the data from the program stage belonging to the organisation unit outside of its data capture assignment

Timeline Data Entry

2021-11-01  
Parrot District Hospital  
Initial Diagnosis  
(Open)

→

2022-01-14  
Mosquito District hos...  
Continuation 1  
(Open)

→

2022-06-25  
Parrot District Hospital  
Continuation 2  
(Scheduled)

←

+

📅

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Report date \*

2022-01-14

Due date

2022-03-27

Type of Treatment for Continuation Phase

Type of Treatment

Select or search from the list

Sputum Examination Results

Sputum Smear Result

Select or search from the list

Culture Result

Select or search from the list

Weight

Weight (in kg)

## Exercise 2

**Perform this exercise within the "DEMO" system.**

### Part 3 - Review Open Access

Log out and log back in again as a user with the following details:

Username : breakglass

Password : District1#

7 / 16

After logging in clear your cache and go to tracker capture.

In this example, in the event this user needs to search for AND access an individual's record that was not registered within their data capture organisation unit(s), they will be able to access it without any extra log entry or audit entry required from the user. That is because the program we are accessing is set to the "Open" access level.

Navigate to tracker capture, select an orgunit and select the Immunization program and search for

- First Name: Jayden
- Last name: Thomas
- Sex : Male

Registration and Data Entry

Reports

Insect District

- Beetle Health Centre
- Butterfly Primary Health Centre
- Cockroach Dispensary
- Fly Hospital Gateway PHC
- Grasshopper Health Centre
- Honeybee Primary Health Centre
- Mosquito District hospital**
- Moth Dispensary
- Spider Mite Dispensary
- Worm Dispensary

Immunization

Lists Search Register

Search for person

Child Number

First Name Jayden

Last name Thomas

Gender Male

Date of Birth Is Exact date

Mother/Caregiver's first

You will see he was not registered in any of the capture org units this user has access to



## Person search results

Registering unit	Registration date	Inactive	First Name	Last name	Gender	Child Number	Date of Birth
Cardinal Hospital Gateway PHC	2016-11-23	No	Jayden	Thomas	Male	36895456	2016-11-02

Go to dashboard

If I select the record, it will just open however. No reason needs to be entered.

Note: The behaviour for the audited level of access is the exact same, except an additional log entry will be automatically created when this record is accessed. The user will not have to enter any additional details though.

### Part 4 - Review Closed Access


You should still be logged in as

Username : breakglass

Password : District1#

Go back to tracker capture, select the ANC program and perform a search

- First Name : Sheila
- Last name : Smith
- Date of Birth : 2003-09-05
- Phone Number : 6134567890


**Trainingland - development instance**

Registration and Data Entry
Reports

Insect District

- Beetle Health Centre
- Butterfly Primary Health Centre
- Cockroach Dispensary
- Fly Hospital Gateway PHC**
- Grasshopper Health Centre
- Honeybee Primary Health Centre
- Mosquito District hospital
- Moth Dispensary
- Spider Mite Dispensary
- Worm Dispensary

Antenatal Care
Lists
Search
Register

Search for person

Insurance Number

First Name: Sheila
Last name: Smith
Age: Is Exact value
Phone number: 6134567890
E-mail
Village/Domicile

More options

Fill in at least 1 attribute to search

You will see she was not registered in any of the capture org units this user has access to

## Person search results

No person found in the selected program. Showing results from other programs

Registering unit	Registration date	Inactive	First Name	Last name	Sex	
Cardinal Hospital Gateway PHC	2022-01-26	No	Sheila	Smith		Flag possible duplicate

Go to dashboard

If I try to open this record, I will not be able to. Instead I will receive the following message.

## Failed to open TEI

No access to tracked entity instances outside of assigned data capture organisationunits.

Close

This is because this program is configured with the CLOSED level of access.

### Exercise 3

Part 5 - Modify the access level of your program

***Perform this exercise within the "CUSTOMIZE" system.***

Log in as your admin user.

