

# DHIS 2 End-user Manual



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DHIS 2 Documentation Team

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1.	Getting started with DHIS 2 as end-user .....	1
1.1.	Getting started with DHIS 2 .....	1
1.2.	Opening DHIS 2 .....	1
1.3.	Logging in and out of the application .....	1
1.4.	Navigating the application .....	2
1.4.1.	The top menu - access to the modules .....	2
1.4.2.	Navigation inside modules .....	3
2.	Data entry .....	5
2.1.	Data entry with DHIS 2 .....	5
2.1.1.	Selecting the data entry form .....	5
2.1.2.	Entering data .....	6
2.1.3.	Editing and deleting data .....	7
2.1.4.	Validating data in the form .....	7
2.1.5.	Off-line data entry .....	7
2.1.6.	Multi-organisation unit data entry .....	8
3.	Using Data Quality functionality .....	9
3.1.	Overview of data quality checks .....	9
3.2.	Data quality checks .....	9
3.3.	Running Validation Rule Analysis .....	9
3.4.	Std Dev Outlier Analysis .....	11
3.5.	Min-Max Outlier Analysis .....	12
3.6.	Follow-Up Analysis .....	12
4.	Using reporting functionality .....	13
4.1.	Reporting functionality in DHIS 2 .....	13
4.2.	Using standard reports .....	13
4.3.	Using dataset reports .....	14
4.4.	Using resources .....	15
4.5.	Using reporting rate summary .....	15
4.6.	Using organisation unit distribution reports .....	16
5.	Using the Pivot Table app .....	17
5.1.	Pivot table overview .....	17
5.2.	Create a pivot table .....	17
5.2.1.	Select dimension items .....	17
5.2.2.	Modify pivot table layout .....	19
5.3.	Change the display of your table .....	21
5.4.	Manage pivot table favorites .....	22
5.4.1.	Save a pivot table as a favorite .....	22
5.4.2.	Open a favorite .....	22
5.4.3.	Rename a favorite .....	22
5.4.4.	Share an interpretation of a favorite .....	22
5.4.5.	Modify sharing settings for a favorite .....	22
5.4.6.	Create a link to a favorite .....	23
5.4.7.	Delete a favorite .....	23
5.5.	Download data from a pivot table .....	23
5.5.1.	Download table layout data format .....	23
5.5.2.	Download plain data source format .....	23
5.5.3.	Download a CSV format without rendering data in the web browser .....	24
5.6.	Embed a pivot table in an external web page .....	24
5.7.	Visualize a pivot table data as a chart or a map .....	25
5.7.1.	Open a pivot table as a chart .....	25
5.7.2.	Open a pivot table selection as a chart .....	25
5.7.3.	Open a pivot table as a map .....	25
5.7.4.	Open a pivot table selection as a map .....	25
5.8.	Constraints and tips .....	26
6.	Using the Data Visualizer app .....	27
6.1.	Data Visualizer overview .....	27
6.2.	Create a chart .....	27

6.3. Select a chart type .....	27
6.4. Select dimension items .....	28
6.4.1. Select indicators .....	29
6.4.2. Select data elements .....	29
6.4.3. Select reporting rates .....	29
6.4.4. Select fixed and relative periods .....	29
6.4.5. Select organisation units .....	30
6.4.6. Select additional dimension items .....	30
6.5. Select series, category and filter .....	31
6.6. Change the display of your chart .....	33
6.7. Download a chart as an image or a PDF .....	34
6.8. Download chart data source .....	34
6.9. Manage chart favorites .....	36
6.9.1. Save a chart as a favorite .....	36
6.9.2. Open a favorite .....	36
6.9.3. Rename a favorite .....	36
6.9.4. Overwrite a favorite .....	37
6.9.5. Share a chart interpretation .....	37
6.9.6. Modify sharing settings for a favorite .....	37
6.9.7. Delete a favorite .....	38
6.10. Embed charts in any web page .....	38
6.11. Visualize a chart as a pivot table or a map .....	38
6.11.1. Open a chart as a pivot table .....	38
6.11.2. Open a chart as a map .....	38
7. Using the GIS app .....	39
7.1. GIS overview .....	39
7.2. Create a new thematic map .....	39
7.3. Manage event layer .....	40
7.3.1. Create or modify event layer .....	40
7.3.2. Turn off cluster .....	41
7.3.3. Modify cluster style .....	41
7.3.4. Modify information in event pop-up windows .....	41
7.3.5. Clear event layer .....	42
7.4. Manage facility layer .....	42
7.4.1. Create or modify facility layer .....	42
7.4.2. Search for an organisation unit .....	42
7.4.3. Clear facility layer .....	43
7.5. Manage boundary layer .....	43
7.5.1. Create or modify boundary layer .....	43
7.5.2. Search for an organisation unit .....	43
7.5.3. Navigate between organisation hierarchies .....	44
7.5.4. Clear boundary layer .....	44
7.6. Manage thematic layer 1- 4 .....	44
7.6.1. Create or modify a thematic layer .....	45
7.6.2. Filter values in a thematic layer .....	45
7.6.3. Search for an organisation unit .....	45
7.6.4. Navigate between organisation hierarchies .....	45
7.6.5. Clear thematic layer .....	46
7.7. Manage facilities in a layer .....	46
7.7.1. Relocate a facility .....	46
7.7.2. Swap longitude and latitude of a facility .....	46
7.7.3. Display facility information .....	46
7.8. Manage Earth Engine layer .....	46
7.8.1. Create or modify an Earth Engine layer .....	47
7.9. Manage map favorites .....	47
7.9.1. Save a map as a favorite .....	48
7.9.2. Open a favorite .....	48

7.9.3. Rename a favorite .....	48
7.9.4. Overwrite a favorite .....	48
7.9.5. Share a map interpretation .....	48
7.9.6. Modify sharing settings for a favorite .....	49
7.9.7. Delete a favorite .....	49
7.10. Manage map legend sets .....	49
7.10.1. Create a new legend set .....	50
7.10.2. Change a legend set .....	50
7.10.3. Delete a legend set .....	50
7.10.4. Assign a legend set to indicator or data element .....	51
7.11. Download a map as image .....	51
7.12. Embed a map in an external web page .....	51
7.13. Using place search .....	51
7.14. Measure distance and area in a map .....	52
7.15. Visualize a map as a pivot table or a chart .....	52
7.15.1. Open a map as a chart .....	52
7.15.2. Open a map as a pivot table .....	52
8. Dashboards .....	53
8.1. Setting up the dashboard .....	53
8.2. Managing the Dashboard .....	54
8.3. Dashboard Sharing .....	54
8.4. Messages and feedback messages .....	55
8.4.1. Create and read messages .....	56
8.4.2. Create a feedback message .....	56
8.4.3. Manage feedback messages .....	56
9. User profiles .....	59
9.1. User settings .....	59
9.2. User profile .....	59



# Chapter 1. Getting started with DHIS 2 as end-user

## 1.1. Getting started with DHIS 2

After reading this chapter you will be able to understand:

- How to open the DHIS 2
- How to log in and out of the application
- How to navigate the application and access its features

## 1.2. Opening DHIS 2

The DHIS 2 is a web-based application and will be available in an Internet browser when you have Internet connection.

Open a browser, we recommend Google Chrome (download installer here: <http://www.google.com/chrome>) and in the address field you type in the URL of the DHIS 2 (ask your technical support team for this).

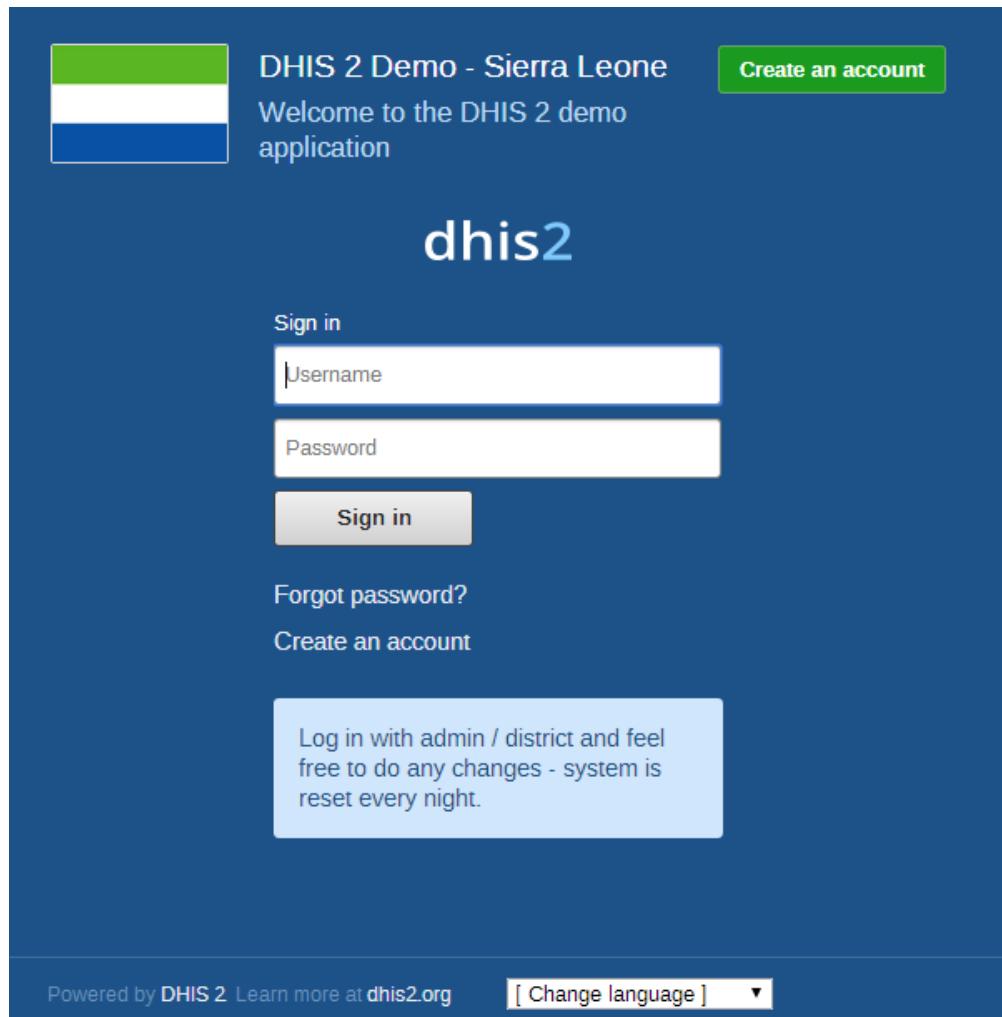
You will then see the login screen of DHIS 2.

## 1.3. Logging in and out of the application

Once you can see the blue login screen of DHIS 2 you must enter your user name and password to log in to the application. If the login is not successful you will be notified that the username or password is incorrect and asked to re-enter these credentials. Once you have successfully logged in you will see the DHIS Dashboard where you can immediately monitor the latest data in your selected charts and access your favourite DHIS sites (reports, maps etc).

When you have finished your DHIS 2 session we recommend that you log out before closing the browser. Use the log out link in the upper right corner and you will be returned to the log in screen.

## Login screen



## 1.4. Navigating the application

The DHIS 2 has two menu systems; the top menu, which houses areas for apps and the user profile, and the left side menu inside most modules to navigate between features inside each module.

The DHIS 2 symbol in the top left corner is a fast link to the user-defined start page, the home page. Often this is set to the dashboard module.

### 1.4.1. The top menu - access to the modules

DHIS 2 consists of various apps (major components) which each have specific features, such as data entry, reporting, dashboard. You can access these from the top menu under Apps. Under profile, details relating to your user account, general user settings and information about DHIS 2 can be found.

To move to a new app you need to move the mouse pointer to one of the top menu items, Apps or Profile, a sub-menu with additional items will then appear. Click on the item you would like to open.

## 1.4.2. Navigation inside modules

When you open most of the apps you will see the app main page which lists the major features in the middle of the screen with a short description. Simply click on the feature you would like to open.

When inside an app you will always see the left side menu with links to its features. Use this menu to jump between features. This is particular useful for navigation within the app.

The data entry and dashboard modules do not have a menu system as they only contain one feature, everything is in one page, so there is no need for a menu there.

### Menu system

Icon	Name	Description
	<b>Standard Report</b>	View and add reports based on the JasperReports library. These can be based on report tables and can be designed in iReport.
	<b>Reporting Rate Summary</b>	Browse the reporting rates of data sets by organisation unit and period based on various criteria for submission.
	<b>Organisation Unit Distribution Report</b>	Browse the organisation unit distribution report based on the organisation unit group sets and its groups.
	<b>Data Approval</b>	View data and manage data approval by approving or unapproving, accepting or unaccepting data.
	<b>Report Table</b>	Add and generate report tables. Report tables are customizable database tables which can be used as basis for reports.



# Chapter 2. Data entry

## 2.1. Data entry with DHIS 2

To open the data entry window hover over the Apps button. A drop down menu will appear listing the apps provided by DHIS 2. Click on the Data Entry option.

The data entry module is where aggregated data is manually registered in the DHIS 2 database. Data is registered for an organisation unit, a period, and a set of data elements (data set) at a time. A data set often corresponds to a paper-based data collection tool.

### 2.1.1. Selecting the data entry form

To start entering data the first step is to open the correct form by following these steps:

1. Locate the orgunit you want to register data for in the tree menu to the left. Expand and close branches by clicking on the +/- symbols. A quick way to find an orgunit is to use the search box just above the tree (the green symbol), but you need to write in the full name to get a match.
2. Select a data set from the dropdown list of data sets available to your selected orgunit.
3. Select a period to register data for. The available periods are controlled by the period type of the data set (reporting frequency). You can jump a year back or forward by using the arrows above the period.

By now you should see the data entry form. From a form design perspective, there are three types for forms: default forms, section forms and custom forms. If a custom form exists, it will be displayed, followed in order of precedence by a section form, and finally a default form.

Main data entry screen

Filter in section	Value
Accute Fiaccid Paralysis (Deaths < 5 yrs)	
Animal Bites - Rabid (Deaths < 5 yrs)	
Cholera (Deaths < 5 yrs)	
Dysentery (Deaths < 5 yrs)	
Louse Borne Typhus - Relapsing fever (Deaths < 5 yrs)	
Malaria (Deaths < 5 yrs)	
Measles (Deaths < 5 yrs)	
Meningitis (Deaths < 5 yrs)	
Plague (Deaths < 5 yrs)	
Rabies (Deaths < 5 yrs)	
Tetanus Neonatal (Deaths < 5 yrs)	
Tetanus Other (Deaths < 5 yrs)	
Typhoid (Deaths < 5 yrs)	
Yellow Fever (Deaths < 5 yrs)	

Buttons at the bottom: Complete, Incomplete, Run validation.

## 2.1.2. Entering data

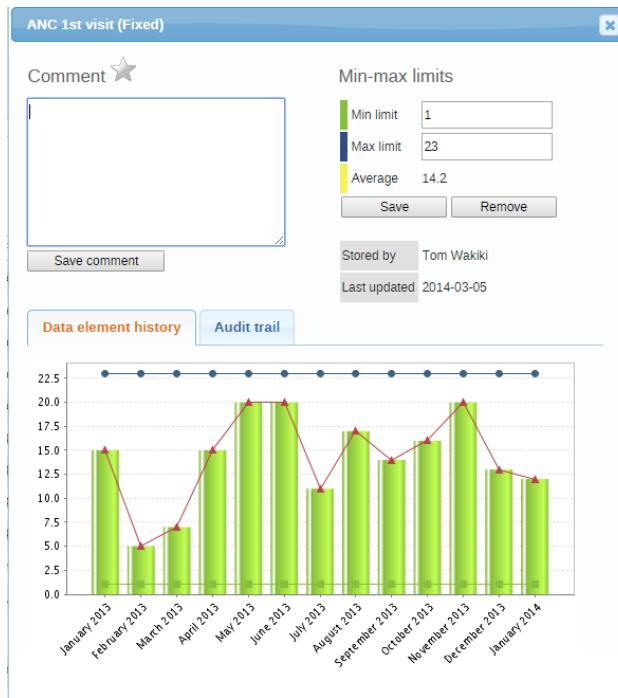
Start entering data by clicking inside the first field and type in the value. Move to the next field using the Tab button. Shift+Tab will take you back one step. You can also use the "up" and "down" arrow keys, as well as the Enter key, to navigate between the form cells. The values are saved immediately and do not require to be saved at a later stage. A green field indicates that the value has been saved in the system (on the server).

