

OpenIZ Administration Portal

User Manual



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Versioning History

Version	Date	Author	Notes
1.0	04/24/2017	Justin Fyfe & Nityan Khanna et al.	Creation
1.1	5/11/2017	Michael Szucsik & Zoltan Jakab	Edits & Export
1.2	6/2/2017	Zoltan Jakab & Michael Szucsik	Revisions
1.3	6/19/2017	Michael Szucsik & Zoltan Jakab	Updates & Revisions
1.4	8/2/2017	Michael Szucsik	Updates

Chapter 1: Introduction to the OpenIZ Administration Portal

1.1 What is OpenIZ?

The **OpenIZ (Open Immunize)** Administration Portal is a powerful web tool that allows healthcare administrators to access, create, and modify immunization data stored on central servers. OpenIZ provides comprehensive tracking of all data related to the administration of vaccinations. It comprises the back-end database, cloud storage, and web tools supporting the **Tanzanian Immunization Registry (TImR)**.

OpenIZ provides a single consistent Immunization Management System which allows development teams to customize local instances. Through its *global back-end / local front-end* approach, OpenIZ builds local in-country capacity while supporting immunization campaigns.

Because OpenIZ can track sensitive information related to a patient's health status, it has been built from the ground up with privacy enforcement and security considerations.

OpenIZ is created and supported by Mohawk College's **mHealth and eHealth Development and Innovation Centre**. Located in Hamilton, Canada, **MEDIC** is an internationally renowned applied research centre in digital health that helps companies, not-for-profits, and government organizations develop and implement innovative digital health solutions to improve patient care.

1.2 Getting Started: Browsing to OpenIZ

The TImR Web Portal is accessed through a **web browser** (*such as Internet Explorer, Mozilla Firefox, or Chrome*).

To access the OpenIZ Administration Portal, you will need to enter the URL of the portal.

Step 1: Open your web browser.

Step 2: In the URL address field, enter the address of the OpenIZ Administration Portal (<http://timradminintl.marc-hi.ca>) and press **Enter** (See the figure below)

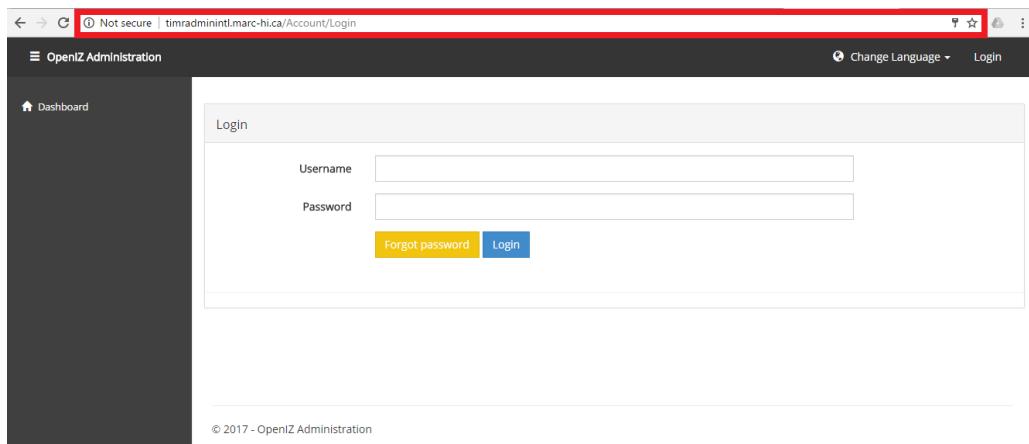


Figure 1.1 - Enter the address here and you will be directed to the login page.

1.3 Selecting a Language

You are able to switch languages to view this portal in either English or Swahili. To change languages:

Step 1: Select the  **Change Language** drop-down and choose your preferred language (See the figure below)

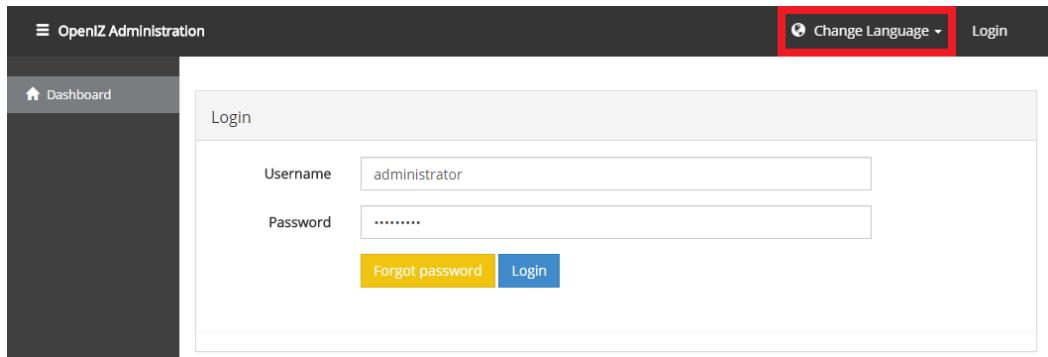


Figure 1.2 - Change Language button

1.4 Joining a Realm

If you are not connected to a realm, see section 19.2 (**Joining a Realm**) for more information.

1.5 Logging In ➔

To log in you must have a valid administrator-level **Username** and **Password**.

Step 1: Type in a valid **Username** and **Password** into the corresponding fields.

Step 2: Click the **Login** button

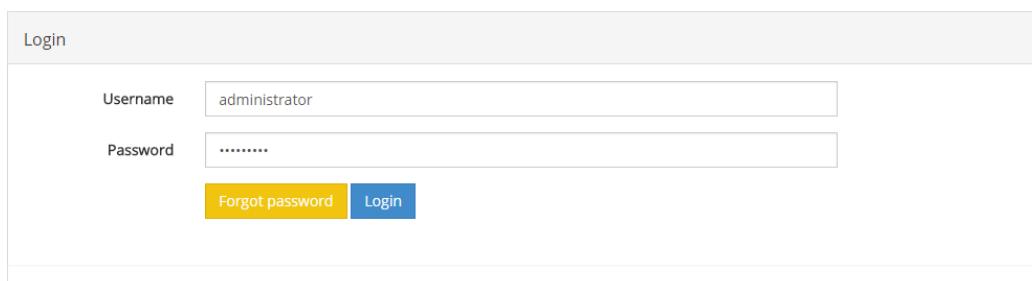


Figure 1.3 - Enter a valid Username and Password to access the OpenIZ Administration Portal

After logging in you will be brought to the Dashboard.

1.6 Logging Off ➔

To log off:

Step 1: Click the button in the top right corner of the OpenIZ Administration portal labelled **Log off** (See figure below)

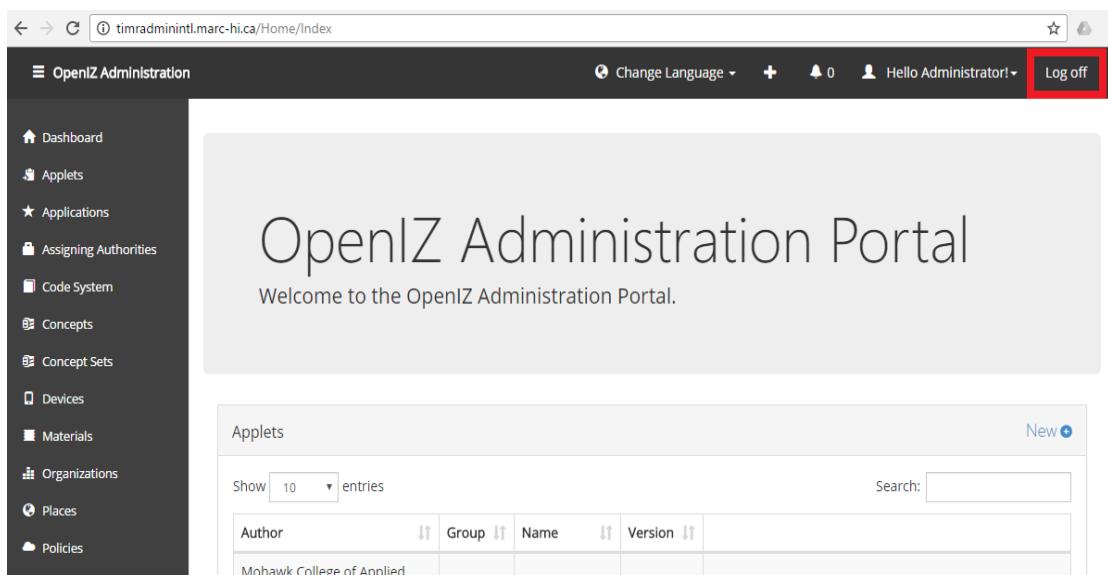


Figure 1.4 - OpenIZ Administration Dashboard, Logging off

1.7 Forgot password

If you have forgotten your password follow these steps:

Step 1: Select **Forgot password** button (See the figure below)

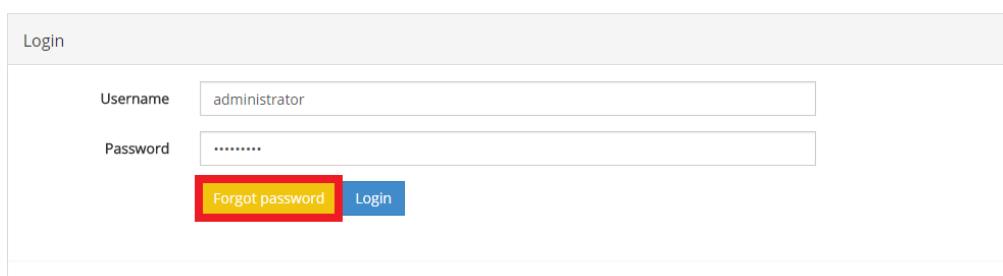
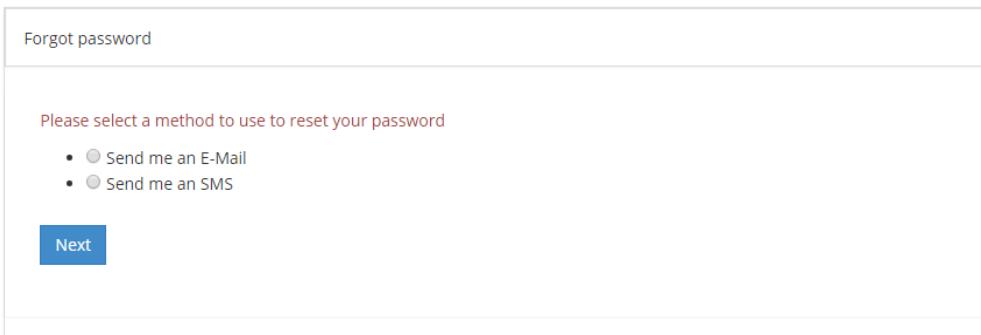
A screenshot of the OpenIZ Login page. It features a 'Login' header, a 'Username' field containing 'administrator', a 'Password' field with masked text, and two buttons at the bottom: 'Forgot password' (highlighted with a red box) and 'Login'.

Figure 1.5 - Login page forgot password

Step 2: Type in your username into **Username** field and click **Next** button

Step 3: Select either **Send me an E-Mail** or **Send me an SMS** (See the figure below)



The image shows a screenshot of a web-based password recovery interface. At the top, it says 'Forgot password'. Below that, a message reads 'Please select a method to use to reset your password'. There are two radio buttons: one for 'Send me an E-Mail' and one for 'Send me an SMS'. At the bottom left is a blue 'Next' button.

Figure 1.6 - Forgot password recovery method

Step 4: Enter either the first part of your email i.e. 'john.smith' if you selected email, or enter the last 4 digits of your phone number if you selected SMS into the **Verification** field, press the **Submit** button



Step 5: An e-mail or SMS message will be sent to the matching recovery e-mail or mobile phone, copy the recovery code you received

Step 6: Set a new password by entering it into the **New Password** field and reentering it in the **Confirm Password** field

Step 7: Click **Done** to set your new password

Chapter 2: The Navigation Toolbar

After logging in you will be brought to the Dashboard, you will have a navigation toolbar at the top of the screen and the side menu along the left side of the screen. (See the figure below)

2.1 Overview

The toolbar has some basic features related to your account or preferences.

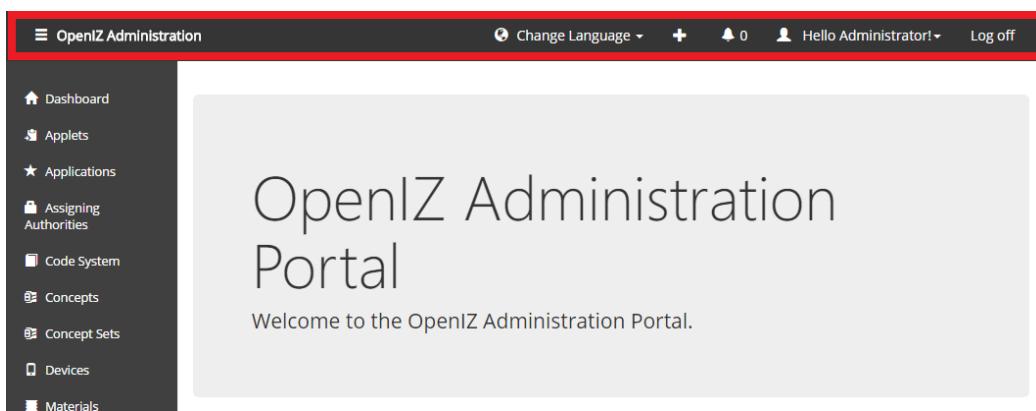


Figure 2.1 - OpenIZ Administration dashboard – Navigation Toolbar

The right side of the **Navigation Toolbar** contains various modules, from left to right (See the figure above):

- **Changing Language** - Change your current language to one of **English or Kiswahili**
- **New Alert** - The creation of user-specific or system wide alerts
- **Viewing Alerts** - The location to view pending alerts
- **Accessing the User Profile** - An area where you can **change your password or update your profile**
- **Logging off** - Allows you to securely log off of the portal

2.2 Change Language

Just like the logging page you are able to switch languages to view this portal in either English or Swahili. This option is available throughout the whole webpage.

To change languages:

Step 1: Select the **Change Language** drop-down and choose your preferred language. (See the figure below)

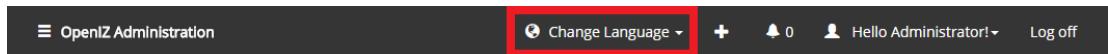


Figure 2.2 - OpenIZ Administration dashboard - Toolbar

2.3 New Alert

This button will open the **Create Alert** page. See the section below for more information on creating and viewing alerts. (See the figure below)



Figure 2.3 - New alert button

2.4 Alerts

This button will take you to the **Alerts** page. The number next to the **Alerts** icon represents your unread alerts. (See the figure below)

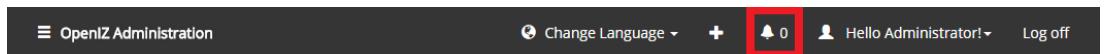


Figure 2.4 - Alerts button

From the **Alerts** page you can create, search, view, acknowledge and delete alerts. (See the figure below)

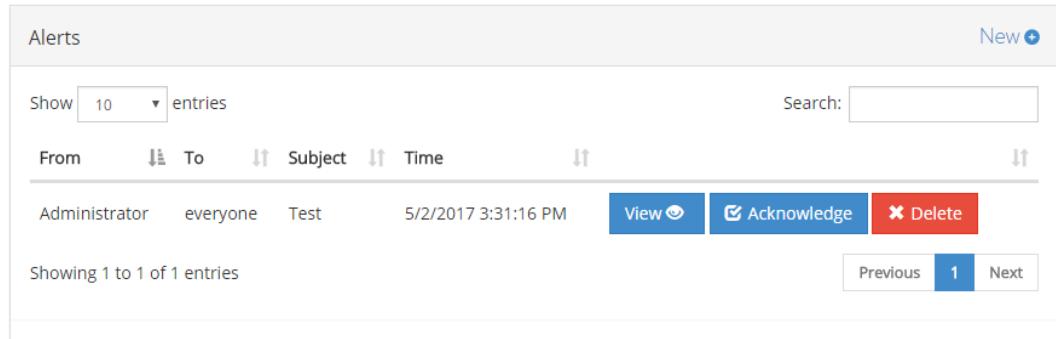


Figure 2.5 - Alerts page

2.4.1 Creating a New Alert

The page you are brought to will have 4 fields and a checkbox (See the figure below):

- **To** - The recipient
- **System Broadcast**
- **Subject** - A brief statement or phrase about the message
- **Priority** - determines the importance of the message
- **Message** - the actual message body

The screenshot shows a 'Create Alert' form. At the top, it says 'Create Alert'. Below that are four input fields: 'To' (text input), 'Subject' (text input), 'Priority' (dropdown menu with 'Alert' selected), and 'Message' (text area). At the bottom are two buttons: 'Cancel' (red) and 'Submit' (blue).

Figure 2.6 - Create Alert page

Step 1: Enter the username of the single recipient who will receive your alert

Note: The web portal will automatically search for users as soon as you've typed in at least 3 characters. After the specified user is found, hit enter to place them into the field

Step 2: If you would like to send the alert to all users in the system, select the option to broadcast this alert to everyone (See the figure below)

Create Alert

To:

Would you like to broadcast this alert to everyone
(This would be a system level alert to all users)

Subject:

Priority:

Message:

Cancel **Submit**

Figure 2.7 – System-wide alert checkbox

Note: Setting the priority to **System** will override the recipient field and will instead broadcast your message to **ALL** users on the system

Step 3: Write the subject header of your message. This will summarize your message into a few key words

Step 4: Set the message priority to **Alert, High Priority**

Step 5: Enter the message you want to send to the recipient(s)

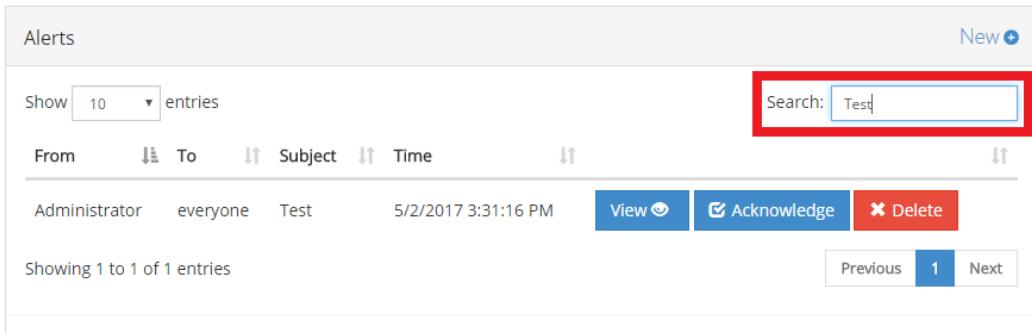
Step 6: Press the **Submit** button



2.4.2 Searching for an Alert

If you have unacknowledged alerts you can search for a specific one by using the search bar on the top right of the **Alerts** page.

Step 1: Start typing a **Username** or **Subject** in the search bar, results will be filtered as you type (See the figure below)



The screenshot shows a table of alerts. At the top right is a 'Search' input field containing 'Test', which is highlighted with a red box. Below the search bar are filter buttons for 'From', 'To', 'Subject', and 'Time'. The table has one entry: 'Administrator' sent to 'everyone' with subject 'Test' at '5/2/2017 3:31:16 PM'. To the right of the entry are 'View' (highlighted with a red box), 'Acknowledge', and 'Delete' buttons. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has 'Previous' and 'Next' buttons.

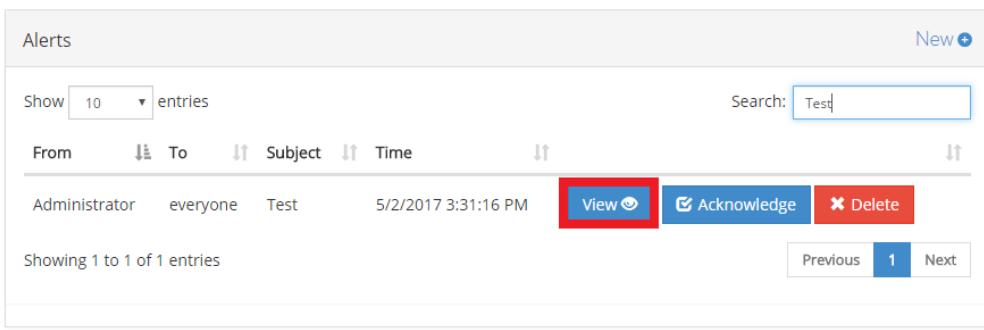
Figure 2.8 - Filtering alerts

2.4.3 Viewing an Alert

If you have new alerts available that have not yet been marked as acknowledged you can view them for more details about the alert and see the message attached.

Step 1: Click on the **Alerts**  icon to open the **Alerts** page

Step 2: Find the alert you want to open and click the **View**  icon, the alert you selected will be displayed (See the figure below)



The screenshot is identical to Figure 2.8, but the 'View' button for the single alert entry is highlighted with a red box.

Figure 2.9 - Viewing alerts

2.4.4 Acknowledging an Alert

Once you are finished with an alert, you can remove it from your **Alerts** page by acknowledging it.

Acknowledge from the Alerts page:

Step 1: Click on the **Alerts**  icon to open the **Alerts** page

Step 2: Find the alert you want to remove and click the **Acknowledge**  button to acknowledge the alert (See the figure below)

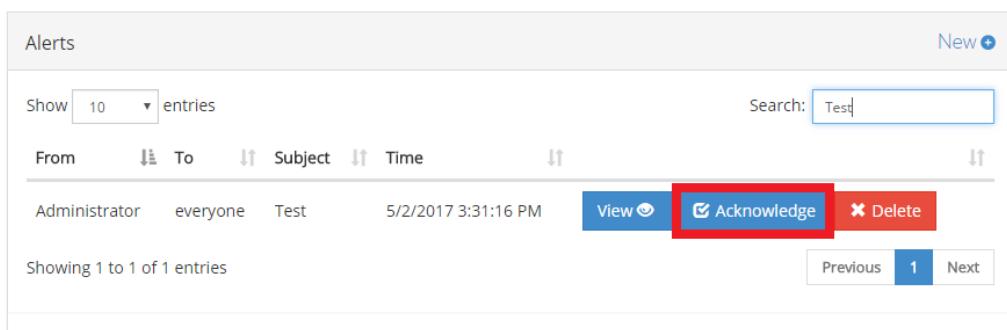


Figure 2.10 - Acknowledging alerts

Acknowledge while viewing the Alert:

Step 1: Click on the **Alerts**  icon to open the **Alerts** page

Step 2: Find the alert you want to open and click the **View**  icon; the alert you selected will be displayed

Step 3: Click either the **Acknowledge**  button to acknowledge the alert, or the **Cancel** button to remove the alert (See the figure below)

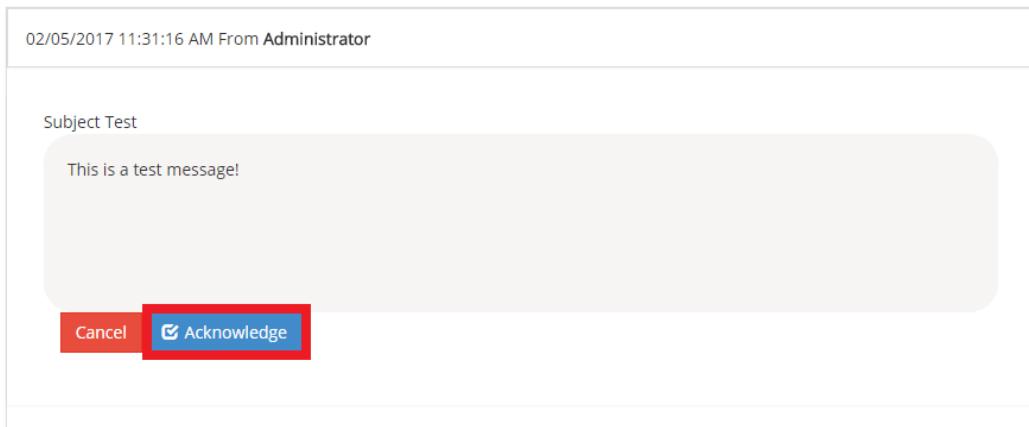


Figure 2.11 - Acknowledging an alert while viewing the alert

2.4.5 Deleting an Alert

You can choose to delete an alert without acknowledging it. This will remove the alert from your **Alerts** page.

Step 1: Click on the **Alerts**  icon to open the **Alerts** page

Step 2: Find the alert you want to remove and click the **Delete**  button to remove the alert (See the figure below)

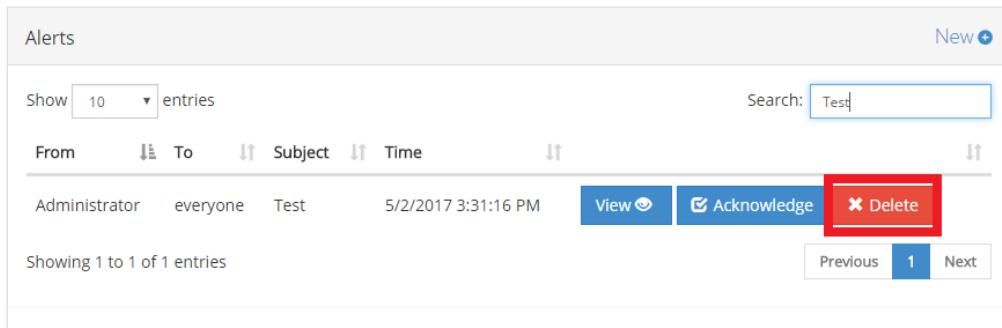


Figure 2.12 - Deleting an alert

2.5 User Preferences

The User preferences drop-down will be displayed as  **Hello Username!** This menu lets you choose from two options: **Change Password** and **Update profile**.

2.5.1 Change Password

You can change the password for your account at any time.

Step 1: Click on the  **Hello Username!** Drop-down menu



Figure 2.13 - User preferences button

Step 2: Select **Change Password**, the **Change Password** page will load

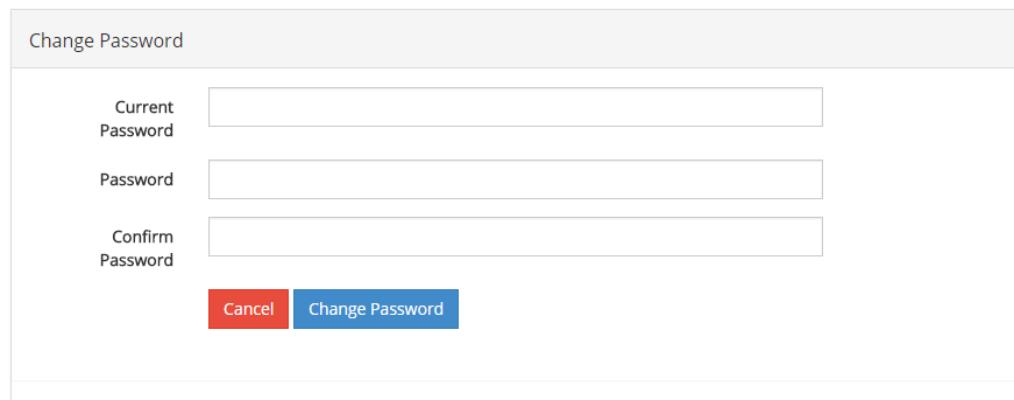
A screenshot of a "Change Password" form. The title "Change Password" is at the top. Below it are three input fields: "Current Password", "Password", and "Confirm Password", each with a corresponding text input box. At the bottom are two buttons: a red "Cancel" button and a blue "Change Password" button.

Figure 2.14 - Change password page

Step 3: Enter in your current password in the **Current Password** field
(**Required**)

Step 4: Enter in your new password in the **Password** field (**Required**)

Step 5: Re-enter your new password in the **Confirm Password** field
(**Required**)

Step 6: Press **Change Password**

2.5.2 Update Profile

With **Update Profile** you can make changes to your personal information, change facilities and set language preferences.

Step 1: Click on the **Hello Username!** Drop-down menu (See the figure below)



Figure 2.15 - User preferences button

Step 2: Select **Update profile**, the **Update profile** page will load

Step 3: Here you can make any changes you wish:

- Email (**Required**)
- Given Name
- Surname
- Facility

Note: Enter 4 or more characters to search for a facility

- Language (**Required**)
- Phone Type
- Phone

Note: This can be Phone number/Fax number/Pager number or others.

Step 4: Press **Save**

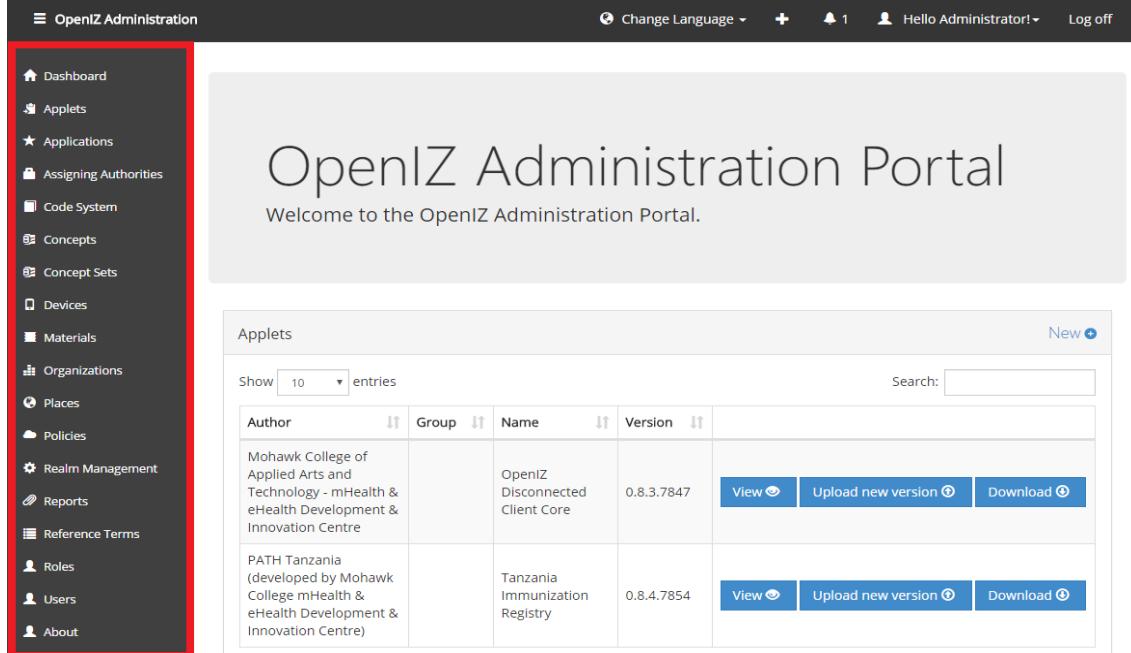
2.6 Logging Off

The **Log off** button in the toolbar allows you to log out from the OpenIZ Admin portal securely. This will be available anywhere while browsing any page in the portal.

See the **Logging off** section in **Chapter 1** for more information.

Chapter 3: The Side Menu

The side menu provides you links to pages that allow you to access and control various objects that are used in the TImR system. (See the figure below)



The screenshot shows the OpenIZ Administration Portal. The top navigation bar includes 'OpenIZ Administration', 'Change Language', a notification icon (1), 'Hello Administrator!', and 'Log off'. The left side features a dark sidebar with a red border containing a list of menu items: Dashboard, Applets, Applications, Assigning Authorities, Code System, Concepts, Concept Sets, Devices, Materials, Organizations, Places, Policies, Realm Management, Reports, Reference Terms, Roles, Users, and About. The main content area displays the 'Applets' page with a table listing two entries. The table columns are Author, Group, Name, and Version. The first entry is 'Mohawk College of Applied Arts and Technology - mHealth & eHealth Development & Innovation Centre' (Group: OpenIZ Disconnected Client Core, Name: OpenIZ Disconnected Client Core, Version: 0.8.3.7847). The second entry is 'PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)' (Group: Tanzania Immunization Registry, Name: Tanzania Immunization Registry, Version: 0.8.4.7854). Each entry has 'View', 'Upload new version', and 'Download' buttons.

