

# Learner's Guide to Validation Rules (Config)

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PERFORM THIS EXERCISE ON THE CONFIGURATION SYSTEM

## What is this guide?

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This guide contains 3 exercises and detailed steps to perform them related to the use of configuring validation rules for the Analytics Tools Level 1 academy. Please perform each of the exercises when prompted by your instructors.

## Learning objectives for this session

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1. Define a validation rule after reviewing a data set
2. Create a validation rule to measure internal consistency
3. Create a validation rule measuring against a generated threshold

## Time needed for this session

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Live demo: 3 demos, ~ 30 mins each

Hands-on exercises: 3 exercises, ~ 30 mins each

## Background on this topic/module

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Validation rules are an excellent tool that can be used to measure a number of consistency measures within a DHIS2 system. As an example, they can be used to manage internal consistency by comparing two or more data items collected during the same process (for example, 2 malaria data items collected at the same time) as well as measuring external consistency by measuring values collected using different mechanisms (for example, data collected via a DHIS2 dataset along with data imported into DHIS2 from a survey).

These rules can be run directly in data entry - recommended if measuring internal consistency - as well as through a batch operation called validation analysis. In this session, you will review how to configure these rules in DHIS2.

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## Live Demo Step-by-Step

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### Exercise 1 - Create a Validation Rule for HIV

#### Example 1 from HIV Monthly Form

Review the data entry page and decide on a logical validation rule to create

We can use the following HIV dataset at the **Facility** level

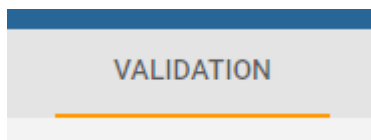
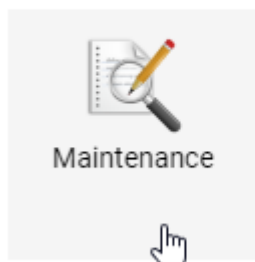
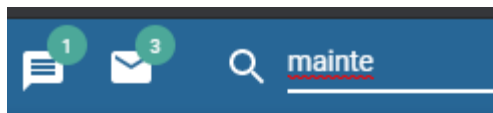
## Data Entry ?

Organisation Unit	Cardinal Hospital Gateway PHC		
Data Set	HIV Monthly		
Period	April 2023	Prev year	Next year
Filter on section	Show all sections		

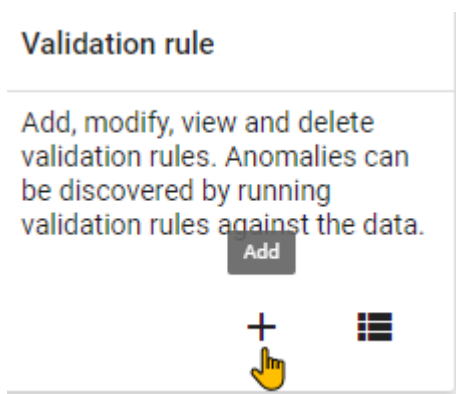
Let's create a rule in which HIV tests positive are less than or equal to HIV tests performed

Create the validation rule HIV tests positive  $\leq$  HIV tests performed

Navigate to the maintenance application in DHIS2 and select the "Validation" tab



Create a new rule by selecting the "+" icon underneath validation rule



Review the fields that will be used to describe the rule. Use your initials to create the rule. **[Note: this is only for practice purposes, you would not use initials in a real life scenario]**

Name (\*)

ND\_HIV tests positive <= HIV tests performed

Short name

HIV tests positive <= HIV tests performed

Code

Description

HIV tests positive <= HIV tests performed

Instruction

Make follow up to respective facility whenever number of HIV tests positive are greater than HIV tests performed

Importance (\*)

Medium

Period type (\*)

Monthly

Here is the description and instruction

HIV tests positive should be less than or the same as HIV tests performed, if not make follow ups to respective facility

Describe the importance and period type as it relates to the validation rule before proceeding.

