

# Learner's Guide to Organisation Unit Groups and Group Sets

## What is this guide?

This guide contains all exercises and detailed steps to perform them related to the review of **organisation unit groups and group sets** for the Design for Data Use Level 1 academy. Please perform each of the exercises when prompted to by your instructors

## Learning objectives for this session

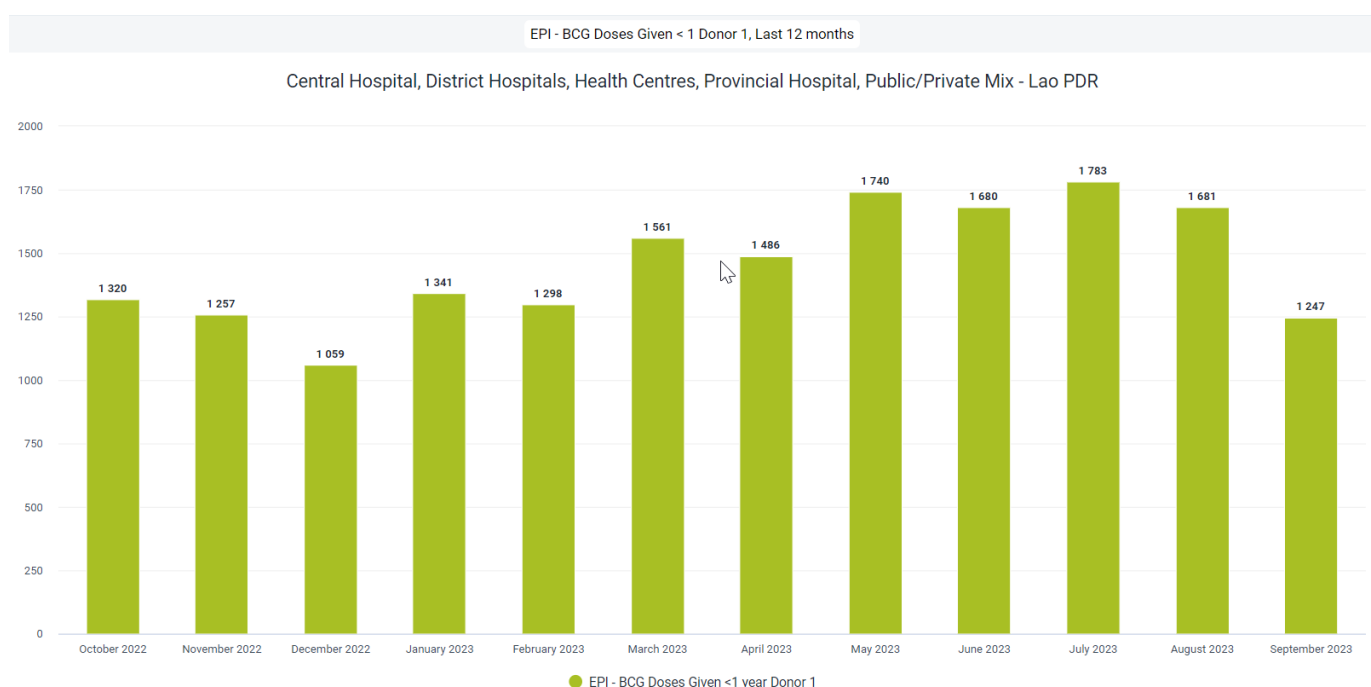
1. Review the concept of organisation units
2. Describe what organisation unit groups are
3. Describe what organisation unit group sets are
4. Use organisation unit groups in analysis apps
5. Use organisation unit group sets in analysis apps
6. Describe the limitations of creating organisation unit groups in maintenance
7. Add organisation units to organisation unit groups via import/export
8. Configure organisation unit group sets in maintenance

## Exercise 1 - Review how organisation unit groups and group sets can be used to visualize data

**Perform this exercise in the DEMONSTRATION system.**

### Review and create the chart "EPI - BCG Doses Given < 1 Donor 1, Last 12 months"

You will start the session by recreating the following chart.