**Input validation:** If you type in an invalid value, e.g. a character in a field that only accepts numeric values you will get a pop-up that explains the problem and the field will be coloured yellow (not saved) until you have corrected the value. If you have defined a min/max range for the field (data element+organisation unit combination) a pop-up message will notify you when the value is out of range, and the value will remain unsaved until you have changed the value (or updated the range and then re-entered the value).

**Disabled fields:** If a field is disabled (grey) it means that the field can and should not be filled. The cursor will automatically jump to the next open field.

**Data history:** By double-clicking on any input field in the form a data history window opens showing the last 12 values registered for the current field (organisation unit+data element +categoryoptioncombo) in a bar chart. This window also shows the min and max range and allows for adjusting the range for the specific organisation unit and data element combination.

Data entry section form with history pop-up



**Follow Up:** In the data history window there is also a feature to tag or star a value. E.g. a suspicious value that needs further investigation can be kept in the system, but marked for Follow-Up. In the Data Quality module you can run a Follow-Up analysis and view all values marked for Follow-Up, and then later edit the values if proved incorrect.

**Audit trail:** The audit trail allows you to view other data values which have been entered prior to the current value. As an example, the following data element was changed from its original value to 120. The audit trail shows when the data value was altered along with which user made the changes.

Data element history		Audit trail	
On	Modified by	Value	Modification
2014-12-29 09:01	admin	120	Update
2014-12-29 09:00	admin	12	Update

### 2.1.3. Editing and deleting data

If you wish to enter data which has already been entered, simply replace the data entry value with the update values.

If you want to delete a data value completely, you should select the value of interest, and press "Delete" on your keyboard. If you enter a zero and the data element has been configured to not store zeros, the previous data value (i.e. the one you wish to modify) will not be overwritten with the new value. Therefore, it is better practice to delete the data value completely (waiting for the cell to turn green) and then to enter the new value.

### 2.1.4. Validating data in the form

When all the available values for the form has been filled in you can run a validation check on the data in the form. Click on the "Run Validation" button in the top right (at the beginning of the data entry page) or lower left (at the end of your data entry page) corner. All validation rules which involves data elements in the current form (dataset) will be run against the new data. Upon completion you will be presented with a list of violations or a simply a message that says "The data entry screen successfully passed validation". See the Data Quality chapter for information on how to define such validation rules.

When you have corrected any erroneous values and are done with the form the recommended practice is to click on the Complete button below the form to register the form as complete. This information is used when generating completeness reports for district, county, province or the national level.

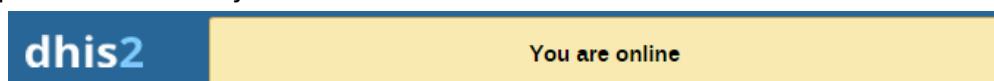
#### Data entry validation result

Validation			
Validation Result <span style="color: orange;">⚠</span>			
The data entry screen has the following validation errors, please correct			
Validation rule	Left side	Operator	Right side
Slept under LLIN at measles (fixed < 1y) cannot be higher than measles doses given (fixed < 1y)	7.0	<=	4.0

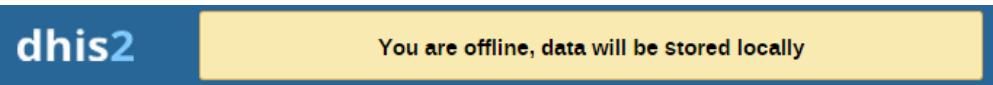
### 2.1.5. Off-line data entry

The data entry module will function even if during data entry the Internet connectivity is not stable. In order to utilize this functionality, you must login to the server while Internet connectivity is present, but if during data entry, the Internet link between your computer and the server becomes unstable, data can still be entered into the data entry form, saved to your local computer, and then pushed to the server once the Internet connectivity has been restored. Data can be entered and stored locally while being off-line and uploaded to the central server when on-line. This means that the on-line deployment strategy will be more viable in areas with unstable Internet connectivity. The total bandwidth usage is greatly reduced since forms no longer are retrieved from the server for each rendering.

When the server is able to be reached through the Internet connection, a message is displayed at the top of the data entry screen below.



If the Internet connection should disconnect for some reason during the data entry process, this will be detected by the application, and you will be informed that your data will be stored locally.



Data entry can proceed as normal. Once you have entered all of the necessary data, and the application detects that the server is back on-line, you will be informed that you have data which needs to be synchronized with the server.



Once the data has successfully synchronized with the server, you will receive a confirmation message that the data has been successfully uploaded to the server.



## 2.1.6. Multi-organisation unit data entry

In some scenarios it is beneficial to enter data for multiple organisation units in the same data entry form, for instance if there are few data elements in the form and a huge number of organisation units in the hierarchy. In that case you can enable multi-organisation unit data entry by going to "System settings" and tick the "Enable multi organisation unit forms" setting. Then, in data entry, select the organisation unit immediately above the organisation unit you want to enter for in the hierarchy. Note that this only work for the "section" based forms. You should now see the data elements appearing as columns and the organisation units appearing as rows in the form. Note that the data entry forms should still be assigned to the facilities that you actually enter data for, i.e. the organisation units now appearing in the form.

# Chapter 3. Using Data Quality functionality

The data quality module provides means to improve the accuracy and reliability of the data in the system. This can be done through validation rules and various statistical checks. All the functionality described below can be accessed from the left side menu in the Services->Data Quality module.

## 3.1. Overview of data quality checks

Ensuring data quality is a key concern in building an effective HMIS. Data quality has different dimensions including:

- Correctness: Data should be within the normal range for data collected at that facility. There should be no gross discrepancies when compared with data from related data elements.
- Completeness: Data for all data elements for all health facilities should have been submitted.
- Consistency: Data should be consistent with data entered during earlier months and years while allowing for changes with reorganization, increased work load, etc. and consistent with other similar facilities.
- Timeliness: All data from all reporting orgunits should be submitted at the appointed time.

## 3.2. Data quality checks

Data quality checking can be done through various means, including:

1. At point of data entry, the software can check the data entered to see if it falls within the min-max ranges of that data element (based on all previous data registered).
2. Defining various validation rules, which can be run once the user has finished data entry. The user can also check the entered data for a particular period and Organization Unit(s) against the validation rules, and display the violations for these validation rules.
3. Analysis of data sets, i.e. examining gaps in data.
4. Data triangulation which is comparing the same data or indicator from different sources.

## 3.3. Running Validation Rule Analysis

You can access Validation Rule Analysis from the Apps->Data Quality menu.

A validation rule is based on an expression which defines a relationship between a number of data elements. The expression has a left side and a right side and an operator which defines whether the former must be less than, equal to or greater than the latter. The expression forms a condition which should assert that certain logical criteria are met. For instance, a validation rule could assert that the total number of vaccines given to infants is less than or equal to the total number of infants.

The validation rule analysis function will test validation rules against the data registered in the system. Validation violations will be reported in cases where the condition defined through the validation rule expression is not met, i.e. the condition is false.

Selecting what data to validate:

First, enter a start date and an end date for which data should be included in the analysis. The date picker widget may be used to select dates.

Second, choose between including all validation rules or all validation rules from a single group.

Third, choose between including the selected organisation unit only or the selected organisation unit with all children in the analysis. Fourth, select the organisation unit. Finally, click validate.

### Run validation rule selection

### Validation results:

The analysis process will run for a while depending on the amount of data that is being analysed. If there were no violations of the validation rules a message saying validation passed successfully is displayed.

If validation violations were found, they will be presented in a list. The organisation unit, period, left side description and value, operator, and right side value and description for each validation violation are displayed.

The show details icon can be clicked in order to get more information about a validation violation. This will open a popup screen that provides information about the data elements included in the validation rules and their corresponding data values. This information can be used in order to fix incorrect data.

The validation violations can be exported to a PDF document by clicking on the Download as PDF button, and to a Microsoft Excel workbook by clicking on the Download as Excel button.

### Run validation rule results

Organisation unit	Period	Importance	Validation Rule	Value	Operator	Value	Details
Baoma Station CHP	September 2015	Medium	Injectable Antibiotics balance = ordered quantity is lower than the average consumption for last 10 months. Please increase your order to an appropriate quantity.	20.0	>=	94.6	(i)
Baoma Station CHP	September 2015	Medium	ANC 3 cannot be higher than ANC 2	23.0	<=	11.0	(i)
Blamawo MCHP	September 2015	Medium	Injectable Antibiotics balance = ordered quantity is lower than the average consumption for last 10 months. Please increase your order to an appropriate quantity.	0.0	>=	156.2	(i)
Blamawo MCHP	September 2015	Medium	Slept under LLIN at measles (fixed < 1y) cannot be higher than measles doses given (fixed < 1y)	18.0	<=	6.0	(i)
Blamawo MCHP	September 2015	Medium	Exclusive breastfeeding at time of penta 3 (fixed < 1y) cannot be higher than penta 3 doses given (fixed < 1y)	7.0	<=	5.0	(i)
Blamawo MCHP	September 2015	Medium	Slept under LLIN at measles (outreach < 1y) cannot be higher than measles doses given (outreach < 1y)	16.0	<=	4.0	(i)
Blamawo MCHP	September 2015	Medium	Exclusive breastfeeding at time of penta 3 (outreach < 1y) cannot be higher than penta 3 doses given (outreach < 1y)	5.0	<=	3.0	(i)
Faabu CHP	September 2015	Medium	Injectable Antibiotics balance = ordered quantity is lower than the average consumption for last 10 months. Please increase your order to an appropriate quantity.	10.0	>=	69.2	(i)
Gerehun CHC	September 2015	Medium	Injectable Antibiotics balance = ordered quantity is lower than the average consumption for last 10 months. Please increase your order to an appropriate quantity.	46.0	>=	579.3	(i)
Golu MCHP	September 2015	Medium	ANC 2 cannot be higher than ANC 1	32.0	<=	13.0	(i)

### 3.4. Std Dev Outlier Analysis

You can access Outlier analysis from the Apps->Data Quality menu.

The standard deviation based outlier analysis provides a mechanism for revealing values that are numerically distant from the rest of the data. Outliers can occur by chance, but they often indicate a measurement error or a heavy-tailed distribution (leading to very high numbers). In the former case one wishes to discard them while in the latter case one should be cautious in using tools or interpretations that assume a normal distribution. The analysis is based on the standard normal distribution.

Select what data to analyse:

First, select the from and to date for the data to include in the analysis.

Second, select the data set from which to pick data elements from.

Third, select all or some of the data elements in the data set by double-clicking or marking them and clicking the add/remove buttons.

Fourth, select the parent organisation unit to use. All children of the organisation unit will be included.

Fifth, select the number of standard deviations. This refers to the number of standard deviations the data is allowed to deviate from the mean before it is classified as an outlier.

Outlier analysis rule selection

Analysis result:

The potential outlier values discovered will be presented in a list after the analysis process is finished. The data element, organisation unit, period, minimum value, actual value, and maximum value will be displayed for each outlier. The minimum and maximum values refer to the border values derived from the number of standard deviations selected for the analysis.

Each outlier value can be modified directly in the analysis result page. The value can be modified by clicking inside the corresponding field in the value column, entering a value and then navigate away from that field either by clicking tab or anywhere outside the field. The system will provide an alert if the value is still outside the defined minimum and maximum values, but the value will saved in any case. The field will have a red background color if the value is outside the range, and a green if inside.

Each outlier value can be marked for further follow-up by clicking the star icon.

### 3.5. Min-Max Outlier Analysis

The min-max value based outlier analysis provides a mechanism for revealing values that are outside the pre-defined minimum and maximum values. Minimum and maximum values can be custom defined or automatically defined by the system in the data administration module. See the section about Std dev outlier analysis for further details on usage.

### 3.6. Follow-Up Analysis

The follow-up analysis function will list all data values which are marked for follow-up. A data value can be marked for follow-up in the data entry module and in the other validation analysis variants in this module. As can be seen in the screen shot below, simply select an organisation unit from the tree. All data values with a follow-up status will be displayed here for the descendants of the selected organisation unit.

Follow-Up Analysis [?](#)

Select parent organisation unit

- Sierra Leone
- Bo
  - Badjia
  - Baoma
  - Bargbe
  - Bargbo
  - Bumpe Ngao
  - Gbo
  - Jaiama Bongor

10 values found

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Data element	▲ Organisation unit ▾	Period	Min	Value	Max	Mark
ART enrollment stage 1 (Male, <15y)	Ngelehun CHC	January 2014	1	12	23	
BCG doses given (Fixed, <1y)	Ngelehun CHC	July 2014	0	11	0	
Complicated deliveries in community live birth	Ngelehun CHC	January 2014	1	3	23	
Fully Immunized child (Fixed, >1y)	Ngelehun CHC	April 2014	1	4	11111	
LLITN given at ANC 1st (Fixed)	Ngelehun CHC	January 2014	5	90	70	
LLITN given at Penta3 (Fixed, <1y)	Ngelehun CHC	July 2014	0	233	0	
OPV1 doses given (Outreach, <1y)	Ngelehun CHC	June 2014	0	3	0	
PCV1 doses given (Outreach, >1y)	Ngelehun CHC	July 2014	5	18	24	
Weight for age between middle and lower line (yellow) (Fixed, <1y)	Ngelehun CHC	July 2014	0	20	0	
Weight for height below 70 percent (Fixed, <1y)	Ngelehun CHC	July 2014	0	23	0	

# Chapter 4. Using reporting functionality

## 4.1. Reporting functionality in DHIS 2

The reporting module in DHIS 2 provides a range of reporting alternatives, and this section will explain how to use them to view and analyse data. Another section explains how to configure and set up the various reporting tools.

**Standard reports:** Standard reports are built on pivot tables, but are more advanced in its design allowing for more cosmetics and styles. These reports can also combine multiple tables and charts in the same report and be made available as one-click reports that are very easy to use. These reports can be downloaded as PDF files which makes them ideal for printing as well as sharing offline.

**Dataset reports:** Dataset reports are simply a printer friendly way to look at the data entry forms with either raw or aggregated data (over time or place). The design used in data entry will be used also in the data set reports. This will work only for data sets that has a custom data entry form set up.

**Dashboard:** The fastest way to view your data. The dashboard can display up to four updated charts as well as shortcuts to your favourite reports, report tables, and map views. Each user can configure a personal dashboard.

**Data Visualizer:** Do flexible visualizations of your data as charts and data tables. Any number of indicators and data elements can be included. Several chart types are available, such as column, stacked column, line, area and pie charts. The charts can be saved in order to be easily retrieved later and can also be put on your personal dashboard. Charts can be downloaded as image and PDF files to your local computer.

**Orgunit distribution reports:** These reports are generated off the orgunit group set information and can show what types (and how many of each type) of health facilities that are located in a given area (any level in the hierarchy). These reports are automatically generated and display the information in both tables and charts, and downloads in PDF, excel, and CSV are available.

**Reporting rate summary:** These reports provide a nice overview of how many facilities that have submitted their data for a given dataset and period. Here you can get both the counts and the percentages showing the reporting rate for all or single data sets.

**Web-based pivot tables:** The built in pivot table tool is a web-based tool to display indicator data by orgunit and period in a typical pivot table view and allows for pivoting manipulations of the tables. It allows for large amounts of data to be downloaded offline for analysis as well.

**GIS:** Present and analyse your data using thematic maps. You can view both data elements and indicators and given that you have coordinates for all your orgunits you can drill down the hierarchy and view maps for all levels from country polygons to facility points. See the separate chapter on GIS for more details. All the map information is built into DHIS 2 and all you need to do is to register coordinates for your organisation units and the maps will be available.

## 4.2. Using standard reports

You access the available reports by navigating to Apps->Reports. In the report menu in the left bar, click Standard Report. A list of all pre-defined reports will appear in the main window.

## Standard reports

The screenshot shows a 'Standard Report' interface. At the top, there is a search bar labeled 'Filter by name' with a 'Filter' and 'Clear' button, and a 'Add new' button. Below the search bar is a table with a header 'Name'. The first row in the table is highlighted in blue and contains the text 'ANC: 1st Visit Cumulative Chart'. A contextual menu is open over this row, listing options: 'Create', 'Sharing settings', 'Edit report' (with a checked checkbox), 'Remove', and 'Show details'. Other rows in the table include 'ANC: Coverages This Year', 'ANC: Overview Report (HTML-based)', 'ANC: Visits This Year', 'Feedback: Indicator Report', and 'Immunization: Overview (HTML-based)'. Below the table, there is a section titled 'Immunization: Raw data by district and chiefdom (SQL-based)' and another section titled 'Nutrition: Breastfeeding and malnutrition'. At the bottom of the interface, there are buttons for 'No. of pages: 1', 'No. of rows per page: 50', 'Jump to page: 1', and 'Go'. Navigation arrows ('<<', '<', '1', '>', '>>') are also present.