Open and explain the Left Side Expression

Open the left side expression and explain what you are intending to do. The rule you are creating is total HIV tests positive between male and female hence for the left side, select the (HIV tests positive Male + HIV tests positive Female)

Left side expr

Description

HIV - HIV tests positive Male + HIV - HIV tests positive Female

# {06wdXKIZ5L2.P1YRvg1gzqV} + # {06wdXKIZ5L2.aakXCEEzhGy}

( ) \* / + - Days

DATA ELEMENTS

PROGRAMS

ORG UNIT COUNTS

CONSTANTS

REPORTING RATES

HIV tests

HIV - HIV tests performed

HIV - HIV tests performed Måle

HIV - HIV tests performed Femmelle

HIV - HIV tests positive

HIV - HIV tests positive Måle

HIV - HIV tests positive Femmelle

HIV - HIV tests positive < 1 years

HIV - HIV tests positive < 1 years Måle

HIV - HIV tests positive < 1 years Femmelle

CANCEL

SAVE

Note:

It is recommended to use the disaggregated data elements instead of the total data element as shown in the figure above e.g. HIV tests positive Male + HIV tests positive Female. This is because during

validation rule analysis, when looking at the details, if the total data element was selected the details will be empty and you will not be able to drill down to identify where the problem originates from.

Select "Save" once the left side has been selected.

Select the Operator

It is "Less than or equal to" in this case, hence select the Less than or equal to operator.

Equal to

Not equal to

Greater than

Greater than or equal to

Less than

Less than or equal to

Compulsory pair

Exclusive pair

Open the Right Side Expression

You will need to do the following for the right side expression:

HIV tests performed Male + HIV tests performed Female,

Create this expression, explaining what you are doing during each step of the way

Right side expr

Missing value strategy

Never skip

☐ Sliding window

Description

HIV - HIV tests performed Male+HIV - HIV tests performed Female

#{sX7pWYXIVii.PiYRwg1gzqV} + #{sX7pWYXIVii.aakXCEEzhGy}

DATA ELEMENTS

PROGRAMS

ORG UNIT COUNTS

CONSTANTS

REPORTING RATES

Search by name

EPI - ADS 0.05 ml broken

EPI - ADS 0.05 ml ending balance

EPI - ADS 0.05 ml missing

EPI - ADS 0.05 ml received

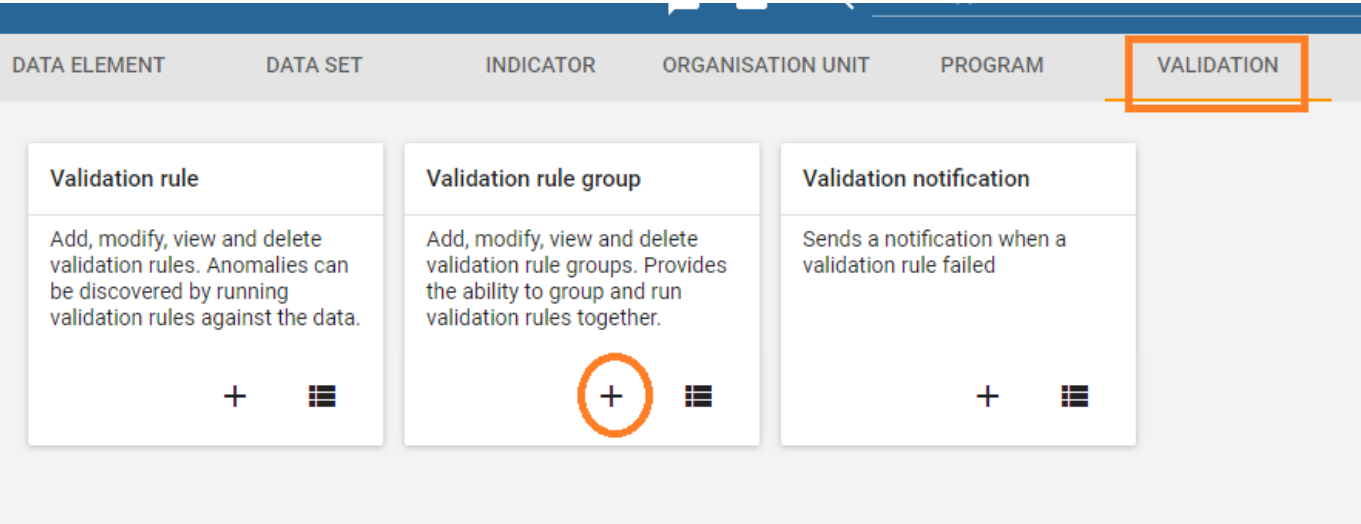
CANCEL

SAVE

Click on "Save" when the expression is complete.