You can open this chart by navigating to data visualizer and opening the chart "EPI - BCG Doses Given < 1 Donor 1, Last 12 months"

This chart has two organisation unit group sets that are being applied to it, located in the filter 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.

Move the org unit group set "Type" from the filter to the category and update the chart.



We can now see the chart is disaggregated by the org unit groups within the group set "Type"

## 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 : Indicator
- Indicator group: Immunization
- Indicator name: EPI - BCG Doses Given < 1 Donor 1

Data

Search by data item name

Data Type

Indicators

Indicator group

All groups

√<sup>10</sup>/<sub>10</sub> EPI - < 1 year monthly target population

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.05 ml stock closing balance

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.05 ml stock coverage time

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.05 ml stock discrepancy rate (%)

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.05 ml stock used

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.05 ml stockout days

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.5 ml stock closing balance

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.5 ml stock coverage time

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.5 ml stock discrepancy rate (%)

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.5 ml stock used

√<sup>10</sup>/<sub>10</sub> EPI - ADS 0.5 ml stockout days

Selected Items

√<sup>10</sup>/<sub>10</sub> EPI - BCG Doses Given <1 year Donor 1

↗

→

↖

←

↑

↓

Hide

Update

Period

- Last 12 months

Organisation unit

When opening the org unit pane, explain that org unit groups can also be used to select relevant organisation units to include in your analysis. Using this option, we can not use the compound filtering options we observed in the first chart we were shown; however if you just want to quickly select a group of organisation units to use in analysis, this can be done. This is another reason why it is very useful to group your organisation units. Note that you can select multiple org unit groups in this selector.

Organisation Unit

User organisation unit

User sub-units

User sub-x2-units

Lao PDR (1)