Figure 3.1 - Side Menu

The **Side Menu** may appear different depending on the roles/policies applied to the user account. For a brief guide on creating custom roles for users to customize functionality, see the **Sample User: Report Admin** section below within this chapter.

Below is a list of all currently available options that may appear in the Side Menu:

3.1 Dashboard

The **Dashboard** is the welcome page of the OpenIZ Administration Portal. A few key objects are seen here including applets, certificate requests, devices and roles.

For more detailed information about the dashboard see the **Dashboard**  section below.

3.2 Applets

The **Applets** page will display a list of Applets currently installed, who created them, version information and more. From here you can add new applets or manage applets already installed.

For more detailed information about the **Applets** page see the **Applets**  section below.

3.3 Applications

The **Applications** page provides you with a search feature to search for any applications installed on the system. You can also add new applications or manage applications already installed.

For more detailed information about the **Applications** page see the **Applications**  section below.

3.4 Assigning Authorities

The **Assigning Authorities** page provides you with a search feature to search for any assigning authorities currently implemented in the system. You can also add new assigning authorities or manage assigning authorities already implemented.

For more detailed information about the **Assigning Authorities** page see the **Assigning Authorities**  section below.

3.5 Certificates

The **Certificates** page provides a list of certificate requests. From here you can accept and reject certificates.

For more detailed information about the **Certificates** page see the **Certificates**  section below.

3.6 Code System

The **Code System** page provides you with a search feature to search for any code systems currently implemented in the system. You can also add new code systems or manage code systems already implemented.

For more detailed information about the **Code System** page see the **Code System**  section below.

3.7 Concepts

The **Concepts** page provides you with a search feature to search for any concepts currently implemented in the system. You can also add new concepts or manage concepts already implemented.

For more detailed information about the **Concepts** page see the **Concepts**  section below.

3.8 Concept Sets

The **Concept Sets** page provides you with a search feature to search for any concept sets currently implemented in the system. You can also add new concept sets or manage concept sets already implemented.

For more detailed information about the **Concept Sets** page see the **Concept Sets**  section below.

3.9 Devices

The **Devices** page provides you with a search feature to search for any devices registered on the system. You can also add new devices or manage devices currently registered.

For more detailed information about the **Devices** area see the **Devices**  section below.

3.10 Extension Types

The **Extension Types** page provides you with a search feature to search for any extension types on the system. You can also add extension types or manage the extension types currently registered.

For more detailed information about the **Extension Types** page see the **Extension Types**  section below.

3.11 Manuals

The **Manuals** page provides you a list of manuals currently available for the system and applications (including this manual). You can also add new manuals or manage these manuals.

For more detailed information about the **Manuals** page see the **Manuals**  section below.

3.12 Materials

The **Materials** page provides you with a search feature to search for any materials currently available on the system. You can also add new materials or manage these materials.

For more detailed information about the **Materials** page see the **Materials**  section below.

3.13 Organizations

The **Organization** page provides you with a search feature to search for any organizations currently registered with the system. You can also add new organizations or manage organizations that are already registered

For more detailed information about the **Organizations** page see the **Organizations**  section below.

3.14 Places

The **Places** page provides you with a search feature to search for any places that are currently registered with the system. You can also add new places or manage the places that are already registered.

For more detailed information about the **Places** page see the **Places**  section below.

3.15 Policies

The **Policies** page provides you with a search feature to search for any policies that are currently implemented in the system. You can also add new policies or manage the policies that are already implemented.

For more detailed information about the **Policies** page see the **Policies**  section below.

3.16 Realm Management

The **Realm Management** page displays the current realm information and provides the ability to **Leave the current realm**  and join another.

For more detailed information about the **Realm Management** page see the **Realm Management**  section below.

3.17 Reports

The **Reports** page provides you with a search feature to search for any reports that have been generated. You can also view and manage these reports.

For more detailed information about the **Reports** page see the **Reports**  section below.

3.18 Reference Terms

The **Reference Terms** page provides you with a search feature to search for any reference terms that are currently implemented in the system. You can also add new reference terms or manage the reference terms that are already implemented.

For more detailed information about the **Reference** page see the **Reference**  section below.

3.19 Roles

The **Roles** page provides you with a search feature to search for any roles currently implemented in the system. You can also add new roles or manage the roles that are already implemented.

For more detailed information about the **Roles** page see the **Roles**  section below.

3.20 Users

The **Users** page provides you with a search feature to search for any users currently registered in the system. You can also add new users or manage the users that are already implemented.

For more detailed information about the **Users** page see the **Users ** section below.

3.21 About

The **About** page provides you with all versioning information for all components of the system. You can also access the **Submit Bug Report** page from this page.

For more detailed information about the **About** page see the **About ** section below.

3.22 Sample User: Report Admin

Not every user should have access to all functions available in the OpenIZ portal.

An example of a full admin account would have all the functions listed in the figure below (See the figure below). This would not be useful for the various types of roles.

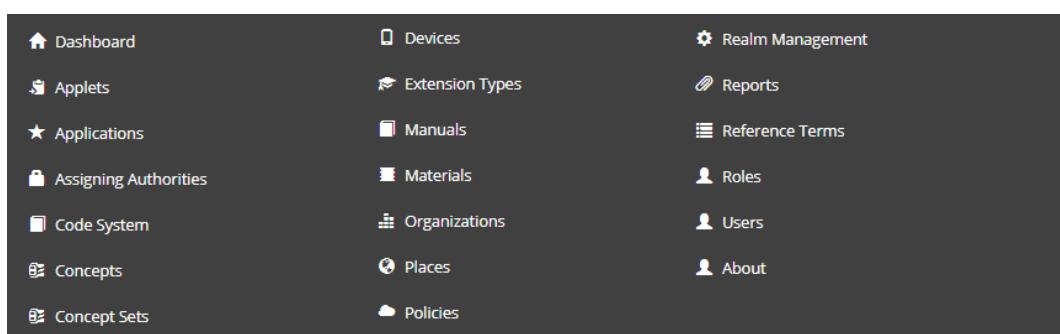


Figure 3.2 – Side Menu options

Custom role(s) can be created for different types of user accounts to only see and have access to specific options in the side menu.

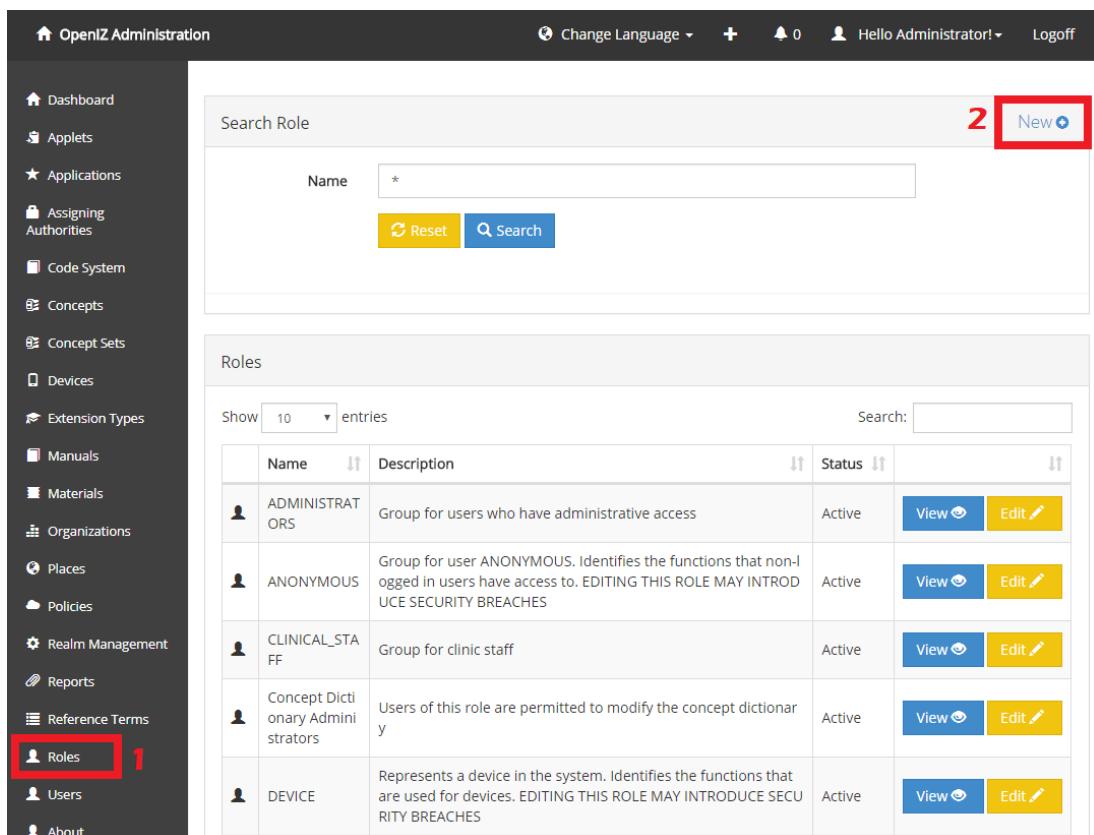
A sample user account may be a **Report Admin**, with limited access only able to view **Reports**.

To create a **Report Admin** user:

Note: You need to have full administrator status, or at minimum the ability to create policies, roles and users.

Firstly, we need to create a role to allow access to the reports.

Step 1: Click to **Roles** button to view the **Roles** page, at the top right of the **Search Role** area click on the **New** button (See the figure below)



The screenshot shows the 'OpenIZ Administration' interface. The left sidebar contains a list of administrative modules: Dashboard, Applets, Applications, Assigning Authorities, Code System, Concepts, Concept Sets, Devices, Extension Types, Manuals, Materials, Organizations, Places, Policies, Realm Management, Reports, Reference Terms, Roles (which is highlighted with a red box and a red number '1'), Users, and About. The main content area has a header 'Search Role' with a 'Name' input field containing an asterisk, a 'Reset' button, and a 'Search' button. To the right of the search area is a red box with the number '2' and a 'New' button with a blue icon. Below this is a table titled 'Roles' with columns for Name, Description, Status, View, and Edit. The table lists five roles: ADMINISTRATORS, ANONYMOUS, CLINICAL_STAFF, Concept Dictionary Administrators, and DEVICE. Each role has a description and a status of 'Active' with 'View' and 'Edit' buttons.

Name	Description	Status	View	Edit
ADMINISTRATORS	Group for users who have administrative access	Active	View	Edit
ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Active	View	Edit
CLINICAL_STAFF	Group for clinic staff	Active	View	Edit
Concept Dictionary Administrators	Users of this role are permitted to modify the concept dictionary	Active	View	Edit
DEVICE	Represents a device in the system. Identifies the functions that are used for devices. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Active	View	Edit

Figure 3.3 – New Role

Step 2: Fill out a name and description for the role, then press the **Submit** button (See the figure below)

- In this example we use *Name: ReportAdmin*

Create Role

Name	ReportAdmin
Description	This user will only be able to log in and view reports.

Cancel **Submit**

Figure 3.4 – Creating a new role

The new **ReportAdmin** role will be created, next we need to add policies to the role to give it special privileges.

After creating the new role you will be on the **View Role** page of the newly created role. To add policies:

Step 3: In the top right corner of the **View Role** area press the **Edit**  button (See the figure below)

View Role

Name	ReportAdmin
Description	This user is able to view and edit reports.

Edit

Figure 3.5 – View role: Edit button

You will be brought to the **Edit Role** page for the **ReportAdmin** role.

Step 4: Click anywhere in the white space of the **Policies** field to view the drop-down menu, either start typing **Login** or find it in the list (See the figure below)

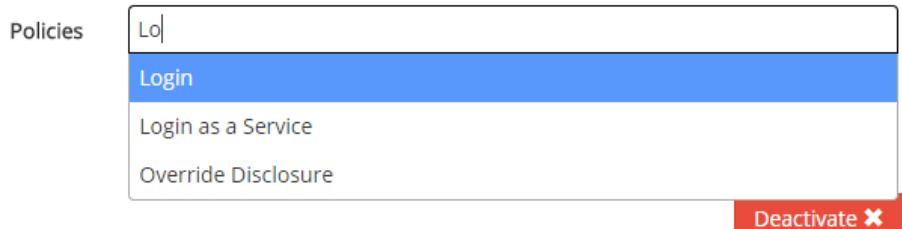


Figure 3.6 – Adding policies

Step 5: Repeat the previous step to add **Unrestricted Data Warehouse** (See the figure below)

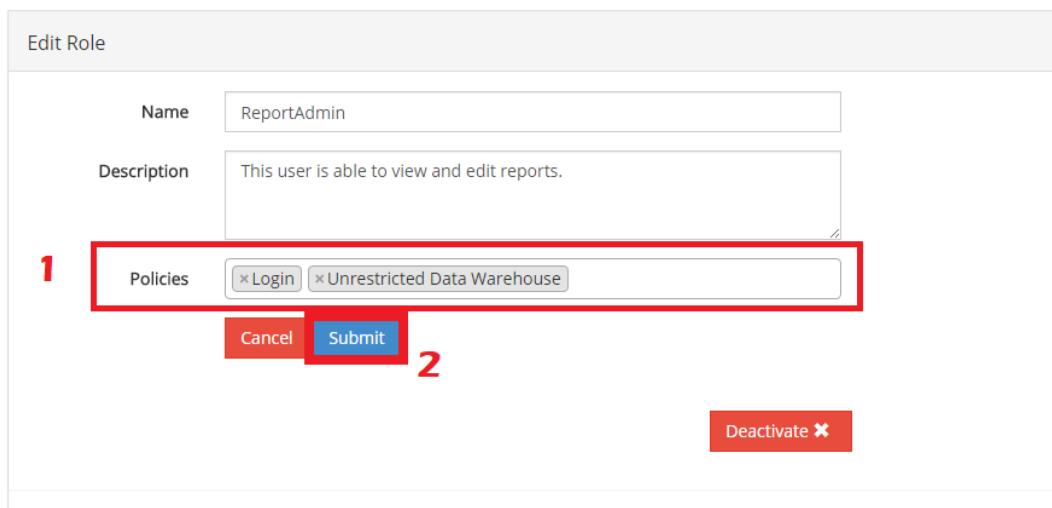


Figure 3.7 – Adding policies to a role and submitting the changes

Step 6: Press the **Submit** button to finish creating the role (See the figure above)

The **ReportAdmin** role will now be able to log in to **OpenIZ** and view the **Reports** page. Now we just need a user account to add the role to.

Step 7: Click to **Users** button to view the **Users** page, at the top right of the **Search User** area click on the **New** **•** button (See the figure below)

The screenshot shows the OpenIZ Administration interface. On the left, a sidebar menu is visible with various options like Dashboard, Applets, Applications, Assigning Authorities, Code System, Concepts, Concept Sets, Devices, Extension Types, Manuals, Materials, Organizations, Places, Policies, Realm Management, Reports, Reference Terms, Roles, and Users. The 'Users' option is highlighted with a red box and a red number '1' below it. At the top right, there are links for Change Language, Hello Administrator!, and Logout. The main content area has a 'Search User' bar with a 'Name' field containing an asterisk (*), a 'Reset' button, and a 'Search' button. To the right of the search bar is a red box with the number '2' and a blue 'New' button. Below the search bar is a table titled 'Users' with columns: Username, Email, Lockout Status, Roles, and Status. The table contains six rows with user data. Each row has 'View' and 'Edit' buttons. The 'Edit' button for the last row is highlighted with a red box and a red number '2'.

Figure 3.8 – New User

Step 8: Fill out all of the details for the user (Example details can be seen in the figure for **Step 9** below)

- In this example we are using the *Username: reportsadmin*

Note: Ensure you are using the **ReportAdmin** role for the **Roles** dropdown. (Click on the empty whitespace in the **Roles** field and either start typing **ReportAdmin**, or find it in the list) (See the figure below)

A screenshot of a dropdown menu for 'Roles'. The input field contains 'ReportA'. Below it, a list of roles is shown, with 'ReportAdmin' highlighted in blue, indicating it is selected.

Figure 3.9 – Adding roles to the user

Step 9: Press the **Submit** button to create the user (See the figure below)

Create User

Username	reportsadmin
Password
Confirm Password
Given Name	Sample
Surname	Sample
Language	English
Roles	ReportAdmin
Facility	Miti Mirefu
Phone Type	Mobile Phone
Phone	04832788324
Email	sampleuser@examplemail.com
<input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0;" type="button" value="Submit"/>	

Figure 3.10 – Creating a new user

The new **reportsadmin** user will be created and have the **ReportAdmin** role to give them specific access to **Reports** on **OpenIZ**. Let's test it out.

Step 10: Log off of **OpenIZ** by pressing the **Logoff** button on the top right corner of the page (See the figure below)

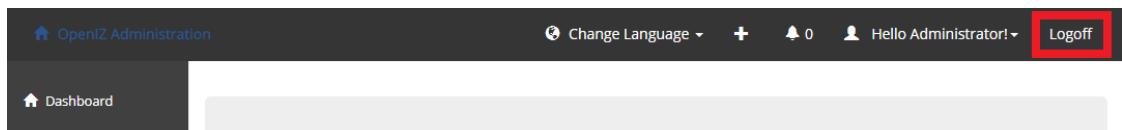


Figure 3.11 – Logging off

Step 11: Log back into **OpenIZ** using the new user account, press the **Log in** button (See the figure below)

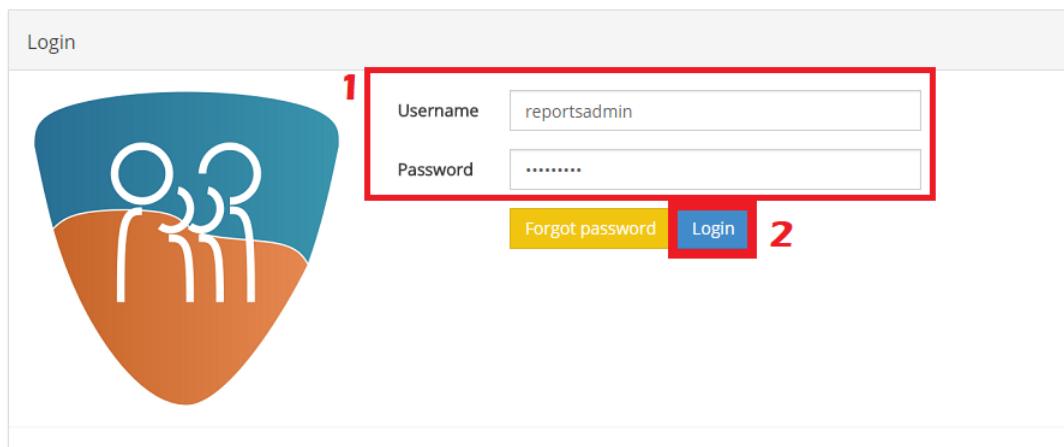


Figure 3.12 – Logging in

You will be logged into the new **reportsadmin** account. As you may see, on the left side tool bar there are only a few options now. The **Dashboard** and **About** page are default for any role that can **Login**, and the **Reports** page is available to those who have **Unrestricted Data Warehouse** access. (See the figure below)

Figure 3.13 – Reports page

Chapter 4: The Dashboard

The **Dashboard** is the main hub for seeing what's going on with the TImR system. There is a quick view of a few sections available on the administration portal such as applets installed, certificate requests, devices registered and available roles.

The Dashboard is the first view you see when you first log in. You can press the **Dashboard**  button from another page to access it. (See the figure below)

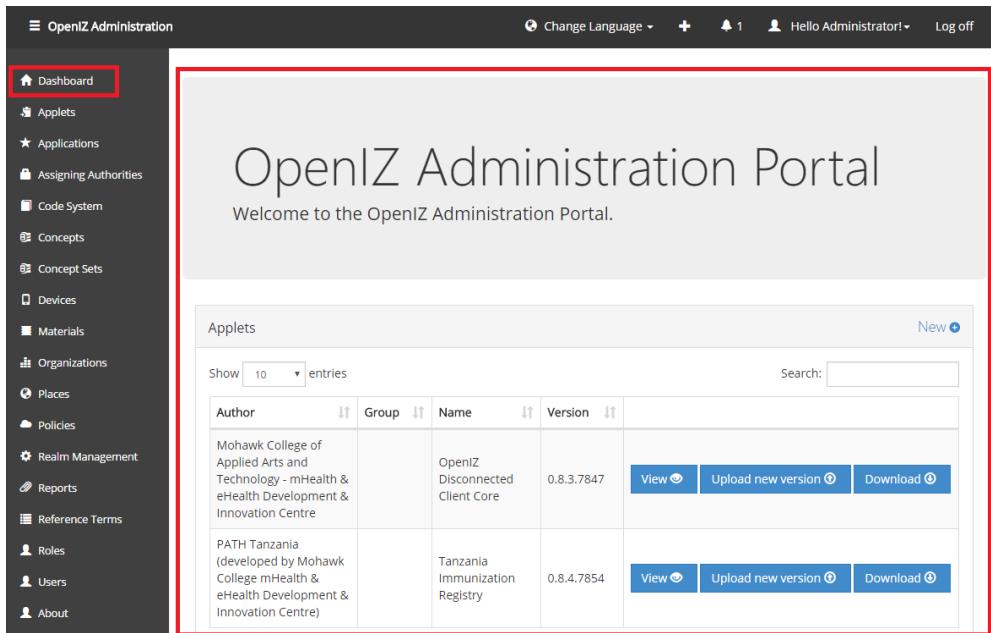


Figure 4.1 - The Dashboard and Dashboard button

4.1 Applets

The **Applets** area shows a list the current applets installed on the system. There are also options to manage these applets or add a new applet. (See the figure below)

Applets				New 
Author	Group	Name	Version	
Mohawk College of Applied Arts and Technology - mHealth & eHealth Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View  Upload new version  Download  Delete 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View  Upload new version  Download  Delete 

Figure 4.2 - Applets area

For more detailed information about **Applets** see the **Applets ** section below.

4.2 Certificate Requests

The **Certificate Requests** area shows a list of all the certificate signing requests that have been submitted. You can view the list, and approve or deny the certificates. (See the figure below)

Certificate Requests	
No new certificate signing requests have been submitted	

Figure 4.3 - Certificate Requests area

For more detailed information about **Certificate Requests** see the **Certificates ** section below.

4.3 Devices

The **Devices** area provides you with a search feature to search for any devices registered on the system. You can also add new devices or manage devices currently registered. (See the figure below)

Devices					
Show 10 entries		Search:			
	Creation Time	Name	Has Policies	Status	
1	21/04/2017 07:26:52 AM	device_public_id	No	Active	View Edit
2	21/04/2017 08:09:14 AM	Nexus7-D850E682AB80	No	Active	View Edit
3	21/04/2017 08:20:46 AM	MINI-IMS-c758b010-bf77-473f-99ab-8016df1f22d3	No	Active	View Edit
4	21/04/2017 08:42:42 AM	MEDIC-T5810-01-FB7B7665-514D-4D99-9992-A8451527E86F	No	Active	View Edit
5	21/04/2017 08:44:54 AM	MEDIC-T5810-01-9CDC2765-7110-4B71-9AD1-502B0DAFCB49	No	Active	View Edit
6	21/04/2017 10:06:52 AM	SM-T560NU-a9a9d9	No	Active	View Edit
7	21/04/2017 10:40:45 AM	SM-T560NU-24a067	No	Active	View Edit
8	21/04/2017 10:41:24 AM	SM-T560NU-26877a	No	Active	View Edit
9	21/04/2017 10:53:19 AM	MINI-IMS-51a9349e-5860-4b76-82f9-950e445025eb	No	Active	View Edit
10	21/04/2017 10:58:02 AM	SM-T280-043c8b	No	Active	View Edit
Showing 1 to 10 of 15 entries			Previous	1	2
				Next	

Figure 4.4 - Devices area

For more detailed information about **Devices** see the **Devices**  section below.

4.4 Roles

The **Roles** area provides you with a search feature to search for any roles currently implemented in the system. You can also add new roles or manage the roles that are already implemented. (See the figure below)

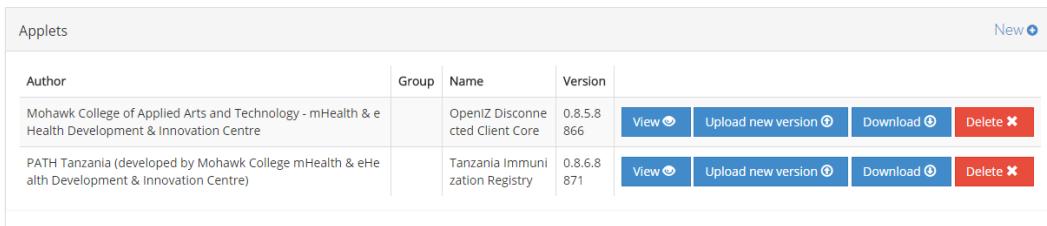
Roles						
Show 10 entries			Search: <input type="text"/>			
	Name	Description	Has Policies	Status		
👤	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	View	Edit
👤	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View	Edit
👤	CLINICAL_STAFF	Group for clinic staff	Yes	Active	View	Edit
👤	DEVICE	Represents a device in the system. Identifies the functions that are used for devices. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View	Edit
👤	IT Officer		No	Active	View	Edit
👤	Middle Level Officer		No	Active	View	Edit
👤	National Level Officer		No	Active	View	Edit

Figure 4.5 - Roles area

For more detailed information about **Roles** see the **Roles** section below.

Chapter 5: Applets ➔

The **Applets** page displays a list of the current applets installed on the system and shows the author, group, name, and version information. (See the figure below)



Applets				New 
Author	Group	Name	Version	
Mohawk College of Applied Arts and Technology - mHealth & e Health Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View  Upload new version  Download  Delete 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View  Upload new version  Download  Delete 

Figure 5.1 - Applets page

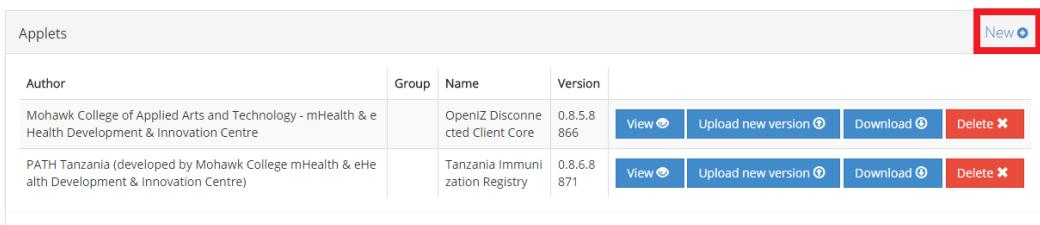
You can add new applets or view, update and download currently installed applets.

5.1 New Applets

From here you can upload new applets to distribute them to the TImR system.

To add a new applet:

Step 1: Click the **New ** button in the top right of the **Applets** area (See the figure below)



Applets				New 
Author	Group	Name	Version	
Mohawk College of Applied Arts and Technology - mHealth & e Health Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View  Upload new version  Download  Delete 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View  Upload new version  Download  Delete 

Figure 5.2 - Creating a new applet

Step 2: You will be brought to the **Upload Applet** page, Click the **Choose File** button (See the figure below)

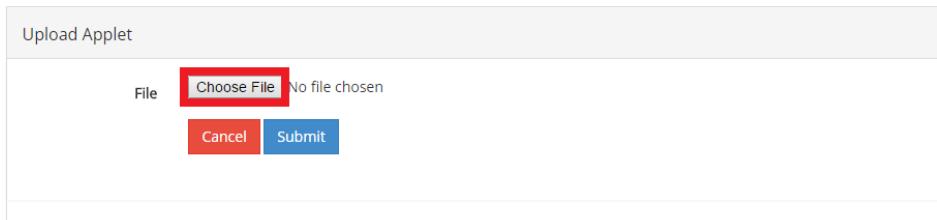


Figure 5.3 - Uploading a new applet

Step 3: In the File Explorer pop-up box, browse to the applet file you wish to add. Select the applet file and click the **Open** button (See the figure below)

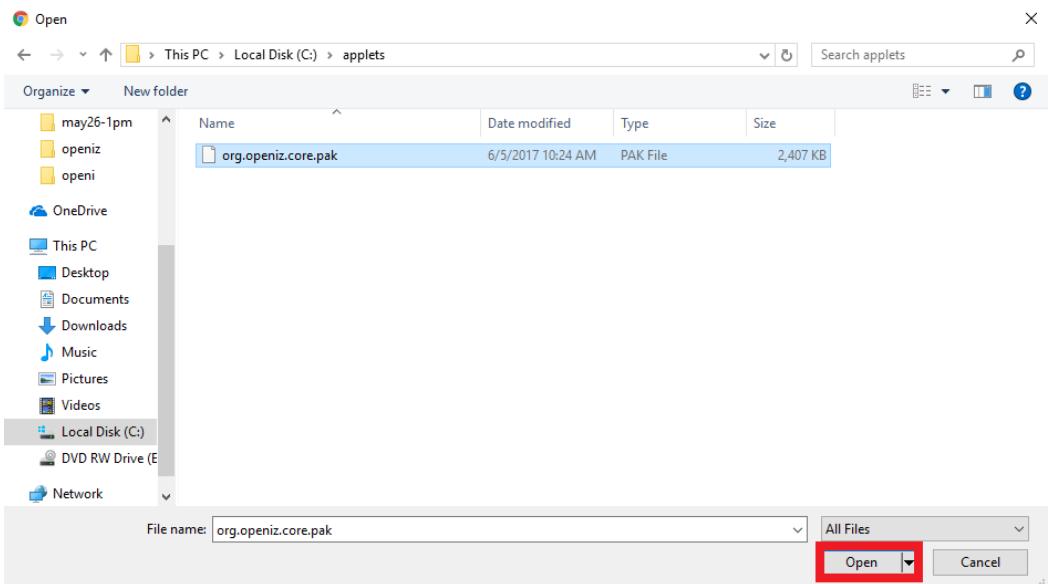


Figure 5.4 – Browsing for the applet file

Step 4: Click the **Submit** button to upload the applet (See the figure below)



5.2 View Applets

You are able to view details about the applets that are currently installed. To view applet details:

Step 1: From the **Applets** page, click the **View**  button next to the applet you wish to view (See the figure below)

Applets				New 
Author	Group	Name	Version	
Mohawk College of Applied Arts and Technology - mHealth & eHealth Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View  Upload new version  Download  Delete 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View  Upload new version  Download  Delete 

Figure 5.5 - View an applet button

You will be brought to the **View Applet** page. You can see basic information, version information as well as any assets for the applet. (See the figure below)

View Applet

Name	OpenIZ Disconnected Client Core
Author	Mohawk College of Applied Arts and Technology - mHealth & eHealth Developme
Id	org.openiz.core
Group	
Version	0.8.3.7847
Assets	0

Assets

No Assets Found

Figure 5.6 - Viewing an applet

5.3 Upload New Applet Version

If you want to upload a newer version to a currently installed applet without adding a new applet:

Step 1: From the **Applets** page, click the **Upload new version**  button next to the applet you wish to update (See the figure below)

Applets					New 
Author	Group	Name	Version		
Mohawk College of Applied Arts and Technology - mHealth & eHealth Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View 	Upload new version 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View 	Upload new version 

Figure 5.7 - Upload a new applet version

You will be brought to the **Upload & View Applet** page. Here you can see what the currently installed applet is and decide to update it or not.