Create a Validation Rule Group

Go to Maintenance> Validation> Validation Group



Click the add button and fill in the details of the validation group. Use your initials to create the validation rule group.

← Validation rule group ?

Name (\*)  
SND\_HIV Validation Rules

Code

Description

Validation rules ⊕ ↺

Search available/selected items

ADS 0.05 ml waste should be less than or equal to consumption  
ADS 0.5 ml waste should be less than or equal to consumption  
all-cause admission <= all-cause outpatient  
all-cause deaths <= all-cause admission  
Bacteriological examinations (TB)  
BCG doses given should be less than total used and wasted

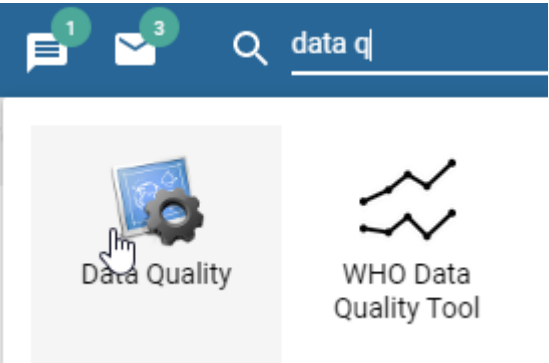
→

HIV tests positive <= HIV tests performed

Place the validation rule you have created into the group and select “Save”

Test the rule in validation rule analysis within the Data Quality App

Navigate to the Data Quality app




Select "Run validation"

## Validation Rule Analysis

Run validation rules in order to unveil anomalies and errors in the data in the database.

Run Validation



Select the following inputs:

- **Date : January 1 2023 - April 1 , 2023**
- **Rule Group : The group you have just made**
- **Parent Organisation unit : Animal Region**

## Validation Rule Analysis ?

Parent organisation unit

Trainingland

Animal Region

Food Region

Start Date

2023-01-04

End Date

2023-04-01

Validation Rule Group

SND\_HIV Validation Rules

☐ Send Notifications


☐ Persist new results

Validate

You should see the below violations

## ← Validation Rule Analysis ?

Download as PDF Download as XLS Download as CSV

Organisation Unit	Period	Importance	Validation Rule	Value	Operator	Value	Details
Cardinal Hospital Gateway PHC	March 2023	MEDIUM	HIV tests positive ≤ HIV tests performed	1,199.00	≤	296.00	

Download as PDF Download as XLS Download as CSV

Did it work for you?

End Exercise 1

## Activity 2 - Create Validation Rule #2 for stock

Review the data entry page and decide on a logical validation rule to create

We can use the following dataset at the **\*\*Facility\*\*** level

### Data Entry ?

✕ Ca

Organisation Unit	Cardinal Hospital Gateway PHC		
Data Set	Immunisation ▼		
Period	January 2023 ▼	Prev year	Next year

Let's create a rule in which DPT-HepB-Hib doses given are less than or equal to Total DPT-HepB-Hib doses used and wasted.

#### Note:

Total used= **(Starting balance + Received) - (VVM + Frozen + Expired + Broken + Missing + Ending balance)**

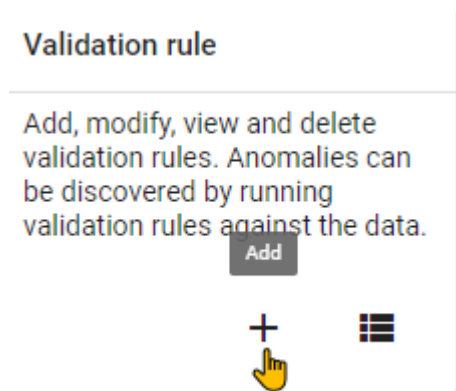
Create the validation rule DPT-HepB-Hib doses given ≤ Total Used DPT-HepB-Hip doses

