

Learner's Guide to the Category Model

What is this guide?

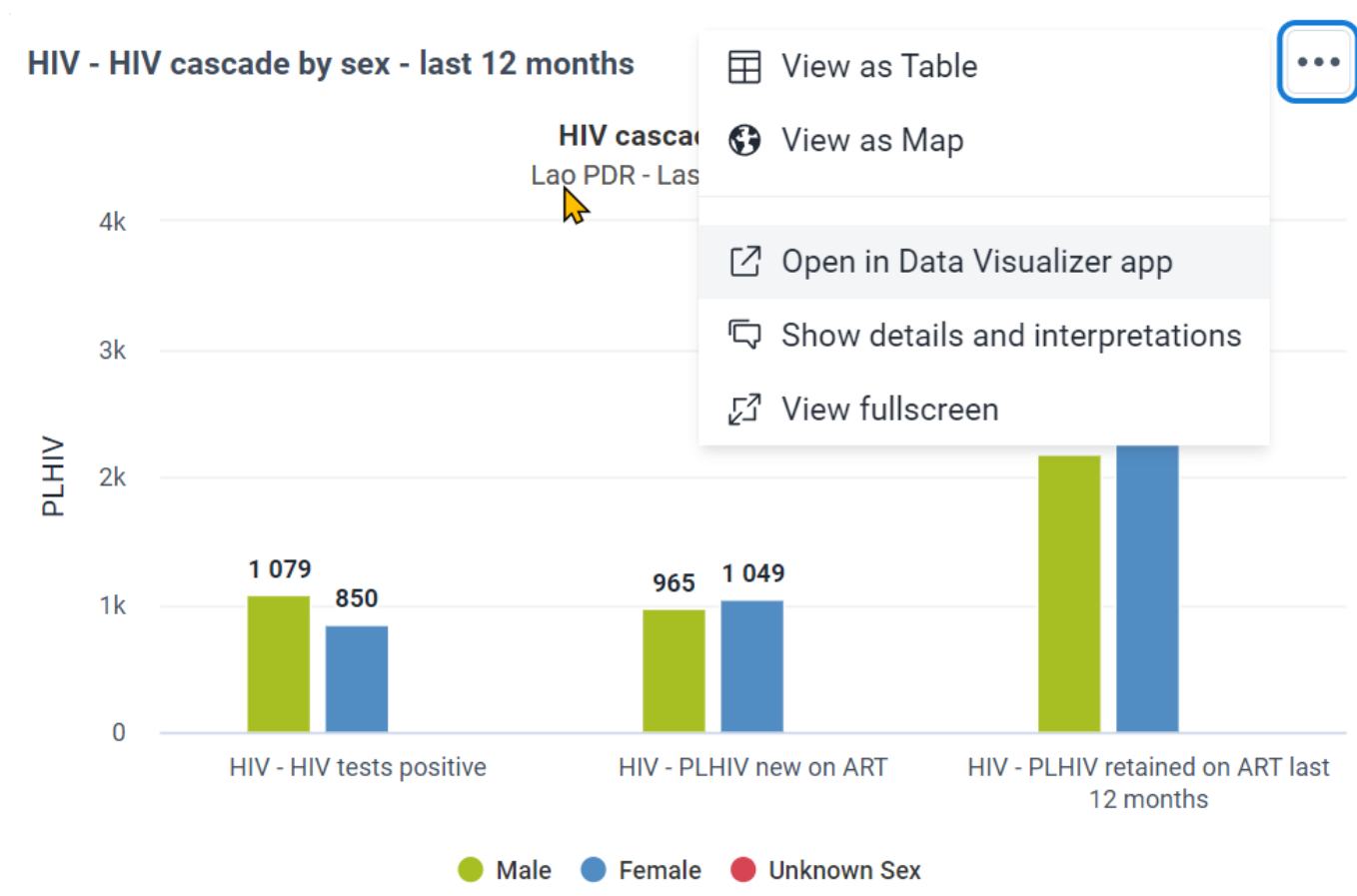
Learning objectives for this session

1. Define the DHIS2 category model
2. Use categories to disaggregate data in analysis apps
3. Create category options, categories and category combinations following a standard operating procedure
4. Describe the relationship between categories, data dimensions and analytics
5. Apply category combinations to data elements

Exercise 1 - Review how categories can be used to visualize data

Perform this exercise in the DEMONSTRATION system

Open the chart "HIV - HIV cascade by sex - last 12 months" from the HIV national dashboard.