Step 2: Click the **Choose File** button (See the figure below)

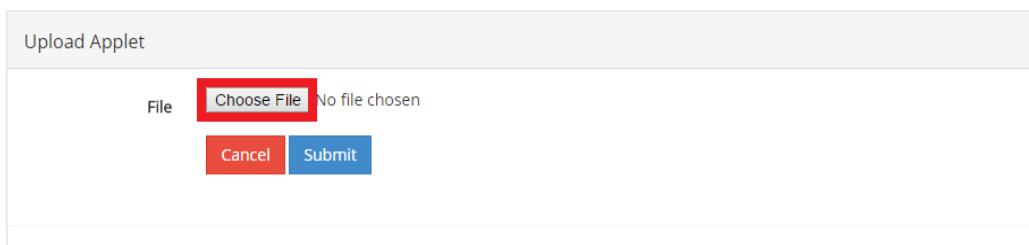


Figure 5.8 - Uploading a new applet version

Step 3: In the File Explorer pop-up box, browse to the applet file you wish to add. Select the applet file and click the **Open** button (See the figure below)

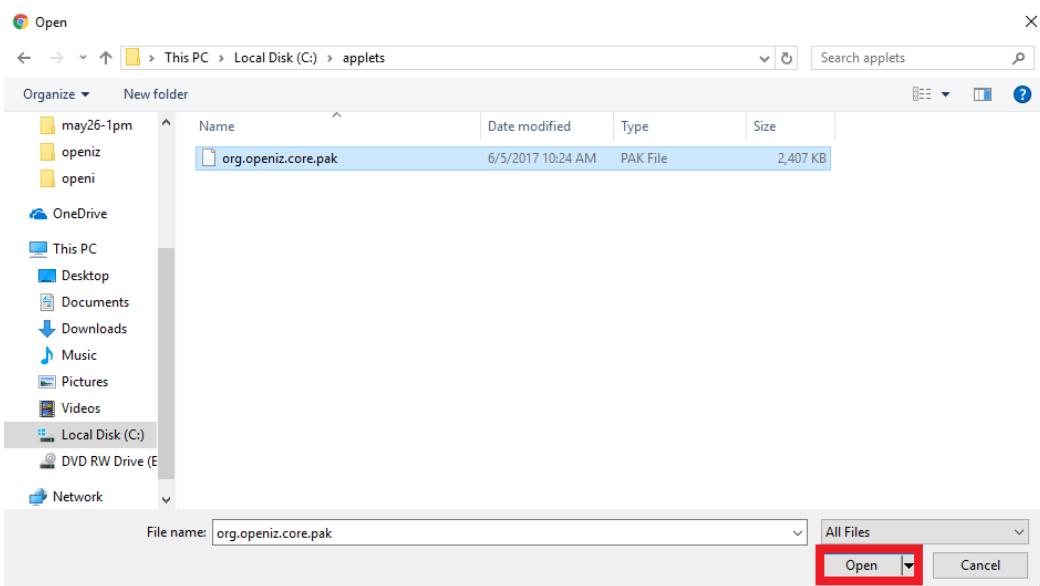


Figure 5.9 – Browsing for the applet file

Step 4: Click the **Submit** button to upload the applet (See the figure below)



5.4 Downloading Applets

You can download a local copy of the currently installed applets:

Step 1: From the **Applets** page, click the **Download**  button next to the applet you wish to download (See the figure below)

Applets				New 
Author	Group	Name	Version	
Mohawk College of Applied Arts and Technology - mHealth & eHealth Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View  Upload new version  Download  Delete 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View  Upload new version  Download  Delete 

Figure 5.10 - Downloading applets – Download button

The applet will be automatically downloaded to your local machine. Unless otherwise specified, the file will likely be in your Downloads folder.

5.5 Deleting Applets

You can delete a submitted applet to remove it from TImR. To delete an applet:

Step 1: Click the **Delete**  button next to the applet you wish to delete (See the figure below)

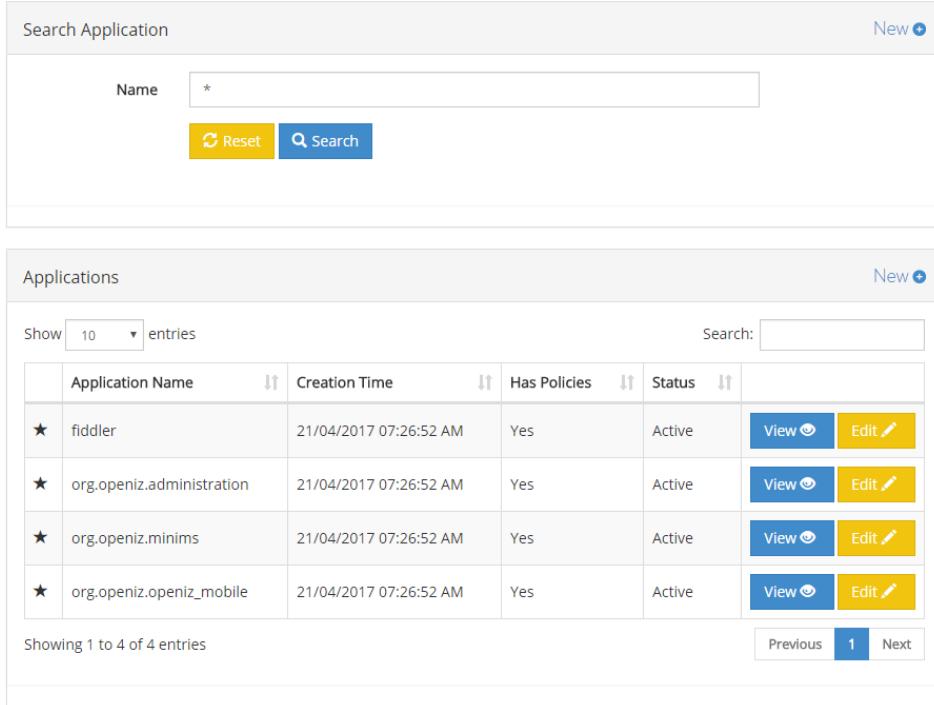
Applets					New 
Author	Group	Name	Version		
Mohawk College of Applied Arts and Technology - mHealth & e Health Development & Innovation Centre		OpenIZ Disconnected Client Core	0.8.5.8 866	View 	Upload new version 
PATH Tanzania (developed by Mohawk College mHealth & eHealth Development & Innovation Centre)		Tanzania Immunization Registry	0.8.6.8 871	View 	Upload new version 

Figure 5.11 – Deleting an applet

You will see a success message displayed stating *Applet deleted successfully*. The applet will be removed from the TImR system.

Chapter 6: Applications ★

The **Applications** page allows you to search for applications, or manually manage applications and their relationships (policies). (See the figure below)



The screenshot shows two main sections: a search interface at the top and a list of applications below it.

Search Application: This section contains a search bar labeled "Name" with a placeholder asterisk (*). Below the search bar are two buttons: "Reset" (yellow) and "Search" (blue).

Applications: This section has a header "Applications" and a "New" button. It includes a search bar and a table with the following data:

	Application Name	Creation Time	Has Policies	Status	View	Edit
★	fiddler	21/04/2017 07:26:52 AM	Yes	Active		
★	org.openiz.administration	21/04/2017 07:26:52 AM	Yes	Active		
★	org.openiz.minims	21/04/2017 07:26:52 AM	Yes	Active		
★	org.openiz.openiz_mobile	21/04/2017 07:26:52 AM	Yes	Active		

Below the table, it says "Showing 1 to 4 of 4 entries" and has navigation buttons for "Previous", "1", and "Next".

Figure 6.1 - Applications page

6.1 Search Applications

If you are looking for a specific application that already exists in the system you can use the **Search Application** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Application** area, enter the name of an application you are looking for and click the **Search**  button (See the figure below)

Figure 6.2 - Searching for an Application

Search results will appear in the **Applications** area below. See the following section on **Applications ★** for more information.

6.2 Applications ★

The **Applications** area of the **Applications** page displays a list of all the applications in the search results. By default the search results load with all applications available. (See the figure below)

	Application Name	Creation Time	Has Policies	Status	
★	fiddler	21/04/2017 07:26:52 AM	Yes	Active	View Edit
★	org.openiz.administration	21/04/2017 07:26:52 AM	Yes	Active	View Edit
★	org.openiz.minims	21/04/2017 07:26:52 AM	Yes	Active	View Edit
★	org.openiz.openiz_mobile	21/04/2017 07:26:52 AM	Yes	Active	View Edit

Showing 1 to 4 of 4 entries

Previous **1** Next

Figure 6.3 - Applications

Applications displayed here show the applications name, creation time, policy status and active status. Applications can be viewed and managed from this page.

New applications can also be added from this page. To add a new application, or view and manage an existing application, see sections below.

6.3 New Application

When a new application is required, you can create a new application with specific policies limiting the power it may have within the system. To create a new application:

Step 1: From the **Applications** page, click the **New**  button in the top right of the **Search Application** area (See the figure below)



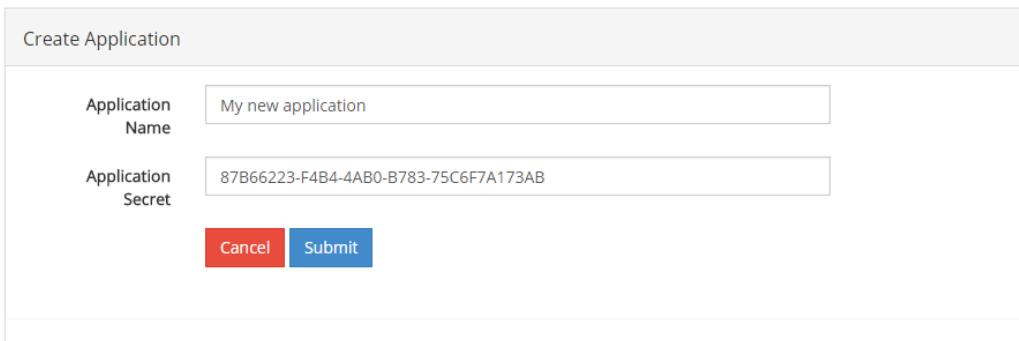
The screenshot shows a search interface for applications. At the top right is a blue button labeled 'New' with a plus sign. Below it is a search bar with the placeholder 'Search Application'. Underneath the search bar is a form with a 'Name' field containing an asterisk (*) and two buttons: 'Reset' (yellow) and 'Search' (blue).

Figure 6.4 - New application button

Step 2: Fill in the fields for the application you are adding (See the figure below):

- Name (**Required**)
- Application Secret

Note: This field will be prefilled with a unique ID



The screenshot shows a 'Create Application' form. It has two fields: 'Application Name' with the value 'My new application' and 'Application Secret' with the value '87B66223-F4B4-4AB0-B783-75C6F7A173AB'. At the bottom are 'Cancel' and 'Submit' buttons.

Figure 6.5 - Create Application page

Step 3: Press the **Submit** button to create the application (See the figure below)



If created successfully you should see a popup display message saying the *Application created successfully*. From here you will see the **View Application** page. See below for more details on viewing and editing applications.

6.4 View Application ★

After finding an application in the search results, or creating a new application you can view the applications details.

Step 1: From the **Applications** page, find an application you would like to view and press the **View**  button

Applications						New 
						Search: <input type="text"/>
	Application Name	Creation Time	Has Policies	Status		
★	fiddler	21/04/2017 07:26:52 AM	Yes	Active	  	
★	My new test application	04/05/2017 10:35:06 AM	No	Active	  	
★	org.openiz.administration	21/04/2017 07:26:52 AM	Yes	Active	  	
★	org.openiz.minims	21/04/2017 07:26:52 AM	Yes	Active	  	
★	org.openiz.openiz_mobile	21/04/2017 07:26:52 AM	Yes	Active	  	
Showing 1 to 5 of 5 entries						  

Figure 6.6 - View Application button

You will be brought to **View Application** page for the application you selected to view.

6.4.1 View Application Area

The **View Application** area displays the initial information for the application that was created. The name and description for the application are displayed in this area.

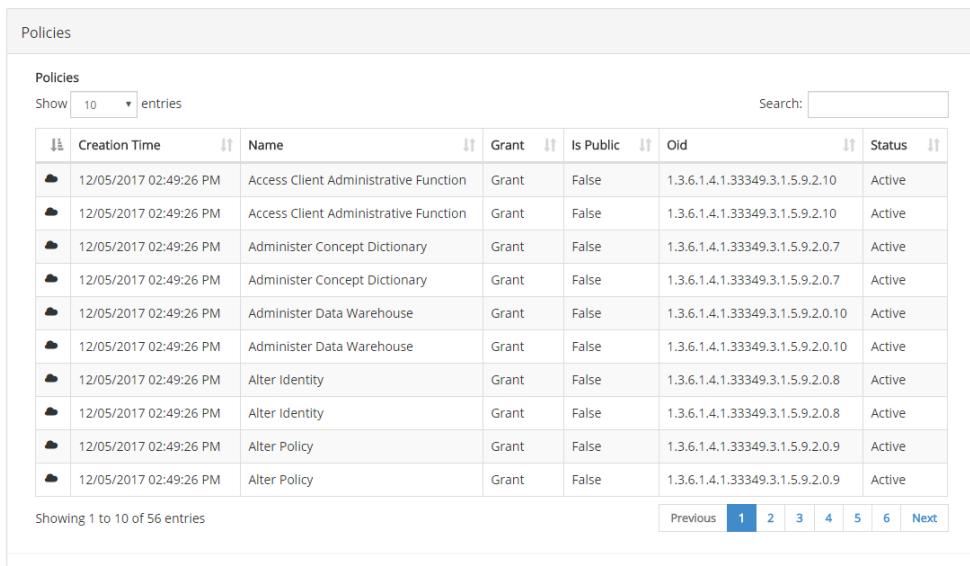


The screenshot shows a 'View Application' interface. At the top, there is a header with the title 'View Application' and an 'Edit' button. Below the header, there is a form with a single field labeled 'Application Name' containing the value 'fiddler'. The entire interface is contained within a light gray box.

Figure 6.7 - View Application area

6.4.2 Policies Area

The **Policies** area displays a list of **Policies**  related to the application. The creation time, name, grant status, public status, oid (object identifier) and active status are all displayed for each policy listed.



The screenshot shows a 'Policies' interface. At the top, there is a header with the title 'Policies' and a search bar. Below the header, there is a table with the following data:

	Creation Time	Name	Grant	Is Public	OID	Status
1	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
2	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
3	12/05/2017 02:49:26 PM	Administer Concept Dictionary	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Active
4	12/05/2017 02:49:26 PM	Administer Concept Dictionary	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Active
5	12/05/2017 02:49:26 PM	Administer Data Warehouse	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Active
6	12/05/2017 02:49:26 PM	Administer Data Warehouse	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Active
7	12/05/2017 02:49:26 PM	Alter Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.8	Active
8	12/05/2017 02:49:26 PM	Alter Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.8	Active
9	12/05/2017 02:49:26 PM	Alter Policy	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.9	Active
10	12/05/2017 02:49:26 PM	Alter Policy	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.9	Active

Showing 1 to 10 of 56 entries

Previous [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) Next

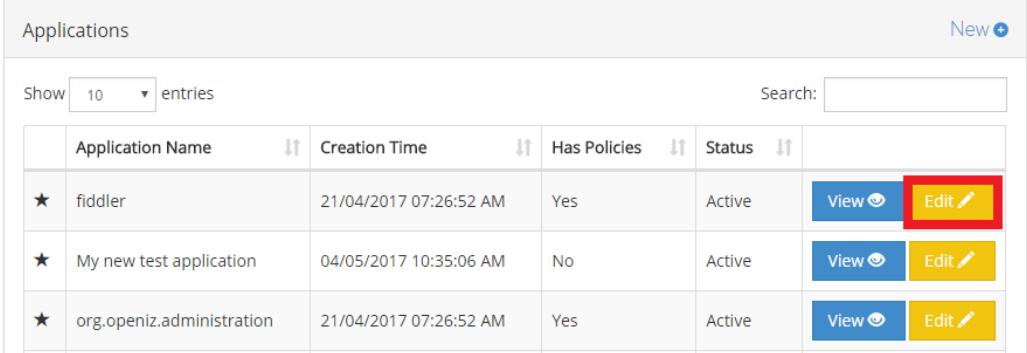
Figure 6.8 - Application Policies area

6.5 Edit Application

Each application has several components that can be edited. You can change the initial details, change policies and view current policies

To access the **Edit Application** page from the **Application** page:

Step 1: Find an application using the search bar and click the **Edit**  button

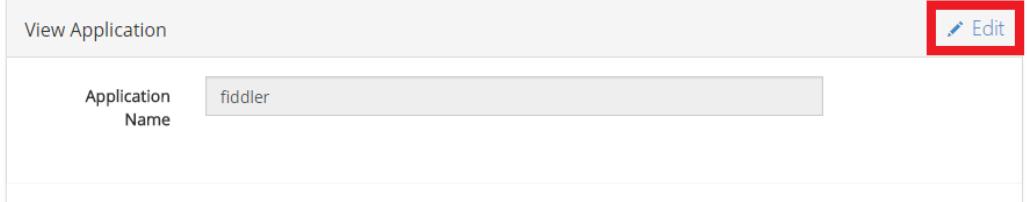


	Application Name	Creation Time	Has Policies	Status	View	Edit
★	fiddler	21/04/2017 07:26:52 AM	Yes	Active	 View	 Edit
★	My new test application	04/05/2017 10:35:06 AM	No	Active	 View	 Edit
★	org.openiz.administration	21/04/2017 07:26:52 AM	Yes	Active	 View	 Edit

Figure 6.9 - Edit Application from the Applications page

To access the **Edit Application** page from the **View Application** page:

Step 1: Click the **Edit**  button



View Application

Application Name: fiddler

Edit

Figure 6.10 - Edit Application from the View Application page

You will be brought to **Edit Application** page for the application you selected to edit. From this page you can modify fields and add or remove policies.

6.5.1 Edit Application Area

In this area you can change all the basic values set for the application you are viewing. *Required fields: Application Name, Policies.*

Edit Application

Application Name	<input type="text" value="fiddler"/>
Policies	<input type="checkbox"/> Access Client Administrative Function <input type="checkbox"/> Administer Concept Dictionary <input type="checkbox"/> Administer Data Warehouse <input type="checkbox"/> Alter Identity <input type="checkbox"/> Alter Policy <input type="checkbox"/> Alter Role <input type="checkbox"/> Change Password <input type="checkbox"/> Create Application <input type="checkbox"/> Create Device <input type="checkbox"/> Create Identity <input type="checkbox"/> Create Role <input type="checkbox"/> Delete Clinical Data <input type="checkbox"/> Delete Warehouse Data <input type="checkbox"/> Login <input type="checkbox"/> Login as a Service <input type="checkbox"/> Override Disclosure <input type="checkbox"/> Query Clinical Data <input type="checkbox"/> Query Warehouse Data <input type="checkbox"/> Read Clinical Data <input type="checkbox"/> Read Metadata <input type="checkbox"/> Read Warehouse Data <input type="checkbox"/> Unrestricted Administrative Function <input type="checkbox"/> Unrestricted All <input type="checkbox"/> Unrestricted Clinical Data <input type="checkbox"/> Unrestricted Data Warehouse <input type="checkbox"/> Unrestricted Metadata <input type="checkbox"/> Write Clinical Data <input type="checkbox"/> Write Warehouse Data
	<input type="button" value="Cancel"/> <input type="button" value="Submit"/>
	<input type="button" value="Deactivate ✕"/>

Figure 6.11 - Edit Application area

If the application being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Application Is Not Active*. To activate or deactivate an application, see the sections below.

Deactivating an Application ✕

In this area you can deactivate the application. Once deactivated, the application cannot be modified or used anywhere in the system until reactivated. To deactivate an application:

Step 1: From the **Edit Application** page, click the red **Deactivate ✕** button in the **Edit Application** area

You will see a message popup stating *Application successfully deactivated* and you will be returned to the **Search & View Applications** page.

Activating an Application

If an application has been deactivated it can be reactivated in the **Edit Application** page. Once activated, the application can again be modified or used in the system until deactivated. To activate an application:

Step 1: From the **Edit Application** page, click the green **Activate ** button in the **Edit Application** area



You will see a message popup stating *Application successfully activated* and you will be returned to the **Search & View Applications** page.

Adding Policies

You are able to modify available policies in the **Edit Application** area of the **Edit Application** page. You can add multiple policies to an application to give that application more functionality throughout the system. To add a policy to an application:

Step 1: Click on an empty part of the **Policies** field



Figure 6.12 - Adding policies

Step 2: A drop-down menu will appear with available policies, select a policy

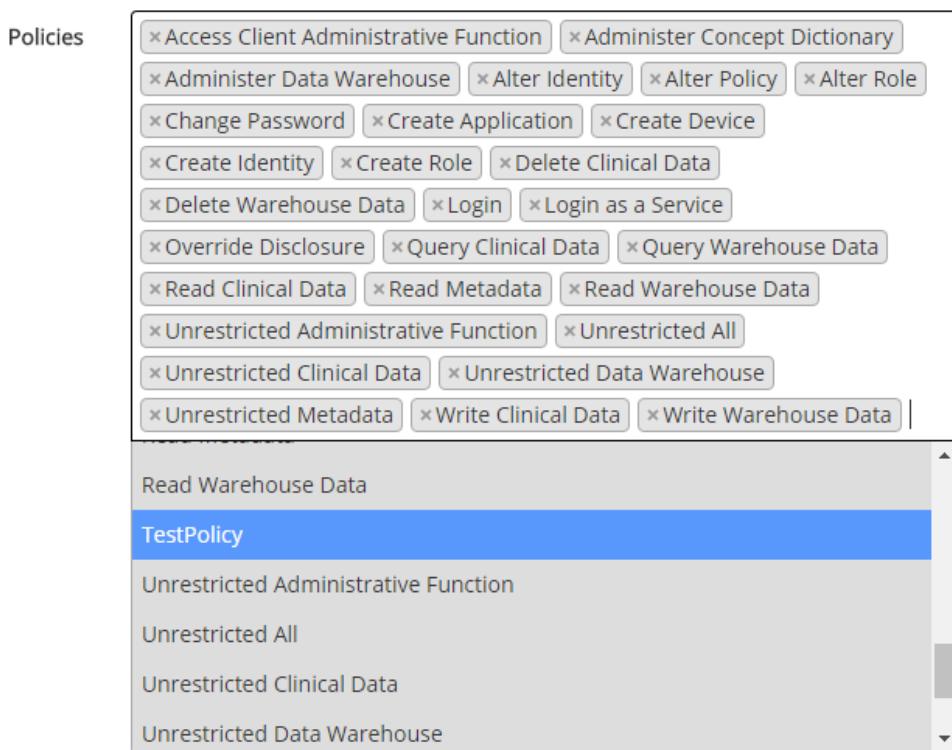


Figure 6.13 - Adding policies - Drop-down menu

Step 3: Repeat the previous steps to add more policies

Step 4: Once you have modified the policies, press the **Submit** button



You will be returned to the **View Application** page. The **Policies** area will be updated with the changes in policies for that application.

Removing Policies

You are able to modify available policies in the **Edit Application** area of the **Edit Application** page. You can restrict access for specific applications by

removing some policies that exist for that application. To remove a policy from an application:

Step 1: Click on the **x** next to the name of a policy in the **Policies** field that you want to remove



Figure 6.14 - Remove policies

Step 2: Repeat the previous step to remove another policy

Step 3: Once you have modified the policies, press the **Submit** button



You will be returned to the **View Application** page. The **Policies** area will be updated with the changes in policies for that application.

6.5.2 Policies Area

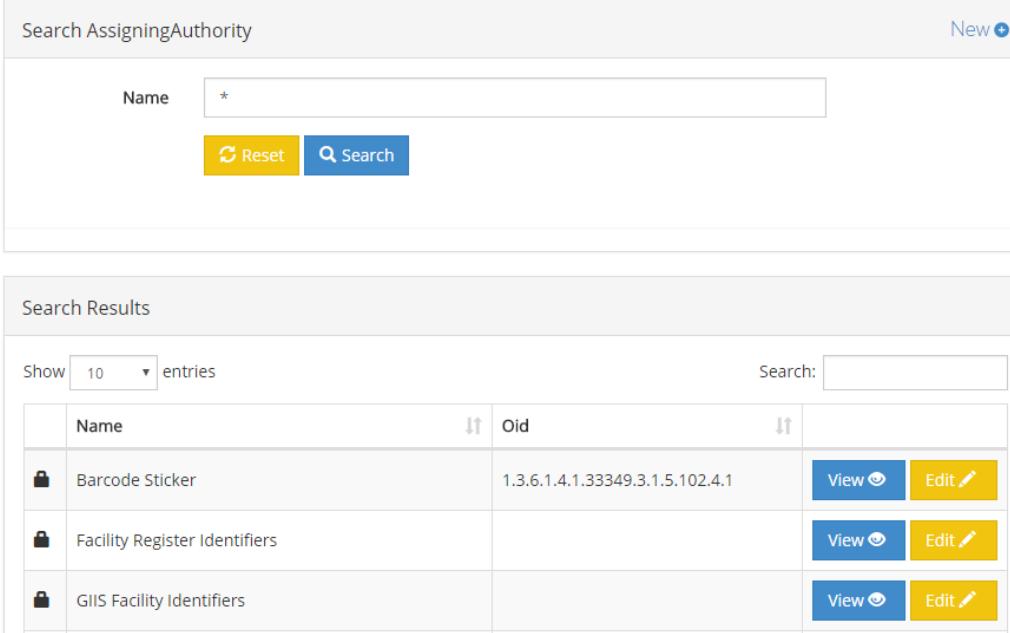
The **Policies** area displays a list of **Policies** related to the application you are editing. The application's creation time, name, grant status, public status, oid (object identifier) and active status are all visible for each policy listed. If the policy list is very large there is a search bar that allows you to filter results.

Policies					
Show 10 entries		Search:			
Creation Time	Name	Grant	Is Public	Oid	
21/04/2017 11:26:28 AM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	
21/04/2017 11:26:28 AM	Administer Concept Dictionary	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	
21/04/2017 11:26:28 AM	Administer Data Warehouse	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	
21/04/2017 11:26:28 AM	Alter Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.8	
21/04/2017 11:26:28 AM	Alter Policy	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.9	
21/04/2017 11:26:28 AM	Alter Role	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.3	
21/04/2017 11:26:28 AM	Change Password	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.1	
21/04/2017 11:26:28 AM	Create Application	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.6	
21/04/2017 11:26:28 AM	Create Device	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.5	
21/04/2017 11:26:28 AM	Create Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.4	
Showing 1 to 10 of 28 entries				Previous	1 2 3 Next

Figure 6.15 – Policies area

Chapter 7: Assigning Authorities

The **Assigning Authorities** page allows you to search for assigning authorities, and view or manage them. (See the figure below)



The screenshot shows the 'Search AssigningAuthority' interface. At the top, there is a search bar with the placeholder 'Search AssigningAuthority' and a 'New +' button. Below the search bar is a form with a 'Name' field containing an asterisk (*) and a 'Search' button. The main area is titled 'Search Results' and displays a table of three entries. The table has columns for 'Name' and 'Oid'. Each row includes a lock icon, the authority name, its Oid, and 'View' and 'Edit' buttons. The table is paginated with 'Show 10 entries' and a 'Search:' input field.

	Name	Oid		
	Barcode Sticker	1.3.6.1.4.1.33349.3.1.5.102.4.1	 View	 Edit
	Facility Register Identifiers		 View	 Edit
	GIIS Facility Identifiers		 View	 Edit

Figure 7.1 - Assigning Authorities page

7.1 Search Assigning Authorities

If you are looking for a specific assigning authority that already exists in the system you can use the **Search Assigning Authority** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Assigning Authority** area, enter the name of an assigning authority you are looking for and click the **Search** button (See the figure below)

Figure 7.2 - Searching for an Assigning Authority

Search results will appear in the **Assigning Authorities** area below. See the following section on **Assigning Authorities**  for more information.

7.2 Assigning Authorities

The **Assigning Authorities** area of the **Assigning Authorities** page displays a list of all the assigning authorities in the search results. By default the search results load with all assigning authorities available. (See the figure below)

Search Results			
Show 10 entries		Search:	
	Name	Oid	
	Barcode Sticker	1.3.6.1.4.1.33349.3.1.5.102.4.1	View 
	Facility Register Identifiers	1.3.6.1.4.1.<<YOUR.PEN>>.10	View 
	GIIS Facility Identifiers	1.3.6.1.4.1.<<YOUR.PEN>>.9	View 
	GIIS Item Identifiers	1.3.6.1.4.1.<<YOUR.PEN>>.1	View 

Figure 7.3 - Assigning Authorities

Assigning authorities displayed here list details such as the name, creation time, policy status and active status. Assigning authorities can be viewed and managed from this page.

New assigning authorities can also be added from this page. To add a new assigning authority, or view and manage an existing assigning authority, see sections below.

7.3 New Assigning Authority

When a new assigning authority is required, you can create a new assigning authority. To create a new assigning authority:

Step 1: From the **Assigning Authorities** page, click the **New**  button in the top right of the **Search Assigning Authority** area (See the figure below)

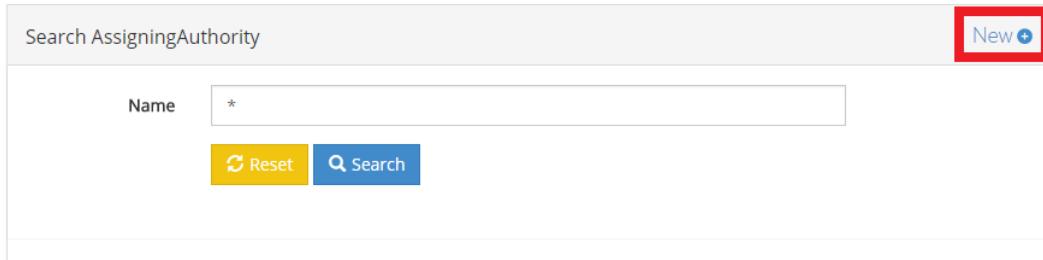


Figure 7.4 - New assigning authority button

Step 2: Fill in the fields for the assigning authority you are adding:

- Name (**Required**)
- Oid (**Required**)

Note: This is the object identifier, this should be a unique value

- Url
- Domain Name (**Required**)
- Validation Regular Expression

Note: This is a custom validation regular expression for the assigning authority

- Is Unique

Note: If an assigning authority is created and marked as unique, this cannot be changed in the future. Before submitting, please ensure that you truly would like this assigning authority to only contain unique values.

- Description

The screenshot shows a form titled 'Create Assigning Authority'. It contains the following fields:

- Name: Text input field
- Oid: Text input field
- Url: Text input field
- Domain Name: Text input field
- Validation Regular Expression: Text input field
- Is Unique: A checkbox labeled with a question mark icon.
- Description: Text input field

Below the 'Is Unique' field is a warning message in red text:

WARNING, If an assigning authority is created and marked as unique, this cannot be changed in the future. Before submitting, please ensure that you truly would like this assigning authority to only contain unique values.

At the bottom are two buttons: 'Cancel' (red) and 'Submit' (blue).

Figure 7.5 - Create Assigning Authority page

Step 3: Press the **Submit** button to create the assigning authority (See the figure below)



If created successfully you should see a popup display message saying the Assigning Authority created successfully. From here you will see the **View Assigning Authority** page. See below for more details on viewing and editing assigning authorities.

7.4 View Assigning Authorities

After finding an assigning authority in the search results, or creating a new assigning authority you can view the assigning authority's details.

Step 1: From the **Assigning Authorities** page, find an assigning authority you would like to view and press the **View**  button (See the figure below)

Search Results			
Show 10 entries		Search:	
	Name	Oid	
	Barcode Sticker	1.3.6.1.4.1.33349.3.1.5.102.4.1	 
	Facility Register Identifiers		 
	GIIS Facility Identifiers		 

Figure 7.6 - View Assigning Authority button

You will be brought to **View Assigning Authority** page for the assigning authority you selected to view.