Navigate to the maintenance application in DHIS2 and select the "Validation" tab





Create a new rule by selecting the "+" icon underneath validation rule



Review the fields that will be used to describe the rule. Use your initials to create the rule **[Note: this is only for practice purposes, you would not use initials in a real life scenario]**

Name (\*)

ND-DPT-HepB-Hib doses given should be less than OR equal to DPT-HepB-Hib doses used

Short name

DPT-HepB-Hib doses given <= DPT-HepB-Hib doses used

Code

Description

DPT-HepB-Hib doses given should be less than or the same as total DPT-HepB-Hib doses used

Instruction

DPT-HepB-Hib doses given should be less than or the same as total DPT-HepB-Hib doses used if not make follow ups to respective facility

Importance (\*)

Medium

Period type (\*)

Monthly

Here is the description and instruction

DPT-HepB-Hib doses given should be less than or the same as total DPT-HepB-Hib doses used and

DPT-HepB-Hib doses given should be less than or the same as total DPT-HepB-Hib doses used if not make follow ups to respective facility

Describe the importance and period type as it relates to the validation rule before proceeding.

Open and explain the Left Side Expression

Open the left side expression. The rule you are creating is total DPT-HepB-Hib doses given which comprises dose 1 to 3; for the left side, select the (DPT-HepB-HIB 1 doses given + DPT-HepB-HIB 2 doses given + DPT-HepB-HIB 3 doses given)

DATA ELEMENTS

PROGRAMS

ORG UNIT COUNTS

CONSTANTS

REPORTING RATES

DPT

EPI - DPT-HepB-HIB 1 doses given

EPI - DPT-HepB-HIB 1 doses given < 1 year

EPI - DPT-HepB-HIB 1 doses given ≥ 1 year

EPI - DPT-HepB-HIB 2 doses given

EPI - DPT-HepB-HIB 2 doses given < 1 year

EPI - DPT-HepB-HIB 2 doses given ≥ 1 year

EPI - DPT-HepB-HIB 3 doses given

EPI - DPT-HepB-HIB 3 doses given < 1 year

Add a description to the left side to clearly state what does the computed items mean

Left side expr

Missing value strategy

Never skip

☐ Sliding window

Description

DPT-HepB-Hib doses given

#{hJJ10nV0kV2} + #{lHnact7BRVU} + #{TWwbtMMWD51}

Select "Save" once the left side has been selected.

## Select the Operator

It is "Less than or equal to" in this case, hence select the Less than or equal to operator.

Equal to

Not equal to

Greater than

Greater than or equal to

Less than

**Less than or equal to**

Compulsory pair

Exclusive pair

## Open the Right Side Expression

You will need to do the following for the right side expression:

DPT-HepB-HIB doses used = (DPT-HepB-HIB doses starting balance + DPT-HepB-HIB doses received) - (DPT-HepB-HIB doses VVM + DPT-HepB-HIB doses frozen + DPT-HepB-HIB doses expired + DPT-HepB-HIB doses broken + DPT-HepB-HIB doses missing + DPT-HepB-HIB doses ending balance)

Create this expression, with reference to the definition of **Total Used stated above**

Right side expr

Missing value strategy  
Never skip

☐ Sliding window

Description

DPT-HepB-Hib doses used

```
{#{NQsPDDcrVP.H11vX50cXC0}+#{REsHmeD8Ene.H11vX50cXC0})-(#{mw41qAc3P56.H11vX50cXC0}+#{nfVroBR7Yhi.H11vX50cXC0}+#{WjV77sg2pXU.H11vX50cXC0}+#{e3rcyUroB0P.H11vX50cXC0}+#{NVAf8CLaHux.H11vX50cXC0}+#{tm5yEw7Ktkr.H11vX50cXC0})}
```

DATA ELEMENTS	PROGRAMS	ORG UNIT COUNTS	CONSTANTS	REPORTING RATES
starting				
EPI - DPT-HepB-HIB starting balance				
EPI - IPV starting balance				
EPI - MR starting balance				
EPI - OPV starting balance				