01 Vientiane Capital

09 Xiangkhouang

10 Vientiane

11 Bolikhamxai

18 Xaisomboun

Central Hospital

District Hospitals

Health Centres

Inpatient

Lao Districts

Lao Provinces

Outpatient

Provincial Hospital

Public

Public/Private Mix

Level

Select a level

Hide

Update

0

November 2021

December 2021

January 2022

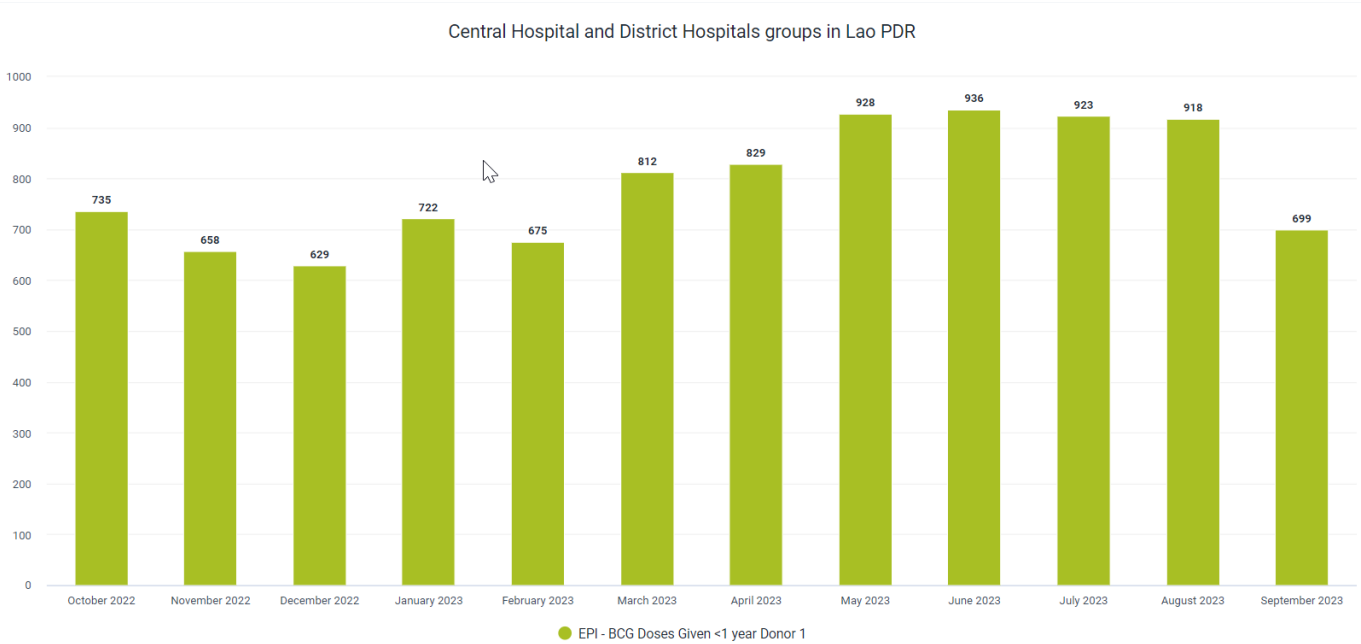
May 2022

June 2022

July 2022

ven &lt;1 year Results

As an example, you can select Central Hospital and District Hospitals as the org unit groups and update the chart.



Have a close look at the chart. **The org unit groups are not added as data dimensions in this scenario** so we can't disaggregate the data any further; however a filter is being applied to only show data from the org unit groups being shown.

Clear the selection of any org unit groups selected here and just ensure Lao is selected as the org unit


Organisation Unit

☐ User organisation unit


☐ User sub-units

☐ User sub-x2-units


▼

☒  Lao PDR (1)


▶

☐  01 Vientiane Capital


▶

☐  09 Xiangkhouang


▶

☐  10 Vientiane

▶

☐  11 Bolikhamxai

▶

☐  18 Xaisomboun

1 selected - [Deselect all](#)

Level

Group

Select a level ▼

Select a group ▼

Hide

Update

Add in the org unit groups Central Hospital, District Hospitals, Health Centres and Provincial Hospital options from the type org unit group set data dimension