You run/view a report by clicking on the name of the report and then selecting "Create" from the contextual menu. If there are any pre-defined parameters, you will see a report parameter window where you must fill in the values needed for orgunit and/or reporting month, depending on what has been defined in the underlying report table(s). Click on "Get Report" when you are ready. The report will either appear directly in your browser or be available as a PDF file for download, depending on your browser settings for handling PDF files. You can save the file and keep it locally on your computer for later use.

## 4.3. Using dataset reports

Dataset reports are printer friendly views of the data entry screen filled with either raw or aggregated data. These are only available for data sets that have custom data entry forms and not for default or section forms.

You can access data set reports from Apps->Reports.

A Criteria window will appear where you fill in the details for your report:

Dataset: The data set you want to display.

Reporting period: The actual period you want data for. This can be aggregated as well as raw periods. This means that you can ask for a quarterly or annual report even though the data set is collected monthly. A data set's period type (collection frequency) is defined in data set maintenance. First select the period type (Monthly, Quarterly, Yearly etc.) in the drop down next to Prev and Next buttons, and then select one of the available periods from the dropdown list below. Use Prev and Next to jump one year back or forward.

Use data for selected unit only: Use this option if you want a report for an orgunit that has children, but only want the data collected directly for this unit and not the data collected by its children. If you want a typical aggregated report for an orgunit you do not want to tick this option.

Reporting Organisation unit: Here you select the orgunit you want the report for. This can be at any level in the hierarchy as the data will be aggregated up to this level automatically (if you do not tick the option above).

When you are done filling in the report criteria you click on "Generate". The report will appear as HTML in a printer-friendly format. Use the print and save as functions in the browser to print or save (as HTML) the report. You can also export the data set report in Excel and PDF formats.

## 4.4. Using resources

The resource tool allows you to upload both files from your local computer to the DHIS server and to add links to other resources on the Internet through URLs. If you want to share a direct link to the DHIS 2 resources you can right click on the "view resource" button and copy the link address.

To create a resource click on the "Add new" button. Enter a name for the resource, then choose between uploading a file or external URL. If you chose file upload click "Choose file" and select your file your local computer. If you chose URL enter the link to the resource on the Internet. Then click "Save".

## 4.5. Using reporting rate summary

Access the reporting rate summary from the Apps->Reports menu. Reporting rate summaries will show how many datasets (forms) that have been submitted by organisation unit and period. There are two methods available to calculate reporting rates (completeness):

- Based on complete data set registrations. A complete data set registration refers to a user marking a data entry form as complete, typically by clicking the complete button in the data entry screen, hereby indicating to the system that she considers the form to be complete. This is i.e. a subjective approach to calculating completeness.
- Based on compulsory data element: You can define any number of data elements in a data set to be compulsory. This implies that data values must be captured for all data elements which have been marked as compulsory in order for the data set to be considered complete. This is i.e. an objective approach to calculating completeness.

The reporting rate summary will for each row show a range of measures:

- Actual reports: Indicates the number of data entry complete registrations for the relevant data set.
- Expected reports: Indicates how many data entry complete registrations are expected. This number is based on the number of organisation units the relevant data set has been assigned to (enabled for data entry).
- Percent: The percentage of reports registered as complete based on the number expected.
- Reports on time: Same as actual reports, only reports registered as complete within the maximum number of days after the end of the reporting period. This number of days after reporting period can be defined per data set in the data set management.
- Percent on time: Same as percentage, only reports registered as complete on time used as numerator.

To run the report you can follow these steps:

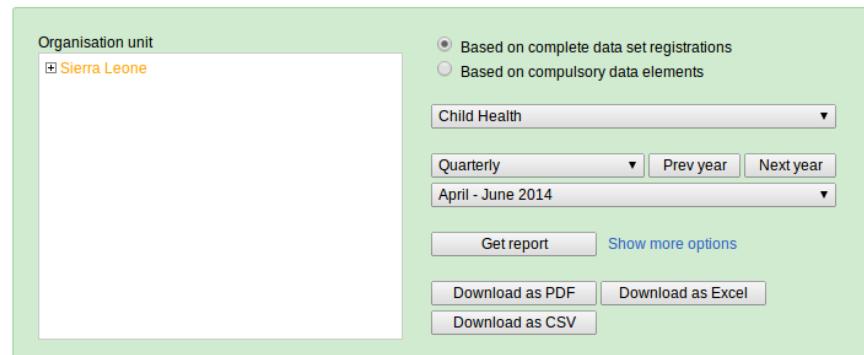
- Select an orgunit from the tree.
- Select one of the completeness methods to use to calculate the reporting rates.

Select all or one data set. All will give you a report with all data sets for the selected organisation unit. A single data set will give you a report with completeness for all children of the selected organisation unit.

- Select a period type and a period from the list of available periods for that period type. Move back/forward one year by using the prev/next buttons.
- The report will then be rendered. Change any of the parameters above and the report will be updated automatically.

## Reporting rate summary

### Reporting Rate Summary



The screenshot shows the 'Reporting Rate Summary' interface. On the left, there's a tree view of 'Organisation unit' with 'Sierra Leone' selected. To the right, there are two radio button options: 'Based on complete data set registrations' (selected) and 'Based on compulsory data elements'. Below these are dropdown menus for 'Child Health' (set to 'Quarterly') and date ranges ('April - June 2014'). Buttons for 'Get report' and 'Show more options' are at the bottom, along with download links for PDF, Excel, and CSV.

#### Sierra Leone - Child Health - Apr to Jun 2014

Name	Actual Reports	Expected Reports	Percent	Reports On Time	Percent On Time
Moyamba	270	282	95.7	270	95.7
Bombali	284	297	95.6	284	95.6
Kenema	348	366	95.1	348	95.1
Kailahun	217	231	93.9	217	93.9

## 4.6. Using organisation unit distribution reports

You can access the Orgunit Distribution reports from the left side menu in the Apps->Reports.

Orgunit distribution reports are reports that show how the orgunits are distributed on various properties like type and ownership, and by geographical areas.

The result can be presented in a table-based report or in a chart.

Running a report:

To run a report first select an orgunit in the upper left side orgunit tree. The report will be based on orgunits located under the selected orgunit. Then select the orgunit group set that you want to use, typically these are Type, Ownership, Rural/Urban, but can be any user-defined orgunit group set. Then you can click on either Get Report to get the table-based presentation or Get chart to get the same result in a chart. You can also download other format such as PDF, Excel and CSV.

Orgunit distribution report

### Organisation unit distribution report



The screenshot shows the 'Organisation unit distribution report' interface. On the left, there's a tree view of 'Report organisation unit' with 'Sierra Leone' selected. To the right, there's a dropdown menu for 'Group set' with 'Facility Ownership' selected. Buttons for 'Get report' and 'Get chart' are at the bottom, along with download links for PDF, Excel, and CSV. A red arrow points to the 'Facility Ownership' dropdown, and the text 'Select group set.' is overlaid in pink at the top right.

# Chapter 5. Using the Pivot Table app

## 5.1. Pivot table overview

With the Pivot Table app, you can create pivot tables based on all available data dimensions in DHIS 2. A pivot table is a dynamic tool for data analysis which lets you summarize and arrange data according to its dimensions. Examples of data dimensions in DHIS 2 are:

- data dimension itself (for example data elements, indicators and events)
- periods (representing the time period for which the data represents)
- organisation hierarchy (representing the geographical location of the data)

From these dimensions you can freely select dimension items to include in the pivot table. You can create additional dimensions in DHIS 2 with the group set functionality. This allows for different aggregation pathways, such as aggregation by "Partner" or facility type.

A pivot table can arrange data dimensions on columns, rows, and as filters. When you place a data dimension on columns, the pivot table will display one column per dimension item. If you place multiple data dimensions on columns, the pivot table displays one column for all combinations of the items in the selected dimensions. When you place a data dimension on rows, the pivot table displays one row per dimension item in a similar fashion. The dimensions you select as filters will not be included in the pivot table, but will aggregate and filter the table data based on the selected filter items.

## 5.2. Create a pivot table

1. In the Apps menu, click Pivot Table.
2. In the menu to the left, select the dimension items you want to analyse, for example data elements or indicators.
3. Click Layout and arrange the data dimensions as columns, rows and filters.

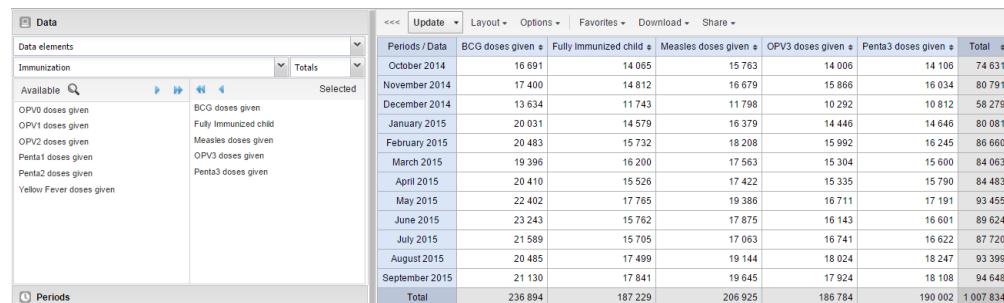
You can keep the default selection if you want.

4. Click Update.

Example 5.1. Pivot table based on the demo database.

In this example, indicators are listed as columns and periods as rows.

Example pivot table with data elements on columns and periods as rows.



The screenshot shows the Pivot Table app interface. On the left, there is a sidebar with sections for 'Data' (selected 'Immunization'), 'Available' (with a search icon), and 'Periods'. The main area is a pivot table with the following structure:

	BCG doses given	Fully Immunized child	Measles doses given	OPV3 doses given	Penta3 doses given	Total
October 2014	16 691	14 065	15 763	14 006	14 106	74 631
November 2014	17 400	14 812	16 679	15 866	16 034	80 791
December 2014	13 634	11 743	11 798	10 292	10 812	58 279
January 2015	20 031	14 579	16 379	14 446	14 646	80 081
February 2015	20 483	15 732	18 208	15 992	16 245	86 660
March 2015	19 396	16 200	17 563	15 304	15 600	84 063
April 2015	20 410	15 526	17 422	15 335	15 790	84 483
May 2015	22 402	17 765	19 386	16 711	17 191	93 455
June 2015	23 243	15 762	17 875	16 143	16 601	89 624
July 2015	21 589	15 705	17 063	16 741	16 622	87 720
August 2015	20 485	17 499	19 144	18 024	18 247	93 399
September 2015	21 130	17 841	19 645	17 924	18 108	94 648
Total	236 894	187 229	206 925	186 784	190 002	1 007 834

### 5.2.1. Select dimension items

The left menu lists sections for all available data dimensions. From each section you can select any number of dimension items. As an example, you can open the section for data elements

and select any number of data elements from the available list. You can select an item by marking it and clicking on the arrow in the section header or simply double-clicking on the item. Before you can use a data dimension in your pivot table you must at least select one dimension item. If you arrange a dimension as columns or rows but do not select any dimension items, the dimension is ignored.

You must choose at least one data dimension type to create a pivot table. The available types are described in this table:

Table 5.1. Data dimension types

Data dimension type	Definition	Examples
Indicators	An indicator is a calculated formula based on data elements.	Coverage of immunization across a specific district.
Data elements	Represents the phenomenon for which data has been captured.	Number of malaria cases; number of BCG doses given.
Data sets	A collection of data elements grouped for data collection. You can select : <ul style="list-style-type: none"><li>• Reporting rates (the percentage of actual reports compared to the expected number of reports)</li><li>• Number of actual reports</li><li>• Number of expected reports (based on organisation units where the data set and the reporting frequency has been assigned)</li></ul>	Reporting rates for immunization and morbidity forms.
Event data items	A data element that is part of a program representing events that have been captured.	Average weight and height for children in a nutrition program.
Program indicators	A calculated formula based on data elements in a program representing events.	Average BMI score for children in a nutrition program.

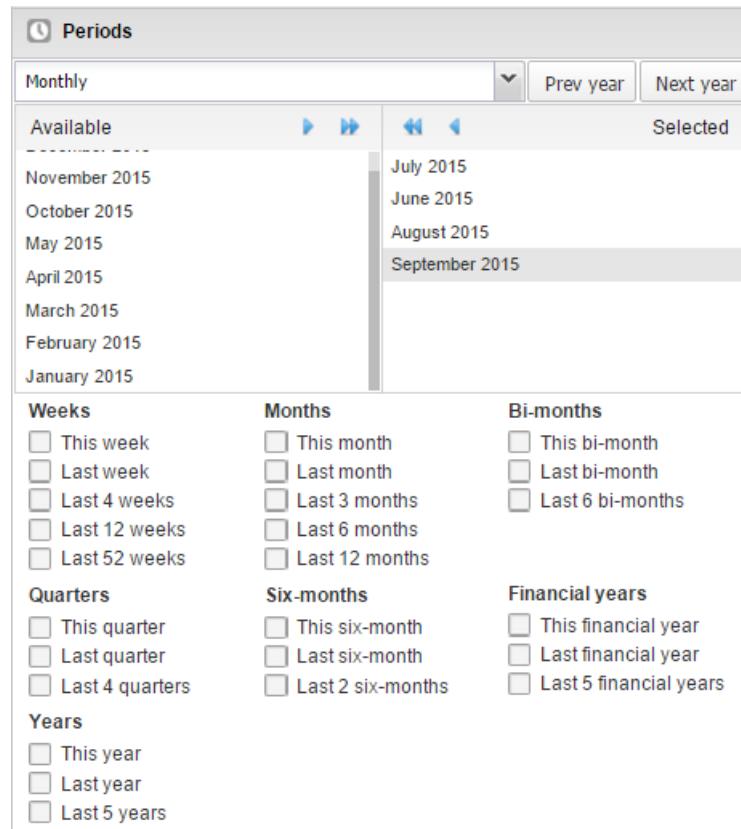
You can combine these dimensions to display for example aggregate data with reporting rates, or event data items together with program indicators, all in the same pivot tables. For the "data element" data dimension, you are also able to select "Totals" and "Details", which will allow you to view different category combination options together on the same pivot table.

For the period dimension you can choose between using fixed periods or relative periods. An example of a fixed period is "January 2012". To select fixed periods start by selecting a period type from the period type list. You can then select periods from the list of available periods.

Relative periods are periods relative to the current date. Examples of relative periods are "Last month", "Last 12 months", "Last 5 years". Relative periods can be selected by ticking the checkboxes next to each period. The main advantage of using relative periods is that when you save a pivot table favorite, it will stay updated with the latest data as time goes by without the need for constantly updating it.

For the organisation unit dimension you can select any number of organisation units from the hierarchy. To select all organisation units below a specific parent organisation unit, right click and click "Select all children". To manually select multiple organisation units, click and hold the Ctrl key while clicking on organisation units. You can tick "User org unit", "User sub-units" or "User sub-x2-units" in order to dynamically insert the organisation unit or units associated with your user account. This is useful when you save a pivot table favorite and want to share it with other users, as the organisation units linked with the other user's account will be used when viewing the favorite.

Selection of fixed and relative periods.



Dynamic dimensions can consist of organisation unit group sets, data element group sets, or category option group sets which have been configured with the type of "Disaggregation". Once the group sets have been configured, they will be come available in the pivot tables, and can be used as additional analysis dimensions, for instance to analyse aggregate data by Type of organisation unit or Implementing partner. Dynamic dimensions work the same as fixed dimensions.



### Tip

Some dynamic dimensions may contain many items. This can cause issues with certain browsers due to the length of the URL when many dimension members are selected. A special "All" check box is available for dynamic dimensions, which allows you to include all available dimensions implicitly in your pivot table, without specifying each and every dimension member.

## 5.2.2. Modify pivot table layout

After selecting data dimensions it is time to arrange your pivot table. Click "Layout" in the top menu to open the layout screen. In this screen you can position your data dimensions as table columns, rows or filters by clicking and dragging the dimensions from the dimensions list to the respective column, row and filter lists. You can set any number of dimensions in any of the lists.