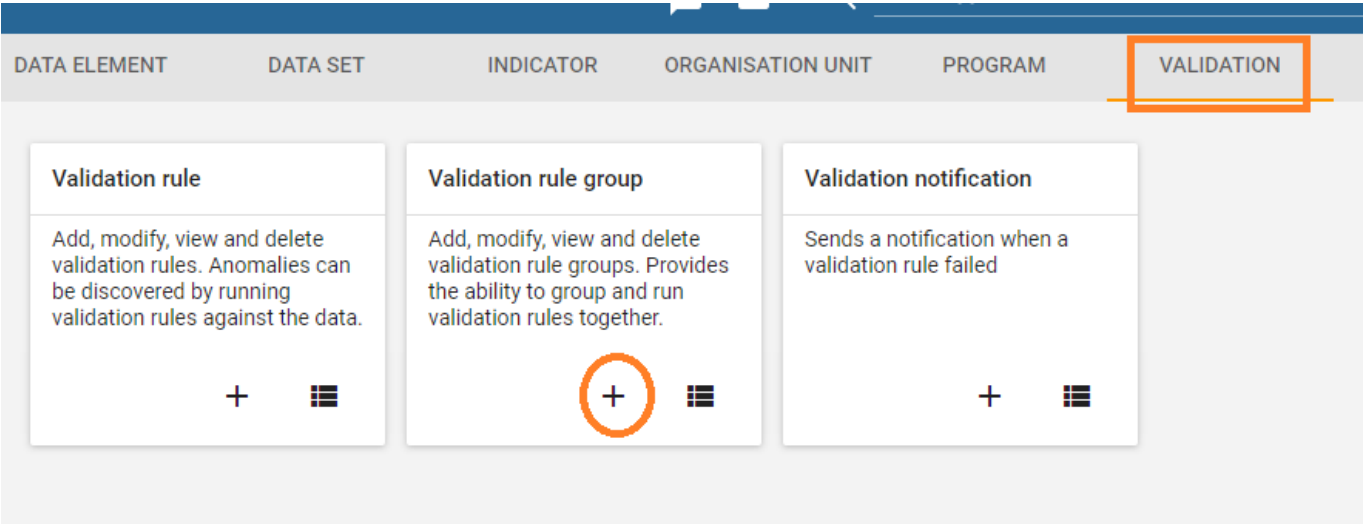
CANCEL SAVE

Click on "Save" when the expression is complete.

## Save the Rule when finished

## Create a Validation Rule Group

Go to Maintenance> Validation> Validation Group



Click the add button and fill in the details of the validation group

Name (\*)  
ND\_Immunisation Stock

Code

Description

Validation rules ⊕ ↺

Search available/selected items

ADS 0.05 ml waste should be less than or equal to consumption

ADS 0.5 ml waste should be less than or equal to consumption

all-cause admission <= all-cause outpatient

all-cause deaths <= all-cause admission

Bacteriological examinations (TB)