7.4.1 View Assigning Authority Area

The **View Assigning Authority** area displays the initial information for the assigning authority that was created. The name, oid (object identifier), URL, domain, validation regular expression and description for the assigning authority are displayed in this area. (See the figure below)

View Assigning Authority

[Edit](#)

Name	Barcode Sticker
Oid	1.3.6.1.4.1.33349.3.1.5.102.4.1
Url	http://ivd.moh.go.tz/timr/barcode
Domain Name	TIMR-BARCODE
Validation Regular Expression	^[0-9]{10}\$
Description	

Figure 7.7 - View Assigning Authority area

7.4.2 Authority Scope Area

The **Authority Scope** area displays a list of all concepts for the assigning authority. (See the figure below)

Authority Scope

Show 10 entries				Search:
	Concept Class	Mnemonic	Names	
Classification Concept	Patient	patient		

Showing 1 to 1 of 1 entries

Previous **1** Next

Figure 7.8 – Authority Scope area

7.5 Edit Assigning Authority

Each assigning authority has several components that can be edited. To access the **Edit Assigning Authority** page from the **Assigning Authority** page:

Step 1: Find an assigning authority using the search bar and click the **Edit**  button (See the figure below)

Search Results			
Show 10 entries		Search:	
	Name	Old	
	Barcode Sticker	1.3.6.1.4.1.33349.3.1.5.102.4.1	View  Edit
	Facility Register Identifiers		View  Edit
	GIIS Facility Identifiers		View  Edit

Figure 7.9 - Edit Assigning Authority from the Assigning Authorities page

To access the **Edit Assigning Authority** page from the **View Assigning Authority** page:

Step 1: Click the **Edit**  button (See the figure below)

View Assigning Authority



Name	Barcode Sticker
Oid	1.3.6.1.4.1.33349.3.1.5.102.4.1
Url	http://ivd.moh.go.tz/timr/barcode
Domain Name	TIMR-BARCODE
Validation Regular Expression	^[0-9]{10}\$
Description	

Figure 7.10 - Edit Assigning Authority from the View Assigning Authority page

You will be brought to **Edit Assigning Authority** page for the assigning authority you selected to edit. From this page you can modify fields.

7.5.1 Edit Assigning Authority Area

In this area you can change all the basic values set for the assigning authority you are viewing. *Required fields: Name, Oid, Domain Name.* (See the figure below)

Edit Assigning Authority	
Name	Barcode Sticker
Oid	1.3.6.1.4.1.33349.3.1.5.102.4.1
Url	http://ivd.moh.go.tz/timr/barcode
Domain Name	TIMR-BARCODE
Validation Regular Expression	^[0-9]{10}\$
Description	
Add concepts	
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	

Figure 7.11 - Edit Assigning Authority

Press the **Submit** button after making any changes. You will be brought back to the **View Code System** page. (See the figure below)



Adding a New Concept ?

Step 1: From the **Edit Assigning Authority** page, in the **Edit Assigning Authority** area, start typing into the **Add concepts** field (See the figure below)

Note: Enter 2 or more characters to search for a concept



Figure 7.12 - Add Concepts field

You are only able to add one concept each time you edit the assigning authority.

Step 2: Once you are satisfied with your changes, press the **Submit** button
(See the figure below)



You will be returned to the **View Assigning Authority** page. To add more concepts to the assigning authority, repeat the previous steps.

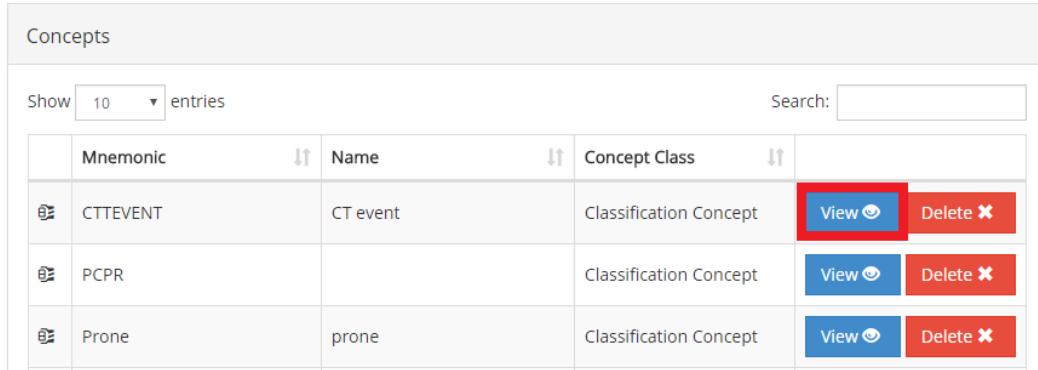
7.5.2 Concepts Area i

The **Concepts** area displays a list of all concepts associated with the assigning authority. You are also able to view or delete existing concepts.

Viewing a Concept i

You can view existing concepts using the **Edit Assigning Authority** page.

Step 1: From the **Edit Assigning Authority** page, in the **Authority Scope** area, click the **Edit**  button next to the concept you wish to edit (See the figure below)



Concepts				
<input type="button" value="Show"/> 10 <input type="button" value="▼"/> entries <input type="text" value="Search:"/>				
	Mnemonic	Name	Concept Class	
	CTTEVENT	CT event	Classification Concept	<input type="button" value="View"/> 
	PCPR		Classification Concept	<input type="button" value="View"/> 
	Prone	prone	Classification Concept	<input type="button" value="View"/> 

Figure 7.13 - View Concept button

You will be brought to the **View Concept** page. Here you can view details about the concept, but no changes can be made (See the figure below). To make changes to concepts, see the section above on **Concepts** .

View Concept

Mnemonic	CTTEVENT
Concept Class	Classification Concept
Creation Time	21/04/2017 11:26:42 AM

Languages

Show	10	entries	Search:							
<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>Language Code</th> <th>Display Name</th> </tr> </thead> <tbody> <tr> <td>🌐</td> <td>en</td> <td>CT event</td> </tr> </tbody> </table>						Language Code	Display Name	🌐	en	CT event
	Language Code	Display Name								
🌐	en	CT event								
Showing 1 to 1 of 1 entries										
Previous 1 Next										

Reference Terms

Show	10	entries	Search:							
<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>Mnemonic</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>☰</td> <td>CTTEVENT</td> <td></td> </tr> </tbody> </table>						Mnemonic	Name	☰	CTTEVENT	
	Mnemonic	Name								
☰	CTTEVENT									
Showing 1 to 1 of 1 entries										
Previous 1 Next										

Figure 7.14 - View Concept page

Deleting a Concept ⓘ

You can delete concepts using the **Edit Assigning Authority** page.

Step 1: From the **Edit Assigning Authority** page, in the **Authority Scope** area, click the **Delete ✖** button next to the concept you wish to delete (See the figure below)

Concepts

Show	10	entries	Search:																					
<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>Mnemonic</th> <th>Name</th> <th>Concept Class</th> <th></th> </tr> </thead> <tbody> <tr> <td>☰</td> <td>CTTEVENT</td> <td>CT event</td> <td>Classification Concept</td> <td style="text-align: right;">View ⓘ Delete ✖</td> </tr> <tr> <td>☰</td> <td>PCPR</td> <td></td> <td>Classification Concept</td> <td style="text-align: right;">View ⓘ Delete ✖</td> </tr> <tr> <td>☰</td> <td>Prone</td> <td>prone</td> <td>Classification Concept</td> <td style="text-align: right;">View ⓘ Delete ✖</td> </tr> </tbody> </table>						Mnemonic	Name	Concept Class		☰	CTTEVENT	CT event	Classification Concept	View ⓘ Delete ✖	☰	PCPR		Classification Concept	View ⓘ Delete ✖	☰	Prone	prone	Classification Concept	View ⓘ Delete ✖
	Mnemonic	Name	Concept Class																					
☰	CTTEVENT	CT event	Classification Concept	View ⓘ Delete ✖																				
☰	PCPR		Classification Concept	View ⓘ Delete ✖																				
☰	Prone	prone	Classification Concept	View ⓘ Delete ✖																				

Figure 7.15 - Delete Concept button

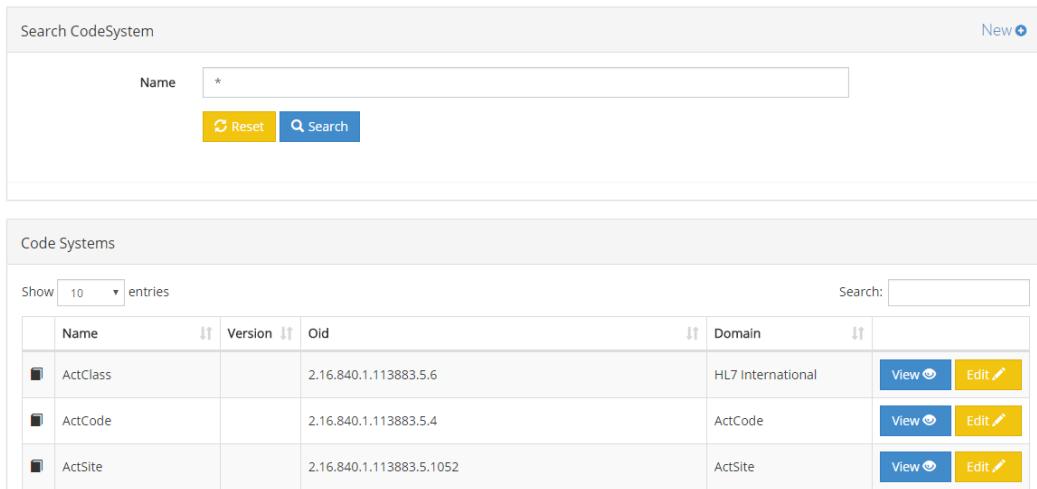
The concept will be deleted and you will be brought to the **View Assigning Authority** page.

Chapter 8: Certificates *

ⓘ This section is currently under development and is unavailable.

Chapter 9: Code System

The **Code Systems** page allows you to search for code systems, and view or manage them. (See the figure below)



The figure consists of two screenshots of a web application. The top screenshot shows a search interface titled 'Search CodeSystem'. It has a 'Name' input field containing an asterisk (*), a 'Reset' button, and a 'Search' button. The bottom screenshot shows a list titled 'Code Systems' with three entries: 'ActClass', 'ActCode', and 'ActSite'. Each entry has columns for Name, Version, Oid, Domain, and actions (View and Edit).

Name	Version	Oid	Domain	
ActClass		2.16.840.1.113883.5.6	HL7 International	View Edit
ActCode		2.16.840.1.113883.5.4	ActCode	View Edit
ActSite		2.16.840.1.113883.5.1052	ActSite	View Edit

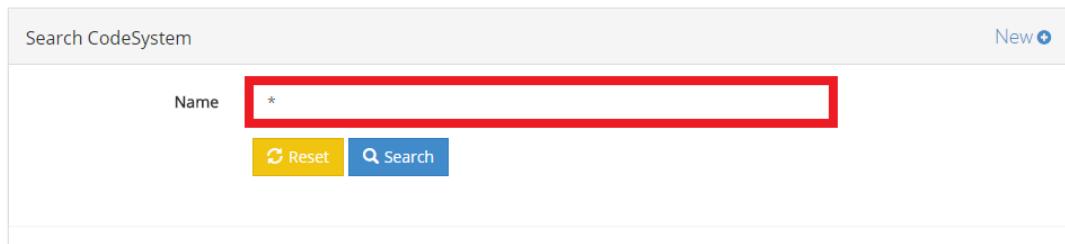
Figure 9.1 - Code Systems page

9.1 Search Code Systems

If you are looking for a specific code system that already exists in the system you can use the **Search Code System** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Code System** area, enter the name of a code system (See the figure below)



The figure shows the 'Search CodeSystem' interface. The 'Name' input field is highlighted with a red box. The 'Reset' and 'Search' buttons are visible below the input field.

Figure 9.2 - Searching for a Code System

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Code Systems** area below. See the following section on **Code Systems**  for more information.

9.2 Code Systems

The **Code Systems** area of the **Code Systems** page displays a list of all the code systems in the search results. By default the search results load with all code systems available. (See the figure below)

Code Systems						
Show 10 entries		Search: <input type="text"/>				
	Name	Version	Oid	Domain		
	ActClass		2.16.840.1.113883.5.6	HL7 International	View 	Edit 
	ActCode		2.16.840.1.113883.5.4	ActCode	View 	Edit 
	ActSite		2.16.840.1.113883.5.1052	ActSite	View 	Edit 
	AdministrableDrugForm		2.16.840.1.113883.5.85	AdministrableDrugForm	View 	Edit 

Figure 9.3 - Code Systems

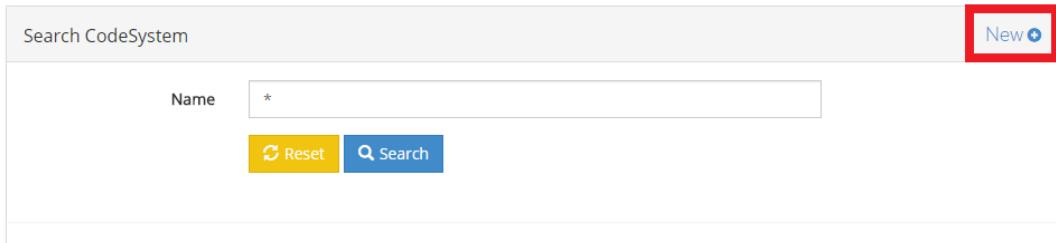
Code systems displayed here list details including the name, version, oid (object identifier) and domain. Code systems can be viewed and managed from this page.

New code systems can also be added from this page. To add a new code system, or view and manage an existing code system, see sections below.

9.3 New Code System

When a new code system is required, you can create a new code system. To create a new code system:

Step 1: From the **Code Systems** page, click the **New** button in the top right of the **Search Code System** area (See the figure below)



The image shows a screenshot of a web-based application interface. At the top, there is a search bar labeled 'Search CodeSystem'. To the right of the search bar is a red rectangular box containing the word 'New' with a small blue circular icon. Below the search bar, there is a form with a 'Name' field containing an asterisk (*) and two buttons: 'Reset' (yellow) and 'Search' (blue).

Figure 9.4 - New code system button

Step 2: Enter the fields for the code system you are adding (See the figure below):

- Name
- Description
- Domain
- Oid (Required)

Note: This is the object identifier, this should be a unique value

- Url (Required)
- Version

Add Code System

Name	Sample Code System
Description	A sample
Domain	TIMR-Code
Oid	213.12.213.123.123.123
Url	http://sample.sample.org/sample
Version	1.0

Figure 9.5 - Add Code System page

Step 3: Press the **Submit** button to create the code system (See the figure below)



If created successfully you should see a popup display message saying the *Code System created successfully*. From here you will see the **View Code System** page. See below for more details on viewing and editing code systems.

9.4 View Code Systems

After finding a code system in the search results, or creating a new code system you can view the code systems details.

Step 1: From the **Code Systems** page, find a code system you would like to view and press the **View** button (See the figure below)

Code Systems					
Show 10 entries				Search: <input type="text"/>	
	Name	Version	Oid	Domain	
1	ActClass		2.16.840.1.113883.5.6	HL7 International	View  Edit 
2	ActCode		2.16.840.1.113883.5.4	ActCode	View  Edit 
3	ActSite		2.16.840.1.113883.5.1052	ActSite	View  Edit 

Figure 9.6 - View Code System button

You will be brought to **View Code System** page for the code system you selected to view.

9.4.1 View Code System Area

The **View Code System** area displays the initial information for the code system that was created. The code systems name, description, domain, oid (object identifier), URL and version for the code system are displayed in this area. (See the figure below)

View Code System  [Edit](#)

Name	ActClass
Description	Classification codes for Acts
Domain	HL7 International
Oid	2.16.840.1.113883.5.6
Url	http://openiz.org/conceptset/v3-ActClassClinicalDocument
Version	

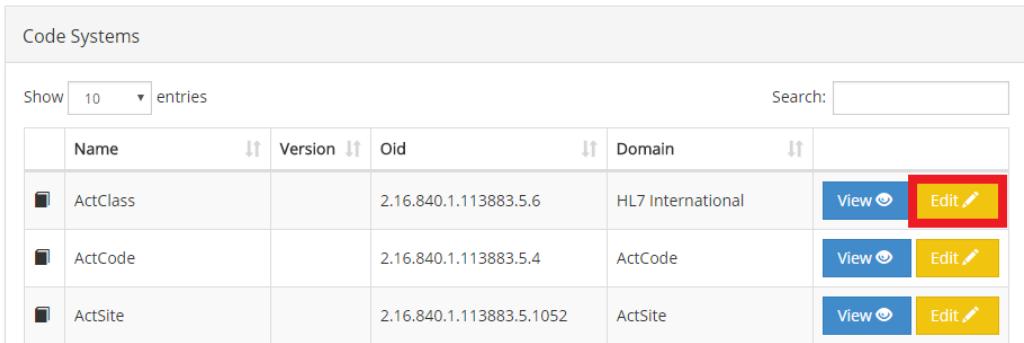
Figure 9.7 - View Code System area

9.5 Edit Code Systems

Each code system has several components that can be edited.

To access the **Edit Code System** page from the **Code System** page:

Step 1: Find a code system using the search bar and click the **Edit**  button
(See the figure below)



Code Systems				
<input type="button" value="Show"/> <input type="button" value="10"/> entries <input type="text" value="Search:"/> <input type="button"/>				
	Name	Version	Oid	Domain
	ActClass		2.16.840.1.113883.5.6	HL7 International
	ActCode		2.16.840.1.113883.5.4	ActCode
	ActSite		2.16.840.1.113883.5.1052	ActSite

Figure 9.8 - Edit Code System from the Code Systems page

To access the **Edit Code System** page from the **View Code System** page:

Step 1: Click the **Edit**  button (See the figure below)

View Code System

Edit

Name	ActClass
Description	Classification codes for Acts
Domain	HL7 International
Oid	2.16.840.1.113883.5.6
Url	http://openiz.org/conceptset/v3-ActClassClinicalDocument
Version	

Figure 9.9 - Edit Code System from the View Code System page

You will be brought to **Edit Code System** page for the code system you selected to edit. From this page you can modify fields.

9.5.1 Edit Code System Area

In this area you can change all the basic values set for the code system you are viewing. *Required fields: Oid, URL.* (See the figure below)

Edit Code System

Name	<input type="text" value="ActClass"/>
Description	<input type="text" value="Classification codes for Acts"/>
Domain	<input type="text" value="HL7 International"/>
Oid	<input type="text" value="2.16.840.1.113883.5.6"/>
Url	<input type="text" value="http://openiz.org/conceptset/v3-ActClassClinicalDocument"/>
Version	<input type="text"/>

[Cancel](#) [Submit](#)

Figure 9.10 - Edit Code System

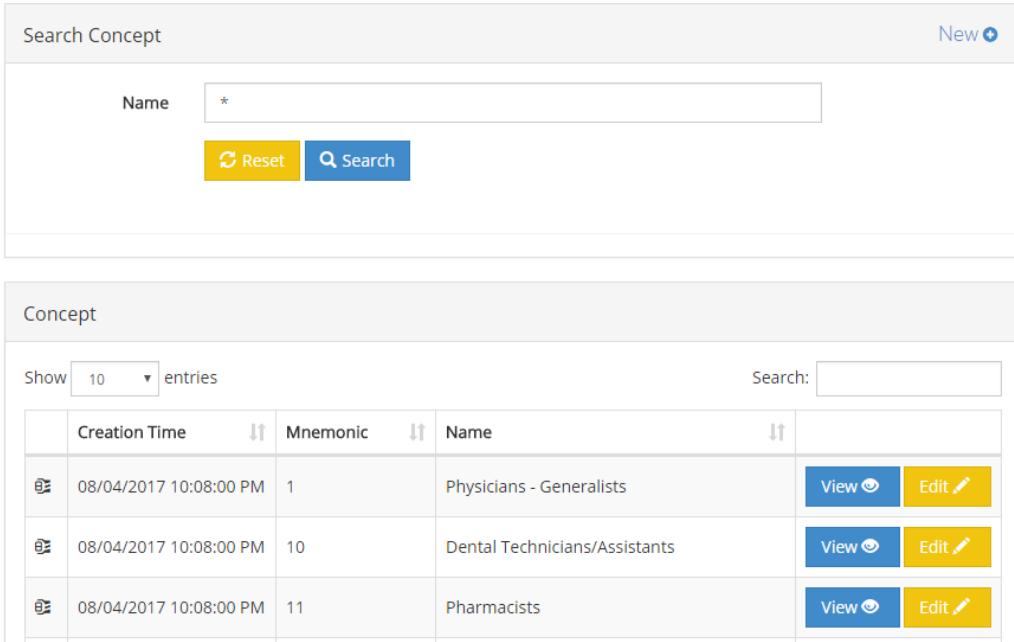
Press the **Submit** button after making any changes. (See the figure below)



You will be brought back to the **View Code System** page.

Chapter 10: Concepts

The **Concepts** page allows you to search for concepts, or manually manage concepts and reference terms. (See the figure below)



The figure consists of two screenshots of a web application. The top screenshot shows a search interface with a 'Search Concept' input field containing the placeholder 'Name *', a 'Reset' button, and a 'Search' button. The bottom screenshot shows a table titled 'Concept' with three rows of data. The columns are 'Creation Time', 'Mnemonic', and 'Name'. The data rows are: 1. Creation Time: 08/04/2017 10:08:00 PM, Mnemonic: 1, Name: Physicians - Generalists, with 'View' and 'Edit' buttons. 2. Creation Time: 08/04/2017 10:08:00 PM, Mnemonic: 10, Name: Dental Technicians/Assistants, with 'View' and 'Edit' buttons. 3. Creation Time: 08/04/2017 10:08:00 PM, Mnemonic: 11, Name: Pharmacists, with 'View' and 'Edit' buttons. The table includes a 'Show 10 entries' dropdown and a 'Search' input field.

	Creation Time	Mnemonic	Name	
	08/04/2017 10:08:00 PM	1	Physicians - Generalists	View  Edit 
	08/04/2017 10:08:00 PM	10	Dental Technicians/Assistants	View  Edit 
	08/04/2017 10:08:00 PM	11	Pharmacists	View  Edit 

Figure 10.1 - The Concepts page

10.1 Search Concepts

If you are looking for a specific concept that already exists in the system you can use the **Search Concept** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Concept** area, enter the name of the concept you are looking for (See the figure below)

Search Concept

New 

Name	<input type="text" value="*"/>
	 Reset  Search

Figure 10.2 - Searching for a Concept

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Concept** area below. See the following section on **Concepts**  for more information.

10.2 Concepts

The **Concept** area of the **Concept** page displays a list of all the concepts in the search results. By default the search results load with all concepts available. (See the figure below)

Concept				
Show 10 entries				Search: <input type="text"/>
	Creation Time	Mnemonic	Name	
🕒	08/04/2017 10:08:00 PM	1	Physicians - Generalists	View Edit
🕒	08/04/2017 10:08:00 PM	10	Dental Technicians/Assistants	View Edit
🕒	08/04/2017 10:08:00 PM	11	Pharmacists	View Edit
🕒	08/04/2017 10:08:00 PM	12	Maduka ya dawa Mafundi / wasaidizi, Pharmacy Technicians/Assistants	View Edit
🕒	08/04/2017 10:08:00 PM	13	Physiotherapists	View Edit
🕒	08/04/2017 10:08:00 PM	14	Medical Assistants/Clinical Officers	View Edit
🕒	08/04/2017 10:08:00 PM	15	Laboratory Scientists	View Edit
🕒	08/04/2017 10:08:00 PM	16	Laboratory Technicians/Assistants	View Edit
🕒	08/04/2017 10:08:00 PM	17	Radiographers	View Edit
🕒	08/04/2017 10:08:00 PM	18	Environmental and Public Health Officers	View Edit

Showing 1 to 10 of 100 entries

Previous [1](#) [2](#) [3](#) [4](#) [5](#) ... [10](#) Next

Figure 10.3 - Concepts

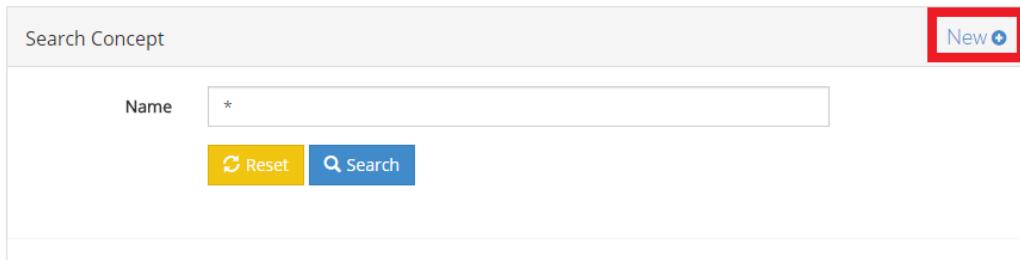
Concepts displayed here show the creation time, mnemonic, and name. Concepts can be viewed and managed from this page.

New concepts can also be added from this page. To add a new concept, or view and manage an existing concept, see sections below.

10.3 New Concept

When a new concept is needed to be added to the system, you can create a new concept. To create a new concept:

Step 1: From the **Concept** page, click the **New**  button in the top right of the **Search Concept** area (See the figure below)



The screenshot shows a search interface for concepts. At the top is a search bar labeled 'Search Concept'. To the right of the search bar is a blue button with the text 'New' and a small circular icon. Below the search bar is a form with a 'Name' field containing an asterisk (*) and a 'Reset' button to its left. To the right of the 'Reset' button is a 'Search' button with a magnifying glass icon. The entire interface is contained within a light gray box.

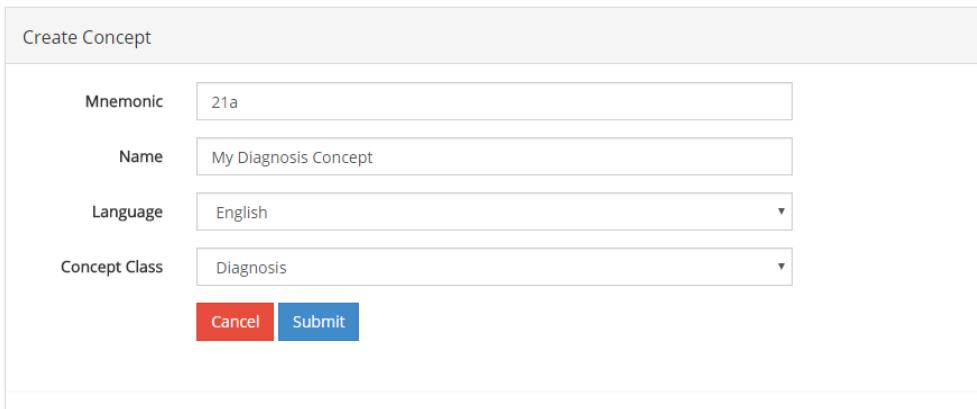
Figure 10.4 - New Concept button

Step 2: You will be brought to the **Create Concept** page, Enter the fields for the concept you are adding (See the figure below):

- Mnemonic (**Required**)

Note: This is memorable value for your concept

- Name (**Required**)
- Language (**Required**)
- Concept Class (**Required**)



The screenshot shows the 'Create Concept' form. It includes fields for 'Mnemonic' (containing '21a'), 'Name' (containing 'My Diagnosis Concept'), 'Language' (set to 'English'), and 'Concept Class' (set to 'Diagnosis'). Below the form are two buttons: 'Cancel' (red) and 'Submit' (blue). The 'Submit' button is highlighted with a red box.

Figure 10.5 - Create Concept page

Step 3: Press the **Submit** button to create the concept (See the figure below)

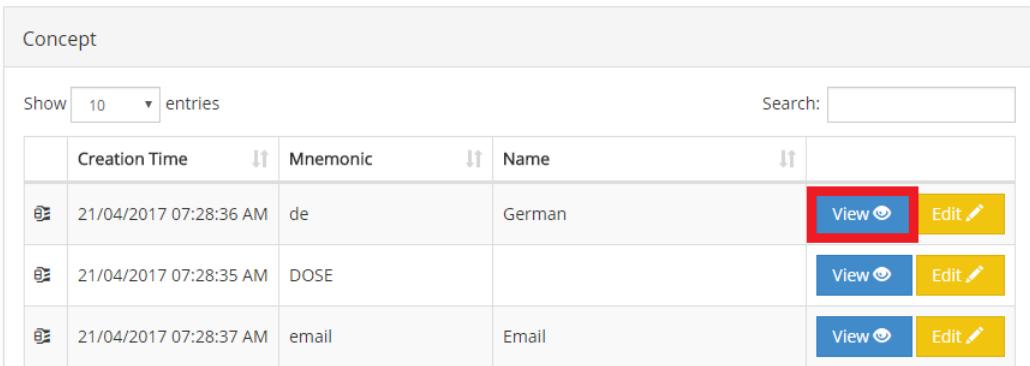


If created successfully you should see a popup display message saying the *Concept created successfully*. From here you will see the **View Concept** page. See below for more details on viewing and editing concepts.

10.4 View Concepts

After finding a concept in the search results, or after creating a new concept you can view the concept's details.

Step 1: From the **Concepts** page, find a concept you would like to view and press the **View**  button (See the figure below)



	Creation Time	Mnemonic	Name		
	21/04/2017 07:28:36 AM	de	German	 View  Edit	 View  Edit
	21/04/2017 07:28:35 AM	DOSE		 View  Edit	 View  Edit
	21/04/2017 07:28:37 AM	email	Email	 View  Edit	 View  Edit

Figure 10.6 - View Concept button

You will be brought to **View Concept** page for the concept you selected to view. The **View Concept** page displays the initial information for the concept that was created as well as languages and reference terms related to the concept. (See the figure below)

View Concept

[Edit](#)

Mnemonic	de
Concept Class	Other Classification
Creation Time	21/04/2017 11:28:36 AM

Languages

Show	10	▼	entries	Search: <input type="text"/>										
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 40%;">Language Code</th> <th style="width: 10%; text-align: center;">↑</th> <th style="width: 40%;">Display Name</th> <th style="width: 10%; text-align: center;">↑</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;">en</td> <td></td> <td style="text-align: center;">German</td> <td></td> </tr> </tbody> </table>					Language Code	↑	Display Name	↑		en		German		Showing 1 to 1 of 1 entries
	Language Code	↑	Display Name	↑										
	en		German											
				Previous	1 Next									

Figure 10.7 - View Concept page

10.4.1 View Concept Area

The **View Concept** area displays the initial information for the concept that was created. (See the figure below)

View Concept

[Edit](#)

Mnemonic	de
Concept Class	Other Classification
Creation Time	21/04/2017 11:28:36 AM

Figure 10.8 - View Concept area

10.4.2 Languages

The **Languages** area displays a list of all languages for the concept. (See the figure below)

Languages	
Show 10 entries	
Language Code	Display Name
en	German
Showing 1 to 1 of 1 entries	
Previous 1 Next	

Figure 10.9 - Languages area

10.4.3 Reference Terms

The **Reference Terms** area provides a list of all the reference terms that have a reference term with the concept that is currently being viewed. Listed here is the mnemonic and name for each reference term. (See the figure below)

Reference Terms	
Show 10 entries	
Mnemonic	Name
de	
Showing 1 to 1 of 1 entries	
Previous 1 Next	

Figure 10.10 - Reference Terms area

10.5 Edit Concept

Each concept has several components that can be edited. You can change the initial details, add or change languages, and add or change reference terms.

To access the **Edit Concept** page from the **Concepts** page:

Step 1: Find a concept using the search bar and click the **Edit**  button (See the figure below)

Concept				
Show 10 entries		Search:		
	Creation Time	Mnemonic	Name	
	21/04/2017 07:28:36 AM	de	German	View 
	21/04/2017 07:28:35 AM	DOSE		View 
	21/04/2017 07:28:37 AM	email	Email	View 

Figure 10.11 - Edit Concept from the Concepts page

To access the **Edit Concept** page from the **View Concept** page:

Step 1: Click the **Edit**  button (See the figure below)

View Concept	
Mnemonic	<input type="text" value="de"/>
Concept Class	<input type="text" value="Other Classification"/>
Creation Time	<input type="text" value="21/04/2017 11:28:36 AM"/>

Figure 10.12 - Edit Concept from the View Concept page

You will be brought to **Edit Concept** page for the concept you selected to edit. From this page you can modify fields and add/edit/remove languages and reference terms.