For instance, you can click on "Organisation units" and drag it to the row list in order to position the organisation unit dimension as table rows. Note that indicators, data elements and data set reporting rates are part of the common "Data" dimension and will be displayed together in the pivot table. For instance, after selecting indicators and data elements in the left menu, you can drag "Organisation Unit" from the available dimensions list to the row dimension list in order to arrange them as rows in the pivot table.

The table layout screen.

Table layout		
Excluded dimensions	Report filter	Column dimensions
Assigned categories Facility Ownership Funding Agency Gender	Row dimensions Periods Organisation units	Data

Hide    Update

After you have set up your pivot table you can click "Update" to render your pivot table, or click "Hide" to hide the layout screen without any changes taking effect. Since we in our example have selected both the period and organisation unit dimension as rows, the pivot table will generate all combinations of the items in these dimensions and produce a table like this:

Pivot table where organisation units and periods are repeated on rows.

Data		Update Layout Options Favorites Download Share							
		Periods	Organisation units / Data	BCG doses given	Fully Immunized child	Measles doses given	OPV3 doses given	Penta3 doses given	Total
June 2015	Bo	2 405	1 427	1 512	1 535	1 544	8 423		
	Bombali	1 585	1 168	1 228	1 183	1 200	6 364		
	Bonthe	779	472	515	541	534	2 841		
July 2015	Bo	4 769	3 067	3 255	3 259	3 278	17 628		
	Bombali	2 255	1 351	1 382	1 559	1 492	8 039		
	Bonthe	1 438	1 219	1 252	1 300	1 303	6 512		
August 2015	Bo	650	597	623	593	560	3 023		
	Bombali	4 343	3 167	3 257	3 452	3 355	17 574		
	Bonthe	2 283	2 092	2 148	2 127	2 073	10 723		
September 2015	Bo	1 613	1 255	1 332	1 318	1 318	6 836		
	Bombali	792	621	650	641	667	3 371		
	Bonthe	4 688	3 968	4 130	4 086	4 058	20 930		
Total	Bo	2 392	1 508	2 067	1 732	1 737	9 436		
	Bombali	1 526	1 344	1 432	1 337	1 403	7 042		
	Bonthe	615	792	684	622	651	3 364		
		4 533	3 644	4 183	3 691	3 791	19 842		
		18 333	13 846	14 825	14 488	14 482	75 974		

### 5.3. Change the display of your table

1. Click Options.
2. Set the options as required.

Table 5.2. Table options

Option	Description
Show column totals	Displays total values in the table for each row and column, as well as a grand total for all values in the table.
Show row totals	
Show column sub-totals	Displays subtotals in the table for each dimension. In the screenshot above, notice how subtotals are generated for each of the periods in the period dimension. If you only select one dimension, subtotals will be hidden for those columns or rows. This is because the values will be equal to the subtotals.
Show row sub-totals	
Show dimension labels	Shows the dimension names as part of the pivot tables.
Hide empty rows	Hides empty rows from the table, which is useful when looking at large tables where a big part of the dimension items do not have data in order to keep the table more readable.
Skip rounding	Skips the rounding of data values, offering the full precision of data values. Can be useful for finance data where the full dollar amount is required.
Aggregation type	The default aggregation operator can be over-ridden here, by selecting a different aggregation operator. Some of the aggregation types are Count, Min and Max.
Show hierarchy	Shows the name of all ancestors for organisation units, for example "Sierra Leone / Bombali / Tamabaka / Sanya CHP" for Sanya CHP. The organisation units are then sorted alphabetically which will order the organisation units perfectly according to the hierarchy.
Include only completed events	Includes only completed events in the aggregation process. This is useful for example to exclude partial events in indicator calculations.
Display density	Controls the size of the cells in the table. You can set it to "comfortable", "normal" and "compact".  The "compact" option is handy in order to fit large tables into the browser screen.
Font size	Controls the size of the table text font. Can be set to "large", "normal" and "small".
Digit group separator	Controls which character to separate groups of digits or "thousands". Can be set to "comma", "space" and "none".
Legend set	Shows a colour indicator next to the values. Currently the GIS legend sets are being used.

3. Click Update.

## 5.4. Manage pivot table favorites

### 5.4.1. Save a pivot table as a favorite

To save a pivot table as a favorite:

1. Click Favorites > Save as.
2. In the text field, enter the name you want to give your pivot table.
3. Click Save.

### 5.4.2. Open a favorite

1. Click Favorites > Open.
2. Find and click the favorite you want to open. You can either use Prev and Next or the search field to find a saved favorite.

### 5.4.3. Rename a favorite

1. Click Favorites > Rename.
2. In the text field, enter the new name you want to give your pivot table.
3. Click Rename.

### 5.4.4. Share an interpretation of a favorite

For certain analysis-related resources in DHIS 2, you can share a data interpretation. An interpretation is a link to the relevant resource with a description of the data.

To create an interpretation of a pivot table and share it with all users of the system:

1. Click Favorites > Write interpretation.
2. In the text field, type a comment, question or interpretation.
3. Click Share.

You can see the interpretation on the Dashboard.

### 5.4.5. Modify sharing settings for a favorite

After you have created a pivot table and saved it as a favorite, you can share the favorite with everyone or a user group:

1. Click Favorites > Share.
2. In the text field, enter the name of the user group you want to share your favorite with and click the + icon.

The chosen user group is added to the list of recipients.

Repeat the step to add more user groups.

3. If you want to allow external access, select the corresponding box.
4. For each user group, choose an access setting. The options are:
  - None
  - Can view
  - Can edit and view
5. Click Save.

## 5.4.6. Create a link to a favorite

1. Click Favorites > Get link.
2. Click the type of link you need.
  - Open in this app: Provides a URL for the favorite. You can use this link to share the favorite with other users or colleagues via email or chat.
  - Open in web api: Provides a URL of the API resource. By default this is a HTML resource, but you can modify the suffix of ".html" to ".json" or ".csv". Other data types are available. This option is most useful when you need an API link to the pivot table resource. See the DHIS 2 developers guide for details about the different types which are available.

## 5.4.7. Delete a favorite

1. Click Favorites > Delete.
2. Click Delete to confirm your choice.

## 5.5. Download data from a pivot table

### 5.5.1. Download table layout data format

To download the data in the current pivot table:

1. Click Download.
2. Under Table layout, click the format you want to download: Microsoft Excel, CSV or HTML.

The data table will have one column per dimension and contain names of the dimension items.

 **Tip**

You can create a pivot table in Microsoft Excel from the downloaded Excel file.

### 5.5.2. Download plain data source format

You can download data in the current pivot table in JSON, XML, Excel, and CSV as plain data formats with different identification schemes (ID, Code, and Name). The data document uses identifiers of the dimension items and opens in a new browser window to display the URL of the request to the Web API in the address bar. This is useful for developers of apps and other client modules based on the DHIS 2 Web API or for those who require a plain data source, for instance for import into statistical packages.

To download plain data source formats:

1. Click Download.
2. Under Plain data source, click the format you want to download.

Table 5.3. Available formats

Format	Action	Description
JSON	Click JSON	<p>Downloads JSON format based on ID property.</p> <p>You can also download JSON format based on Code or Name property.</p>

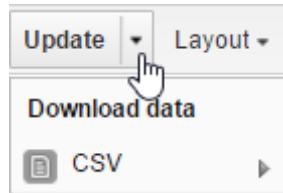
Format	Action	Description
XML	Click XML	Downloads XML format based on ID property.  You can also download XML format based on Code or Name property.
Microsoft Excel	Click Microsoft Excel	Downloads XML format based on ID property.  You can also download Microsoft Excel format based on Code or Name property.
CSV	Click CSV	Downloads CSV format based on ID property.  You can also download CSV format based on Code or Name property.
JRXML	Put the cursor on Advanced and click JRXML	Produces a template of a Jasper Report which can be further customized based on your exact needs and used as the basis for a standard report in DHIS 2.
Raw data SQL	Put the cursor on Advanced and click Raw data SQL	Provides the actual SQL statement used to generate the pivot table. You can use it as a data source in a Jasper report, or as the basis for an SQL view.

### 5.5.3. Download a CSV format without rendering data in the web browser

You can download data in CSV format directly without rendering the data in the web browser. This helps to reduce any constraints in the system settings that has been set with regards to the maximum number of analytic records. This lets you download much larger batches of data that you can use for later offline analysis.

To download data in CSV format without first rendering data in the web browser:

1. Click the arrow beside Update.



2. Click CSV to download the format based on ID property.

The file downloads to your computer.

 Tip

You can also download CSV format based on Code or Name property.

### 5.6. Embed a pivot table in an external web page

Certain analysis-related resources in DHIS 2, like pivot tables, charts and maps, can be embedded in any web page by using a plug-in. You will find more information about the plug-ins in the Web API chapter in the DHIS 2 Developer Manual.

To generate a HTML fragment that you can use to display the pivot table in an external web page:

1. Click Embed.
2. Click Select to highlight the HTML fragment.

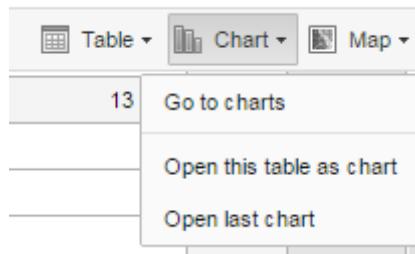
## 5.7. Visualize a pivot table data as a chart or a map

When you have made a pivot table you can switch between pivot table, chart and map visualization of your data.

### 5.7.1. Open a pivot table as a chart

1. Click Chart > Open this table as chart.

Your current pivot table opens as a chart.



### 5.7.2. Open a pivot table selection as a chart

If you want to visualize a small part of your pivot table as a chart you can click directly on a value in the table instead opening the whole table.

1. In the pivot table, click a value.

547	1 374	4 995	483
1 347	1 802	7 487	876
1 892	Open selection as chart		1 025
450	Open selection as map		279
463	885	3 385	542
1 700	1 643	6 852	587
28 157	27 208	124 892	9 660

2. To verify the selection, hold the cursor over Open selection as chart. The highlighted dimension headers in the table indicate what data will be visualized as a chart.
3. Click Open selection as chart.

### 5.7.3. Open a pivot table as a map

1. Click Chart > Open this table as map

Your current pivot table opens as a map.

### 5.7.4. Open a pivot table selection as a map

1. In the pivot table, click a value.

A menu displays.

2. Click Open selection as map.

Your selection opens as a map.

## 5.8. Constraints and tips

When selecting and arranging dimensions there are a few constraints that apply. All of these constraints are validated and the pivot table module will provide feedback if any constraint is violated.

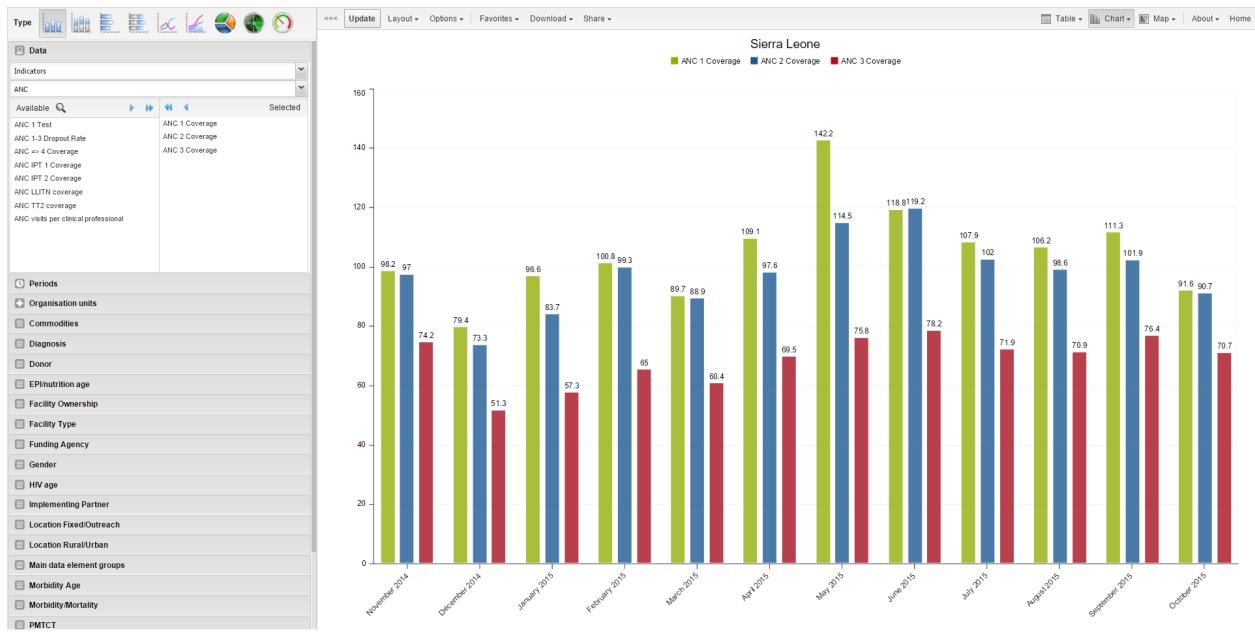
- At least one dimension must be selected on columns or rows.
- At least one period must be included in the pivot table.
- Data element group sets and reporting rates cannot appear in the same pivot table.
- A table cannot contain more than the maximum number of analytic records which have been specified through the system settings. The maximum number of records could also be constrained by the maximum RAM which is available to your browser. Consider making smaller tables instead of one table which displays all of your data elements and indicators together.

### Tip

Pivot tables in DHIS 2 are limited to a system set parameter, which controls the number of data values which can be returned. The reason for this is two fold. First, it would be easy to overwhelm the server with a very complicated request for a large pivot table. Second, the amount of data which is able to be rendered in a browser is fairly limited. If you are having problems with very large or complex tables, consider to try and reduce the number of items. It is usually more useful to have smaller, concise tables which are easier to understand and which address a particular analysis.

# Chapter 6. Using the Data Visualizer app

## 6.1. Data Visualizer overview



With the Data Visualizer app, you can select content, for example indicators, data elements, periods and organisation units, for an analysis. The app works well over poor Internet connections and generates charts in the web browser. Little data is transferred over the Internet.

- You can hide and show individual data series in the chart by clicking directly on the series label in the chart. They appear either at the top or to the right of the chart.
- You can click on the triple left-arrow button on the top centre menu. This collapses the left side menu and gives more space for the chart. You can get the menu back by clicking on the same button again.

## 6.2. Create a chart

1. In the Apps menu, click Data Visualizer.
2. Select a chart type.
3. In the menu to the left, select the meta data you want to analyse. You must select one or more elements from all of the three dimensions - data (indicators, data elements, reporting rates), periods (relative, fixed) and organisation units (units or groups).

Last 12 Months from the period dimension and the root organisation unit are selected by default.

4. Click Layout and arrange the dimensions.

You can keep the default selection if you want.

5. Click Update.

## 6.3. Select a chart type

The Data Visualizer app has nine different chart types, each with different characteristics. To select a chart type:

1. In Chart type, click the chart type you need.

Table 6.1. Chart types

Chart type	Description
Column chart	<p>Displays information as vertical rectangular columns with lengths proportional to the values they represent.</p> <p>Useful when you want to, for example, compare performance of different districts.</p>
Stacked column chart	<p>Displays information as vertical rectangular columns, where bars representing multiple categories are stacked on top of each other.</p> <p>Useful when you want to, for example, display trends or sums of related data elements.</p>
Bar chart	Same as column chart, only with horizontal bars.
Stacked bar chart	Same as stacked column chart, only with horizontal bars.
Line chart	<p>Displays information as a series of points connected by straight lines. Also referred to as time series.</p> <p>Useful when you want to, for example, visualize trends in indicator data over multiple time periods.</p>
Area chart	<p>Is based on line chart, with the space between the axis and the line filled with colors and the lines stacked on top of each other.</p> <p>Useful when you want to compare the trends of related indicators.</p>
Pie chart	<p>Circular chart divided into sectors (or slices).</p> <p>Useful when you want to, for example, visualize the proportion of data for individual data elements compared to the total sum of all data elements in the chart.</p>
Radar chart	Displays data on axes starting from the same point. Also known as spider chart.
Speedometer chart	Semi-circle chart which displays values out of 100 %. Also referred to as a gauge chart.

2. Click Update.

## 6.4. Select dimension items

A dimension refers to the elements which describe the data values in the system. There are three main dimensions in the system:

- Data: Includes data elements, indicators and datasets (reporting rates), describing the phenomena or event of the data.
- Periods: Describes when the event took place.
- Organisation units: Describes where the event took place.