This chart has one category with three category options being used to disaggregate several data elements (Sex) located in the series of the chart. In analysis, we can apply as many combination of data dimensions as required to create our intended input and organisation unit groups/group sets can help with this.

They can also support the disaggregation of our data.

Add the disaggregation "Age (HIV)" to the category of the chart and update the chart.



We can see we can add more than one category to disaggregate our data, as long as the data itself is disaggregated and collected this way.

Create a new chart

To create a new chart select File - > New

Here are the inputs for the chart:

Chart Type

- Column

Data

- Data Type : Data Elements
- Data Element group: HIV
- Data Element names: HIV - HIV tests positive, HIV - PLHIV new on ART, HIV - PLHIV retained on ART last 12 months

Data

The screenshot shows a data selection interface. On the left, there is a search bar labeled 'Search by data item name'. Below it, the 'Data Type' is set to 'Data elements'. The 'Data element group' is set to 'HIV', and the 'Disaggregation' is set to 'Totals only'. A list of data elements is shown below, with the first item 'HIV - ANC clients newly tested HIV positive and started' partially visible. On the right, a 'Selected Items' panel lists three items: 'HIV - HIV tests positive', 'HIV - PLHIV new on ART', and 'HIV - PLHIV retained on ART last 12 months'.

Period

- Last 12 months

Organisation unit

- Lao PDR

We now want to add in our categories for our data. In this case, we need to know how the data elements we selected are disaggregated.

If you are not completely familiar with this, one way to perform a quick check is to review the form in data entry or in the reports app if you have access to.

HIV

Filter in section	0-14 years		15+ years	
	Male	Female	Male	Female
HIV tests performed	7	12	11	1
HIV tests positive	5	9	9	0

Here we can see the data elements that we are working with are disaggregated by age and sex; we can therefore also use these to disaggregate our data in visualizer.

Add in the categories for Age (HIV)

Age (HIV)

- ☐ Automatically include all items
Select all Age (HIV) items. With this option, new items added in the future will be automatically included.
- ☒ Manually select items...

Selected Items

▣ 0-14 years

▣ 15+ years

and sex

Sex (Male/Female)

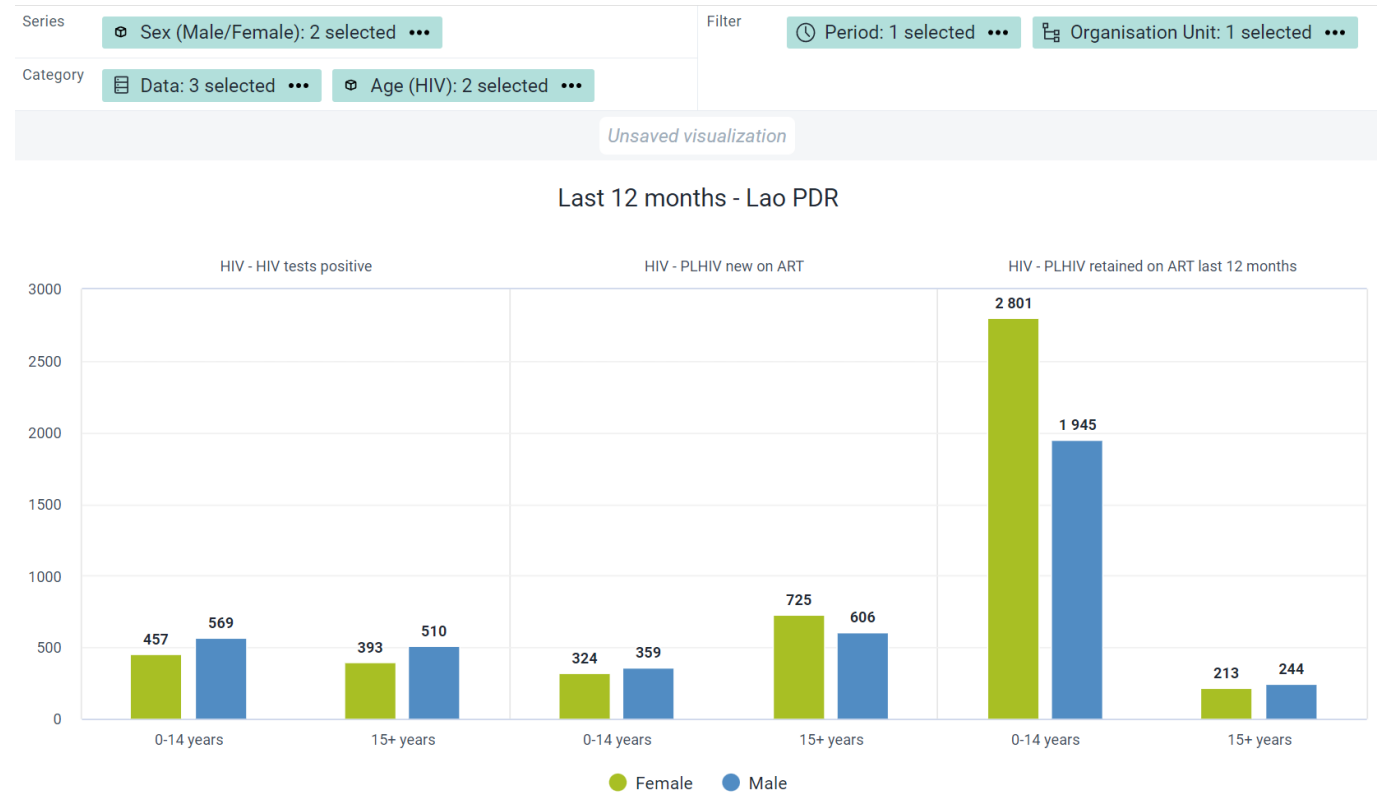
- ☐ Automatically include all items
Select all Sex (Male/Female) items. With this option, new items added in the future will be automatically included.
- ☒ Manually select items...