10.5.1 Edit Concept Area

In this area you can change all the basic values set for the concept you are viewing. *Required fields: Mnemonic.*

Edit Concept

Mnemonic: de

Concept Class: Other Classification

Add Reference Terms:

Relationship:

Cancel Submit

Figure 10.13 - Edit Concept page

10.5.2 Languages Area

The **Languages** area displays a list of all languages for the concept. You are also able to add new languages and edit or delete existing languages.

Creating a New Language

Step 1: From the **Edit Concept** page, in the **Languages** area, click the **New**  button (See the figure below)

Languages		
New 		
Show	10	entries
Language Code  Display Name 		
 en	German	Edit  Delete 
Showing 1 to 1 of 1 entries		
Previous 1 Next		

Figure 10.14 - New Language button

You will be brought to the **Add Language** page. Here you can add a language by using the **Add Language** area and also see the list of current languages in the **Languages** area of this page. (See the figure below)

Add Language

Language: English

Name:

Cancel Submit

Figure 10.15 - Add Language page

Step 2: In the **Add Language** area:

- Select a **Language (Required)**
- Enter a **Name (Required)**

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new language you will be returned to the **Edit Concept** page.

Editing a Language

You can view and edit existing languages using the **Edit Language** page.

Step 1: From the **Edit Concept** page, in the **Languages** area, click the **Edit** button next to the language you wish to edit (See the figure below)

Languages

New

Show 10 entries

Search:

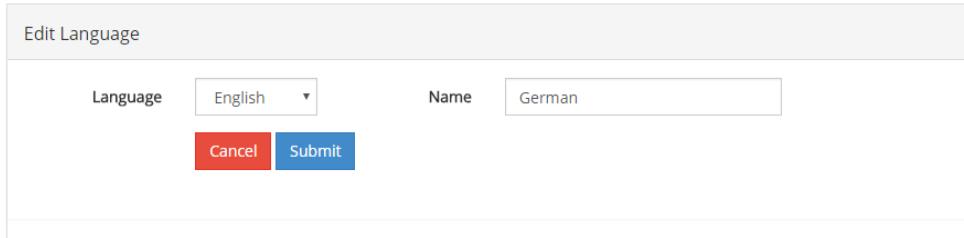
	Language Code	Display Name	
	en	German	Edit Delete

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 10.16 - Edit Language button

You will be brought to the **Edit Language** page. Here you can edit the language by using the **Edit Language** area and also see the list of current languages in the **Languages** area of this page. (See the figure below)



The screenshot shows a 'Edit Language' page. At the top, it says 'Edit Language'. Below that, there is a form with a 'Language' dropdown set to 'English' and a 'Name' input field containing 'German'. At the bottom of the form are two buttons: 'Cancel' and 'Submit'.

Figure 10.17 - Edit Language page

Step 2: In the **Edit Language** area:

- Select a **Type** (Required)
- Enter a **Name** (Required)

Step 3: Press the **Submit** button (See the figure below)



Deleting a Language

You can delete languages using the **Edit Language** page.

Step 1: From the **Edit Concept** page, in the **Languages** area, click the **Delete**  button next to the language you wish to delete (See the figure below)



The screenshot shows a 'Languages' table. The table has columns for 'Language Code' and 'Display Name'. There is one entry: 'en' and 'German'. To the right of the 'Display Name' column, there are 'Edit' and 'Delete' buttons. The 'Delete' button is highlighted with a red box.

	Language Code	Display Name	
	en	German	 

Showing 1 to 1 of 1 entries

Previous **1** Next

Figure 10.18 - Delete Language

The language will be deleted and the **Edit Concept** page will be refreshed.

10.5.3 Reference Terms Area

The **Reference Terms** area displays a list of all reference terms for the concept. You are also able to add new reference terms and edit or delete existing reference terms.

Creating a New Reference Term Name

Step 1: From the **Edit Concept** page, in the **Reference Terms** area, click the **Edit**  button (See the figure below)

Reference Terms		
Show	10	entries
	Mnemonic	Name
	de	
 		
Showing 1 to 1 of 1 entries		
Previous  1 Next		

Figure 10.19 - Edit Reference Terms button

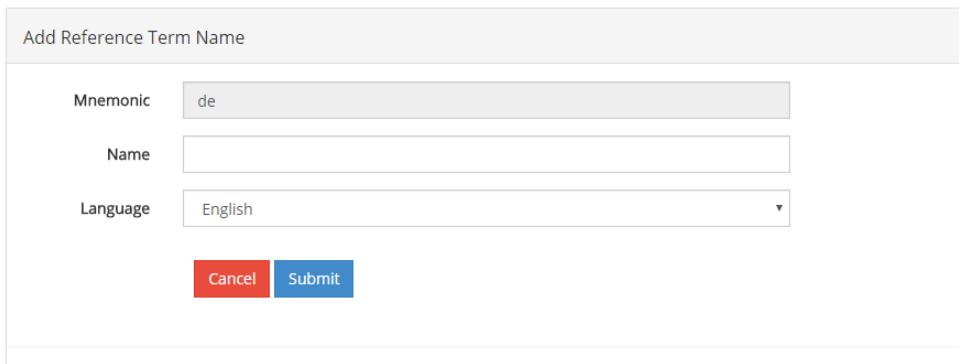
You will be brought to the **Edit Reference Term** page.

Step 2: In the **Reference Term Name** area, click the **New**  button (See the figure below)

Reference Term Name
No data available

Figure 10.20 - New Reference Term Name button

You will be brought to the **Add Reference Term Name** page. Here you can add a new reference term by using the **Add Reference Term Name** area and also see the list of current reference terms in the **Reference Terms** area of this page. (See the figure below)



The screenshot shows a form titled "Add Reference Term Name". It contains three fields: "Mnemonic" with the value "de", "Name" (empty), and "Language" set to "English". At the bottom are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red border.

Figure 10.21 - Add Reference Term Name page

Step 3: In the **Add Reference Term Name** area:

- Enter a **Name** (Required)
- Select a **Language** (Required)

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new reference term you will be returned to the **Edit Reference Term** page.

Editing a Reference Term

You can view and edit existing reference term using the **Edit Reference Term** page.

Step 1: From the **Edit Concept** page, in the **Reference Term** area, click the **Edit**  button next to the reference term you wish to edit (See the figure below)

Reference Terms	
Show	10 ▾ entries
Search:	<input type="text"/>
Mnemonic	Name
de	Edit  Delete 
Showing 1 to 1 of 1 entries	
Previous 1 Next	

Figure 10.22 - Edit Reference Term button

You will be brought to the **Edit Reference Term** page. Here you can edit the reference term by using the **Edit Reference Term** area and also see the list of current reference term names in the **Reference Term Names** area of this page. (See the figure below)

Edit Reference Term	
Mnemonic	<input type="text" value="de"/>
Cancel	Submit
Delete 	

Figure 10.23 - Edit Reference Term page

Step 2: In the **Edit Reference Term** area:

- Enter a **Mnemonic** (Required)

Step 3: Press the **Submit** button (See the figure below)

Cancel	Submit
------------------------	------------------------

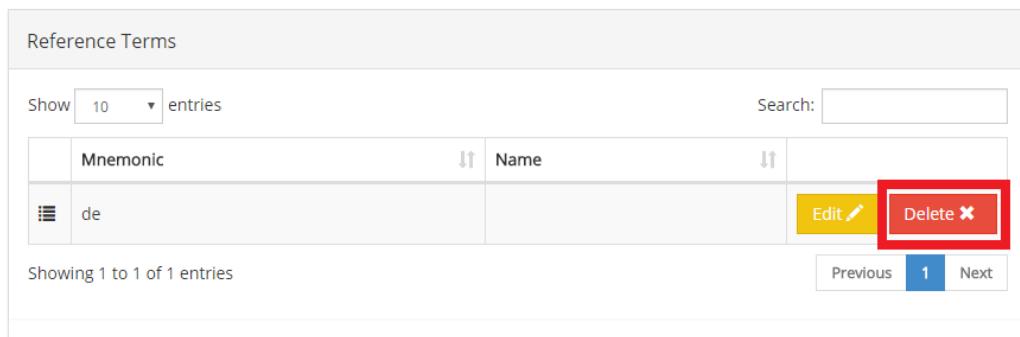
You will be returned to the **View Reference Term** page for the reference term you were just editing.

Deleting a Reference Term

You can delete reference terms using the **Edit Concept** page or while editing a reference term.

Deleting a reference term from the **Edit Concept** page:

Step 1: In the **Reference Terms** area, click the **Delete ✕** button next to the reference term you wish to delete (See the figure below)



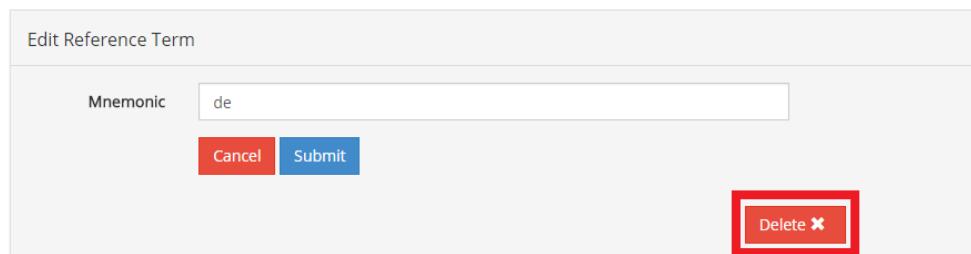
Reference Terms		
Show 10 entries		Search:
	Mnemonic	Name
de		
Showing 1 to 1 of 1 entries		
Previous		1
Next		

Figure 10.24 - Delete Reference Term button

The reference term will be deleted and the **Edit Concept** page will be refreshed.

Deleting a reference term from the **Edit Reference Term** page while editing a reference term (to **Edit** a Reference term see the section above this):

Step 1: In the **Edit Reference Term** area, click the **Delete ✕** button (See the figure below)



Edit Reference Term

Mnemonic: de

Cancel Submit

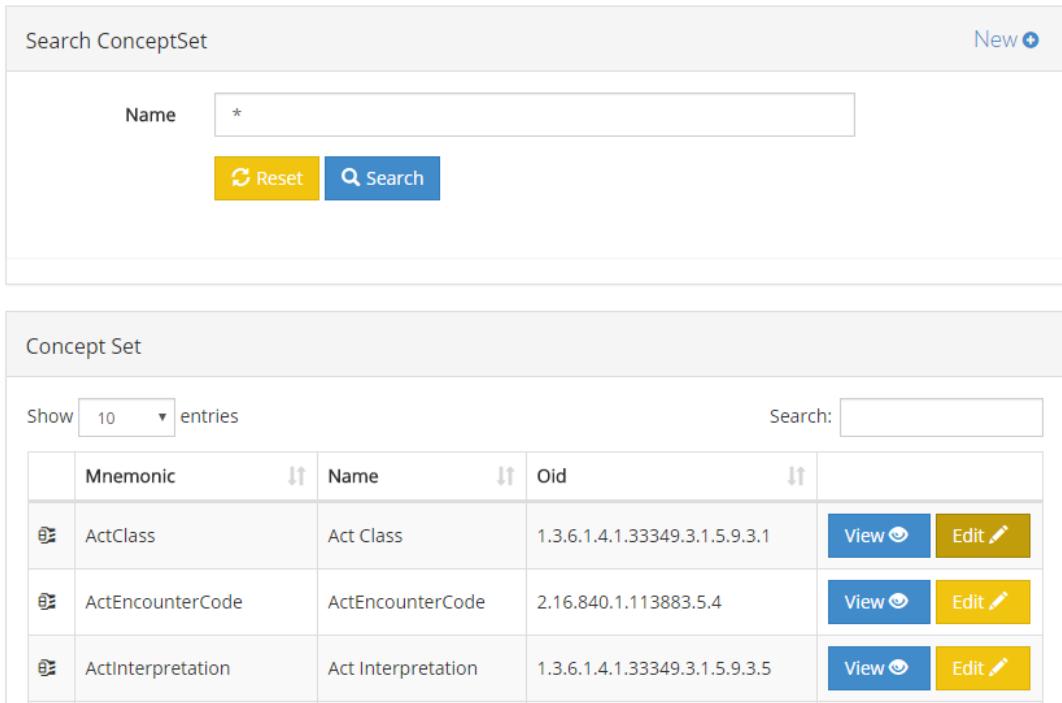
Delete ✕

Figure 10.24 - Delete Reference Term button

The reference term will be deleted and the **Edit Concept** page will be refreshed.

Chapter 11: Concept Sets

The **Concept Sets** page allows you to search for concept sets, and view or manage them. (See the figure below)



The figure consists of two screenshots of a web-based application for managing concept sets.

The top screenshot shows a search interface titled "Search ConceptSet". It features a "Name" input field with a placeholder asterisk (*), a "Reset" button, and a "Search" button. A "New" button with a plus sign is located in the top right corner.

The bottom screenshot shows a list titled "Concept Set". It includes a "Show 10 entries" dropdown and a "Search" input field. The list table has columns for Mnemonic, Name, and Oid, with "View" and "Edit" buttons for each row. The data in the table is as follows:

	Mnemonic	Name	Oid	
	ActClass	Act Class	1.3.6.1.4.1.33349.3.1.5.9.3.1	View  Edit 
	ActEncounterCode	ActEncounterCode	2.16.840.1.113883.5.4	View  Edit 
	ActInterpretation	Act Interpretation	1.3.6.1.4.1.33349.3.1.5.9.3.5	View  Edit 

Figure 11.1 - Concept Sets page

11.1 Search Concept Sets

If you are looking for a specific concept set that already exists in the system you can use the **Search Concept Set** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Concept Set** area, enter the name of a concept set (See the figure below)

Figure 11.2 - Searching for a Concept Set

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Concept Sets** area below. See the following section on **Concept Sets**  for more information.

11.2 Concept Sets

The **Concept Sets** area of the **Concept Sets** page displays a list of all the concept sets in the search results. By default the search results load with all concept sets available. (See the figure below)

	Mnemonic	Name	Oid	
	ActClass	Act Class	1.3.6.1.4.1.33349.3.1.5.9.3.1	View  Edit 
	ActEncounterCode	ActEncounterCode	2.16.840.1.113883.5.4	View  Edit 
	ActInterpretation	Act Interpretation	1.3.6.1.4.1.33349.3.1.5.9.3.5	View  Edit 

Figure 11.3 - Concept Sets

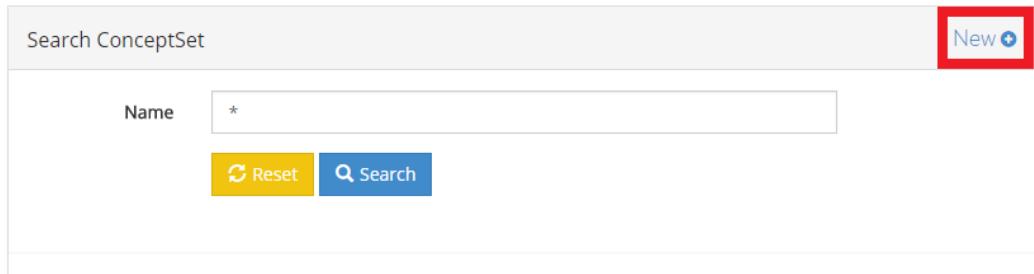
Concept sets displayed here list the mnemonic, name and oid (object identifier). Concept sets can be viewed and managed from this page.

New concept sets can also be added from this page. To add a new concept set, or view and manage an existing concept set, see sections below.

11.3 New Concept Set

When a new concept set is required, you can create a new concept set. To create a new concept set:

Step 1: From the **Concept Sets** page, click the **New**  button in the top right of the **Search Concept Set** area (See the figure below)



The screenshot shows a search interface for 'ConceptSet'. At the top right is a blue button labeled 'New' with a white plus sign. Below it is a search bar with the placeholder 'Search ConceptSet'. Underneath the search bar is a form with a 'Name' field containing an asterisk (*) and two buttons: 'Reset' (yellow) and 'Search' (blue).

Figure 11.4 - New concept set button

Step 2: Enter the fields for the concept set you are adding (See the figure below):

- Mnemonic **(Required)**
- Name **(Required)**
- Oid **(Required)**

Note: This is the object identifier, this should be a unique value

- Url **(Required)**

Create Concept Set

Mnemonic	samp
Name	Sample
Oid	340.324.21.213.12.231
Url	http://sample.sample.org/sample

Cancel **Submit**

Figure 11.5 - Add Concept Set page

Step 3: Press the **Submit** button to create the concept set (See the figure below)



If created successfully you should see a popup display message saying the *Concept Set created successfully*. From here you will see the **View Concept Set** page. See below for more details on viewing and editing concept sets.

11.4 View Concept Sets

After finding a concept set in the search results, or creating a new concept set you can view the concept sets details.

Step 1: From the **Concept Sets** page, find a concept set you would like to view and press the **View**  button (See the figure below)

Concept Set					
Show 10 entries				Search: <input type="text"/>	
	Mnemonic	Name	Oid		
☒	ActClass	Act Class	1.3.6.1.4.1.33349.3.1.5.9.3.1	View 	Edit 
☒	ActEncounterCode	ActEncounterCode	2.16.840.1.113883.5.4	View 	Edit 
☒	ActInterpretation	Act Interpretation	1.3.6.1.4.1.33349.3.1.5.9.3.5	View 	Edit 

Figure 11.6 - View Concept Set button

You will be brought to **View Concept Set** page for the concept set you selected to view.

11.4.1 View Concept Set Area

The **View Concept Set** area displays the initial information for the concept set that was created. The mnemonic, name, oid (object identifier) and url for the concept set are listed in this area. (See the figure below)

View Concept Set	
Mnemonic	ActClass
Name	Act Class
Oid	1.3.6.1.4.1.33349.3.1.5.9.3.1
Url	http://openiz.org/conceptset/act-class

Figure 11.7 - View Concept Set area

11.4.2 Concepts Area

The **Concepts Set** area display a list of all concepts in the concept set. (See the figure below)

Concepts			
Show 10 entries		Search:	
	Concept Class	Mnemonic	Names
☒	Classification Concept	CTTEVENT	CT event
☒	Classification Concept	PCPR	
☒	Classification Concept	Prone	prone
☒			
☒			
☒			
☒			
☒			
☒			

Showing 1 to 10 of 38 entries

Previous 1 2 3 4 Next

Figure 11.8 - View Concept Set area

11.5 Edit Concept Set ☒

Each concept set has several components that can be edited.

To access the **Edit Concept Set** page from the **Concept Set** page:

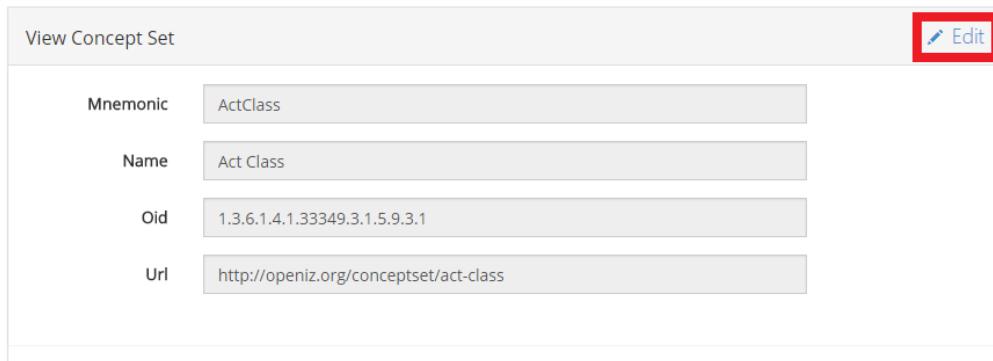
Step 1: Find a concept set using the search bar and click the **Edit** button
(See the figure below)

Concept Set					
Show 10 entries		Search:			
	Mnemonic	Name	OID		
☒	ActClass	Act Class	1.3.6.1.4.1.33349.3.1.5.9.3.1	View	Edit
☒	ActEncounterCode	ActEncounterCode	2.16.840.1.113883.5.4	View	Edit
☒	ActInterpretation	Act Interpretation	1.3.6.1.4.1.33349.3.1.5.9.3.5	View	Edit

Figure 11.9 - Edit Concept Set from the Concept Sets page

To access the **Edit Concept Set** page from the **View Concept Set** page:

Step 1: Click the **Edit**  button (See the figure below)



The screenshot shows a 'View Concept Set' page with the following fields:

Mnemonic	ActClass
Name	Act Class
Oid	1.3.6.1.4.1.33349.3.1.5.9.3.1
Url	http://openiz.org/conceptset/act-class

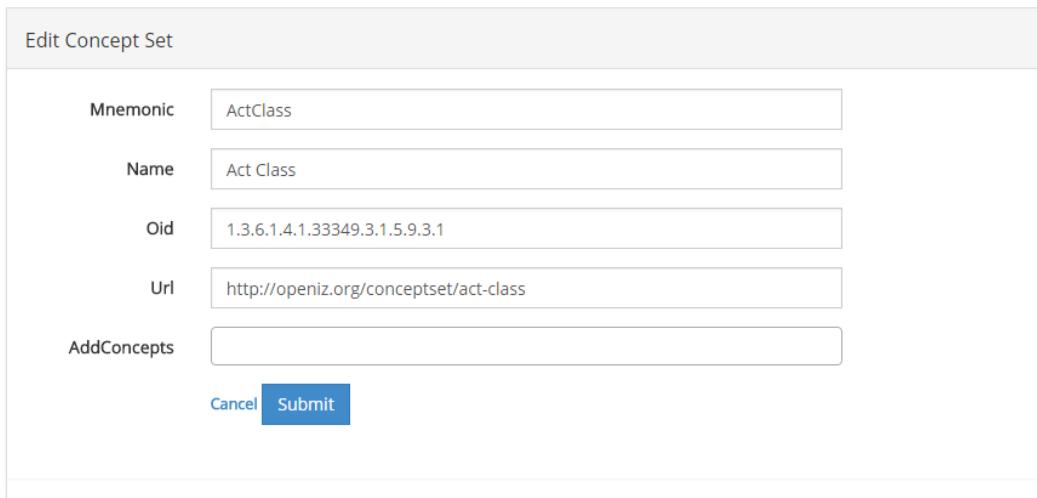
A red box highlights the 'Edit' button in the top right corner.

Figure 11.10 - Edit Concept Set from the View Concept Set page

You will be brought to **Edit Concept Set** page for the concept set you selected to edit. From this page you can modify fields.

11.5.1 Edit Concept Set Area

In this area you can change all the basic values set for the concept set you are viewing. *Required fields: Oid, Url.* (See the figure below)



The screenshot shows an 'Edit Concept Set' page with the following fields:

Mnemonic	ActClass
Name	Act Class
Oid	1.3.6.1.4.1.33349.3.1.5.9.3.1
Url	http://openiz.org/conceptset/act-class
AddConcepts	

A red box highlights the 'Submit' button at the bottom.

Figure 11.11 - Edit Concept Set

This section of the page allows you to add new concepts to the concept set. To add a new concept, see the section below. Otherwise, press the **Submit** button after making any changes. (See the figure below)



You will be brought back to the **View Concept Set** page.

Adding a New Concept ⓘ

Step 1: From the **Edit Concept Set** page, in the **Edit Concept Set** area, start typing into the **Add Concepts** field (See the figure below)

Note: Enter 2 or more characters to search for a concept

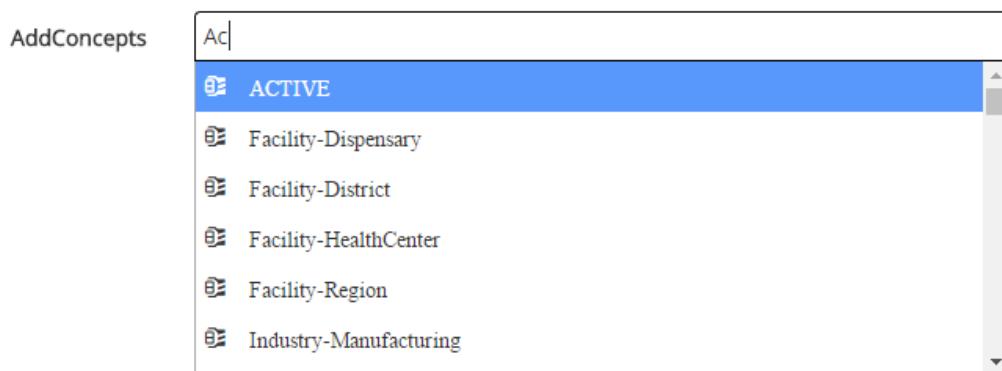


Figure 11.12 - Add Concepts field

You are able to add multiple concepts while editing the concept set, to add more repeat the last step by clicking an empty area on the **Add Concepts** field.

Step 2: Once you are satisfied with your changes, press the **Submit** button (See the figure below)



You will be returned to the **Edit Concept** page.

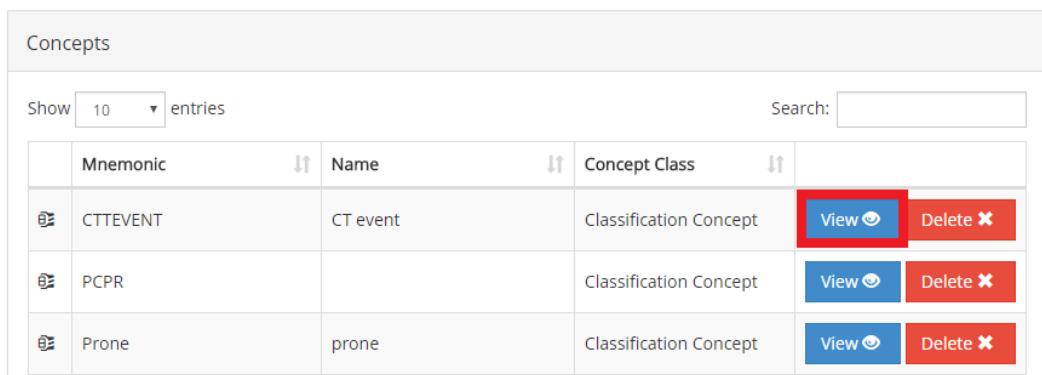
11.5.2 Concepts Area ⓘ

The **Concepts** area displays a list of all concepts in the concept set. You are also able to view or delete existing concepts.

Viewing a Concept ⓘ

You can view existing concepts using the **Edit Concept Set** page.

Step 1: From the **Edit Concept Set** page, in the **Concepts** area, click the **Edit** button next to the concept you wish to edit (See the figure below)



Concepts				
Show 10 entries Search: <input type="text"/>				
	Mnemonic	Name	Concept Class	
CTTEVENT	CT event	Classification Concept	View ⓘ	Delete ✖
PCPR		Classification Concept	View ⓘ	Delete ✖
Prone	prone	Classification Concept	View ⓘ	Delete ✖

Figure 11.13 - View Concept button

You will be brought to the **View Concept** page. Here you can view details about the concept, but no changes can be made (See the figure below). To make changes to concepts, see the section above on **Concepts ⓘ**.

View Concept

Mnemonic	CTTEVENT
Concept Class	Classification Concept
Creation Time	21/04/2017 11:26:42 AM

Languages

Show	10	▼	entries	Search:					
			<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: left;">Language Code</td> <td style="width: 50%; text-align: right;">Display Name</td> </tr> <tr> <td>en</td> <td>CT event</td> </tr> </table>			Language Code	Display Name	en	CT event
Language Code	Display Name								
en	CT event								

Showing 1 to 1 of 1 entries

Previous	1	Next
----------	---	------

Reference Terms

Show	10	▼	entries	Search:					
			<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: left;">Mnemonic</td> <td style="width: 50%; text-align: right;">Name</td> </tr> <tr> <td>CTTEVENT</td> <td></td> </tr> </table>			Mnemonic	Name	CTTEVENT	
Mnemonic	Name								
CTTEVENT									

Showing 1 to 1 of 1 entries

Previous	1	Next
----------	---	------

Figure 11.14 - View Concept page

Deleting a Concept

You can delete concepts using the **Edit Concept Sets** page.

Step 1: From the **Edit Concept Sets** page, in the **Concepts** area, click the **Delete X** button next to the concept you wish to delete (See the figure below)

Concepts

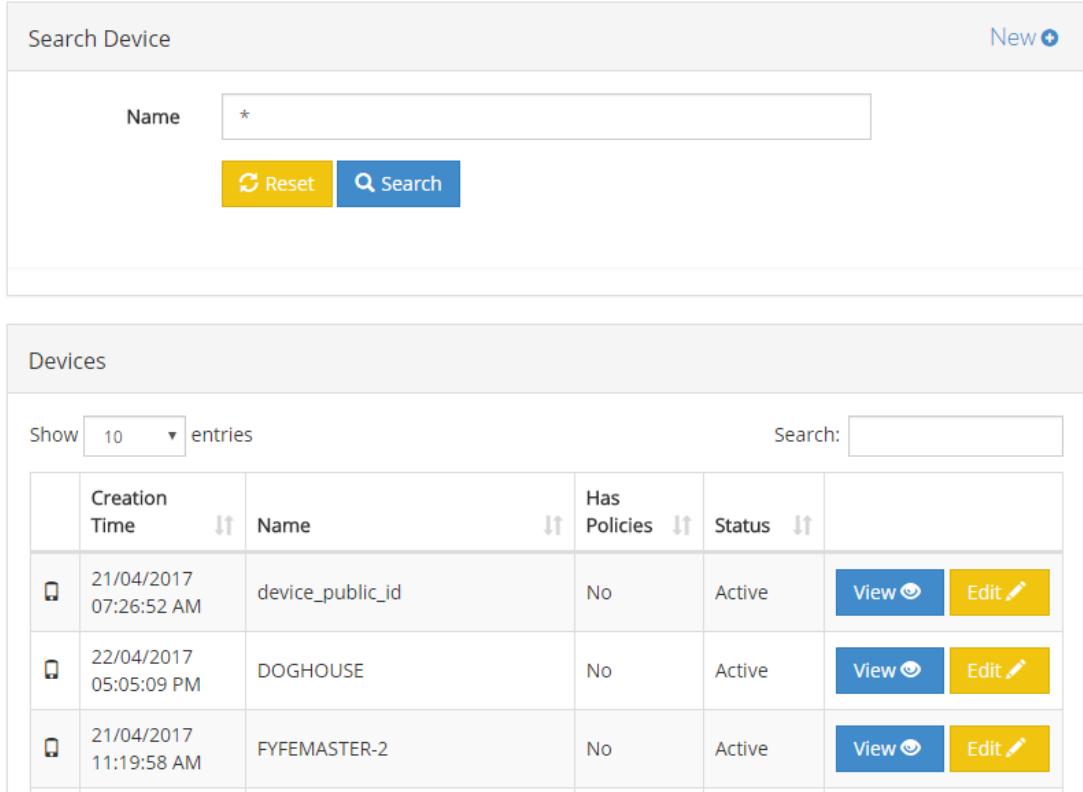
Show	10	▼	entries	Search:						
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; text-align: left;">Mnemonic</td> <td style="width: 25%; text-align: left;">Name</td> <td style="width: 25%; text-align: left;">Concept Class</td> <td style="width: 25%; text-align: right;">View </td> <td style="width: 25%; text-align: right;">Delete </td> </tr> </table>						Mnemonic	Name	Concept Class	View 	Delete 
Mnemonic	Name	Concept Class	View 	Delete 						
CTTEVENT	CT event	Classification Concept	View 	Delete 						
PCPR		Classification Concept	View 	Delete 						
Prone	prone	Classification Concept	View 	Delete 						

Figure 11.15 - Delete Concept button

The concept will be deleted and the **Edit Concept Set** page will be refreshed.