The Data Visualizer app lets you use these dimensions completely flexible in terms of appearing as series, categories and filter.



## Note

You can select dimension items in different ways:

- Double-click a dimension item name.
- Highlight one or several dimension items and click the single-arrow.
- To select all dimension items in a list, click the double-arrow.
- To deselect dimension items, use the arrows or double-click the names in the Selected list.

### 6.4.1. Select indicators

The Data Visualizer app can display any number of indicators and data elements in a chart. You can select both indicators and data elements to appear together in the same chart, with their order of appearance the same as the order in which they are selected.

1. Click Data and select Indicators.
2. Select an indicator group.

The indicators in the selected group appear in the Available list.

3. Select one or several indicators by double-clicking the name.

The indicator moves to the Selected list.

### 6.4.2. Select data elements

The Data Visualizer app can display any number of indicators and data elements in a chart. You can select both indicators and data elements to appear together in the same chart, with their order of appearance the same as the order in which they are selected.

1. Click Data and select Data elements.
2. Select a data element group.

The data elements in the selected group appear in the Available list.

3. Select one or several data elements by double-clicking the name.

The data element moves to the Selected list.

### 6.4.3. Select reporting rates

The Data Visualizer app can display reporting rates in a chart, by itself or together with indicators and data elements. Reporting rates are defined by data sets.

1. Click Data and select Reporting rates.
- The reporting rates appear in the Available list.
2. Select one or several reporting rates by double-clicking the name.

The reporting rate moves to the Selected list.

### 6.4.4. Select fixed and relative periods

1. Click Periods.
2. Select one or several periods.

You can combine fixed periods and relative periods in the same chart. Overlapping periods are filtered so that they only appear once.

- Fixed periods: In the Select period type box, select a period type. You can select any number of fixed periods from any period type.
- Relative periods: In the lower part of the Periods section, select as many relative periods as you like. The names are relative to the current date. This means that if the current month is March and you select Last month, the month of February is included in the chart.

#### 6.4.5. Select organisation units

1. Click Organisation units.
2. Click the gearbox icon.
3. Select a Selection mode and an organisation unit.

There are three different selection modes:

Table 6.2. Selection modes

Selection mode	Description
Select organisation units	<p>Lets you select the organisation units you want to appear in the chart from the organization tree.</p> <p>Select User org unit to disable the organisation unit tree and only select the organisation unit that is related to your profile.</p> <p>Select User sub-units to disable the organisation unit tree and only select the sub-units of the organisation unit that is related to your profile.</p> <p>Select User sub-x2-units to disable the organisation unit tree and only select organisation units two levels down from the organisation unit that is related to your profile.</p> <p>This functionality is useful for administrators to create a meaningful "system" favorite. With this option checked all users find their respective organisation unit when they open the favorite.</p>
Select levels	<p>Lets you select all organisation units at one or more levels, for example national or district level.</p> <p>You can also select the parent organisation unit in the tree, which makes it easy to select for example, all facilities inside one or more districts.</p>
Select groups	<p>Lets you select all organisation units inside one or several groups and parent organisation units at the same time, for example hospitals or chiefdoms.</p>

4. Click Update.

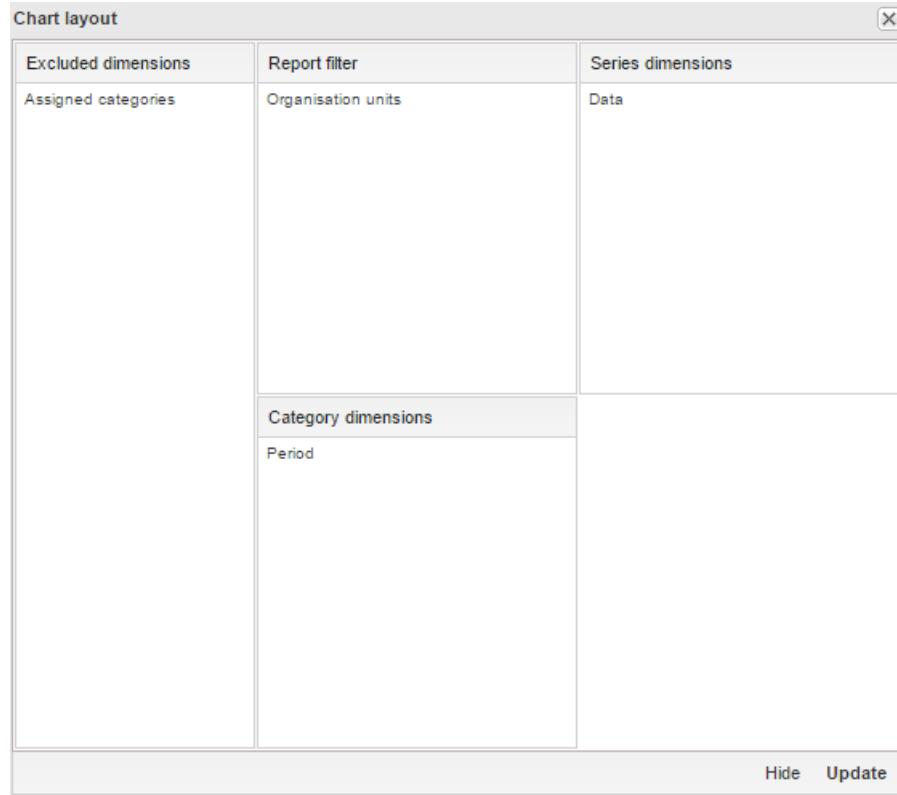
#### 6.4.6. Select additional dimension items

Depending on the settings for your organisation unit group sets and data element group sets, you can select additional dimension items from the left menu.

Here you can add dimension items such as age, sex, etc. without having to add them as detailed data element selections. This is useful when you want to separate these categories in your analysis.

The additional dimension items you select are available in Chart layout as dimensions.

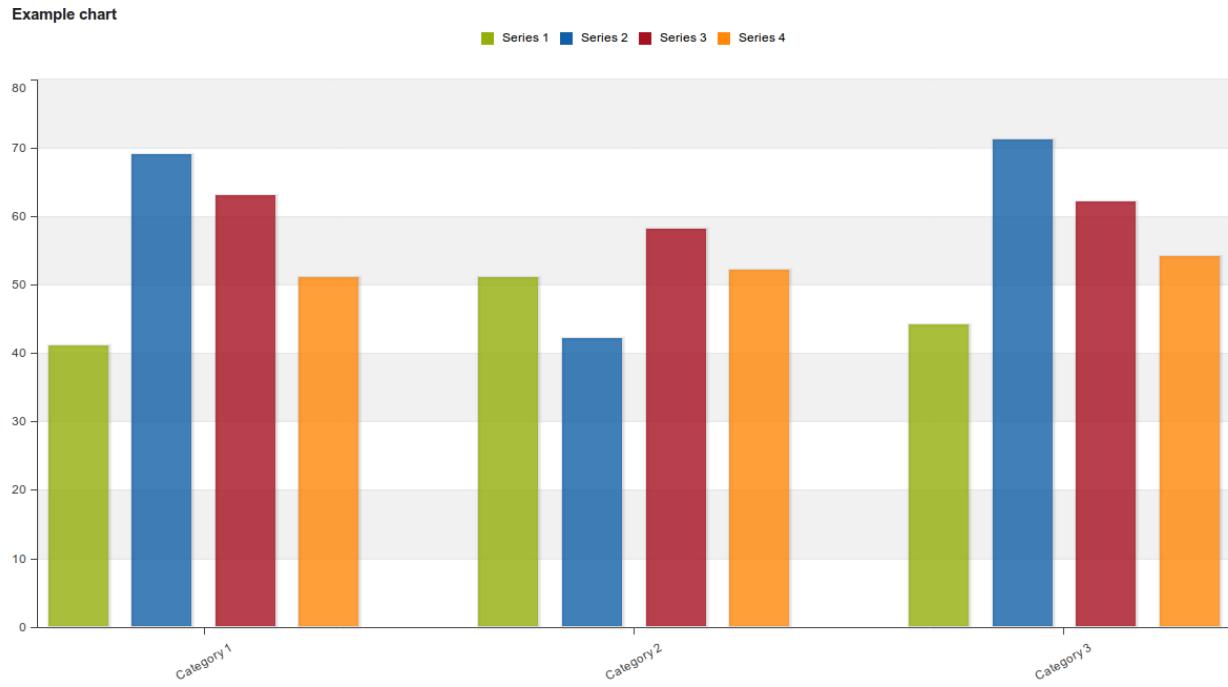
## 6.5. Select series, category and filter



You can define which dimension of the data you want to appear as series, category and filter.

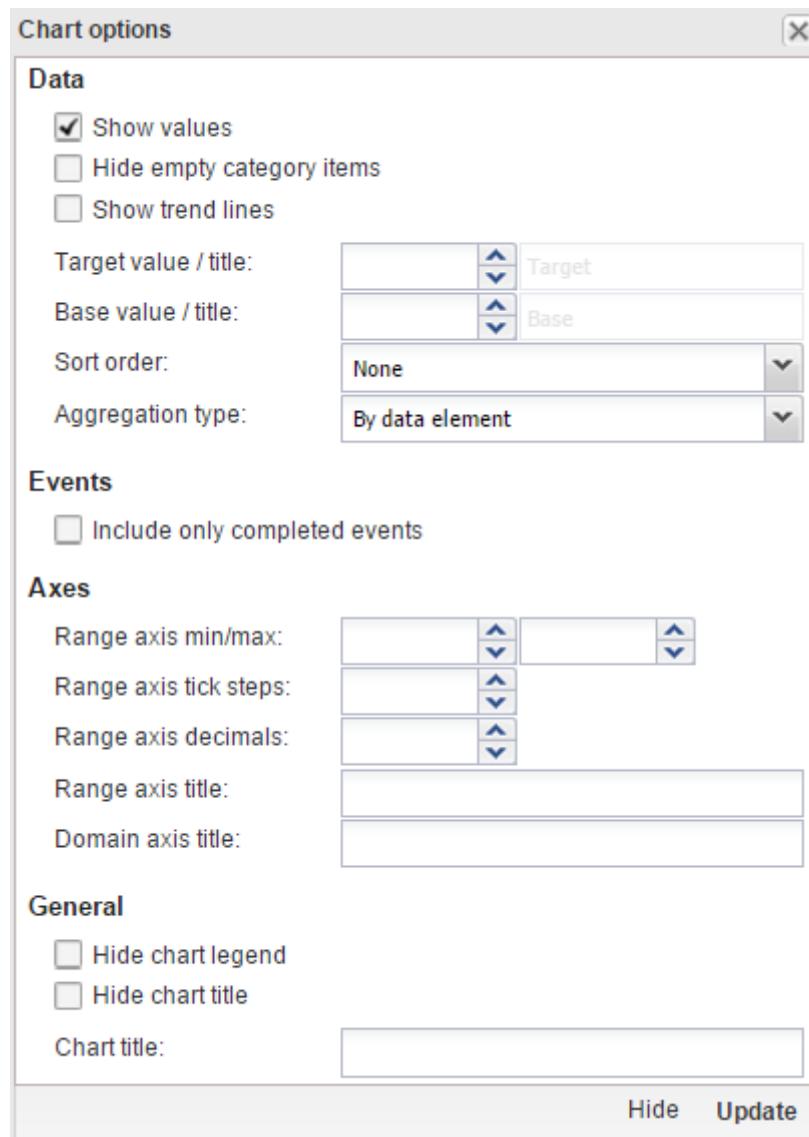
1. Click Layout.
2. Drag and drop the dimensions to the appropriate space. Only one dimension can be in each section.
3. Click Update.

### Example 6.1. Chart illustrating the concepts of series, categories and filter



- **Series:** A series is a set of continuous, related elements (for example periods or data elements) which you want to visualize in order to emphasize trends or relations in its data.
- **Categories:** A category is a set of elements (for example indicators or organisation units) for which you want to compare its data.
- **Filter:** Since most charts are two-dimensional, a filter must be used on the third dimension in order to use only a single element for the chart to become meaningful.

## 6.6. Change the display of your chart



1. Click Options.
2. Set the options as required.

Table 6.3. Chart options

Option	Description
Show values	Shows the values above the series in the chart.
Hide empty category items	Hides the category items with no data from the chart.
Show trend lines	Displays the trend line which visualizes how your data evolves over time. For example if performance is improving or deteriorating. Useful when periods are selected as category.
Target value / title:	Displays a horizontal line at the given domain value. Useful for example when you want to compare your performance to the current target.
Base value / title:	Displays a horizontal line at the given domain value. Useful for example when you want to visualize how your performance has evolved since the beginning of a process.

Option	Description
Sort order:	Allows you to sort the values on your chart from either low to high or high to low.
Aggregation type:	Defines how the data elements or indicators will be aggregated within the chart. Some of the aggregation types are By data element, Count, Min and Max.
Include only completed events	Includes only completed events in the aggregation process. This is useful when you want for example to exclude partial events in indicator calculations.
Range axis min/max:	Defines the maximum and minimum value which will be visible on the range axis.
Range axis tick steps:	Defines the number of ticks which will be visible on the range axis.
Range axis decimals:	Defines the number of decimals which will be used for range axis values.
Range axis title:	Type a title here to display a label next to the range axis (also referred to as the Y axis). Useful when you want to give context information to the chart, for example about the unit of measure.
Domain axis title:	Type a title here to display a label below the domain axis (also referred to as the X axis). Useful when you want to give context information to the chart, for example about the period type.
Hide chart legend	Hides the legend and leaves more room for the chart itself.
Hide chart title	Hides the title of your chart.
Chart title:	Type any title here to display it above the chart.

3. Click Update.

## 6.7. Download a chart as an image or a PDF

After you have created a chart you can download it to your local computer as an image or PDF file.

1. Click Download.
2. Under Graphics, click Image (.png) or PDF (.pdf).

The file is automatically downloaded to your computer. Now you can for example embed the image file into a text document as part of a report.

## 6.8. Download chart data source

You can download the data source behind a chart in JSON, XML, Excel, CSV, JXRML or Raw data SQL formats with different identification schemes (ID, Code, and Name). The data document uses identifiers of the dimension items and opens in a new browser window to display the URL of the request to the Web API in the address bar. This is useful for developers of apps and other client modules based on the DHIS 2 Web API or for those who require a plan data source, for instance for import into statistical packages.

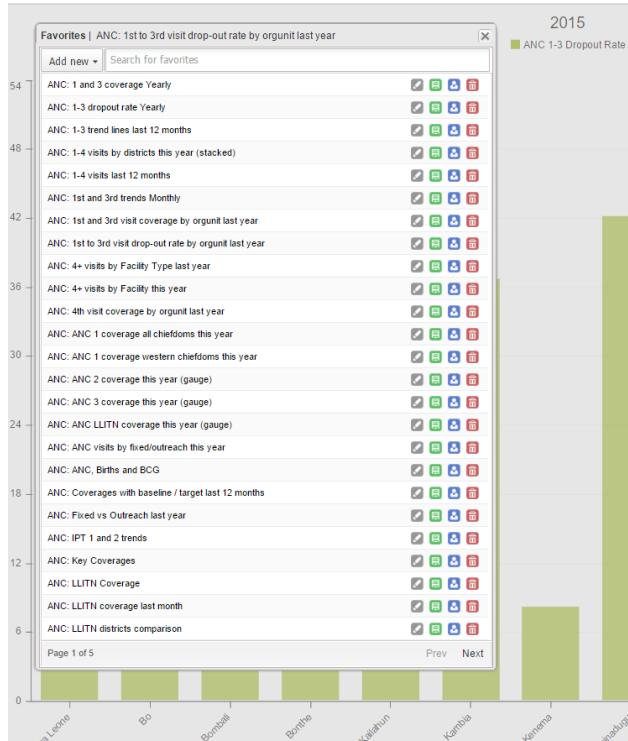
To download plain data source formats:

1. Click Download.
2. Under Plain data source, click the format you want to download.

Table 6.4. Available formats

Format	Action	Description
JSON	Click JSON	Downloads JSON format based on ID property.  You can also download JSON format based on Code or Name property.
XML	Click XML	Downloads XML format based on ID property.  You can also download XML format based on Code or Name property.
Microsoft Excel	Click Microsoft Excel	Downloads Microsoft Excel format based on ID property.  You can also download Microsoft Excel format based on Code or Name property.
CSV	Click CSV	Downloads CSV format based on ID property.  You can also download CSV format based on Code or Name property.
JRXML	Put the cursor on Advanced and click JRXML	Produces a template of a Jasper Report which can be further customized based on your exact needs and used as the basis for a standard report in DHIS 2.
Raw data SQL	Put the cursor on Advanced and click Raw data SQL	Provides the actual SQL statement used to generate the data visualization. You can use it as a data source in a Jasper report, or as the basis for a SQL view.