Type

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

Search

Public/Private Mix

Selected Items

Central Hospital

District Hospitals

Health Centres

Provincial Hospital

➔

Alter the chart layout to look like the following

Series

Data: 1 selected

Category

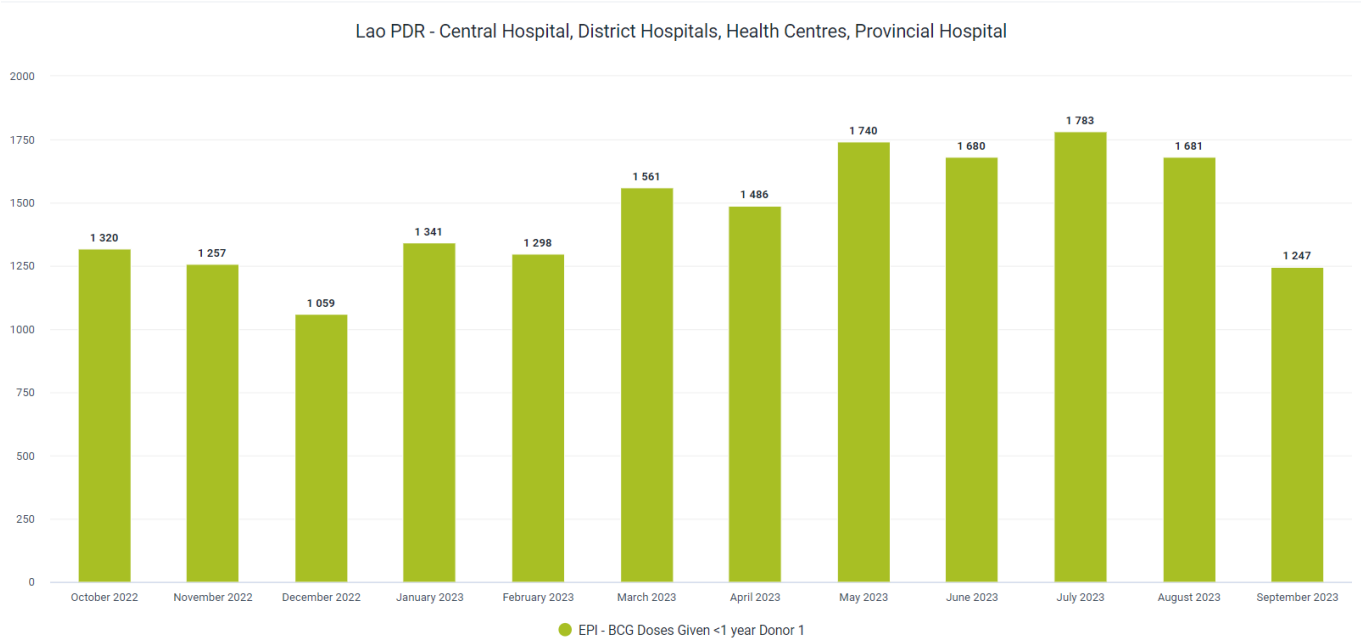
Period: 1 selected

Filter

Organisation Unit: 1 selected

Type: 4 selected

Then update the chart



Using the org unit group sets we have added, we can filter the chart further. As an example, we can remove some of the org unit types from the filter.

Type

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

Search

☐ District Hospitals

☐ Provincial Hospital

☐ Public/Private Mix

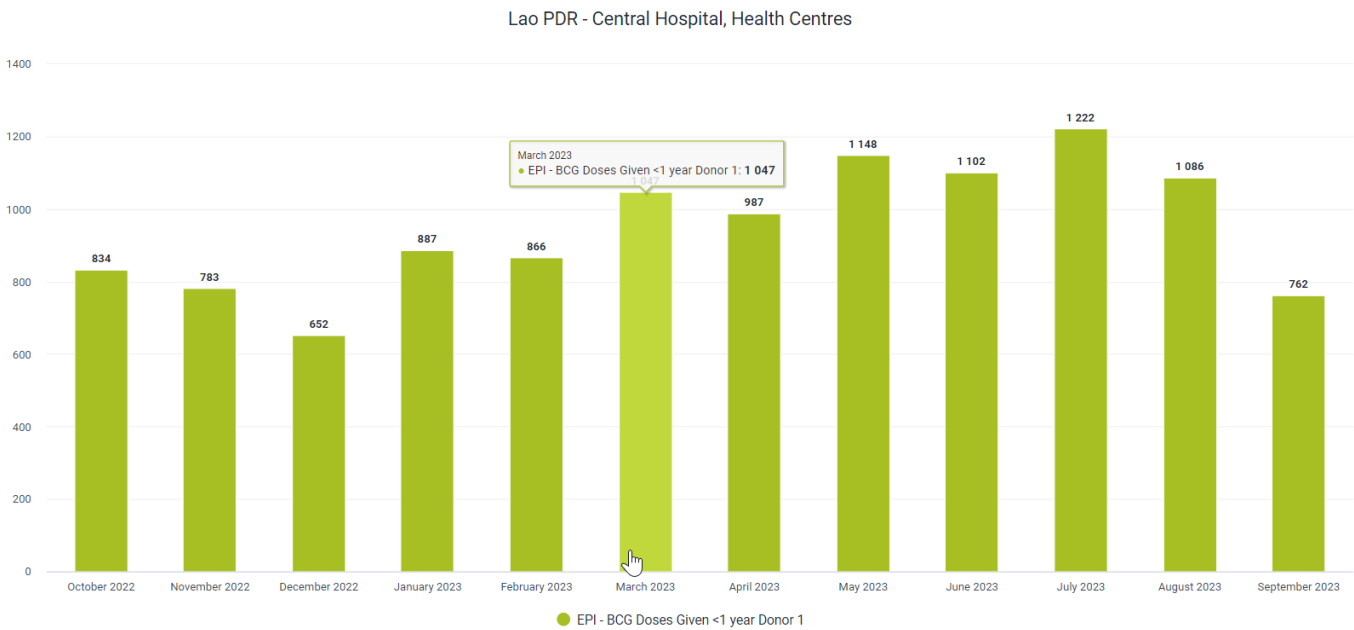
➔

Selected Items

☐ Central Hospital

☐ Health Centres

Update the chart and you will see the data is refined further



We can also use these dimensions to disaggregate our date in visualizations. Update the layout to the following