Chapter 12: Devices

The **Devices** page allows you to search for devices, and view or manage them. (See the figure below)



The screenshot shows the 'Devices' page interface. At the top, there is a search bar labeled 'Search Device' with a 'Name' field containing a placeholder asterisk (*). Below the search bar are 'Reset' and 'Search' buttons. To the right of the search bar is a 'New' button with a plus sign. The main area is titled 'Devices' and contains a table with three rows of device data. The table columns are: Creation Time, Name, Has Policies, and Status. Each row includes a small icon, a timestamp, a device name, a status indicator (No/Yes), and an active status (Active). To the right of each row are 'View' and 'Edit' buttons. Above the table, there are 'Show 10 entries' and a 'Search' input field.

	Creation Time	Name	Has Policies	Status	
	21/04/2017 07:26:52 AM	device_public_id	No	Active	View 
	22/04/2017 05:05:09 PM	DOGHOUSE	No	Active	View 
	21/04/2017 11:19:58 AM	FYFEMASTER-2	No	Active	View 

Figure 12.1 - Devices page

12.1 Search Devices

If you are looking for a specific device that already exists in the system you can use the **Search Device** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Device** area, enter the name of a device (See the figure below)

Search Device

Name

New

Figure 12.2 - Searching for a Device

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Devices** area below. See the following section on **Devices** for more information.

12.2 Devices

The **Devices** area of the **Devices** page displays a list of all the devices in the search results. By default the search results load with all devices available. (See the figure below)

Devices

Show entries Search:

	Creation Time	Name	Has Policies	Status	
	21/04/2017 07:26:52 AM	device_public_id	No	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>
	22/04/2017 05:05:09 PM	DOGHOUSE	No	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>
	21/04/2017 11:19:58 AM	FYFEMASTER-2	No	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>

Figure 12.3 - Devices

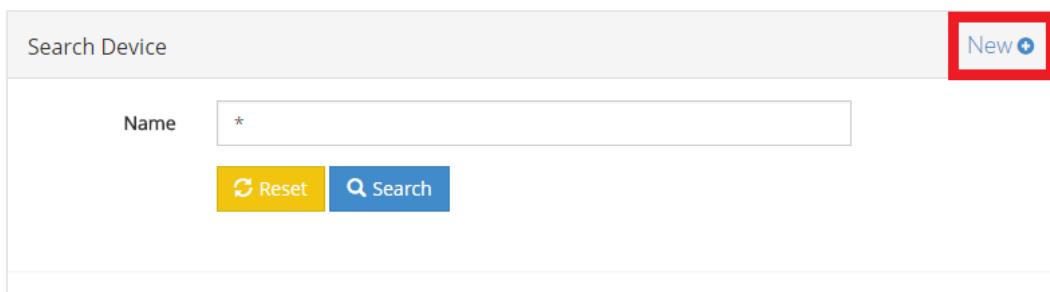
Devices displayed here list details including the creation time, device name, policy status and active status. Devices can be viewed and managed from this page.

New devices can also be added from this page. To add a new device, or view and manage an existing device, see sections below.

12.3 New Device

When a new device is required, you can create a new device. To create a new device:

Step 1: From the **Devices** page, click the **New**  button in the top right of the **Search Device** area (See the figure below)

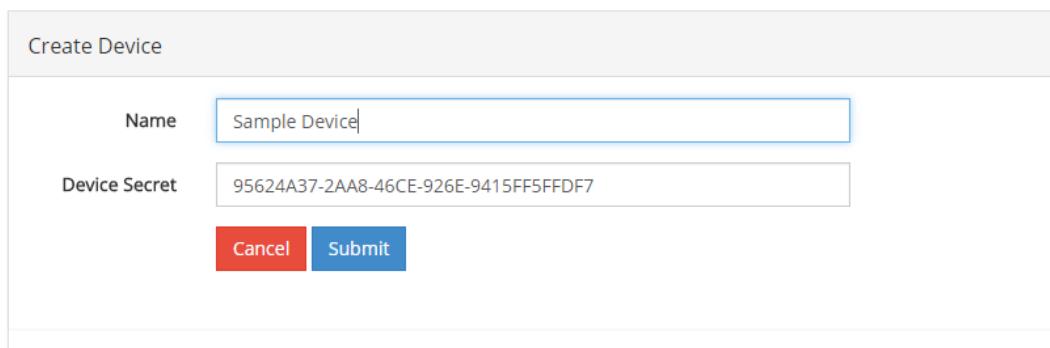


The screenshot shows a search interface for devices. At the top right is a blue button labeled 'New' with a white plus sign. Below it is a search bar with the placeholder 'Name' and a red asterisk indicating it is required. Underneath the search bar are two buttons: a yellow 'Reset' button with a circular arrow icon and a blue 'Search' button with a magnifying glass icon.

Figure 12.4 - New device button

Step 2: Enter the fields for the device you are adding (See the figure below):

- Name (**Required**)
- Device Secret (**Required**)



The screenshot shows a 'Create Device' form. At the top is a title 'Create Device'. Below it are two input fields: 'Name' with the value 'Sample Device' and 'Device Secret' with the value '95624A37-2AA8-46CE-926E-9415FF5FFDF7'. At the bottom are two buttons: a red 'Cancel' button and a blue 'Submit' button.

Figure 12.5 - Create Device page

Step 3: Press the **Submit** button to create the device (See the figure below)



If created successfully you should see a popup display message saying the *Device created successfully*. From here you will see the **View Device** page. See below for more details on viewing and editing devices.

12.4 View Devices

After finding a device in the search results, or creating a new device you can view the devices details.

Step 1: From the **Devices** page, find a device you would like to view and press the **View**  button (See the figure below)

Devices						
Show <input type="button" value="10"/> entries			Search: <input type="text"/>			
	Creation Time	Name	Has Policies	Status		
	21/04/2017 07:26:52 AM	device_public_id	No	Active	<input data-bbox="1087 1245 1214 1290" type="button" value="View"/> 	<input data-bbox="1230 1245 1294 1290" type="button" value="Edit"/> 
	22/04/2017 05:05:09 PM	DOGHOUSE	No	Active	<input data-bbox="1087 1329 1214 1373" type="button" value="View"/> 	<input data-bbox="1230 1329 1294 1373" type="button" value="Edit"/> 
	21/04/2017 11:19:58 AM	FYFEMASTER-2	No	Active	<input data-bbox="1087 1418 1214 1457" type="button" value="View"/> 	<input data-bbox="1230 1418 1294 1457" type="button" value="Edit"/> 

Figure 12.6 - View Device button

You will be brought to **View Device** page for the device you selected to view.

12.4.1 View Device Area

The **View Device** area displays the initial information for the device that was created. The name for the device is displayed in this area. (See the figure below)

View Device	
Edit	
Name	Sample Device

Figure 12.7 - View Device area

12.4.2 Policies Area

The **Policies** area displays a list of policies for the device being viewed. (See the figure below)

Policies
No associated policies

Figure 12.8 - Policies area

12.5 Edit Devices

Each device has a couple components that can be edited.

To access the **Edit Device** page from the **Device** page:

Step 1: Find a device using the search bar and click the **Edit**  button (See the figure below)

Devices					
Show 10 entries		Search:			
Creation Time	Name	Has Policies	Status		
21/04/2017 07:26:52 AM	device_public_id	No	Active	View	Edit
22/04/2017 05:05:09 PM	DOGHOUSE	No	Active	View	Edit
21/04/2017 11:19:58 AM	FYFEMASTER-2	No	Active	View	Edit

Figure 12.9 - Edit Device from the Devices page

To access the **Edit Device** page from the **View Device** page:

Step 1: Click the **Edit** button (See the figure below)

View Device	
Edit	
Name	Sample Device

Figure 12.10 - Edit Device from the View Device page

You will be brought to **Edit Device** page for the device you selected to edit. From this page you can modify fields.

12.5.1 Edit Device Area

In this area you can change the name and policies for the device you are viewing. *Required fields: Name.* (See the figure below)

Edit Device

Name	Sample Device
Policies	
Cancel Submit	
Deactivate 	

Figure 12.11 - Edit Device

Press the **Submit** button after making any changes. (See the figure below)



You will be brought back to the **View Device** page.

Deactivating a Device

In this area you can deactivate the device. Once deactivated the device cannot be modified or used anywhere in the system until reactivated. To deactivate a device:

Step 1: From the **Edit Device** page, click the red **Deactivate ** button in the **Edit Device** area (See the figure below)



You will see a message popup stating *Device successfully deactivated* and you will be returned to the **Search & View Devices** page.

Activating a Device

If a device has been deactivated it can be reactivated in the **Edit Device** page. Once activated the device can again be modified or used in the system until deactivated. To activate a device:

Step 1: From the **Edit Device** page, click the green **Activate**  button in the **Edit Device** area (See the figure below)



You will see a message popup stating *Device successfully activated* and you will be returned to the **Search & View Devices** page.

Adding Policies

You are able to modify available policies in the **Edit Device** area of the **Edit Device** page. You can add multiple policies to a device to give that device more functionality throughout the system. To add a policy to a device:

Step 1: Click on an empty part of the **Policies** field (See the figure below)



Figure 12.12 - Adding policies

Step 2: A drop-down menu will appear with available policies, select a policy (See the figure below)

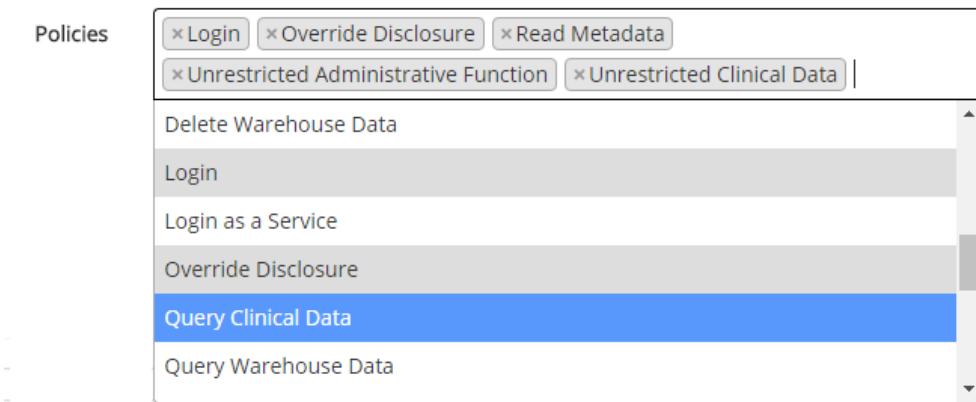


Figure 12.13 - Adding policies - Drop-down menu

Step 3: Repeat the previous steps to add more policies

Step 4: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Device** page. The **Policies** area will be updated with the changes in policies for that device.

Removing Policies

You are able to modify available policies in the **Edit Device** area of the **Edit Device** page. You can restrict access for specific devices by removing some policies that exist for that device. To remove a policy from a device:

Step 1: Click on the **x** next to the name of a policy in the **Policies** field that you want to remove (See the figure below)



Figure 12.14 - Remove policies

Step 2: Repeat the previous step to remove another policy

Step 3: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Device** page. The **Policies** area will be updated with the changes in policies for that device.

12.5.2 Policies Area

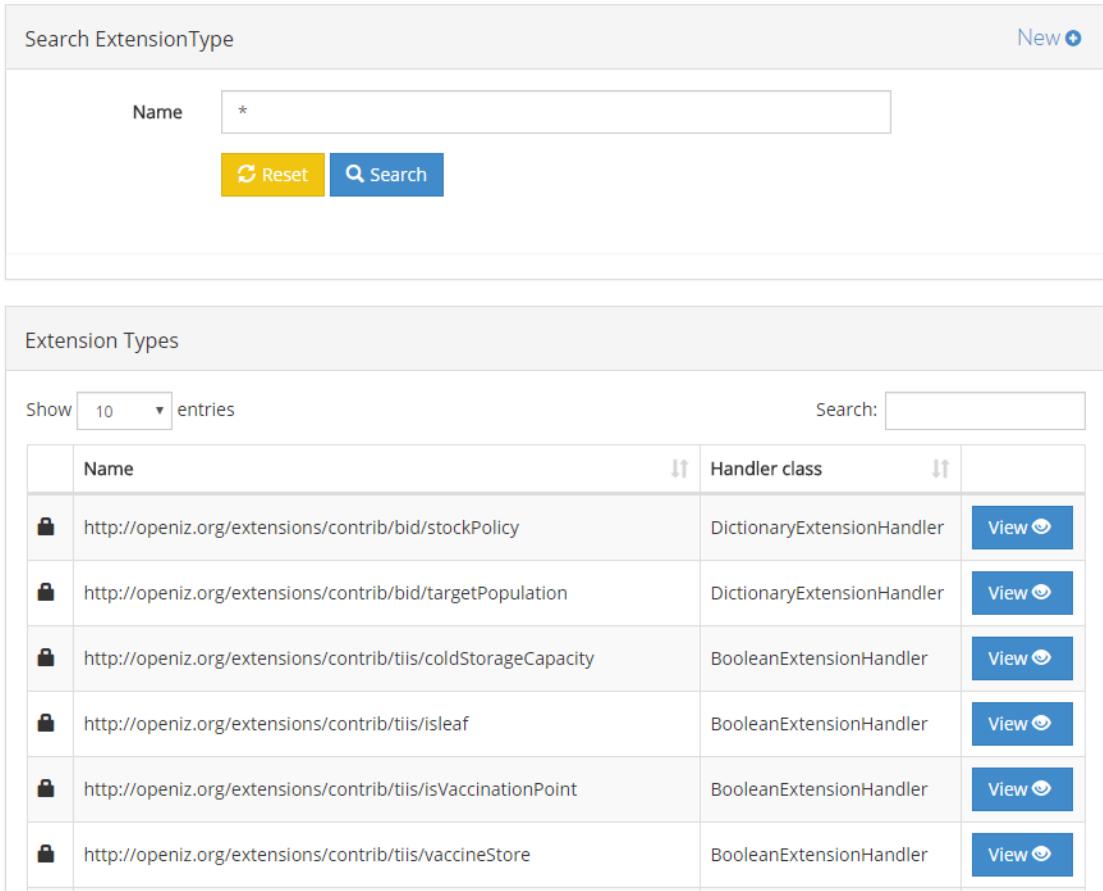
The **Policies** area displays a list of **Policies** related to the device you are editing. The creation time, name, grant status, public status, oid (object identifier) and active status are all shown for each policy listed. If the policy list is very large there is a search bar that allows you to filter results. (See the figure below)

Policies						
	Creation Time	Name	Grant	Is Public	Oid	Status
	21/04/2017 07:26:28 AM	Login	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.1	Active
	21/04/2017 07:26:28 AM	Override Disclosure	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.3	Active
	21/04/2017 07:26:28 AM	Read Metadata	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.4.0	Active
	21/04/2017 07:26:28 AM	Unrestricted Administrative Function	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.0	Active
	21/04/2017 07:26:28 AM	Unrestricted Clinical Data	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.2	Active

Figure 12.15 - Policies area

Chapter 13: Extension Types

The **Extension Types** page displays a list the current extension types installed on the system and shows the name and handler class for the extension type. (See the figure below)



The screenshot shows two main sections of the 'Extension Types' page. The top section is a search form with fields for 'Name' and buttons for 'Reset' and 'Search'. The bottom section is a table listing extension types, with columns for 'Name' and 'Handler class', and a 'View' button for each entry.

Name	Handler class	
http://openiz.org/extensions/contrib/bid/stockPolicy	DictionaryExtensionHandler	View
http://openiz.org/extensions/contrib/bid/targetPopulation	DictionaryExtensionHandler	View
http://openiz.org/extensions/contrib/tiis/coldStorageCapacity	BooleanExtensionHandler	View
http://openiz.org/extensions/contrib/tiis/isleaf	BooleanExtensionHandler	View
http://openiz.org/extensions/contrib/tiis/isVaccinationPoint	BooleanExtensionHandler	View
http://openiz.org/extensions/contrib/tiis/vaccineStore	BooleanExtensionHandler	View

Figure 13.1 - Extension Types page

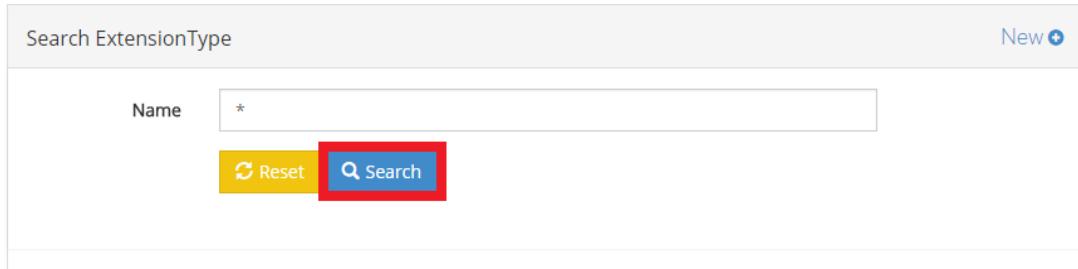
You can add new extension types or view ones current installed extension types.

13.1 Search Extension Types

If you are looking for a specific extension type that already exists in the system you can use the **Search Extension Type** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Extension Type** area, enter the name of an extension type you are looking for and click the **Search** button (See the figure below)



Search ExtensionType

Name *

Reset Search

New +

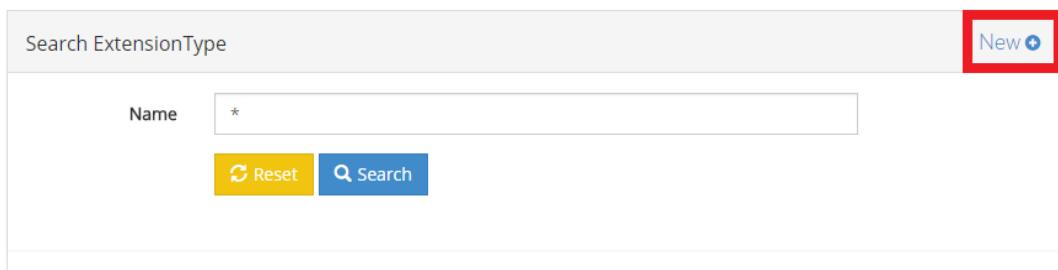
Figure 13.1 - Searching for an Extension Type

Search results will appear in the **Extension Types** area below. See the following section on **Extension Types**  for more information.

13.1 New Extension Types

From here you can upload new extension types to distribute them to the TImR system. To add a new extension type:

Step 1: Click the **New +** button in the top right of the **Extension Types** area (See the figure below)



Search ExtensionType

Name *

Reset Search

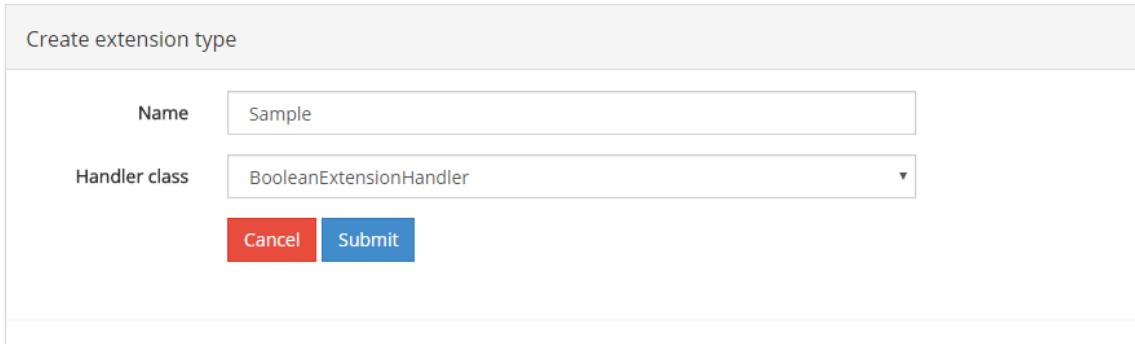
New +

Figure 13.3 - Creating a new extension type

Step 2: You will be brought to the **Create extension type** page

Step 3: Fill in the form (See the figure below):

- Name (**Required**)
- Handler class (**Required**)



Create extension type

Name

Handler class

Cancel Submit

Figure 13.4 – Creating a new extension type

Step 4: Click the **Submit** button to upload the extension type (See the figure below)



13.2 View Extension Types

You are able to view details about the extension types that are currently installed. To view extension type details:

Step 1: From the **Extension Types** page, click the **View**  button next to the extension type you wish to view (See the figure below)

Extension Types			
Show 10 entries		Search:	
	Name	Handler class	
🔒	http://openiz.org/extensions/contrib/bid/stockPolicy	DictionaryExtensionHandler	View
🔒	http://openiz.org/extensions/contrib/bid/targetPopulation	DictionaryExtensionHandler	View
🔒	http://openiz.org/extensions/contrib/tiis/coldStorageCapacity	BooleanExtensionHandler	View
🔒	http://openiz.org/extensions/contrib/tiis/isleaf	BooleanExtensionHandler	View
🔒	http://openiz.org/extensions/contrib/tiis/isVaccinationPoint	BooleanExtensionHandler	View
🔒	http://openiz.org/extensions/contrib/tiis/vaccineStore	BooleanExtensionHandler	View

Figure 13.5 - View an extension type button

You will be brought to the **View Extension** page. You can see the extension type name and handler class. (See the figure below)

View extension type

Name	http://openiz.org/extensions/contrib/bid/stockPolicy
Handler class	DictionaryExtensionHandler

Figure 13.6 - Viewing an extension type

Chapter 14: Manuals ➔

The **Manuals** page displays a list of the manuals that are currently available. (See the figure below)

Manuals		New 
Name	DownloadLink	
OpenIZAdministrationPortalManual	http://timadminintl.marc-hi.ca/Manual/Download/59d8913c-b249-e711-8376-0050569d02a0	 
TimRFormScannerUserManual	http://timadminintl.marc-hi.ca/Manual/Download/5ad8913c-b249-e711-8376-0050569d02a0	 
TimRMobileApplicationUserManual	http://timadminintl.marc-hi.ca/Manual/Download/712d1e45-b249-e711-8376-0050569d02a0	 
TimRWebPortalUserManual	http://timadminintl.marc-hi.ca/Manual/Download/722d1e45-b249-e711-8376-0050569d02a0	 

Figure 14.1 - Manuals page

You can add new manuals or download manuals.

14.1 New Manuals

From here you can upload new manuals to distribute them to the TImR system.

To add a new manual:

Step 1: Click the **New**  button in the top right of the **Manuals** area (See the figure below)

Manuals		New 
Name	DownloadLink	
OpenIZAdministrationPortalManual	http://timadminintl.marc-hi.ca/Manual/Download/59d8913c-b249-e711-8376-0050569d02a0	 
TimRFormScannerUserManual	http://timadminintl.marc-hi.ca/Manual/Download/5ad8913c-b249-e711-8376-0050569d02a0	 
TimRMobileApplicationUserManual	http://timadminintl.marc-hi.ca/Manual/Download/712d1e45-b249-e711-8376-0050569d02a0	 
TimRWebPortalUserManual	http://timadminintl.marc-hi.ca/Manual/Download/722d1e45-b249-e711-8376-0050569d02a0	 

Figure 14.2 - Creating a new manual

Step 2: You will be brought to the **Upload Manual** page, Click the **Choose File** button (See the figure below)

Note: Manual files must be in **.pdf** format

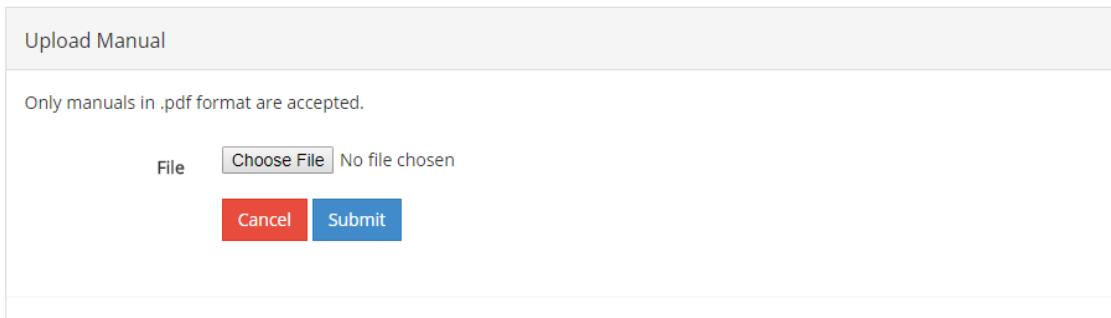


Figure 14.3 - Uploading a new manual

Step 3: In the File Explorer pop-up box, browse to the manual file you wish to add. Select the manual file and click the **Open** button (See the figure below)

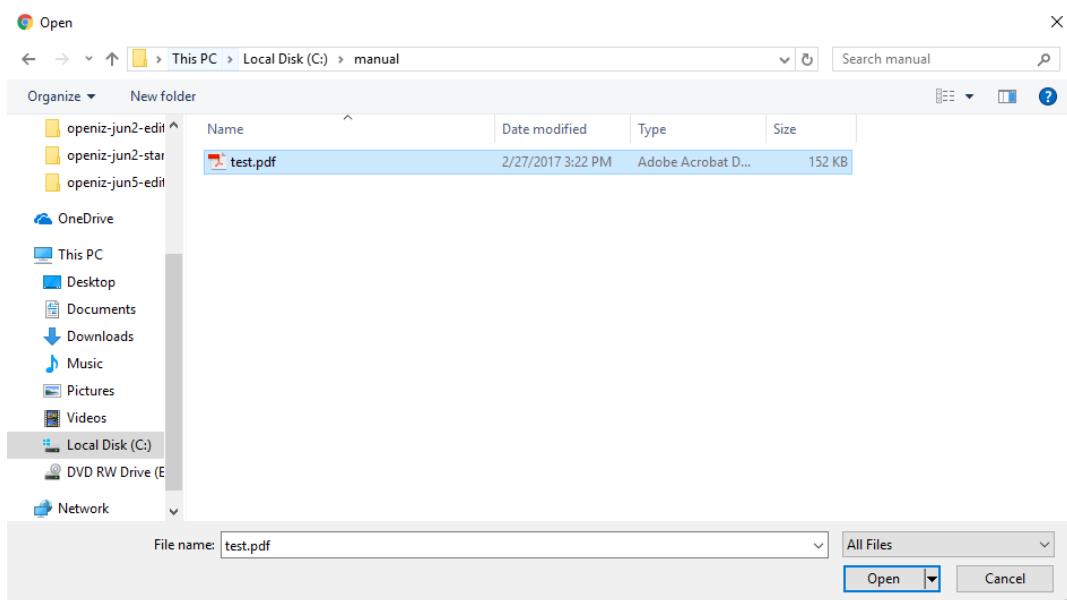


Figure 14.4 – Browsing for the manual file

Step 4: Click the **Submit** button to upload the manual (See the figure below)



14.2 Downloading Manuals

You can download a local copy of an available manual to view:

Step 1: From the **Manuals** page, click the **Download**  button next to the manual you wish to download (See the figure below)

Manuals		
Name	DownloadLink	
OpenIZAdministrationPortalManual	http://timradminintl.marc-hi.ca/Manual/Download/59d8913c-b249-e711-8376-0050569d02a0	  
TimRFormScannerUserManual	http://timradminintl.marc-hi.ca/Manual/Download/5ad8913c-b249-e711-8376-0050569d02a0	 
TimRMobileApplicationUserManual	http://timradminintl.marc-hi.ca/Manual/Download/712d1e45-b249-e711-8376-0050569d02a0	 
TimRWebPortalUserManual	http://timradminintl.marc-hi.ca/Manual/Download/722d1e45-b249-e711-8376-0050569d02a0	 

Figure 14.5 - Downloading manuals – Download button

The manual will be automatically downloaded to your local machine. Unless otherwise specified, the file will likely be in your Downloads folder.

14.3 Deleting Manuals

You can delete a submitted manual to remove it from TImR. To delete a manual:

Step 1: Click the **Delete**  button next to the manual you wish to delete (See the figure below)

Manuals		
Name	DownloadLink	
OpenIZAdministrationPortalManual	http://timradminintl.marc-hi.ca/Manual/Download/59d8913c-b249-e711-8376-0050569d02a0	 
TimRFormScannerUserManual	http://timradminintl.marc-hi.ca/Manual/Download/5ad8913c-b249-e711-8376-0050569d02a0	 
TimRMobileApplicationUserManual	http://timradminintl.marc-hi.ca/Manual/Download/712d1e45-b249-e711-8376-0050569d02a0	 
TimRWebPortalUserManual	http://timradminintl.marc-hi.ca/Manual/Download/722d1e45-b249-e711-8376-0050569d02a0	 

Figure 14.6 – Deleting a manual

You will see a success message displayed stating *Manual deleted successfully*. The manual will be removed from the TImR system.

Chapter 15: Materials

The **Materials** page allows you to search for materials, or manually manage materials and relationships.

15.1 Search Material

If you are looking for a specific material that already exists in the system you can use the **Search Material** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Material** area, enter the name of a material (See the figure below)



The screenshot shows a search interface titled 'Search Material'. At the top right is a 'New' button with a plus sign. Below it is a search bar with the placeholder 'Name' and a red border. Inside the search bar is an asterisk (*) symbol. Below the search bar are two buttons: a yellow 'Reset' button and a blue 'Search' button with a magnifying glass icon. The 'Search' button is highlighted with a red box.

Figure 15.1 - Searching for a Material

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Materials** area below (See the figure below). See the following section on **Materials** for more information.

Search Material New

Name	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 4px; margin-bottom: 5px;" type="text"/> *
<input style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 4px; background-color: #f0ad4e; color: white; font-weight: bold; margin-right: 10px;" type="button" value="Reset"/> <input style="border: 1px solid #0070C0; padding: 2px 10px; border-radius: 4px; background-color: #0070C0; color: white; font-weight: bold;" type="button" value="Search"/>	

Materials New

Show	<input type="button" value="10"/>	entries	Search: <input style="width: 100%; border: 1px solid #ccc; padding: 2px; border-radius: 4px; margin-bottom: 5px;" type="text"/>	
Creation Time	Name	Type	Status	
21/04/2017 11:28:43 AM	ADS_0.05ML	N/A	Active	<input icon"="" style="height: 1em;" type="button" value="View "/> <input edit="" icon"="" style="height: 1em;" type="button" value="Edit "/>
21/04/2017 11:28:43 AM	ADS_0.5ml	N/A	Active	<input icon"="" style="height: 1em;" type="button" value="View "/> <input edit="" icon"="" style="height: 1em;" type="button" value="Edit "/>
21/04/2017 11:28:35 AM	BCG	BCG Bacillus Calmette-Guerin vaccine	Active	<input icon"="" style="height: 1em;" type="button" value="View "/> <input edit="" icon"="" style="height: 1em;" type="button" value="Edit "/>
21/04/2017 11:28:40 AM	BCG Diluent	N/A	Active	<input icon"="" style="height: 1em;" type="button" value="View "/> <input edit="" icon"="" style="height: 1em;" type="button" value="Edit "/>

Figure 15.2 - Materials page

15.2 Materials

The **Materials** area of the **Materials** page displays a list of all the materials in the search results. By default the search results load with all types of materials available.