## 6.9. Manage chart favorites



Saving your charts as favorites makes it easy to restore them later. It also gives you the opportunity to share them with other users as an interpretation or display them on the dashboard.

### 6.9.1. Save a chart as a favorite

1. Click Favorites.

The Favorites dialog box opens.

2. Click Add new.

The Create new favorite dialog box opens.

3. In the text box, type the name you want to give your chart.

4. Click Create.

### 6.9.2. Open a favorite

1. Click Favorites.

The Favorites dialog box opens.

2. Find the favorite you want to open. You can either use Prev and Next or the search field to find a saved favorite. The list is filtered on every character that you enter.

3. Click the name.

### 6.9.3. Rename a favorite

1. Click Favorites.

The Favorites dialog box opens.

2. Find the favorite you want to rename.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the grey rename icon next to the favorite's name.

The Rename favorite dialog box favorite opens.

4. Type the new name and click Update.

#### 6.9.4. Overwrite a favorite

To save the current chart to an existing favorite (overwrite):

1. Click Favorites.

The Favorites dialog box opens.

2. Find the favorite you want to overwrite.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the green overwrite icon next to the favorite's name.

4. Click OK to confirm that you want to overwrite the favorite.

#### 6.9.5. Share a chart interpretation

For certain analysis-related resources in DHIS 2, you can share a data interpretation. An interpretation is a link to the relevant resource together with a text expressing some insight about the data.

To create an interpretation of a chart and share it with all users of the system:

1. Open or create a favorite chart.

2. Click Share > Write interpretation.

The Write interpretation dialog box opens.

3. In the text field, type a comment, question or interpretation.

4. Click Share.

The dialog box closes automatically. You can see the interpretation on the Dashboard.

#### 6.9.6. Modify sharing settings for a favorite

After you have created a chart and saved it as a favorite, you can share the favorite with everyone or a user group. To modify the sharing settings:

1. Click Favorites.

2. Find the favorite you want to share.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the blue share icon next to the favorite's name.

4. In the text box, enter the name of the user group you want to share your favorite with and click the + icon.

The chosen user group is added to the list of recipients.

Repeat the step to add more user groups.

5. If you want to allow external access, select the corresponding box.

6. For each user group, choose an access setting. The options are:

- None
- Can view
- Can edit and view

7. Click Save.

### 6.9.7. Delete a favorite

1. Click Favorites.

The Favorites dialog box opens.

2. Find the favorite you want to delete.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the red delete icon next to the favorite's name.

4. Click OK to confirm that you want to delete the favorite.

## 6.10. Embed charts in any web page

Certain analysis-related resources in DHIS 2, like pivot tables, charts and maps, can be embedded in any web page by using a plug-in. You will find more information about the plug-ins in the Web API chapter in the DHIS 2 Developer Manual.

To generate a HTML fragment that you can use to display the chart in an external web page:

1. Click Share > Embed in web page.

The Embed in web page window opens.

2. Click Select to highlight the HTML fragment.

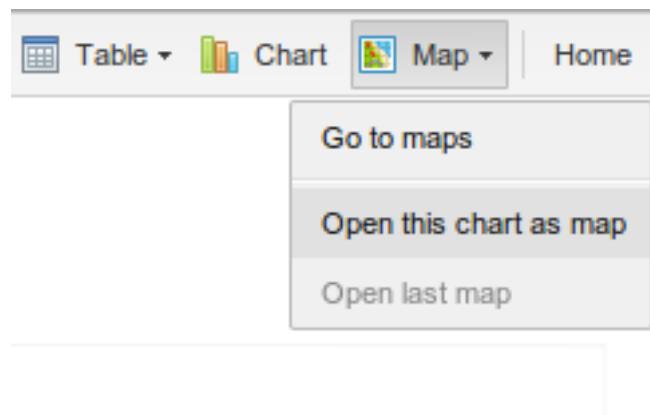
## 6.11. Visualize a chart as a pivot table or a map

When you have made a chart you can switch between pivot table, chart and map visualization of your data.

### 6.11.1. Open a chart as a pivot table

1. Click Chart > Open this chart as table.

Your current chart opens as a pivot table.



### 6.11.2. Open a chart as a map

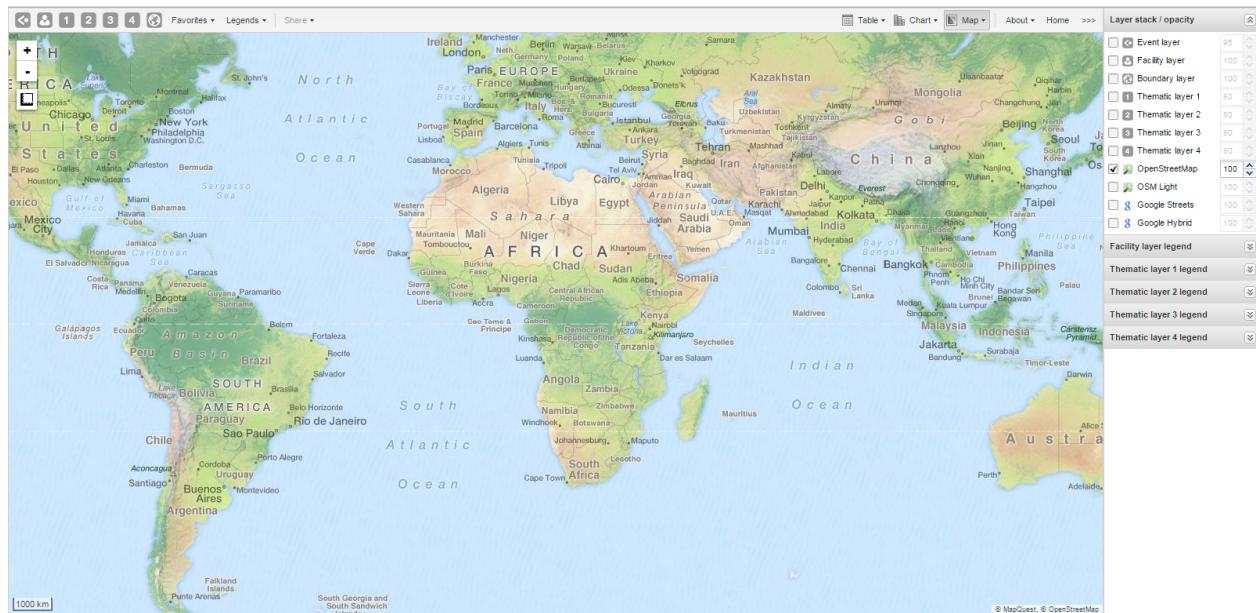
1. Click Chart > Open this chart as map.

Your current chart opens as a map.

# Chapter 7. Using the GIS app

## 7.1. GIS overview

### Main GIS screen



- The four icons in the left upper corner represent the vector layers and they are the starting point of the GIS app.
- In the top right corner you get an overview of the layers:
  - If you are online you will see Google Streets and Google Hybrid which can be used as background maps and layers. Switch between the two of them by checking the check box. The default base map is OpenStreetMap. To get a nice background map, select the OSM Light. By clearing a box you can hide the corresponding background completely.
  - If you want to see the background, but with reduced opacity, you can set the visibility to something lower than 100 % in the numberbox to the right.
  - The final four layers are the vector layers which you use for thematic mapping (explained in the next section). The panels below hold the map legends when you create a thematic map. A legend explains the link between values and colors on your map.
- Zoom to content automatically adjusts the zoom level and map center position to put the data on your map in focus.
- To get information for an event you can simply click on it. This opens a pop-up window which displays all available information for that event.
- The current longitude and latitude position of the mouse cursor is displayed in the bottom right corner of the map.

## 7.2. Create a new thematic map

You use four vector layers to create a thematic map. The workflow for creating a new thematic map is:

1. In the Apps menu, click GIS.

The DHIS 2 GIS window opens.

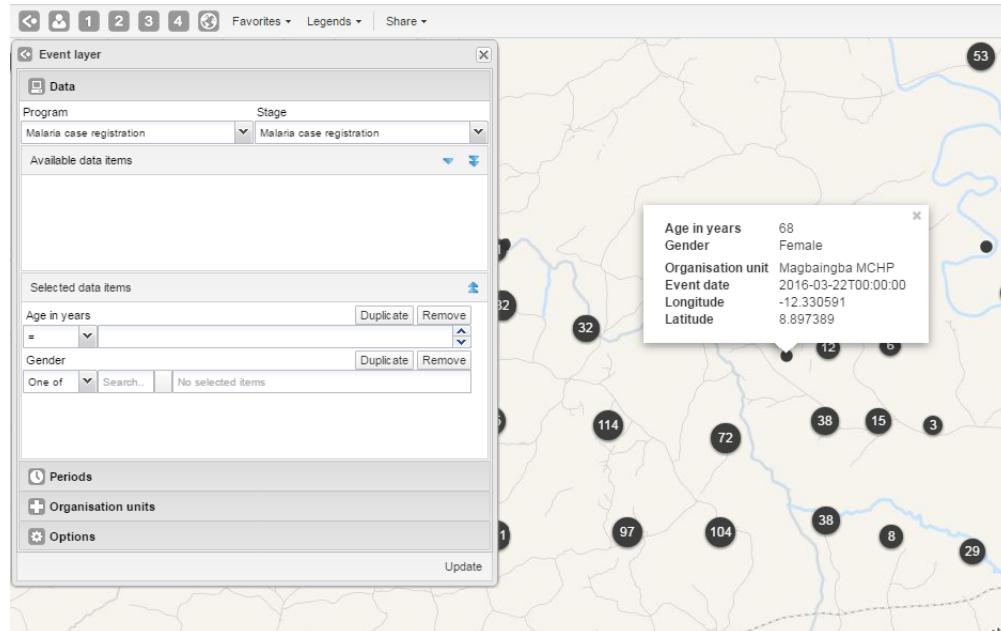
2. In the top menu, click a layer you want to add to the map.
  - Event layer

- Facility layer
  - Boundary layer
  - Thematic layer 1 - 4
3. Click Edit layer and select the parameters you need..
  4. Click Update.

## 7.3. Manage event layer

The purpose of the event layer is to display the geographical location of events registered in the DHIS 2 tracker. This layer lets you drill down from the aggregated data displayed in the thematic layers to the underlying individual events or cases.

### Event layer



### 7.3.1. Create or modify event layer

1. In the top menu, click the event layer icon.
2. Click Edit layer.
3. Select a program and then select a program stage.

If there is only one stage available for the selected program, the stage is automatically selected. A list of data elements and attributes will appear in the Available data items panel.

4. Select any data element or attribute from this list as part of your query.
  - To select you can either double-click a data element or (multi) select and use the single-arrow downward button. The double-arrow button will select all data elements in the list. All selected data elements will get their own row in the Selected data items.
  - You can use an element multiple times in your query by clicking Duplicate.
  - For data elements of type text you will get two choices: Contains implies that the query will match all values which contains your search value, and Is exact implies that only values which is completely identical to your search query will be returned.
  - For data elements of type option set, you can select any of the options from the drop down box by using the down-wards arrow or by start typing directly in the box to filter for options.
5. In the Periods section, select the time span for when the events took place. You can select either a fixed period or a relative period.

- Fixed period: In the Period field, select Start/end dates and fill in a start date and an end date.
  - Relative period: In the Period field, select one of the relative periods, for example This month or Last year.
6. In the Organisation units section, select the organisation units you want to include in the query.
  7. In the Options section, select if you want group nearby events and change style of the cluster points.
  8. Click Update.

### 7.3.2. Turn off cluster

By default events are clustered in a map. You can turn off this function to display all events separately.

1. In the top menu, click the event layer icon.
2. Click Edit layer.
3. Click Options.
4. Clear Group nearby events check box.
5. Click Update.

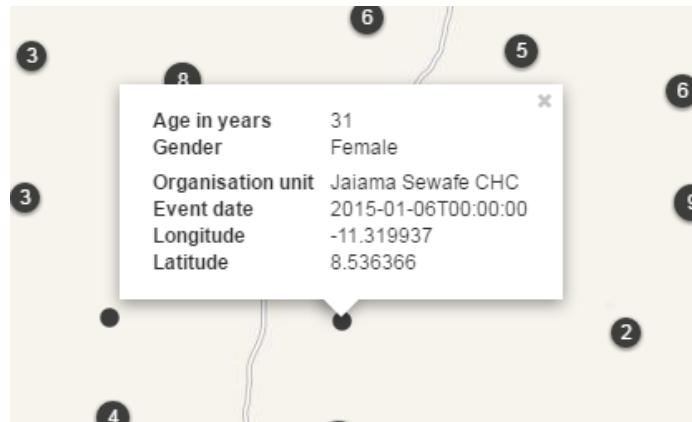
### 7.3.3. Modify cluster style

1. In the top menu, click the event layer icon.
2. Click Edit layer.
3. In the Options section, change the Point color and Point radius.
4. Click Update.

### 7.3.4. Modify information in event pop-up windows

For events in a cluster map, you can modify the information displayed in the event pop-up window.

Pop-up window with event information



1. On the home page, click Apps > Programs / Attributes.
2. Click Program.
3. Click the program you want to modify and select View program stages.
4. Click the program stage name and select Edit.
5. Scroll down to the Selected data elements section.

6. For every data element you want to display in the pop-up window, select corresponding Display in reports.
7. Click Update.

### 7.3.5. Clear event layer

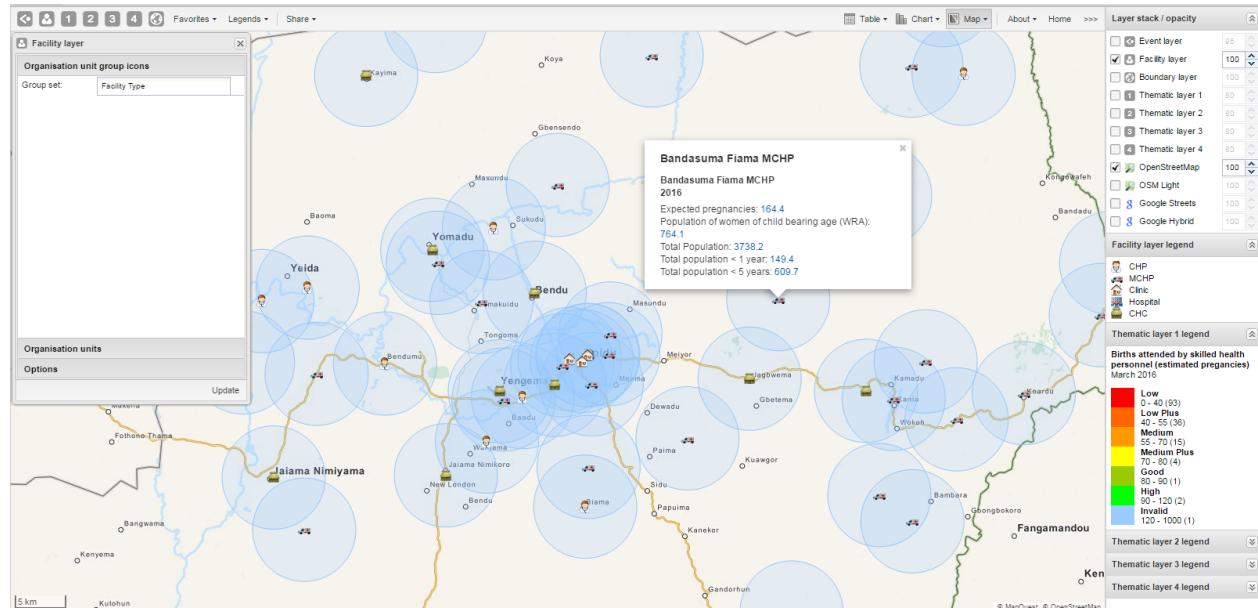
To clear all data in a map:

1. In the top menu, click the event layer icon.
2. Click Clear.

## 7.4. Manage facility layer

The facility layer displays icons that represent facilities based on the facility type. Polygons will not show up on the map, so make sure to select an organisation unit level that has facilities.

### Facility layer



### 7.4.1. Create or modify facility layer

1. In the top menu, click the facility layer icon.
2. Click Edit layer.
3. In the Organisation unit group icons section, select a Group set.
4. In the Organisation units section, select one or several organisation units.
5. In the Options section, select if you want to show labels and if so, how they look.
6. In the Options section, select if you want to display a circle with a certain radius around each facility.
7. Click Update.