Selected Items

▣ Female

▣ Male

Modify the layout and update the chart



You will see the disaggregations (categories) have now been applied.

Exercise 2 - Review how to manage category options in maintenance

Perform this exercise in the CUSTOMIZATION system

In our example, let us create the category options that we had used to disaggregate our HIV data. In this example, we had:

- Sex (male, female)
- Age (0-14, 15+)

Let us just start with these examples.

Navigate to maintenance -> Category -> Category Option

From this screen, the first thing you want to do is search for the category option you are creating.

District Health Information Software 2

ALL CATEGORY DATA ELEMENT DATA SET INDICATOR ORGANISATION UNIT PROGRAM VALIDATION OTHER

Category option

Category option management ?

Search by name, code or id

Male

1 - 2 of 2

Name	Public access	Last updated	
Male	Public view	November 3, 20...	

1 - 2 of 2

If I type in "Male" as a category option, I will see that this already exists. Under normal circumstances, you would stop here. Never create a duplicate category option when it already exists.

In this scenario, we want to go through the process of the category model from start to finish; so we will create this category option for demonstration purposes only.

Create a new category option by selecting the plus icon.

Use your initials as a prefix and create the category option Male

← Category option ?

This object will be created with public edit and view rights

Name (*)

SND_Male

Short name

SND_Male

Code

Form name

Description

Start date

End date

Filtering organisation units by name

0 Organisation units selected

Lao PDR

▸

01 Vientiane Capital

▸

09 Xiangkhouang

▸

10 Vientiane

▸

11 Bolikhamxai

▸

18 Xaisomboun

For organisation units within

Lao PDR

Organisation unit level

SELECT

DESELECT

Organisation unit group

SELECT

DESELECT

SELECT ALL

DESELECT ALL

SAVE

CANCEL

You can discuss the fields as you fill them in. Save the category option when you are finished.

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Repeat this process to create the category options for female, 0-15 and 15+.