BCG doses given should be less than total used and wasted

Cases positive at community level <= Cases tested at community level

Cases tested at community level <= Cases treated at community level

Cases treated <= Suspected malaria cases

DPT-HepB-Hib 2 administered <= DPT-HepB-Hib 2 dose threshold

DPT-HepB-Hib doses given should be less than total used and wasted

→

←

ND\_DPT-HepB-Hib doses given should be less than OR equal to DPT-HepB-Hib d

ASSIGN ALL 68 →

← REMOVE ALL 1

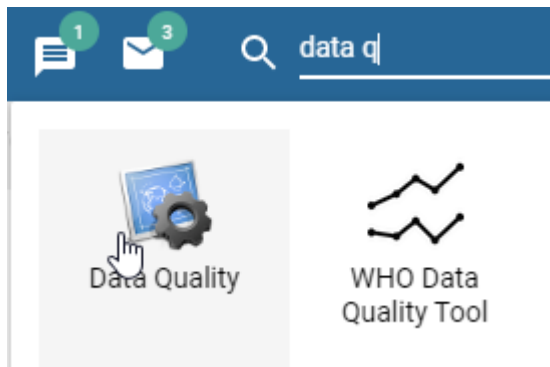
SAVE

CANCEL

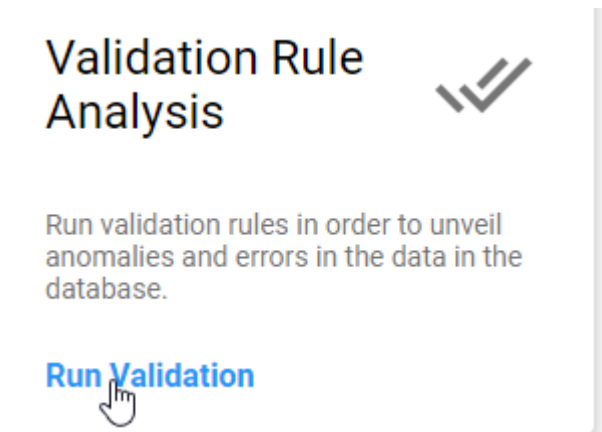
Place the validation rule you have created into the group and select "Save"

Test the rule in validation rule analysis within the Data Quality App

Navigate to the Data Quality app



Select "Run validation"



Select the following inputs:

- **Date : January 1, 2023 - April 1, 2023**
- **Rule Group : The group you have just made**
- **Parent Organisation unit : Dog District**

You should see the below violations

← Validation Rule Analysis ?							
<a href="#">Download as PDF</a> <a href="#">Download as XLS</a> <a href="#">Download as CSV</a>							
Organisation Unit	Period	Importance	Validation Rule	Value	Operator	Value	Details
Beagle Hospital Gateway PHC	January 2023	MEDIUM	DPT-HepB-Hib doses given should be less than total used	2,204.00	<=	2,167.00	
Dalmatian Dispensary	January 2023	MEDIUM	DPT-HepB-Hib doses given should be less than total used	829.00	<=	815.00	
Pug Private Medical Practice	January 2023	MEDIUM	DPT-HepB-Hib doses given should be less than total used	58.00	<=	57.00	

Did it work for you?

End Activity 2

## [OPTIONAL] Activity 3 - Create a validation rule #3 using the DPT-HepB-Hib 2 threshold

**Note: this is an optional exercise and may not be covered by your instructor. You can perform this exercise if you want to have additional practice outside of the academy timeframe.**

In this example, a rule will be created in which we compare an entered value to a calculated threshold. The steps to create the rule are very similar to the other examples.

**Note: A Predictor is used to calculate the threshold value; this will not be covered in this academy**

Create the validation rule [DPT-HepB-Hib 2 administered <= DPT-HepB-Hib 2 dose threshold ]

Review and understand the fields that will be used to create the rule. As mentioned above the data element used for the threshold is a computed variable generated from a predictor, a concept that is not covered in this academy. It has already been configured and available within the list of data elements; in practice you would also need to make this yourself if not already available.

Use your initials to create the rule.

Name (\*)

ND\_DPT-HepB-Hib 2 administered <= DPT-HepB-Hib 2 dose threshold

Short name

Code

Description

The amount of DPT-HepB-Hib 2 administered should be <= the mean + 3SD's of the the last 11 months (excluding the preceding month)

Instruction

DPT-HepB-Hib 2 administered <= DPT-HepB-Hib 2 dose threshold

Importance (\*)

Medium

Period type (\*)

Monthly

### Open the Left Side Expression

Open the left side expression and add the required data element. You are trying to create the rule comparing the amount of DPT-HepB-Hib 2 dose with a calculated threshold. Select the data element "EPI - DPT-HepB-Hib 2 doses given Female and EPI - DPT-HepB-Hib 2 doses given Male" for the left side.

Right side expr

Missing value strategy  
Never skip

☐ Sliding window

Description

DPT-HepB-Hib doses used

{#{NOQsPDDcrVP.H1lvX50cXC0}+#{REs%meD8Ene.H1lvX50cXC0})-({#{mw41qAc3P56.H1lvX50cXC0}+#{nfvrrob7Yhi.H1lvX50cXC0}+#{WjV77sg2pXU.H1lvX50cXC0}+#{e3rcyUro80P.H1lvX50cXC0}+#{NVAf8CLaHux.H1lvX50cXC0}+#{tm5yEwTKtkr.H1lvX50cXC0})}

DATA ELEMENTS

PROGRAMS

ORG UNIT COUNTS

CONSTANTS

REPORTING RATES

starting

EPI - DPT-HepB-HIB starting balance  
EPI - IPV starting balance  
EPI - MR starting balance  
EPI - OPV starting balance

CANCEL

SAVE

Select "Save" once the left side has been selected.