### 7.4.2. Search for an organisation unit

To locate an organisation unit in the map:

1. In the top menu, click the facility layer icon.
2. Click Search.

The Organisation unit search dialog box opens.

3. In the text field, type the name of the organisation unit you are looking for or click a name in the list.

The organisation unit is highlighted in the map.

### 7.4.3. Clear facility layer

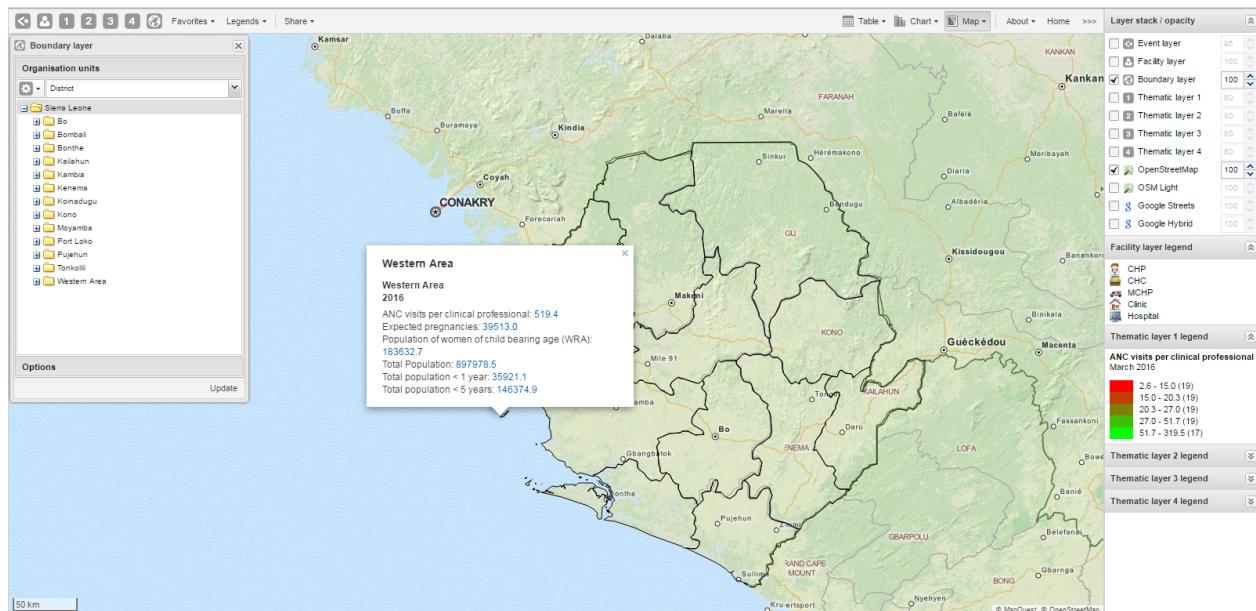
To clear all data in a facility layer:

1. In the top menu, click the facility layer icon.
2. Click Clear.

## 7.5. Manage boundary layer

The purpose of the boundary layer is to display the boundaries and coordinates in the system. No data will be shown. This layer is useful if you are offline and thus have no background map.

Boundary layer



### 7.5.1. Create or modify boundary layer

1. In the top menu, click the boundary layer icon.
2. Click Edit layer.
3. In the Organisation units section, select one or several organisation units.

You can select the organisation units you want to show on the map by selecting a level and a parent. That means "show all organisations units at this level that are children of this parent".

4. In the Options section, select if you want to show labels and if so, how they look.
5. Click Update.

### 7.5.2. Search for an organisation unit

To locate an organisation unit in the map:

1. In the top menu, click the boundary layer icon.
2. Click Search.

The Organisation unit search dialog box opens.

3. In the text field, type the name of the organisation unit you are looking for or click a name in the list.

The organisation unit is highlighted in the map.

### 7.5.3. Navigate between organisation hierarchies

When there are visible organisation units on the map, you can easily navigate up and down in the hierarchy without using the level/parent user interface.

1. Right-click one of the organisation units.
2. Select Float up or Drill down.

The drill down option is disabled if you are on the lowest level or if there are no coordinates available on the level below. Vice versa goes for floating up.

### 7.5.4. Clear boundary layer

To clear all data in a boundary layer:

1. In the top menu, click the boundary layer icon.
2. Click Clear.

## 7.6. Manage thematic layer 1- 4

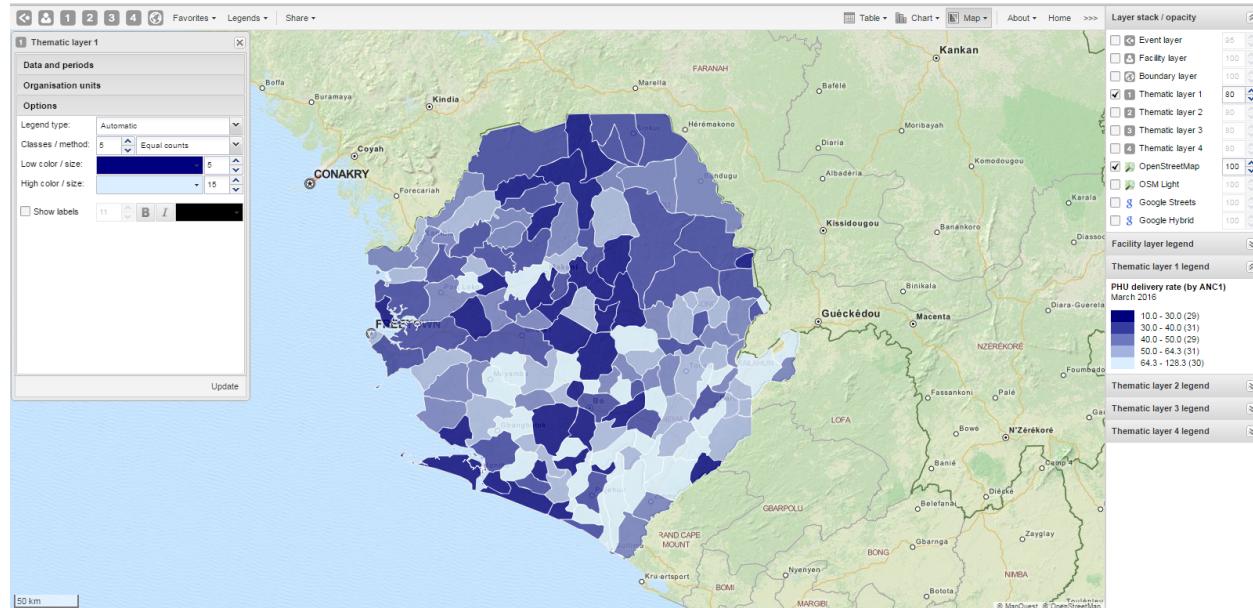
The four thematic layer panels let you use your data for thematic mapping. All you need to do is selecting your desired combination of indicator/data element, period and map combination. Then the organisation unit level and parent to define the boundaries. If your database has coordinates and aggregated data values for these organisation units they will appear on the map.



### Note

The DHIS 2 analytics tables must be refreshed in order to have aggregated data values available.

### Thematic mapping



### 7.6.1. Create or modify a thematic layer

1. In the top menu, click the icon of the thematic layer you want to create or modify.
2. Click Edit layer.
3. In the Data and periods section, select the data and periods you want to display.
4. In the Organisation units section, select one or several organisation units.
5. In the Options section, select Automatic or Predefined legend type.
  - Automatic legend types means that the application will create a legend set for you based on your what method, number of classes, low color and high color you select. Method alludes to the size of the legend classes.  
Set to Equal intervals they will be “highest map value – lowest map value / number of classes”.  
Set to Equal counts the legend creator will try to distribute the organisation units evenly.  
The legend appears as an even gradation from the start color to the end color.
  - If you have facilities in your thematic layer, you can set the radius for maximum and minimum values by changing the values in the Low color / size and High color size boxes.
  - For information about Predefined legend sets, see [Section 7.10, “Manage map legend sets”](#).
6. In the Options section, select if you want to show labels and if so, how they look.
7. Click Update.

### 7.6.2. Filter values in a thematic layer

Thematic layer 1-4 menu have a Filter option in addition to the boundary layer menu options. It lets you apply value filters to the organisation units on the map. The filter is removed when you close the filter window.

To filter values in a thematic layer:

1. In the top menu, click the icon of thematic layer you want to create or modify.
2. Click Filter....
3. Modify the Greater than and And/or lower than values.
4. Click Update.

### 7.6.3. Search for an organisation unit

To locate an organisation unit in a thematic layer:

1. In the top menu, click the relevant thematic layer icon.
2. Click Search.

The Organisation unit search dialog box opens.

3. In the text field, type the name of the organisation unit you are looking for or click a name in the list.

The organisation unit is highlighted in the map.

### 7.6.4. Navigate between organisation hierarchies

When there are visible organisation units on the map, you can easily navigate up and down in the hierarchy without using the level/parent user interface.

1. Right-click one of the organisation units.
2. Select Float up or Drill down.

The drill down option is disabled if you are on the lowest level or if there are no coordinates available on the level below. Vice versa goes for floating up.

## 7.6.5. Clear thematic layer

To clear all data in a thematic layer:

1. In the top menu, click the relevant thematic layer icon.
2. Click Clear.

## 7.7. Manage facilities in a layer

You can have facilities in Facility, Boundary and Thematic layers.

### 7.7.1. Relocate a facility

1. Right-click a facility and click Relocate.
2. Put the cursor in the new location.

The new coordinate is stored permanently..

### 7.7.2. Swap longitude and latitude of a facility

1. Right-click a facility and click Swap lon/lat.

### 7.7.3. Display facility information

You can view organisation unit information set by the administrator in two different ways.

Table 7.1. View organisation unit information

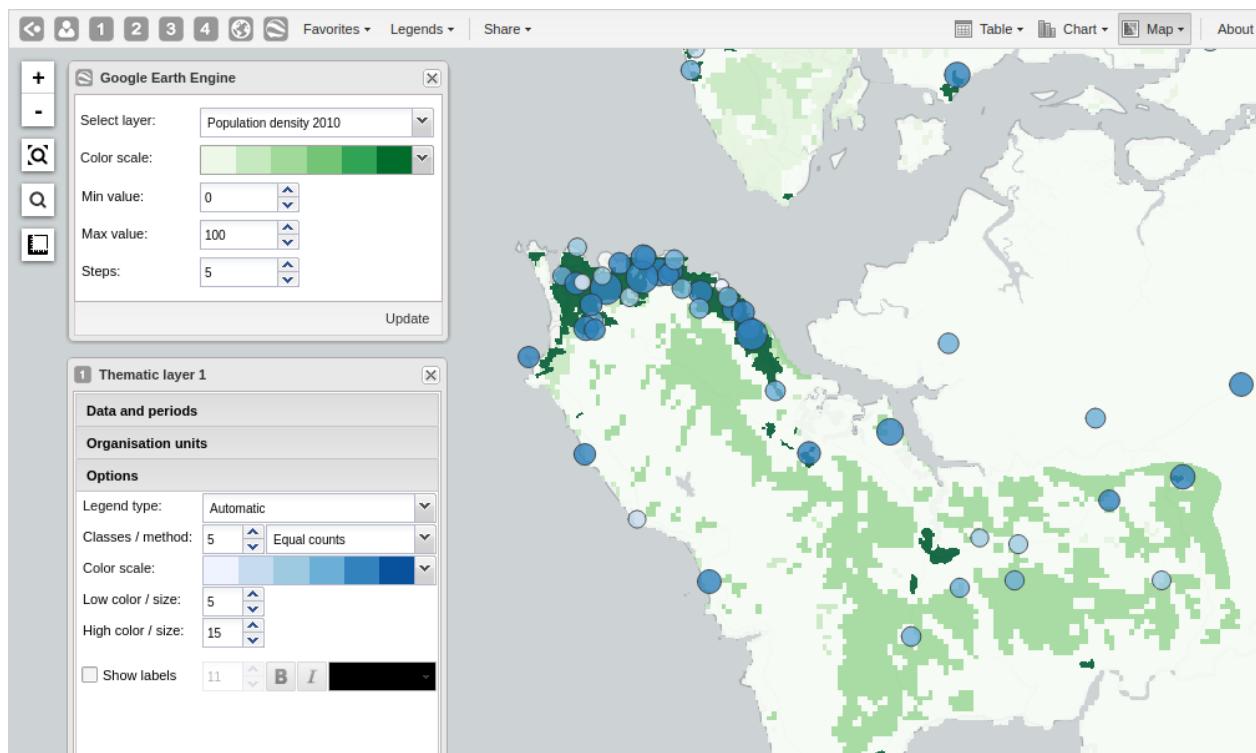
Function	Action
View information for the current period	1. Click a facility.
View information for a selected period	1. Right-click a facility and click Show information. 2. In the Infrastructural data section, select a period.

## 7.8. Manage Earth Engine layer

The Earth Engine layer lets you display satellite imagery and geospatial datasets from Google's vast catalog. This layer is useful in combination with thematic and event layers to enhance analysis. The following layers are currently supported:

- Elevation: Metres above sea level.
- Nighttime lights: Lights from cities, towns, and other sites with persistent lighting, including gas flares (from 2013).
- Population density: Population in 100 x 100 m grid cells (from 2010).

## Earth engine population density layer

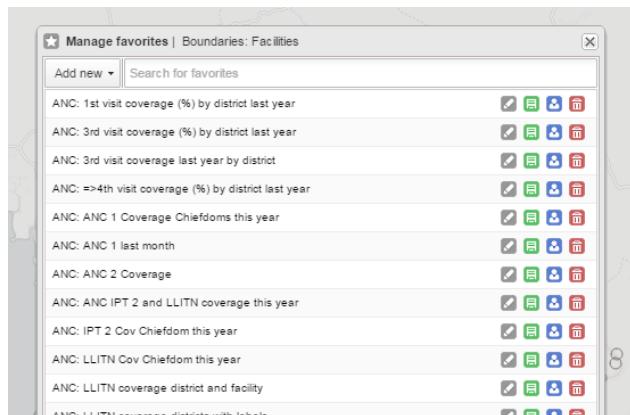


### 7.8.1. Create or modify an Earth Engine layer

1. In the top menu, click the Earth Engine layer icon.
2. Select a dataset, e.g. "Elevation".
3. Select min / max values. The meaning of those values depend on which data set you select.
4. Select a color scale and the number of steps (meaning number of distinct colors in the color scale).
5. Click Update.

## 7.9. Manage map favorites

### Favorite maps



Saving your maps as favorites makes it easy to restore them later. It also gives you the opportunity to share them with other users as an interpretation or put it on the dashboard. You can save all types of layers as a favorite. A favorite always opens with the default background map.

### 7.9.1. Save a map as a favorite

When you have created a map it is convenient to save it as a favorite:

1. Click Favorites.

The Manage favorites dialog box opens.

2. Click Add new.

The Create new favorite dialog box opens.

3. In the text field, type the name you want to give your pivot table.

4. Click Create.

Your favorite is added to the list.

### 7.9.2. Open a favorite

1. Click Favorites.

The Manage favorites dialog box opens.

2. Find the favorite you want to open. You can either use Prev and Next or the search field to find a saved favorite. The list is filtered on every character that you enter.

3. Click the name.

### 7.9.3. Rename a favorite

1. Click Favorites.

The Manage favorites dialog box opens.

2. Find the favorite you want to rename.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the grey rename icon next to the favorite's name.

The Rename favorite dialog box favorite opens.

4. Type the new name and click Update.

### 7.9.4. Overwrite a favorite

To save the current map to an existing favorite (overwrite):

1. Click Favorites.

The Manage favorites dialog box opens.

2. Find the favorite you want to overwrite.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the green overwrite icon next to the favorite's name.

4. Click OK to confirm that you want to overwrite the favorite.

### 7.9.5. Share a map interpretation

For certain analysis-related resources in DHIS 2, you can share a data interpretation. An interpretation is a link to the relevant resource together with a text expressing some insight about the data.

To create an interpretation of a map and share it with all users of the system:

1. Open or create a favorite map.
2. Click Share > Write interpretation.

The Write interpretation dialog box opens.

3. In the text field, type a comment, question or interpretation.
4. Click Share.

The dialog box closes automatically. You can see the interpretation on the Dashboard.