Exercise 3 - Review how to manage categories in maintenance

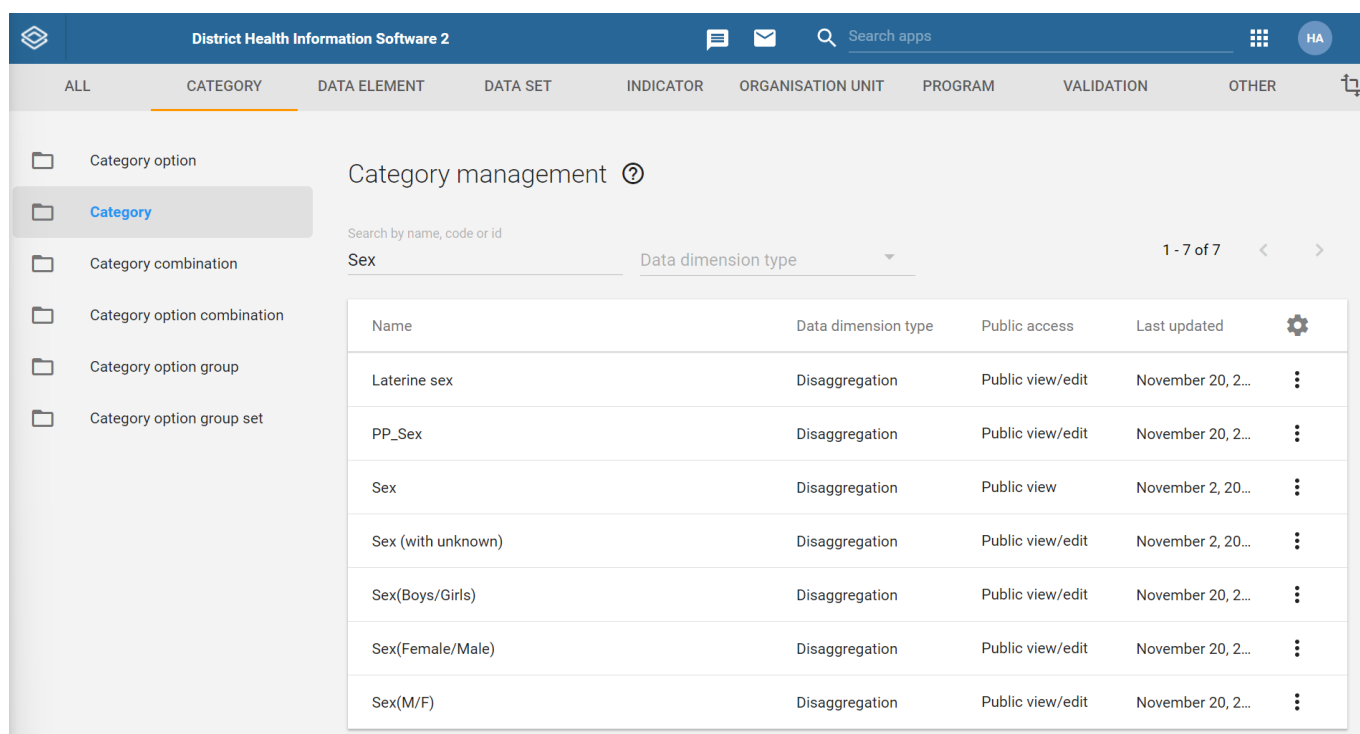
Perform this exercise in the CUSTOMIZATION system

We want to create two categories:

- Sex (male, female)
- Age (0-14, 15+)

Navigate to maintenance -> Category -> Category

From this screen, the first thing you want to do is search for the category you are creating.



The screenshot shows the 'Category management' screen in the 'District Health Information Software 2'. The sidebar on the left contains a tree view with the following items: 'Category option', 'Category', 'Category combination', 'Category option combination', 'Category option group', and 'Category option group set'. The 'Category' item is selected. The main area displays a search bar with the text 'Search by name, code or id' and a dropdown menu for 'Data dimension type' set to 'Sex'. Below the search bar is a table with 7 rows and 5 columns: 'Name', 'Data dimension type', 'Public access', 'Last updated', and a settings icon. The table contains the following data:

Name	Data dimension type	Public access	Last updated	
Laterine sex	Disaggregation	Public view/edit	November 20, 2...	⋮
PP_Sex	Disaggregation	Public view/edit	November 20, 2...	⋮
Sex	Disaggregation	Public view	November 2, 20...	⋮
Sex (with unknown)	Disaggregation	Public view/edit	November 2, 20...	⋮
Sex(Boys/Girls)	Disaggregation	Public view/edit	November 20, 2...	⋮
Sex(Female/Male)	Disaggregation	Public view/edit	November 20, 2...	⋮
Sex(M/F)	Disaggregation	Public view/edit	November 20, 2...	⋮

We will see there are a couple sexes listed already. Under normal circumstances, you would stop here. Never create a duplicate categories when they already exist.

In this scenario, we want to go through the process of the category model from start to finish; so we will create these categories for demonstration purposes only.

Create a new category by selecting the plus icon.

Use your initials as a prefix and create the category for sex, Make sure you use the category options that you have created (initials_male, initials_female)

← Category ?