Navigate to your Antenatal Care program (the one you created as part of the assignment) in Maintenance and review the program details. Change the access level to "Protected"

Version

10

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Tracked entity type (\*)

Person

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Category combination (\*)

None

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Display front page list



First stage appears on registration page

Access level

Protected



Completed events expiry days

0

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This is where we configure the access level of the program. This then needs to be combined with a user's data capture scope to dictate the behaviour that we observe in tracker capture.

### Modify the sharing settings of your program

**Share your program and program stages** with the user group "access levels"

Metadata : can view only

Data : can capture and view

Who has access

Public access

No access

External access

No access

Access Levels

Add users and user groups

Enter names

Can edit and view

Can view only

Can capture and view

Can view only

No access

Ensure you have someone registered in your ANC program

Make sure that someone is registered in the ANC program that you have made.

Registration and Data Entry

Reports

Trainingland

Animal Region

Bird District

Cardinal Hospital Gateway PHC

Crow Health Centre

Hawk Primary Health Centre

Ostrich Health Centre

Owl Dispensary

Parrot District Hospital

Peacock Dispensary

Pigeon Primary Health Centre

JT\_TB Treatment Card

Lists

Search

Register

Custom working list

First name

Last name

Age

Sex

Number of rows per page: 50

If there is no one registered, then register a new person into your program. **You can register them anywhere EXCEPT for the org units within Vegetable District.**


Review the “access\_levels” user in the users app


**NOTE : DO NOT MODIFY THIS USER! Just review the users details.**

Navigate to the users app and find the “access\_levels” user.


# User Management


access

Org.unit 

Time inactive 

Invitatio

 New

Display name 	Username	Last login
Access Levels	access_levels	

Review their orgunit assignment

## Organisation unit access

Customise the organisation units this user has access to for searching, capturing and managing data.



### Organisation unit selections are recursive

Selecting a unit gives access to all units in its sub-hierarchy.

### Data capture and maintenance \*

The organisation units that this user can enter and edit data for.

- ▼ ☒ Trainingland
  - ▶ ☐ Animal Region
  - ▼ ☒ Food Region
    - ▶ ☐ Dessert District
    - ▶ ☐ Dinner District
    - ▶ ☐ Fruit District
    - ▶ ☐ Staple District
    - ▶ ☐ Sweet District
    - ▶ ☒ Vegetable District

### Data output and analysis

The organisation units that this user can export and analyse.

- ▶ ☒ Trainingland

### Search

The organisation that this user can search for and in.

- ▶ ☒ Trainingland

We can see here the data capture org unit is limited to one district. The search org units comprise the entire country however. This, combined with the program access level, will dictate the behaviour of what happens

when this user tries to access a tracked entity instance in our program. At the moment, we have shared the ANC program with this user via a user group, so that is the program they will be able to access.

In summary:

For the closed level

- If a TEI is outside of a users data capture scope, the user can not open it

For the protected level

- If a TEI is outside of a users data capture scope, the user can open it but will have to enter a reason. This access expires after 3 hours before they have to enter a reason again

For the audited level

- If a TEI is outside of a users data capture scope, the user can open it but additional log entries will be made on its access

For the open level

- If a TEI is outside of a users data capture scope, the user can open it. Only the regular log/audit history is recorded

Keep in mind, the user still needs sharing settings applied to their user that allows them to interact with the program as well, otherwise they won't be able to perform any operations with the program. We can see that the user "access\_level" is part of the "Access Levels" user group that you have just assigned to the program that you have made.

Available user groups		User groups this user is a member of
<div>Filter options</div>		
TB - Admin	➡	TB - Entry
TB - Analysis	→	Access Levels
	⬅	

### Login as the "access\_levels" user in and search for a TEI in your ANC program

Login to the CUSTOMIZE system using

Username : access\_levels

Password : District1#

Navigate to tracker capture, select an organisation unit, select your program and perform a search.

Search for a person registered in your program. You should get the prompt that asks you to enter a reason for accessing the record. This is due to setting the program to the protected level of access.