## 7.9.6. Modify sharing settings for a favorite

After you have created a map and saved it as a favorite, you can share the favorite with everyone or a user group. To modify the sharing settings:

1. Click Favorites.
2. Find the favorite you want to share.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the blue share icon next to the favorite's name.
4. In the text box, enter the name of the user group you want to share your favorite with and click the + icon.

The chosen user group is added to the list of recipients.

Repeat the step to add more user groups.

5. If you want to allow external access, select the corresponding box.
6. For each user group, choose an access setting. The options are:
  - None
  - Can view
  - Can edit and view
7. Click Save.

## 7.9.7. Delete a favorite

1. Click Favorites.

The Manage favorites dialog box opens.

2. Find the favorite you want to delete.

You can either use Prev and Next or the search field to find a saved favorite.

3. Click the red delete icon next to the favorite's name.
4. Click OK to confirm that you want to delete the favorite.

## 7.10. Manage map legend sets

You can create your own legend sets to ensure meaningful maps.



### Note

Continuous legends are supposed to end and start on the same value, for example 0-50 and 50-80. The GIS app automatically take care of this. Do not try to do this yourself by setting legends to for example 0-50 and 51-80. This will cause a usually unwanted gap in your legend set.

### 7.10.1. Create a new legend set

1. Click Legends.

The Legend sets dialog box opens.

2. Click Add new.

3. In the Legend set name box, type the name you want to give the legend set.

4. Create the legends you want to have in your legend set:

- a. In the Legend name field, type the legend name.
- b. Select Start/end value.
- c. Select Symbolizer.
- d. Click Add legend.

The legend is added to Current legends.

- e. Repeat until you have created all the legends you need.

Example 7.1. Vaccination coverage legends

Table 7.2. Example of vaccination coverage legends

Legend name	Start value	End value	Symbolizer
Low bad	0	50	red
Medium	50	80	yellow
High good	80	100	green
Too high	100	1000	grey

5. Click Create.



#### Note

If your legend set has overlapping legends (for example 0-50 and 40-80) you will not be allowed to proceed. If your legend set has a gap between the legends (for example 0-50 and 60-80) you will get a warning, but are allowed to proceed.

### 7.10.2. Change a legend set

1. Click Legends.

The Legend sets dialog box opens.

2. Click the edit icon next to the legend set you want to modify.

3. In the Current legends list, click the edit icon next to the legend you want to modify.

The Edit legend dialog box opens.

4. Modify the parameters and click Update.

5. In the Legend sets dialog box, click Update.

### 7.10.3. Delete a legend set

1. Click Legends.

The Legend sets dialog box opens.

2. Click the delete icon next to the legend set you want to delete.

3. Click OK to confirm that you want to delete the legend set.

## 7.10.4. Assign a legend set to indicator or data element

You can assign a legend set to an indicator or a data element in the Indicator/Data element module. This legend set will then be automatically selected when such an indicator/data element is selected in the GIS.

## 7.11. Download a map as image

1. Take a screenshot of the map with the tool of your choice.
2. Save the screenshot in desired format.

## 7.12. Embed a map in an external web page

Certain analysis-related resources in DHIS 2, like pivot tables, charts and maps, can be embedded in any web page by using a plug-in. You will find more information about the plug-ins in the Web API chapter in the DHIS 2 Developer Manual.

To generate a HTML fragment that you can use to display the map in an external web page:

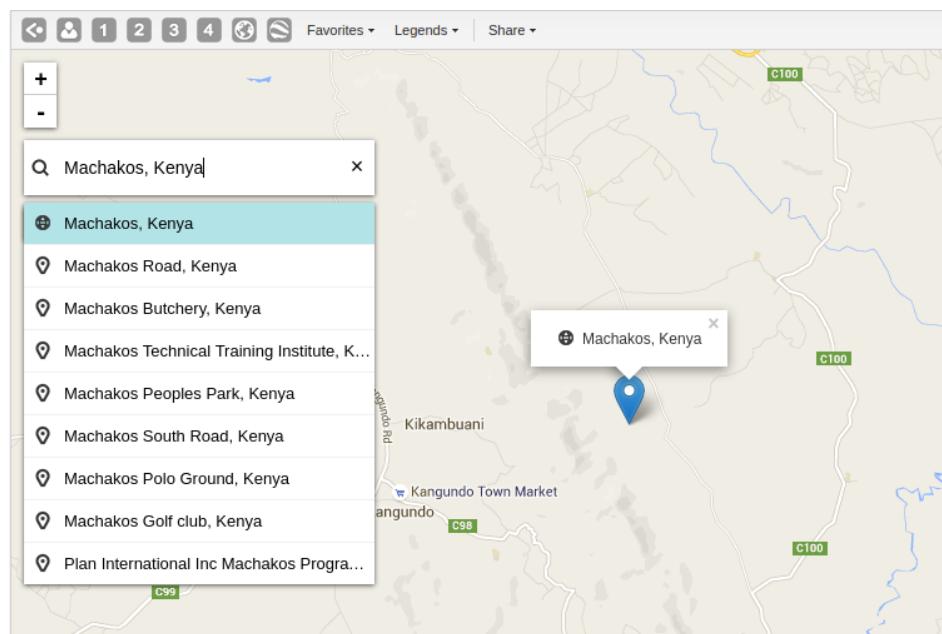
1. Click Share > Embed in web page.
- The Embed in web page window opens.
2. Click Select to highlight the HTML fragment.

## 7.13. Using place search

The place search function allows you to search for almost any location or address. The place search is powered by the Mapzen mapping platform. This function is useful in order to locate sites, facilities, villages, towns and more on the map.

1. Click the magnifier icon on the left side of the screen.
2. Enter your search term.
3. Select from the list of matching locations which appear as you type. A pin will indicate the location on the map.

Place search



## 7.14. Measure distance and area in a map

1. In the upper left part of the map, put the cursor on the Measure distances and areas icon and click Create new measurement.
2. Add points to the map.
3. Click Finish measurement.

## 7.15. Visualize a map as a pivot table or a chart

When you have made a map you can switch between pivot table, chart and map visualization of your data. The function is inactive if the data the map is based on cannot render as a chart or table.

### 7.15.1. Open a map as a chart

1. Click Chart > Open this map as chart.

Your current map opens as a chart.

### 7.15.2. Open a map as a pivot table

1. Click Chart > Open this map as table.

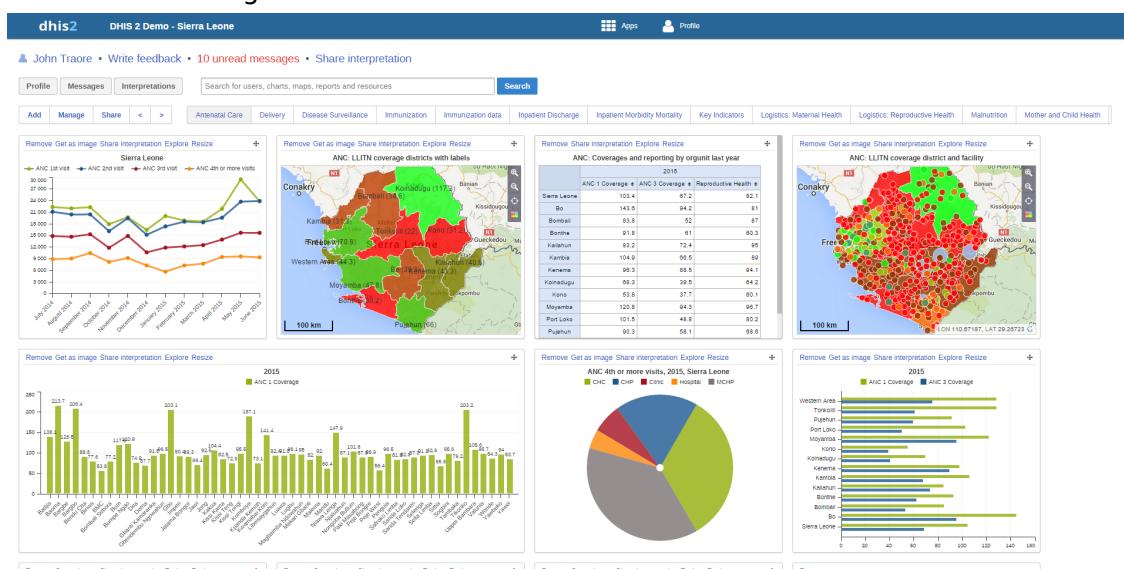
Your current map opens as a pivot table.

# Chapter 8. Dashboards

Dashboards are intended to provide quick access to different analytical objects (maps, charts, reports, tables, etc) to an individual user. Dashboards can also be shared with user groups. For instance, a user or administrator could create a dashboard called "Malaria" which might contain all relevant information on malaria. This dashboard could then be shared with the user group called "Malaria control", which might consist of all users of the malaria control programme. All users within this group would then be able to view the same dashboard.

## 8.1. Setting up the dashboard

The dashboard can contain any number of objects (charts, maps, reports, tables, resources, etc). These can be freely arranged on the dashboard as you wish. Dashboard items can be located and added by searching for favourites, resources, users or messages in the available search box and clicking on the "Add" button.



In this screen shot, the dashboard has already been populated with a number of objects, such as charts, map views, tables and messages. There are several hyperlink options available on each item:

- Remove

Allows you to remove the item from the dashboard when you have the appropriate user rights.

- Get as Image

Opens up a pop-up window and allows you to download the image to your computer.

- Share interpretation

Allows you to share an interpretation of the dashboard item. Your interpretation will be shared publicly with other users of the DHIS 2 system, in the "Interpretation" section of the dashboard.

- Explore

Loads the favorite in its corresponding app (ie. a map will open full-sized in the GIS app).

- Resize

Resizes the dashboard item. There are 3 sizes in which to choose from.

Maps, charts and tables can be viewed as full size as images (in the case of charts and map views) or as HTML resources (in the case of reports, tables and messages).

To reorder how the dashboard appears, simply drag-and-drop any of the objects to a new position. In order to change between the various dashboards which are available, simply select the listed items that are available to review. The list can be scrolled though by using the <, > symbols to the left of the dashboard names.

## 8.2. Managing the Dashboard

In addition to adding items or modifying the layout of a dashboard, further options allow you to add additional dashboards, modify their names, delete an entire dashboard and share the dashboard with other users. These additional items can be managed using the "Add," "Manage," and "Share" links on the top left of the dashboard next to the dashboard names.

- Add

Allows additional dashboards to be added.

- Manage

Can change the name of the dashboard, add messages to or delete the dashboard. This applies to the currently selected dashboard item.

- Share

Allows the sharing of dashboard items with user groups. User permissions can also be assigned to each user group.

## 8.3. Dashboard Sharing

In order to share a dashboard with user groups, first select "Share" from the dashboard page. This will bring up the dashboard sharing settings options. To share the dashboard with specific user groups, type in their name in the sharing settings dialogue box and click on the "+" sign to add them to the dashboard sharing settings

The screenshot shows a 'Sharing Settings' dialog box. At the top, it says 'Sharing Settings' and has a close button. Below that, the dashboard title 'Antenatal Care' is displayed. A search bar labeled 'Search for user groups' with a '+' button is present. Under 'Created by:', it shows 'Tom Wakiki'. There are three main sharing categories: 'External access (without login)', 'Public access (with login)', and 'User groups'. Under 'External access', there is a checked checkbox. Under 'Public access', a dropdown menu is set to 'None'. Under 'User groups', two groups are listed: 'Cape Town University Research Group' (with a dropdown set to 'Can edit and view') and 'Africare HQ' (with a dropdown set to 'Can view'). At the bottom right are 'Cancel' and 'Save' buttons.

All dashboards have two sharing groups set by default.

- External access (without login)

This option, when selected, provides access to the dashboard as an external resource. This is useful for when you are creating an external web portal but would like to call information from a dashboard you have made internally within DHIS 2. By default, this option is not selected.

- Public access (with login)

This option allows the selected dashboard to be pushed to all users within your DHIS 2 instance. This can also be hidden from public view by selecting the "None" option, which is the default option for new dashboards.

User groups which have been added manually can be assigned two types of permissions within the dashboard

- Can view

Provides the user group with view only rights to the dashboard.

- Can edit and view

Allows the user groups to edit the dashboard in addition to viewing it. Editing allows for altering the layout, resizing and removing items, renaming/deleting the dashboard etc.

## 8.4. Messages and feedback messages

The screenshot shows the 'Messages' section of the DHIS 2 interface. At the top, there are buttons for 'Write message' (blue), 'Write feedback' (blue), and several other navigation options like 'Inbox', 'Follow up', and 'Unread'. Below this is a table listing three messages:

Sender	Subject	Date	Action
System notification	Analytics table process failed	2015-03-02	
System notification	Resource table process failed	2015-02-12	
Tom Wakiki	Alerts as of 2014-08-19 09:49: High 12, Medium 0, Low 0	2014-08-19	

DHIS 2 has a message function that allows different users and user groups to communicate with each other. With this function you can for example receive feedback regarding data quality and timeliness of submissions, or answer questions from a particular user.



### Note

Messages are not sent to users' e-mail addresses, the messages only appear within DHIS 2.

- You can send messages to either a specific user, user group or groups of users who have been assigned to particular organisation units.
- All users that have access to the dashboard can send a feedback message. Feedback messages are routed to a particular group of users.



### Note

To configure the feedback message function, you must:

1. Create a user group (for example "Feedback recipients") with all of the users who should receive feedback messages.
2. Go to Apps > Settings > General > Feedback recipients and select the user group.

Each time a feedback message is sent, it will then appear as a message in the inbox of each member of the user group.

### 8.4.1. Create and read messages

Write new message

To org unit

Organisation Unit Selection

- Sierra Leone
- Bo
  - Badjia
  - Baoma
  - Bargbe
  - Bargbo
  - Bumpe Ngao**
  - Gbo
  - Jaiama Bongor
  - Kakua
  - Komboya
  - Lugbu
  - Mankon Lango

To user

Family Planning Program Coordinators

Subject

Data review meeting

We will have a family planning data review meeting at ~~9am~~ in our main office. Please attend.

Text

**Send** **Discard**

To create a message:

1. From the Dashboard, click Messages.
2. Click Write message.
3. Define who you want to receive the message. You can send a message to organisation units, users and user groups.
  - In the To org unit field, select the organisation units or group of organisation units you want to send the message to.
  - In the To user field, select the users or user groups you want to send the message to.
4. Type a subject and a message.
5. Click Send.

To read a message:

1. From the Dashboard, click Messages.
2. Click a message.

If the message is part of a conversation, you'll see all messages in this conversation.

### 8.4.2. Create a feedback message

1. From the Dashboard, click Write feedback.
2. Type a subject and a message.
3. Click Send.

The message will appear in all of the specified users' message inboxes.

### 8.4.3. Manage feedback messages



#### Note

You will only see feedback messages and have access to the feedback handling options if you are a member of the user group that is set up to handle feedback messages.

You'll receive feedback messages to your Messages inbox. For feedback messages you have the following options in addition to the messages options:

Table 8.1. Feedback message handling options

Function	Description
Set status	<p>All feedback messages get the status Open when created.</p> <p>To keep track of the feedback messages that exist, you can change the status to Invalid, Pending or Solved.</p> <p>You can filter messages in your inbox based on their status. This makes it easier to switch between feedback messages and normal messages.</p>
Set priority	<p>You can mark feedback messages with different priorities: None, Low, Medium or High.</p> <p>Setting the priority makes it easier to keep track of which feedback messages you need resolved first, and which feedback messages that can wait.</p>
Write internal reply	<p>When you work in a team of feedback message handling managers, you might want to discuss the feedback message before sending an answer to the sender. You can keep this discussion in the same message conversation as the feedback message itself.</p> <p>To send a reply that can only be seen by other managers, click Internal reply.</p>



# Chapter 9. User profiles

With profiles, users can alter the appearance of their DHIS 2, change the interface language, and enabled SMS and email notifications. Users can also enter information into their "Profile".

## 9.1. User settings

To access the user settings menu, select "Profile->Settings". You can select the interface language and the database language. The interface language refers to the translation of the user interface of the DHIS 2 software. The database language refers to the translated content of the metadata contained in the system, for instance, data elements and indicators. Different interface styles can be set to alter the appearance of the system.

User can choose to receive their messages via email and/or SMS by ticking the appropriate check boxes.

If no value is set for a given user setting, the system setting value will be used.

## 9.2. User profile

Users can choose to enter more data, such as their email and phone number, job title, gender, birthday, etc into their profile. Just select "Profile->Profile" from the main menu.