Name (*)
SND_Sex

Short name (*)
SND_Sex

Code

Description

Data dimension type (*)
Disaggregation

☒ Data dimension

Category options

SND_

358 hidden by filters

ASSIGN ALL →

SAVE

0 hidden by filters

SND_Male

SND_Female

← REMOVE ALL 2

You can discuss the fields as you fill them in. In particular, make sure to review the data dimension type. Leave it as disaggregation but we will come back to attributes in a later session.

Also, explain that the data dimension tick box allows the category to show up on the left side menu in analysis apps.

Column

Update File Options Download

Filter dimensions

MAIN DIMENSIONS

- Data
- Period
- Organisation Unit

OTHER DIMENSIONS

- Assigned Categories

YOUR DIMENSIONS

- Admin Levels
- Age (HIV)
- Age in years (0-14, 15+, unknown)
- Age in years (0-4, 5-14, 15+)
- Age in years (0-4, 5-14, 15-24, 25-34, 35-44, 45-54, 55-64, 65+, unknown)
- Culture results (cases)
- Culture results (tests)

Series Data

Category Period: 1 selected

Filter Organisation Unit: 1 selected

Getting started

Repeat this process to create the category for Age (0-14/15+). Ensure you use the category options that you made with your initials to create this new category.

Exercise 4 - Review how to manage category combinations in maintenance

We want to create one category combination

- Age (0-14, 15+) + Sex

Navigate to maintenance -> Category -> Category combination

From this screen, the first thing you want to do is search for the category you are creating.

If we were to investigate a bit, we would see Age and sex (HIV) category combination is actually the same as what we are about to create. This is because the category Age (HIV) actually contains the same age groups we have made.

Name (*)
Age (HIV)

Short name (*)
Age (HIV)

Code

Description

Data dimension type (*)
Disaggregation

☒ Data dimension

Category options

⊕ ↺

Search available/selected items

+
++
+++
0-4 years
0 days
0 year
10 - 14
10 days
10 years
<10 yrs
11+ days

→
←

0-14 years
15+ years

↑
↓

ASSIGN ALL 360 →

← REMOVE ALL 2

SAVE

CANCEL

It is important to consider that sometimes the duplicate item you are looking for might not be readily apparent based on its name alone. Keep this in mind when searching for duplicates in your own system and only create items when you are absolutely sure they are not located anywhere else.

In this scenario, we want to go through the process of the category model from start to finish; so we will create this category combination for demonstration purposes only.

Create a new category combination by selecting the plus icon.

Use your initials as a prefix and create the category combination for Age (0-14, 15+) + Sex. Make sure you use the categories that you have created (initials_sex, initials_age (0-14/15+))

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Category combination

This object will be created with public edit and view rights

Name (*)

SND_Age (0-14, 15+) + Sex

Code

Data dimension type (*)

Disaggregation

☐ Skip category total in reports

Categories

SND

90 hidden by filters

→

←

0 hidden by filters

SND_Age (0-14/15+)
SND_Sex

↑
↓

ASSIGN ALL →

← REMOVE ALL 2

SAVE

CANCEL

You can discuss the fields as you fill them in. In particular, make sure to review the data dimension type. Leave it as disaggregation but we will come back to attributes in a later session.

Exercise 5 - Check the category option combinations

Perform this exercise in the CUSTOMIZATION system

We have successfully created our category combination. It is now time to check if the category option combinations have been created. Based on what we made, we should have a total of 4 category option combinations

- 0-14, Male
- 0-14, Female
- 15+, Male
- 15+, Female

To check this,

Navigate to maintenance -> Category -> Category option combination

Search for your category combination, hit the action button followed by show details

Category option

Category

Category combination

Category option combination

Category option group

Category option group set

Category option combination management ?

Search by name, code or id

SND

1 - 5 of 5

Name	Public access	Last updated	
SND_0-14 years, SND_Female		October 16, 2023	
SND_0-14 years, SND_Male		October 16, 2023	
SND_15+ years, SND_Female		October 16, 2023	
SND_15+ years, SND_Male		October 16, 2023	

Short name

SND_0-14 years, SND_Female

Created

Mon Oct 16 2023 15:41:52 GMT+0530 (India Standard Time)

Last updated

Mon Oct 16 2023 15:41:52 GMT+0530 (India Standard Time)

Id

Pjoeikxy00J

Now that you have verified it has been created correctly, you can use the category combination to disaggregate the data elements, indicators, validation rules, etc. you need to as required!