Select the Operator

It is "less than or equal to" in this case. Explain why this is.

Equal to

Not equal to

Greater than

Greater than or equal to

Less than

Less than or equal to

Compulsory pair

Exclusive pair

Open the Right Side Expression

Select the data element "EPI - DPT-HepB-Hib 2 doses given threshold" for the right side.

Right side expr

Missing value strategy  
Never skip

☐ Sliding window

Description

EPI - DPT-HepB-Hib 2 doses given threshold

#{0w43r1kxuQn}

DATA ELEMENTS

PROGRAMS

ORG UNIT COUNTS

thresh

EPI - DPT-HepB-Hib 2 dose given threshold

EPI - RV 2 doses given threshold

MAL - Malaria confirmed MEDIAN+2 STD (threshold)

MAL - Malaria confirmed MEDIAN (threshold)

Click on "Save" when the expression is complete.

Save the Rule when finished

Create a Validation Rule Group

Place the validation rule you have created into the group and select "Save." Use your initials to create the group.

Name (\*)

ND\_Immunisation thresholds

Code

Description

Validation rules

Search available/selected items

ADS 0.05 ml waste should be less than or equal to consumption

ADS 0.5 ml waste should be less than or equal to consumption

all-cause admission <= all-cause outpatient

all-cause deaths <= all-cause admission

Bacteriological examinations (TB)

BCG doses given should be less than total used and wasted

Cases positive at community level <= Cases tested at community level

Cases tested at community level <= Cases treated at community level

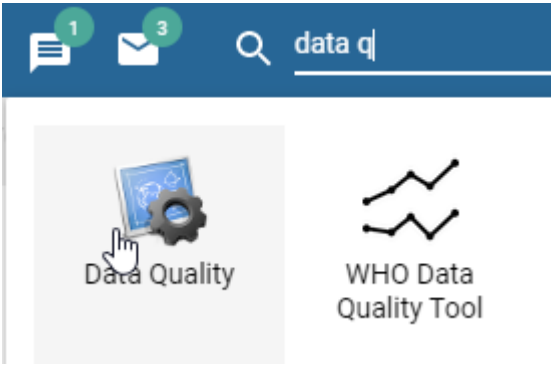
DPT-HepB-Hib 2 administered <= DPT-HepB-Hib 2 dose threshold

Rotavirus 2 administered <= Rotavirus threshold

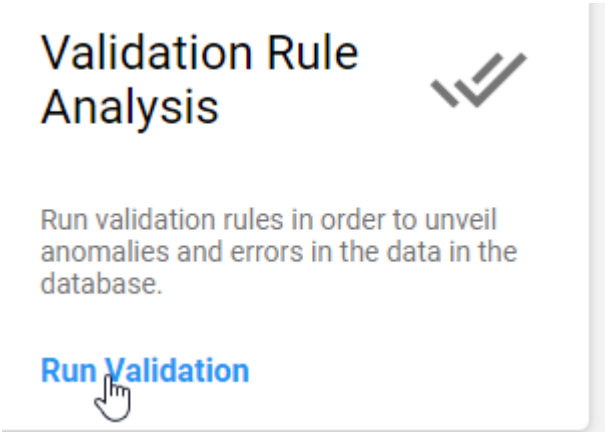
Test the validation rule in validation analysis within the Data Quality app

Navigate to the data quality app





Select “Run validation”



Select the following inputs:

- **Date : January 1 2023 - April 1, 2023**
- **Rule Group : The group you have just made**
- **Parent Organisation unit : Dog District**
- 

## Validation Rule Analysis ?

Parent organisation unit

▼ Trainingland

▼ Animal Region

▶ Bird District

▶ Cat District

Dog District

▶ Fish District

▶ Game District

▶ Insect District

▶ Food Region

Start Date

2023-01-01

End Date

2023-04-04

Validation Rule Group

ND\_Immunisation Validation Rules

☐ Send Notifications

☐ Persist new results

Validate

You should see the violations. Does it work for you?

End Activity 3