Series

Data: 1 selected

⋮

Category

Type: 2 selected

⋮

⌚ Period: 1 selected

⋮

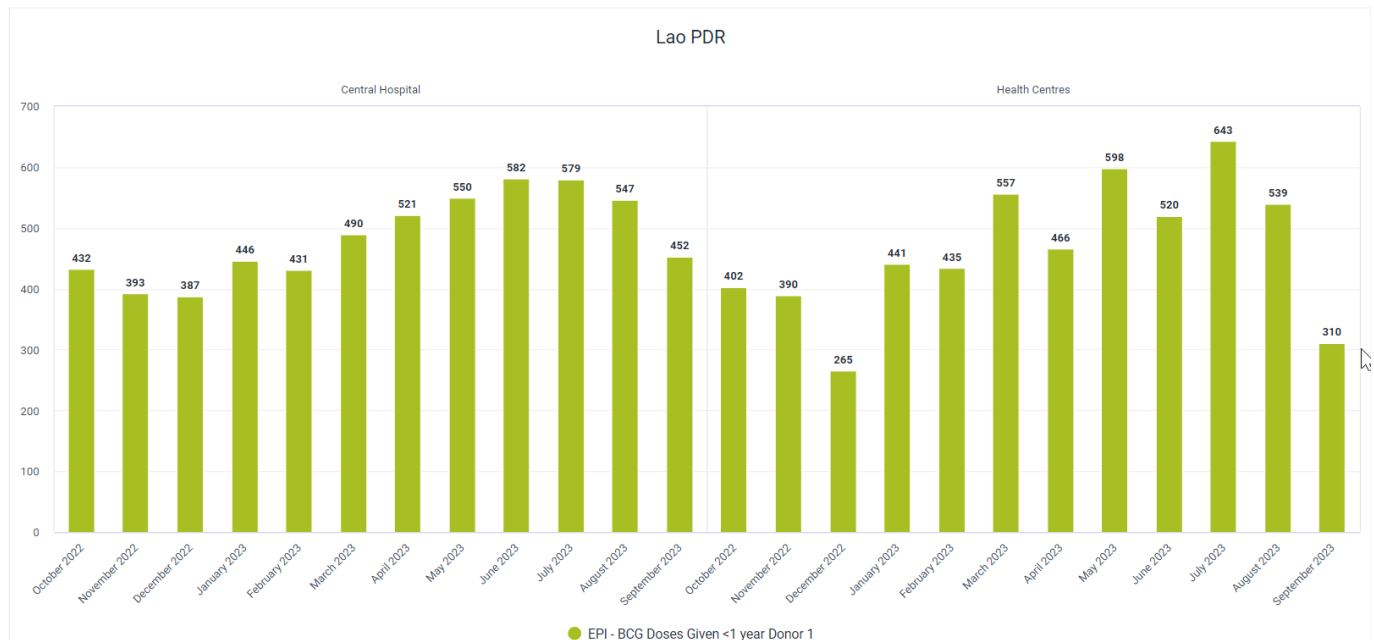
Filter

Organisation Unit: 1 selected

⋮

And update the visualization

7 / 12



From these examples, we can see there is a lot of flexibility introduced by using org unit groups and group sets in data analysis; and having them configured correctly will prove very useful.

## Exercise 2 - Manage OU Groups in Maintenance

### ***Perform this exercise in the CUSTOMIZATION system***


In order to create org unit groups and group sets in DHIS2, we can use the maintenance app. This should be a review for most participants.

Navigate to maintenance -> organisation unit and create a new organisation unit group.

Try to create a group for all health centres using your initials as a prefix.

When you go to filter organisation units by name type in "HC."