Materials displayed here list details such as the creation time, name, type and active status. Materials can be viewed and managed from this page. (See the figure below)

Materials						New 
Show 10 entries				Search: <input type="text"/>		
	Creation Time	Name	Type	Status		
	21/04/2017 11:28:43 AM	ADS_0.05ML	N/A	Active	View 	Edit 
	21/04/2017 11:28:43 AM	ADS_0.5ml	N/A	Active	View 	Edit 
	21/04/2017 11:28:35 AM	BCG	BCG Bacillus Calmette-Guerin vaccine	Active	View 	Edit 
	21/04/2017 11:28:40 AM	BCG Diluent	N/A	Active	View 	Edit 
	21/04/2017 11:28:35 AM	DTP-Hib-HepB	DTP- Haemophilus influenzae type b conjugate and hepatitis b vaccine DTP-Hib-Hep B	Active	View 	Edit 
	21/04/2017 11:28:35 AM	Measles	measles measles virus vaccine	Active	View 	Edit 
	21/04/2017 11:28:36 AM	Mebendazole	Mebendazole Supplement	Active	View 	Edit 
	21/04/2017 11:28:35 AM	MR	M/R measles and rubella virus vaccine	Active	View 	Edit 
	21/04/2017 11:28:40 AM	MR Diluent	N/A	Active	View 	Edit 
	21/04/2017 11:28:35 AM	OPV	OPV poliovirus vaccine, live, oral	Active	View 	Edit 

Showing 1 to 10 of 17 entries

Previous [1](#) [2](#) Next

Figure 15.3 - Materials

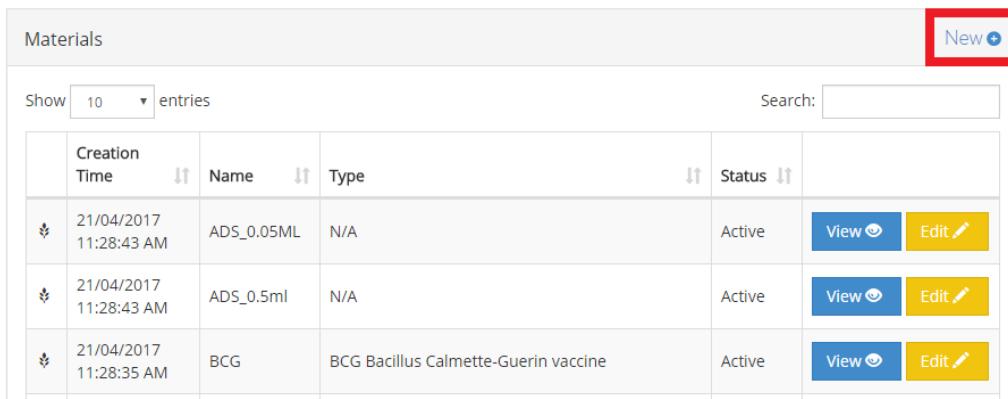
New materials can also be added from this page. To add a new material, or view or manage an existing material, see sections below.

15.3 New Material

When a new material has been acquired, you can create a new material in order to have it become available throughout the system.

To create a new material:

Step 1: From the **Materials** page, click the **New ** button in the top right of the **Search Material** area, or click the **New ** button in the top right of the **Materials** area (See the figure below)



The screenshot shows a table titled 'Materials' with a red box highlighting the 'New' button in the top right corner. The table has columns for 'Creation Time', 'Name', 'Type', and 'Status'. Each row contains a 'View' and an 'Edit' button. The data in the table is as follows:

Creation Time	Name	Type	Status	
21/04/2017 11:28:43 AM	ADS_0.05ML	N/A	Active	View Edit
21/04/2017 11:28:43 AM	ADS_0.5ml	N/A	Active	View Edit
21/04/2017 11:28:35 AM	BCG	BCG Bacillus Calmette-Guerin vaccine	Active	View Edit

Figure 15.4 - New Material button

Step 2: You will be brought to the **Create Material** page, Fill in the fields for the material you are adding (See the figure below):

- Name (**Required**)
- Form Concept

Note: This refers to the way this material is administered

- Quantity Concept

Note: Measurement type for this material

- Type Concept

Note: The material type

- Expiry date

Create Material

Name	<input type="text"/>
Form Concept	<input type="text"/>
Quantity Concept	<input type="text"/>
Type Concept	<input type="text"/>
Expiry date	<input type="text"/> 1/1/0001 12:00:00 AM <input type="button" value="Calendar"/>
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	

Figure 15.5 - Create Material page

Step 3: Press the **Submit** button to create the material (See the figure below)



If created successfully you should see a popup display message saying the *Material created successfully*. From here you will see the **View Material** page. See below for more details on viewing and editing materials.

15.4 View Material

After finding a material in the search results, or creating a new material you can view the materials details.

Step 1: From the **Materials** page, find a material you would like to view and press the **View**  button (See the figure below)

Materials						New 
Show <input type="text" value="10"/> entries			Search: <input type="text"/>			
Creation Time	Name	Type		Status		
21/04/2017 11:28:43 AM	ADS_0.05ML	N/A		Active	View 	Edit 
21/04/2017 11:28:43 AM	ADS_0.5ml	N/A		Active	View 	Edit 
21/04/2017 11:28:35 AM	BCG	BCG Bacillus Calmette-Guerin vaccine		Active	View 	Edit 

Figure 15.6 - View Material button

You will be brought to **View Material** page for the material you selected to view. (See the figure below)

View Material		Edit 
Name	ADS_0.05ML	
Form Concept	Injection AdministrableDrugForm-Injection	
Quantity Concept		
Type	N/A	
Expiry date	01/01/0001	
Updated By		
Updated Time	07/26/2017 15:34:53	

Identifiers			
Show <input type="text" value="10"/> entries		Search: <input type="text"/>	
	Name	Type	Value
	GIIS Item Identifiers	GIIS_ITEM	62
	VIMS Item Identifiers	VIMS_ITEM_ID	2422

Figure 15.7 - View Material page

15.4.1 Record Verification

Sometimes records may be added from an external system. This can be left alone unless you wish to make any changes to the material. If the material has not yet been verified, you will see the **Record Verification Required** area appear above the **View Material** area on the **View Material** page. (See the figure below)



Figure 15.8 - Record Verification Required alert

If you want to verify this material:

Step 1: Look through the material information, identifiers and relationships for the material you want to verify, ensure it is correct

Step 2: Press the **Verify** button (See the figure below)

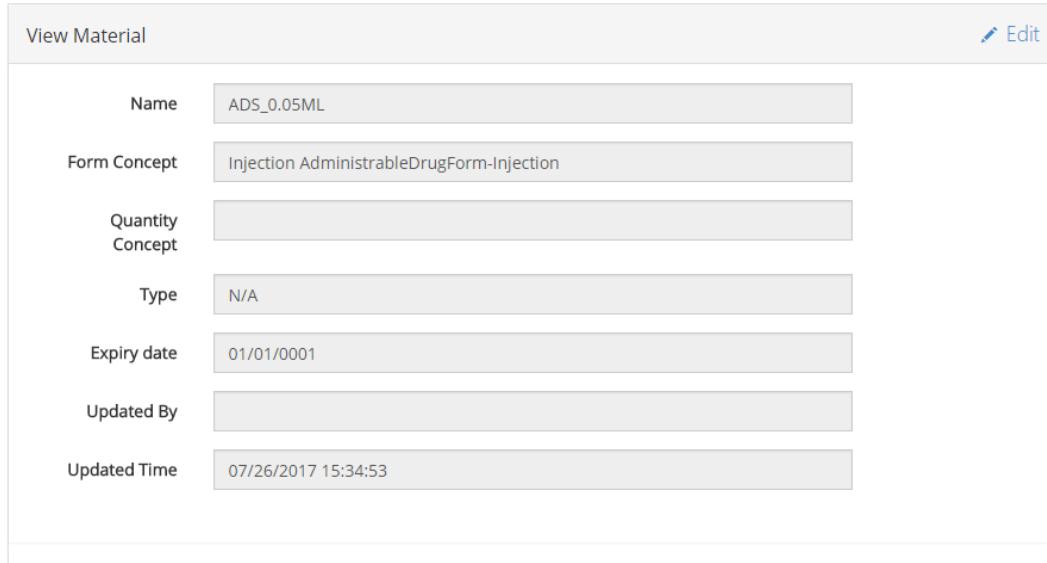


Figure 15.9 - Record Verification Required Verify button

You will see a green popup message stating the *Data verified successfully* and returned to the **View Material** page for the material you are currently viewing.

15.4.2 View Material Area

The **View Material** area displays the initial information for the material that was created. Details such as the materials name, form concept, quantity concept, type concept, expiry date and update information are all displayed in this area. (See the figure below)



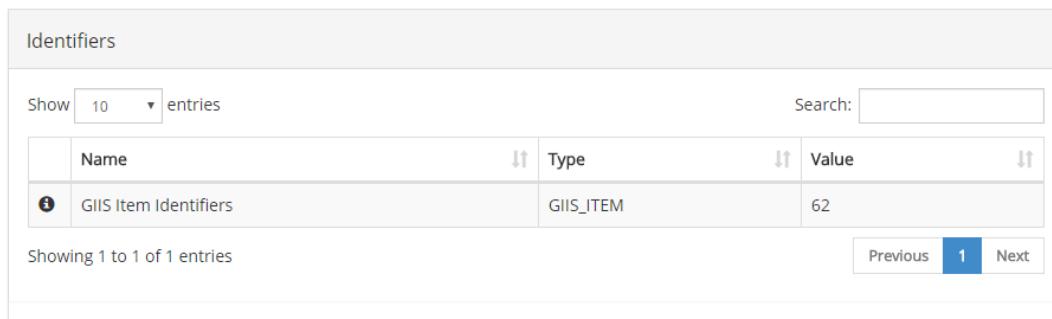
The screenshot shows a 'View Material' interface with the following data:

Name	ADS_0.05ML
Form Concept	Injection AdministribleDrugForm-Injection
Quantity Concept	
Type	N/A
Expiry date	01/01/0001
Updated By	
Updated Time	07/26/2017 15:34:53

Figure 15.10 - View Material area

15.4.3 Identifiers

The **Identifiers** area displays a list of all identifiers for the material. (See the figure below)



The screenshot shows an 'Identifiers' table with the following data:

	Name	Type	Value
●	GIIS Item Identifiers	GIIS_ITEM	62

Showing 1 to 1 of 1 entries

Figure 15.11 - Identifiers area

15.4.4 Relationships

The **Relationships** area displays a list of relationships between manufactured materials and the concept of the materials. Also displayed here are

relationship details such as the name, relationship type, type and quantity. (See the figure below)

Relationships					
Show 10 entries		Search:			
	Name	Relationship type	Type	Quantity	
☒	ADS_0.05ML (BD)	manufactured product	N/A	0	
☒	ADS_0.05ML (BD)	manufactured product	N/A	0	
☒	ADS_0.05ML (BD)	manufactured product	N/A	0	
☒	ADS_0.05ML (BD)	manufactured product	N/A	0	
☒	ADS_0.05ML (BD)	manufactured product	N/A	0	
☒	ADS_0.05ML (Bharat Biotech International Ltd)	manufactured product	N/A	0	
☒	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0	
☒	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0	
☒	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0	
☒	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0	
Showing 1 to 10 of 11 entries			Previous	1	2
					Next

Figure 15.12 - Relationships area

15.5 Edit Material ■

Each material has several components that can be edited. You can change the initial details, add or change identifiers, and add or change relationships.

To access the **Edit Material** page from the **Materials** page:

Step 1: Find a material using the search bar and click the **Edit**  button (See the figure below)

Materials							New 
Show 10 entries				Search: <input type="text"/>			
	Creation Time	Name	Type		Status		
	21/04/2017 11:28:43 AM	ADS_0.05ML	N/A		Active	 	
	21/04/2017 11:28:43 AM	ADS_0.5ml	N/A		Active	 	
	21/04/2017 11:28:43 AM	BCG	BCG Bacillus Calmette-Guerin vaccine		Active	 	

Figure 15.13 - Edit Material from the Materials page

To access the **Edit Material** page from the **View Material** page:

Step 1: Click the **Edit**  button (See the figure below)

View Material	
Name	<input type="text" value="ADS_0.05ML"/>
Form Concept	<input type="text" value="Injection AdministrableDrugForm-Injection"/>
Quantity Concept	<input type="text"/>
Type	<input type="text" value="N/A"/>
Expiry date	<input type="text" value="01/01/0001"/>
Updated By	<input type="text"/>
Updated Time	<input type="text" value="07/26/2017 15:34:53"/>

Figure 15.14 - Edit Material from the View Material page

You will be brought to **Edit Material** page for the material you selected to edit. From this page you can modify fields and add/edit/remove identifiers and relationships.

15.5.1 Edit Material Area

In this area you can change all the basic values set for the material concept you are viewing. *Required fields: Name.* (See the figure below)

The screenshot shows the 'Edit Material' page with the following fields:

- Name: ADS_0.05ML
- Form Concept: Injection
- Quantity Concept: (empty)
- Type Concept: (empty)
- Expiry date: (empty)
- Updated By: (empty)
- Updated Time: 07/26/2017 15:34:53

At the bottom right of the form area, there is a red button labeled 'Deactivate ✕'.

Figure 15.15 - Edit Material page

If the material being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Material Is Not Active*. To activate or deactivate a material, see the sections below.

Deactivating a Material ✕

In this area you can deactivate the material. Once deactivated the material cannot be modified or used anywhere in the system until reactivated. To deactivate a material:

Step 1: From the **Edit Material** page, click the red **Deactivate ✕** button in the **Edit Material** area (See the figure below)



You will see a message popup stating *Material successfully deactivated* and you will be returned to the **Search & View Materials** page.

Activating a Material

If a material has been deactivated it can be reactivated in the **Edit Material** page. Once activated the material can again be modified or used in the system until deactivated. To activate a material:

Step 1: From the **Edit Material** page, click the green **Activate**  button in the **Edit Material** area (See the figure below)



You will see a message popup stating *Material successfully activated* and you will be returned to the **Search & View Materials** page.

15.5.2 Identifiers Area

The **Identifiers** area displays a list of all identifiers for the material. You are also able to add new identifiers and edit or delete existing identifiers.

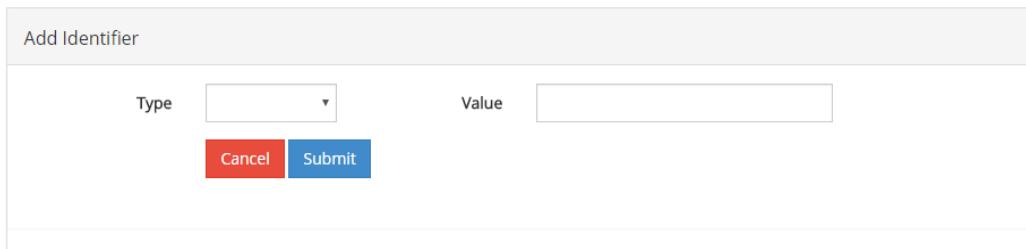
Creating a New Identifier

Step 1: From the **Edit Material** page, in the **Identifiers** area, click the **New**  button (See the figure below)

Identifiers					New 
Show 10 entries					Search: <input type="text"/>
	Name	Type	Value		
	GIIS Item Identifiers	GIIS_ITEM	62	Edit 	Delete 
Showing 1 to 1 of 1 entries					
			Previous	1	Next

Figure 15.16 - New Identifier button

You will be brought to the **Add Identifier** page. Here you can add an identifier by using the **Add Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.



The image shows a screenshot of a web page titled "Add Identifier". The page has a light gray header. Below the header is a form with two input fields: "Type" and "Value". The "Type" field is a dropdown menu with a downward arrow. The "Value" field is a text input box. At the bottom of the form are two buttons: "Cancel" (red) and "Submit" (blue). The "Submit" button is currently highlighted with a red border.

Figure 15.17 - Add Identifier page

Step 2: In the **Add Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new identifier you will be returned to the **Edit Material** page.

Editing an Identifier

You can view and edit existing identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Material** page, in the **Identifiers** area, click the **Edit**  button next to the identifier you wish to edit (See the figure below)

Identifiers					New 
Show 10 entries			Search:		
	Name	Type	Value		
	GIIS Item Identifiers	GIIS_ITEM	62	 Edit	 Delete
Showing 1 to 1 of 1 entries					
			Previous	1	Next

Figure 15.18 - Edit Identifier button

You will be brought to the **Edit Identifier** page. Here you can edit the identifier by using the **Edit Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

Edit Identifier

Type	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text" value="GIIS Item I"/>	Value	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text" value="62"/>
	<input style="border: 1px solid #ccc; padding: 2px 10px; background-color: #e0e0e0; color: black; font-weight: bold; width: 50px; height: 25px; margin-right: 10px;" type="button" value="Cancel"/>		<input style="border: 1px solid #0070C0; padding: 2px 10px; background-color: #0070C0; color: white; font-weight: bold; width: 50px; height: 25px;" type="button" value="Submit"/>

Figure 15.19 - Edit Identifier page

Step 2: In the **Edit Identifier** area:

- Select a **Type** (**Required**)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Deleting an Identifier

You can delete identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Material** page, in the **Identifiers** area, click the **Delete**  button next to the identifier you wish to delete (See the figure below)

Identifiers				New 
Show 10 entries Search: <input type="text"/>				
	Name	Type	Value	
	GIIS Item Identifiers	GIIS_ITEM	62	 
Showing 1 to 1 of 1 entries				Previous  Next

Figure 15.20 - Delete Identifier

The identifier will be deleted and the **Edit Material** page will be refreshed.

15.5.3 Relationships Area

The **Relationships** area displays a list of all relationships for the material. You are also able to add new relationships and edit or delete existing relationships. Concept materials can have relationships with manufactured materials.

Creating a New Relationship: New Manufactured Material

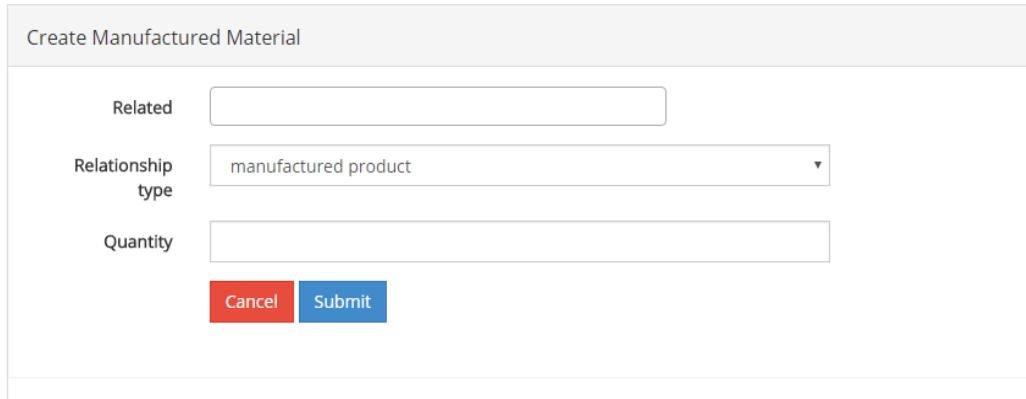
Step 1: From the **Edit Material** page, in the **Relationships** area, click the **New Manufactured Material ** button (See the figure below)

Relationships				Associate material   New manufactured material 
Show 10 entries Search: <input type="text"/>				
	Name	Relationship type	Type	Quantity
	324 (Haffkine)	manufactured product	CMVIG cytomegalovirus immune globulin, intravenous	N/A
Showing 1 to 1 of 1 entries				Previous  Next

Figure 15.21 - New Manufactured Material button

You will be brought to the **Create Manufactured Material** page. Here you can add a new relationship by using the **Create Manufactured Material** area

(See the figure below) and also see the list of current relationships in the **Relationships** area of this page.



The screenshot shows a form titled 'Create Manufactured Material'. It has three input fields: 'Related' (empty), 'Relationship type' (set to 'manufactured product'), and 'Quantity' (empty). Below the fields are two buttons: 'Cancel' (red) and 'Submit' (blue).

Figure 15.22 - Create Manufactured Material page

Step 2: In the **Create Manufactured Material** area, start typing the related materials name into the **Related** field

Note: Enter 4 or more characters to search for a related material

Step 3: Select a relationship type with the **Relationship Type** dropdown and enter a material quantity in the **Quantity** field

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Material** page.

Creating a New Relationship: Associate Material ✎

Step 1: From the **Edit Material** page, in the **Relationships** area, click the **Associate Material** ✎ button (See the figure below)

Relationships						Associate material 	New manufactured material 
Show 10 entries				Search: <input type="text"/>			
Name	Relationship type	Type	Quantity				
 324 (Haffkine)	manufactured product	CMVIG cytomegalovirus immune globulin, intravenous	N/A	Delete 			

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 15.23 – Associate Material button

You will be brought to the **Associate Material** page. Here you can add a new relationship by using the **Associate Material** area (See the figure below) and also see the list of current relationships in the **Relationships** area of this page.

Associate material

Related	<input type="text"/>
Relationship type	<input type="text" value="used entity"/>
Quantity	<input type="text"/>
<input style="background-color: #e63366; color: white; border: 1px solid #e63366; padding: 2px 10px; border-radius: 5px; margin-right: 10px;" type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 2px 10px; border-radius: 5px;" type="button" value="Submit"/>	

Figure 15.24 - Associate Material page

Step 2: In the **Associate Material** area, start typing the related materials name into the **Related** field

Note: Enter 2 or more characters to search for a related material

Step 3: Select a relationship type with the **Relationship Type** dropdown and enter a material quantity in the **Quantity** field

Step 3: Press the **Submit** button (See the figure below)

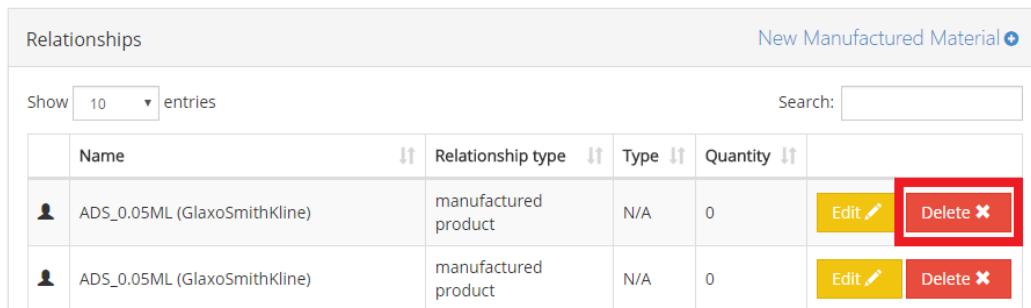


Upon creation of a new relationship you will be returned to the **Edit Material** page.

Deleting a Relationship ✖

You can delete relationships using the **Edit Material** page.

Step 1: From the **Edit Material** page, in the **Relationships** area, click the **Delete ✖** button next to the relationship you wish to delete (See the figure below)



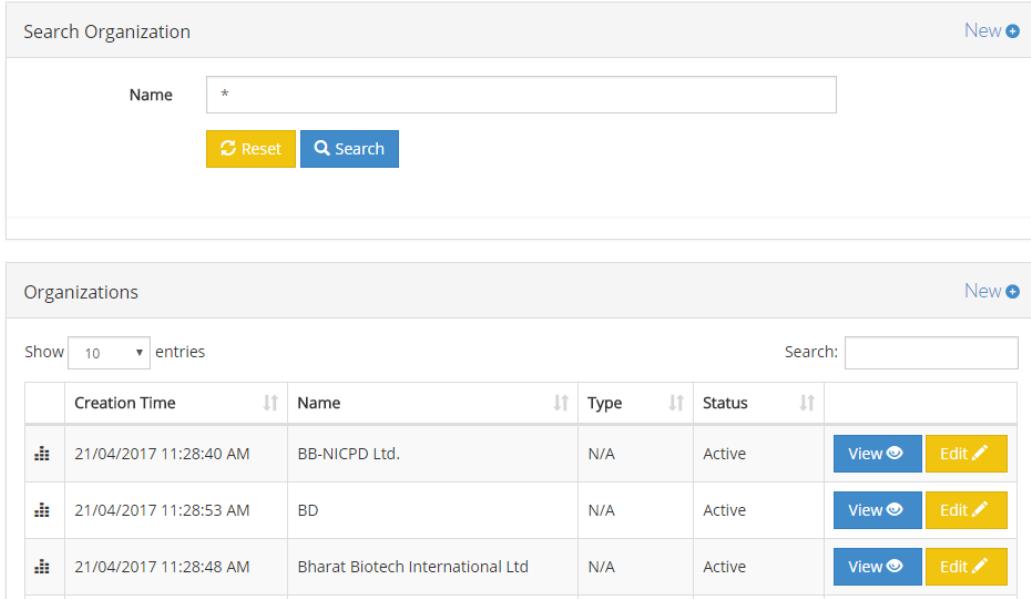
Relationships					New Manufactured Material	
Show 10 entries		Search:				
	Name	Relationship type	Type	Quantity		
👤	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0	Edit	Delete ✖
👤	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0	Edit	Delete ✖

Figure 15.25 - Delete Relationship button

The relationship will be deleted and the **Edit Material** page will be refreshed.

Chapter 16: Organizations

The **Organizations** page allows you to search for organizations, or manually manage organizations and relationships. (See the figure below)



The screenshot shows two parts of a web application. The top part is a search interface titled 'Search Organization' with a 'Name' input field containing an asterisk (*), a 'Reset' button, and a 'Search' button. The bottom part is a table titled 'Organizations' showing three rows of data. The columns are 'Creation Time', 'Name', 'Type', and 'Status'. Each row has 'View' and 'Edit' buttons. The data is as follows:

Creation Time	Name	Type	Status	View	Edit
21/04/2017 11:28:40 AM	BB-NICPD Ltd.	N/A	Active	 View	 Edit
21/04/2017 11:28:53 AM	BD	N/A	Active	 View	 Edit
21/04/2017 11:28:48 AM	Bharat Biotech International Ltd	N/A	Active	 View	 Edit

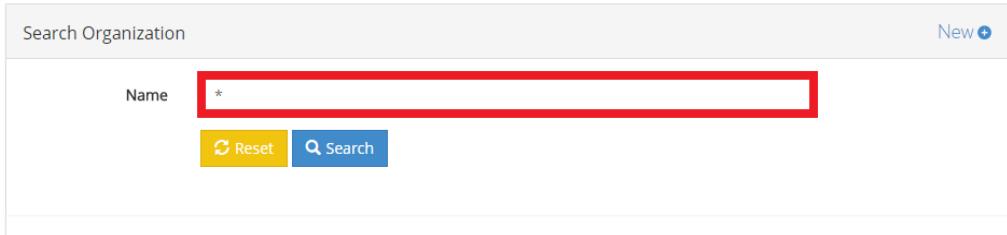
Figure 16.1 - The Organizations page

16.1 Search Organizations

If you are looking for a specific organization that already exists in the system you can use the **Search Organization** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Organization** area, enter the name of an organization (See the figure below)



The screenshot shows the 'Search Organization' interface. The 'Name' input field is highlighted with a red box and contains an asterisk (*). Below the input field are 'Reset' and 'Search' buttons.

Figure 16.2 - Searching for an Organization

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Organizations** area below. See the following section on **Organizations**  for more information.

16.2 Organizations

The **Organization** area of the **Organization** page displays a list of all the organizations in the search results. By default the search results load with all organizations available. (See the figure below)

Organizations						New 
Show 10  entries		Search: <input type="text"/>				
	Creation Time 	Name 	Type 	Status 		
	21/04/2017 11:28:40 AM	BB-NICPD Ltd.	N/A	Active	 	
	21/04/2017 11:28:53 AM	BD	N/A	Active	 	
	21/04/2017 11:28:48 AM	Bharat Biotech International Ltd	N/A	Active	 	
	21/04/2017 11:28:53 AM	Biological E	N/A	Active	 	
	21/04/2017 11:28:41 AM	Biological E Limited	N/A	Active	 	
	21/04/2017 11:28:41 AM	GlaxoSmithKline	N/A	Active	 	
	21/04/2017 11:28:53 AM	GSK	N/A	Active	 	
	21/04/2017 11:28:40 AM	Haffkine	N/A	Active	 	
	21/04/2017 11:28:41 AM	Pfizer, Inc	N/A	Active	 	
	21/04/2017 11:28:49 AM	PT Bio Industries	N/A	Active	 	
Showing 1 to 10 of 16 entries						   

Figure 16.3 - Organizations

Organizations displayed here list details such as creation time, name, type and active status. Organizations can be viewed and managed from this page.

New organizations can also be added from this page. To add a new organization, or view and manage an existing organization, see sections below.

16.3 New Organization

When a new organization is needed to be added to the system, you can create a new organization. To create a new organization:

Step 1: From the **Organization** page, click the **New**  button in the top right of the **Search Organization** area, or click the **New**  button in the top right of the **Organizations** area (See the figure below)

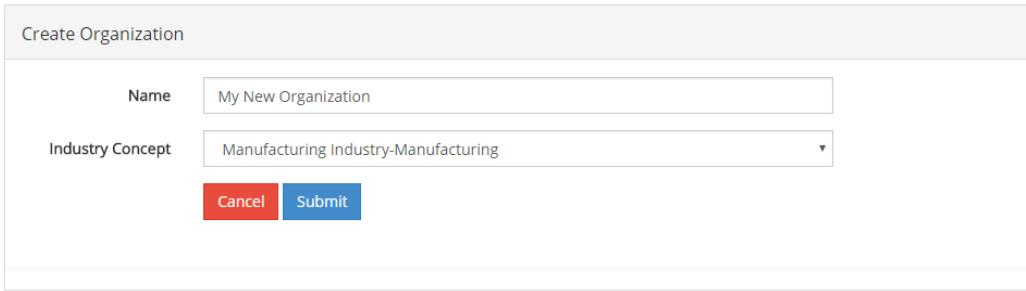


Organizations					
New					
Search:					
	Creation Time	Name	Type	Status	
	21/04/2017 11:28:40 AM	BB-NICPD Ltd.	N/A	Active	View 
	21/04/2017 11:28:53 AM	BD	N/A	Active	View 
	21/04/2017 11:28:48 AM	Bharat Biotech International Ltd	N/A	Active	View 

Figure 16.4 - New Organization button

Step 2: You will be brought to the **Create Organization** page (See the figure below), Enter the fields for the organization you are adding:

- Name (**Required**)
- Industry Concept



The screenshot shows a 'Create Organization' form. It has two input fields: 'Name' with 'My New Organization' and 'Industry Concept' with 'Manufacturing Industry-Manufacturing'. Below the fields are 'Cancel' and 'Submit' buttons, with 'Submit' being highlighted.

Figure 16.5 - Create Organization page

Step 3: Press the **Submit** button to create the organization (See the figure below)

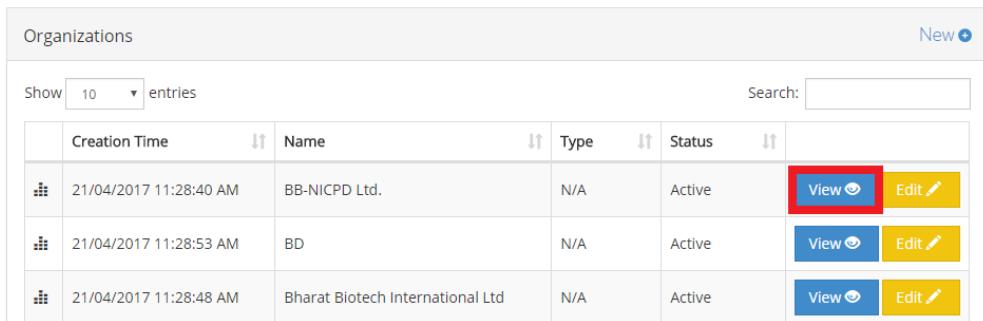


If created successfully you should see a popup display message saying the *Organization created successfully*. From here you will see the **View Organization** page. See below for more details on viewing and editing organizations.

16.4 View Organizations

After finding an organization in the search results, or after creating a new organization you can view the organization's details.

Step 1: From the **Organizations** page, find an organization you would like to view and press the **View** button (See the figure below)



The screenshot shows a table of organizations. The columns are: Creation Time, Name, Type, Status, View, and Edit. The 'View' button for the first organization is highlighted with a red box.

	Creation Time	Name	Type	Status	View	Edit
1	21/04/2017 11:28:40 AM	BB-NICPD Ltd.	N/A	Active		
2	21/04/2017 11:28:53 AM	BD	N/A	Active		
3	21/04/2017 11:28:48 AM	Bharat Biotech International Ltd	N/A	Active		

Figure 16.6 - View Organization button

You will be brought to **View Organization** page for the organization you selected to view. (See the figure below)

The screenshot displays the 'View Organization' page with three main sections: 'View Organization', 'Identifiers', and 'Relationships'.