 This object will be created with public edit and view rights

Name (\*)

SND\_Health Centre

Short name

SND\_Health Centre

Code

Description

Color

**SELECT COLOR**

Symbol

Select

Filtering organisation units by name

HC

0 Organisation units selected

- ☐ HC Aoxai
- ☐ HC Banboh
- ☐ HC Banboua
- ☐ HC Banchiang
- ☐ HC Bandoh
- ☐ HC Bandon (Pakngum)
- ☐ HC Bandong (Thaviang)
- ☐ HC Banmai (Keo-oudom)
- ☐ HC Bannong (Phaxai)
- ☐ HC Bantha
- ☐ HC Banthat (Phonhong)
- ☐ HC Banthouay
- ☐ HC Banvang
- ☐ HC Banxai
- ☐ HC Banxoh (Bankouay)
- ☐ HC Bo-o
- ☐ HC Bokoh (Banpho)
- ☐ HC Boungkouang
- ☐ HC Boungphao
- ☐ HC Bounthin (Phiangdang)
- ☐ HC Chansavang (Sikhottabong)

For organisation units within **Lao PDR**

Organisation unit level

SELECT

DESELECT

Organisation unit group

SELECT

DESELECT

SELECT ALL

DESELECT ALL

**SAVE**

CANCEL

After you have filtered out your organisation units, you need to select them manually by selecting the checkbox next to the orgunit name to add them to your group. This can take some time so for exercise purposes you may only select a couple and proceed to **Save** the org unit group.

HC

10 Organisation units selected

☒ HC Aoxai  
☒ HC Banboh  
☒ HC Banboua  
☒ HC Banchiang  
☒ HC Bandoh  
☒ HC Bandon (Pakngum)  
☒ HC Bandong (Thaviang)  
☒ HC Banmai (Keo-oudom)  
☒ HC Bannong (Phaxai)  
☒ HC Bantha  
☐ HC Banthat (Phonhong)  
☐ HC Banthouay  
☐ HC Banvang  
☐ HC Banxai  
☐ HC Banxoh (Bankouay)  
☐ HC Bo-o  
☐ HC Bokoh (Banpho)  
☐ HC Boungkouang  
☐ HC Boungphao  
☐ HC Bounthin (Phiangdang)  
☐ HC Chansavang (Sikhottabong)  
☐ HC Chaus

For organisation units within Lao PDR  
Organisation unit level  
Health Facility ▼ SELECT DESELECT  
Organisation unit group ▼ SELECT DESELECT  
SELECT ALL DESELECT ALL

SAVE CANCEL


## Exercise 3 - Create org unit group sets via maintenance

### *Perform this exercise in the CUSTOMIZATION system*

To finalize this process, you would normally have to create at least one more org unit group; however the steps you follow are the same as what we have shown now. Instead, we will use the org unit group you just made plus existing groups in order to create an **org unit group set**. Within the group set, exclusivity is a key principle. This means an org unit should not belong to more than one org unit group within an org unit group set. Also, each of the org units in the entire system should be within one of the org unit groups belonging to the group set as well. This is so when we perform analysis with these org unit groups and group sets, we are not excluding org units from our totals.

Navigate to org unit group set and create a new one within maintenance (maintenance -> organisation unit -> add new org unit group set).

Add in the following groups, using the health centre group you created rather than the existing one.

 This object will be created with public edit and view rights

Name (\*)

SND\_Type

Short name (\*)

SND\_Type

Code

Description

- ☐ Compulsory
- ☒ Data dimension
- ☐ Include subhierarchy in analytics

Organisation unit groups



Search available/selected items

Health Centres

Inpatient

Lao Districts

Lao Provinces

Outpatient

Public

→

←

SND\_Health Centres

Central Hospital

District Hospitals

Provincial Hospital

Public/Private Mix

ASSIGN ALL 6 →

← REMOVE ALL 5

SAVE

CANCEL

Save it when you are finished.

## Exercise 4 - Use the created groups in visualizer

### Chart type

- Stacked column

### Data

- Data Type : Indicator
- Indicator group: Immunization
- Indicator name: EPI - BCG Doses Given < 1 Results

### Period

- Last 12 months

### Organisation unit

- Lao PDR

Organisation unit group set

- the one you just made

You can now use your groups for selecting org units and your group sets as dimensions to disaggregate your data!