View Organization: This section contains the following data:

Name	BB-NICPD Ltd.
Industry	Manufacturing
Type	N/A
Updated By	
Updated Time	07/26/2017 15:59:25

Identifiers: This section shows a table of identifiers:

	Name	Type	Value
1	GIIS Manufacturer Identifiers	GIIS_MANUFACTURER	32
2	Manufacturer Codes	MANUFACTURER_CODE	BBN

Showing 1 to 2 of 2 entries

Relationships: This section shows a table of relationships:

	Name	Type	Value
--	------	------	-------

Show 10 entries

Figure 16.7 - View Organization page

16.4.1 Record Verification

Sometimes records may be added from an external system. This can be left alone unless you wish to make any changes to the organization. If the organization has not yet been verified, you will see the **Record Verification Required** area appear above the **View Organization** area on the **View Organization** page. (See the figure below)

Record verification required

Attention: This Record Is From An External System, If You Wish To Make Changes, You Will Need To First Verify This Record. This Can Be Done By Clicking The 'Verify' Button Below

Verify

Figure 16.8 - Record Verification Required alert

If you want to verify this organization:

Step 1: Look through the organization information, identifiers and relationships for the organization you want to verify, ensure it is correct

Step 2: Press the **Verify** button (See the figure below)

Record verification required

Attention: This Record Is From An External System, If You Wish To Make Changes, You Will Need To First Verify This Record. This Can Be Done By Clicking The 'Verify' Button Below

Verify

Figure 16.9 - Record Verification Required Verify button

You will see a green popup message stating the *Data verified successfully* and be returned to the **View Organization** page for the organization you are currently viewing.

16.4.2 View Organization Area

The **View Organization** area displays the initial information for the organization that was created. Details such as the name, industry, and the type concept for the organization are all displayed in this area. (See the figure below)

View Organization

[Edit](#)

Name	BB-NICPD Ltd.
Industry	Manufacturing
Type	N/A
Updated By	
Updated Time	07/26/2017 15:59:25

Figure 16.10 - View Organization area

16.4.3 Identifiers

The **Identifiers** area displays a list of all identifiers for the organization. (See the figure below)

Identifiers			
Show 10 entries		Search:	
	Name	Type	Value
1	GLIS Manufacturer Identifiers	GIIS_MANUFACTURER	32
2	Manufacturer Codes	MANUFACTURER_CODE	BBN

Showing 1 to 2 of 2 entries

Previous [1](#) Next

Figure 16.11 - Identifiers area

16.4.4 Relationships

The **Relationships** area displays a list of relationships between organizations and manufactured materials. Also displayed here are details such as the name, relationship type, type and quantity.

Relationships					
Show 10 entries		Search: <input type="text"/>			
	Name	Relationship type	Type	Quantity	
☒	BCG (BB-NICPD Ltd.)	warranted product	Bacillus Calmette-Guerin vaccine BCG	0	
☒	BCG (BB-NICPD Ltd.)	warranted product	Bacillus Calmette-Guerin vaccine BCG	0	
☒	BCG (BB-NICPD Ltd.)	warranted product	Bacillus Calmette-Guerin vaccine BCG	0	
☒	BCG Diluent (BB-NICPD Ltd.)	warranted product	N/A	0	
☒	BCG Diluent (BB-NICPD Ltd.)	warranted product	N/A	0	
☒	BCG Diluent (BB-NICPD Ltd.)	warranted product	N/A	0	

Figure 16.12 - Relationships area

16.5 Edit Organization

Each organization has several components that can be edited. You can change the initial details, add or change identifiers, and add or change relationships.

To access the **Edit Organization** page from the **Organizations** page:

Step 1: Find an organization using the search bar and click the **Edit**  button
(See the figure below)

Search Organization						New 			
Name		<input type="text"/>							
		 Reset	 Search						
<hr/>									
Organizations									
Show 10 entries		Search: <input type="text"/>							
	Creation Time	Name	Type	Status					
grid	21/04/2017 11:28:40 AM	BB-NICPD Ltd.	N/A	Active	 				
grid	21/04/2017 11:28:53 AM	BD	N/A	Active	 				
grid	21/04/2017 11:28:48 AM	Bharat Biotech International Ltd	N/A	Active	 				

Figure 16.13 - Edit Organization from the Organizations page

To access the **Edit Organization** page from the **View Organization** page:

Step 1: Click the **Edit**  button (See the figure below)



The screenshot shows a 'View Organization' page with the following fields and their values:

Name	BB-NICPD Ltd.
Industry	Manufacturing
Type	N/A
Updated By	(empty)
Updated Time	07/26/2017 15:59:25

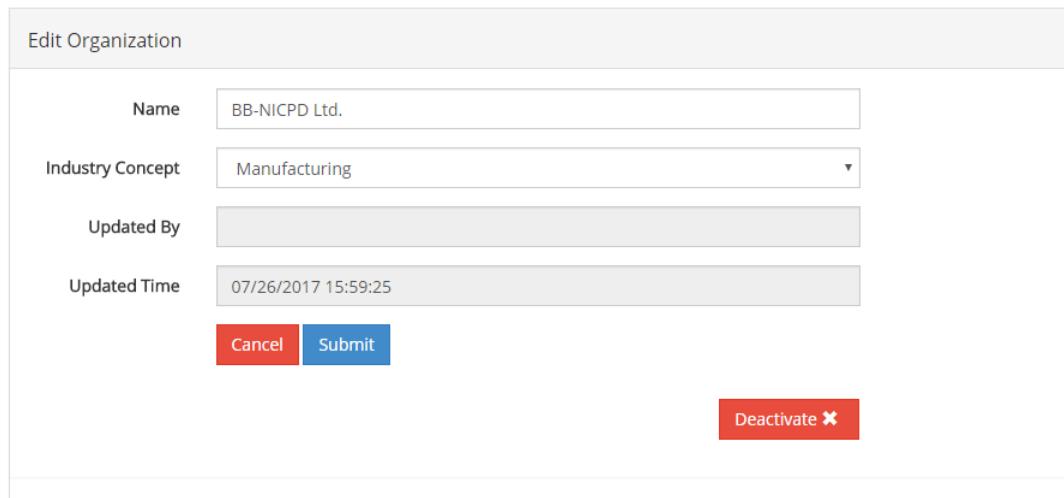
In the top right corner, there is an 'Edit' button with a pencil icon, which is highlighted with a red box.

Figure 16.14 - Edit Organization from the View Organization page

You will be brought to **Edit Organization** page for the organization you selected to edit. From this page you can modify fields and add/edit/remove identifiers and relationships.

16.5.1 Edit Organization Area

In this area you can change all the basic values set for the organization you are viewing. *Required fields: Name.* (See the figure below)



The screenshot shows an 'Edit Organization' page with the following fields and their values:

Name	BB-NICPD Ltd.
Industry Concept	Manufacturing
Updated By	(empty)
Updated Time	07/26/2017 15:59:25

At the bottom of the page, there are two buttons: 'Cancel' (red) and 'Submit' (blue). To the right of the buttons, there is a 'Deactivate' button with a red 'X' icon.

Figure 16.15 - Edit Organization page

If the organization being viewed has been deactivated there will be a red label at the top of the page stating: **Warning, This Organization Is Not Active**. To activate or deactivate an organization, see the sections below.

Deactivating an Organization ✖

In this area you can deactivate the organization. Once deactivated the organization cannot be modified or used anywhere in the system until reactivated. To deactivate an organization:

Step 1: From the **Edit Organization** page, click the red **Deactivate ✖** button in the **Edit Organization** area (See the figure below)



You will see a message popup stating *Organization successfully deactivated* and you will be returned to the **Search & View Organizations** page.

Activating an Organization ⓘ

If an organization has been deactivated it can be reactivated in the **Edit Organization** page. Once activated the organization can again be modified or used in the system until deactivated. To activate an organization:

Step 1: From the **Edit Organization** page, click the green **Activate ⓘ** button in the **Edit Organization** area (See the figure below)



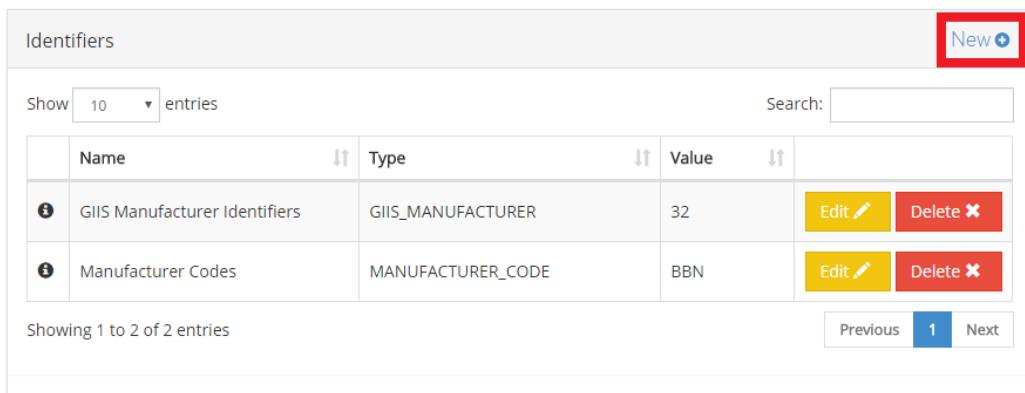
You will see a message popup stating *Organization successfully activated* and you will be returned to the **Search & View Organizations** page.

16.5.2 Identifiers Area ⓘ

The **Identifiers** area displays a list of all identifiers for the organization. You are also able to add new identifiers and edit or delete existing identifiers.

Creating a New Identifier ⓘ

Step 1: From the **Edit Organization** page, in the **Identifiers** area, click the **New ⓘ** button (See the figure below)



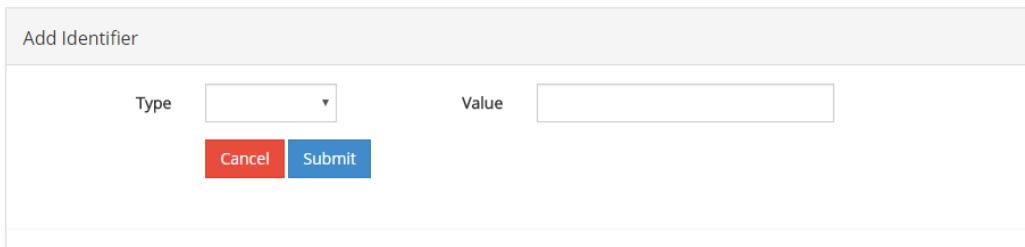
Identifiers					
Show 10 entries Search: <input type="text"/>					
	Name	Type	Value	Edit	Delete
ⓘ	GIIS Manufacturer Identifiers	GIIS_MANUFACTURER	32	 Edit	 Delete
ⓘ	Manufacturer Codes	MANUFACTURER_CODE	BBN	 Edit	 Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

Figure 16.16 - New Identifier button

You will be brought to the **Add Identifier** page. Here you can add an identifier by using the **Add Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.



Add Identifier		
Type	<input type="text"/>	Value <input type="text"/>
<input type="button" value="Cancel"/>	<input type="button" value="Submit"/>	

Figure 16.17 - Add Identifier page

Step 2: In the **Add Identifier** area:

- Select a **Type** (Required)

- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new identifier you will be returned to the **Edit Organization** page.

Editing an Identifier

You can view and edit existing identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Organization** page, in the **Identifiers** area, click the **Edit**  button next to the identifier you wish to edit (See the figure below)

Identifiers				New 
Show 10 entries				Search: <input type="text"/>
	Name	Type	Value	
	GIIS Manufacturer Identifiers	GIIS_MANUFACTURER	32	 
	Manufacturer Codes	MANUFACTURER_CODE	BBN	 

Showing 1 to 2 of 2 entries Previous  1  Next

Figure 16.18 - Edit Identifier button

You will be brought to the **Edit Identifier** page. Here you can edit the identifier by using the **Edit Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

Figure 16.19 - Edit Identifier page

Step 2: In the **Edit Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Deleting an Identifier i

You can delete identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Organization** page, in the **Identifiers** area, click the **Delete** X button next to the identifier you wish to delete (See the figure below)

Identifiers					New +
Show 10 entries			Search:		
	Name	Type	Value	Edit	Delete
1	GIIS Manufacturer Identifiers	GIIS_MANUFACTURER	32	Edit	Delete
2	Manufacturer Codes	MANUFACTURER_CODE	BBN	Edit	Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

Figure 16.20 - Delete Identifier

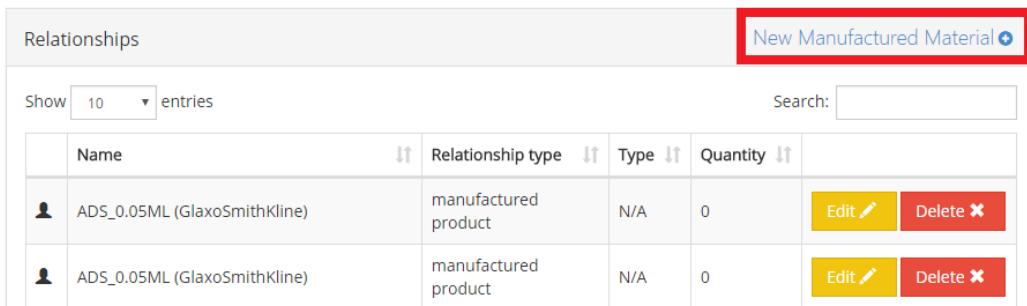
The identifier will be deleted and the **Edit Organization** page will be refreshed.

16.5.3 Relationships Area ↗

The **Relationships** area displays a list of all relationships for the organization. You are also able to add new relationships and edit or delete existing relationships. Manufactured materials can have relationships with organizations.

Creating a New Relationship ↗

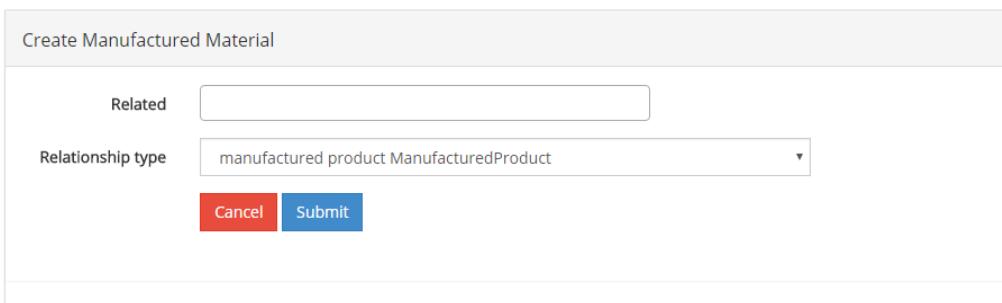
Step 1: From the **Edit Organization** page, in the **Relationships** area, click the **New Manufactured Material**  button (See the figure below)



Relationships					
Name		Relationship type	Type	Quantity	
ADS_0.05ML (GlaxoSmithKline)		manufactured product	N/A	0	 
ADS_0.05ML (GlaxoSmithKline)		manufactured product	N/A	0	 

Figure 16.21 - New Manufactured Material button

You will be brought to the **Create Manufactured Material** page. Here you can add a new relationship by using the **Create Manufactured Material** area (See the figure below) and also see the list of current relationships in the **Relationships** area of this page.



Create Manufactured Material	
Related	<input type="text"/>
Relationship type	<input type="text" value="manufactured product ManufacturedProduct"/>
<input type="button" value="Cancel"/>	<input type="button" value="Submit"/>

Figure 16.22 - Create Manufactured Material page

Step 2: In the **Create Manufactured Material** area, start typing the related materials name into the **Related** field

Note: Enter 4 or more characters to search for a related material

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Organization** page.

Deleting a Relationship ✖

You can delete relationships using the **Edit Organization** page.

Step 1: From the **Edit Organization** page, in the **Relationships** area, click the **Delete ✖** button next to the relationship you wish to delete (See the figure below)

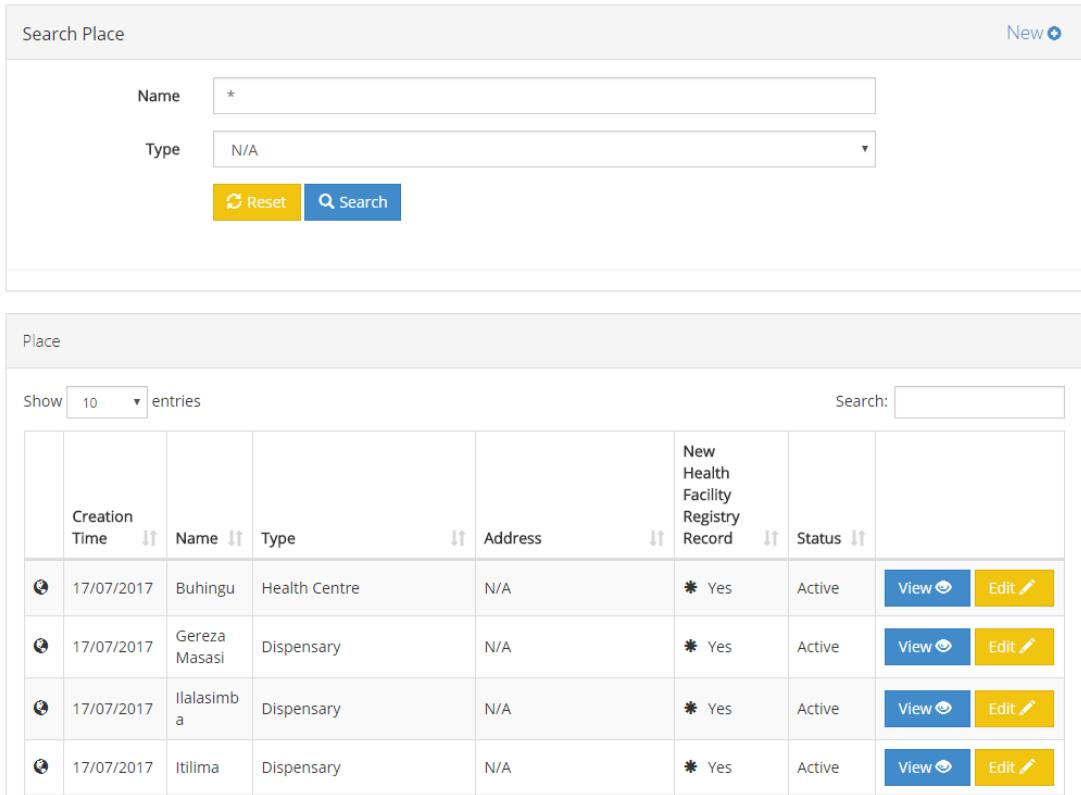
A screenshot of the 'Relationships' section on the 'Edit Organization' page. The table lists two relationships. The second row, for 'ADS_0.05ML (GlaxoSmithKline)', has a 'Delete ✖' button highlighted with a red rectangular box. The table has columns: Name, Relationship type, Type, and Quantity.

Figure 16.25 - Delete Relationship button

The relationship will be deleted and the **Edit Organization** page will be refreshed.

Chapter 17: Places

The **Places** page allows you to search for places, or manually manage places and relationships. (See the figure below)



The figure consists of two screenshots of a web application. The top screenshot shows a search interface with fields for 'Name' and 'Type', and buttons for 'Reset' and 'Search'. The bottom screenshot shows a list of places with columns for Creation Time, Name, Type, Address, New Health Facility Registry Record, and Status, each with 'View' and 'Edit' buttons.

Creation Time	Name	Type	Address	New Health Facility Registry Record	Status	
17/07/2017	Buhingu	Health Centre	N/A	* Yes	Active	View Edit
17/07/2017	Gereza Masasi	Dispensary	N/A	* Yes	Active	View Edit
17/07/2017	Ilalasimb a	Dispensary	N/A	* Yes	Active	View Edit
17/07/2017	Itilima	Dispensary	N/A	* Yes	Active	View Edit

Figure 17.1 - The Places page

17.1 Search Places

If you are looking for a specific place that already exists in the system you can use the **Search Place** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Place** area, enter the name of a place (See the figure below)

Figure 17.2 - Searching for a Place

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Places** area below. See the following section on **Places**  for more information.

17.2 Places

The **Search Results** area of the **Places** page displays a list of all the places in the search results. By default the search results load with all places available. (See the figure below)

Place								
Show <select>10</select> entries <input type="text" value="Search:"/> <input type="button" value="Search"/>								
	Creation Time	Name	Type	Address	New Health Facility Registry Record	Status		
	17/07/2017	Buhingu	Health Centre	N/A	* Yes	Active	<input type="button" value="View"/> 	<input type="button" value="Edit"/> 
	17/07/2017	Gereza Masasi	Dispensary	N/A	* Yes	Active	<input type="button" value="View"/> 	<input type="button" value="Edit"/> 
	17/07/2017	Ilalasimb a	Dispensary	N/A	* Yes	Active	<input type="button" value="View"/> 	<input type="button" value="Edit"/> 
	17/07/2017	Itilima	Dispensary	N/A	* Yes	Active	<input type="button" value="View"/> 	<input type="button" value="Edit"/> 
	19/07/2017	Iyela I	Village	Iyela, Mbeya CC, Mbeya District, Mbeya Region, Tanzania	* Yes	Active	<input type="button" value="View"/> 	<input type="button" value="Edit"/> 

Figure 17.3 - Places page

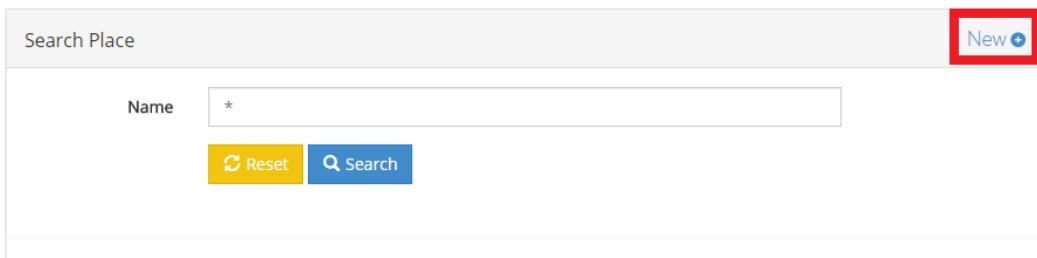
Places displayed here list details such as creation time, name, type and active status. Places can be viewed and managed from this page.

New places can also be added from this page. To add a new place, or view and manage an existing place, see sections below.

17.3 New Places

You can create a new place to have it implemented in the system. To create a new place:

Step 1: From the **Places** page, click the **New**  button in the top right of the **Search Place** area (See the figure below)



The screenshot shows a search interface for 'Places'. At the top right is a red-bordered 'New' button with a plus sign. Below it is a search bar labeled 'Search Place'. Underneath the search bar is a form with a 'Name' field containing an asterisk (*) and two buttons: 'Reset' and 'Search'.

Figure 17.4 - New place button

Step 2: You will be brought to the **Create Place** page, enter or select the fields for the place you are adding (See the figure below):

- Name (**Required**)
- Country

Note: You must enter 4 or more characters to search for a country

- State

Note: You must enter 4 or more characters to search for a state

- County

Note: You must enter 4 or more characters to search for a county

- City

Note: You must enter 4 or more characters to search for a city

- Precinct

Note: You must enter 4 or more characters to search for a precinct

- Street Address
- Target Population
- Target Population Year
- Type Concept

Note: Type concept for Places is the place type (district/facility/village and more)

- Service delivery location checkbox

Note: Check this box if the Place being created is providing a service such as care

Create Place

Name	Test Place
The name of the place	
Country	x Tanzania
State	x Kilimanjaro Region
County	x Rombo District
City	x Rombo DC
Precinct	x Uebtu
Street Address	
Target population	500
The target population	
Target Population Year	2017
The year of the target population - format 'YYYY'	
Type Concept	Village
Is this a service delivery location? (That being, does this place provide a service, such as care?) <input checked="" type="checkbox"/>	
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	

Figure 17.5 - Create Place page

Step 3: Press the **Submit** button to create the place (See the figure below)



If created successfully you should see a popup display message saying the *Place created successfully*. From here you will see the **View Place** page. See below for more details on viewing and editing places.

17.4 Viewing Places

After finding a place in the search results, or creating a new place you can view the places details.

Step 1: From the **Places** page, find a place you would like to view and press the **View**  button (See the figure below)

Search Results					
Show 10 entries		Search: <input type="text"/>			
	Creation Time	Name	Type	Status	
1	30/04/2017 01:10:52 AM	Arusha Region	Region	Active	View Edit
2	21/04/2017 11:29:02 AM	Denmark Mission Dispensary	Health Center	Active	View Edit
3	21/04/2017 11:29:01 AM	Ekenya Dispensary	Health Center	Active	View Edit

Figure 17.6 - View Place button

You will be brought to **View Place** page for the place you selected to view.
(See the figure below)

View Place

[Edit](#)

Name	Buhingu
Address	N/A
Target population	0
Target Population Year	0
Type	Health Centre
Is this a service delivery location? (That being, does this place provide a service, such as care?)	Yes
Updated By	
Updated Time	07/17/2017 01:19:40

Identifiers

Show 10 entries

Search:

	Name	Type	Value
1	Facility Register Identifiers	HIE_FRID	urn:uuid:1cdb8868-befe-3ae7-a8d5-b3e1f461661b
2	Facility ID	Facility ID	00000000-0000-0000-0000-000000000000

Figure 17.7 - View Place page

17.4.1 Record Verification

Sometimes records may be added from an external system. This can be left alone unless you wish to make any changes to the place. If the place has not yet been verified, you will see the **Record Verification Required** area appear above the **View Place** area on the **View Place** page (See the figure below).



Figure 17.8 - Record Verification Required alert

If you want to verify this place:

Step 1: Look through the place Information, identifiers and relationships for the place you want to verify, ensure it is correct

Step 2: Press the **Verify** button (See the figure below)

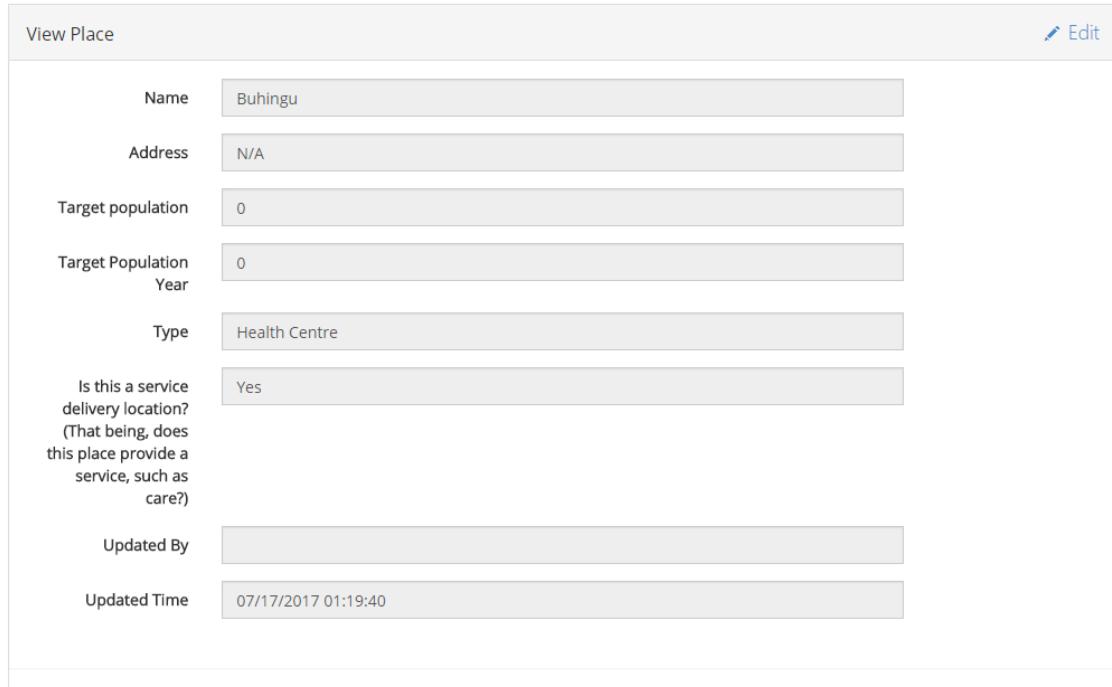


Figure 17.9 - Record Verification Required Verify button

You will see a green popup message stating the *Data verified successfully* and be returned to the **View Place** page for the place you are currently viewing.

17.4.2 View Place Area

The **View Place** area displays the initial information for the place that was created. Details such as the name, target population and type concept for the place are all displayed in this area. (See the figure below)



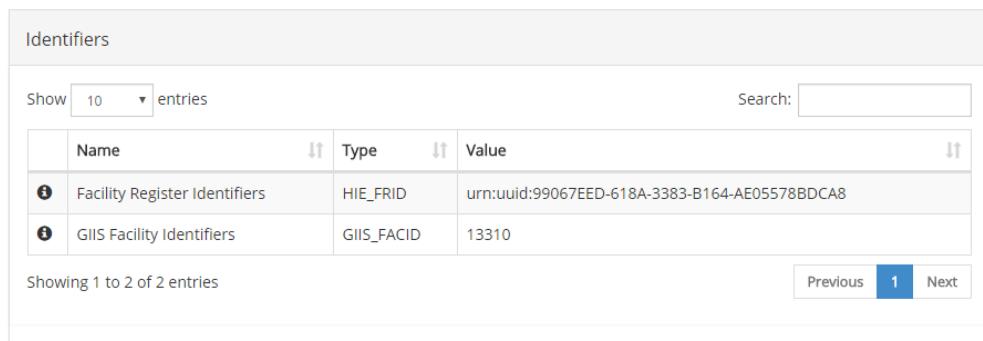
The screenshot shows a 'View Place' form with the following fields and values:

- Name: Buhingu
- Address: N/A
- Target population: 0
- Target Population Year: 0
- Type: Health Centre
- Is this a service delivery location? (That being, does this place provide a service, such as care?): Yes
- Updated By: (empty)
- Updated Time: 07/17/2017 01:19:40

Figure 17.10 - View Place area

17.4.3 Identifiers

The **Identifiers** area displays a list of all identifiers for the place. (See the figure below)



The screenshot shows a table of identifiers for a place, with the following data:

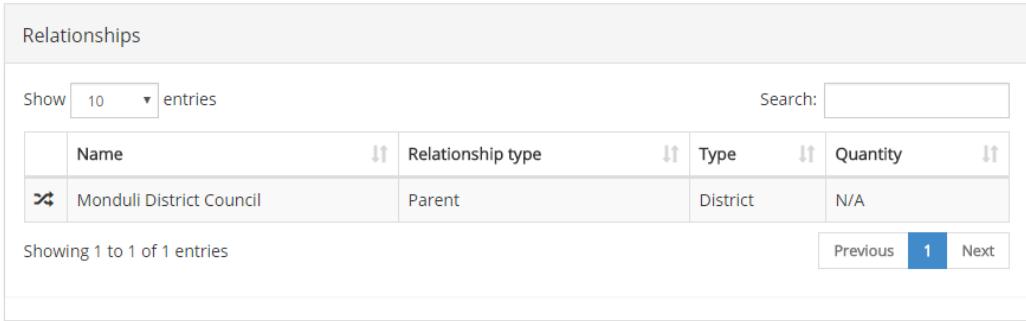
	Name	Type	Value
1	Facility Register Identifiers	HIE_FRID	urn:uuid:99067EED-618A-3383-B164-AE05578BDCA8
2	GIIS Facility Identifiers	GIIS_FACID	13310

Showing 1 to 2 of 2 entries

Figure 17.11 - Identifiers area

17.4.4 Relationships

The **Relationships** area displays a list of relationships between places and materials. Also displayed here are details such as the name, relationship type, type and quantity. (See the figure below)



Relationships				
Show 10 entries Search:				
	Name	Relationship type	Type	Quantity
	Monduli District Council	Parent	District	N/A
Showing 1 to 1 of 1 entries				
Previous				1 Next

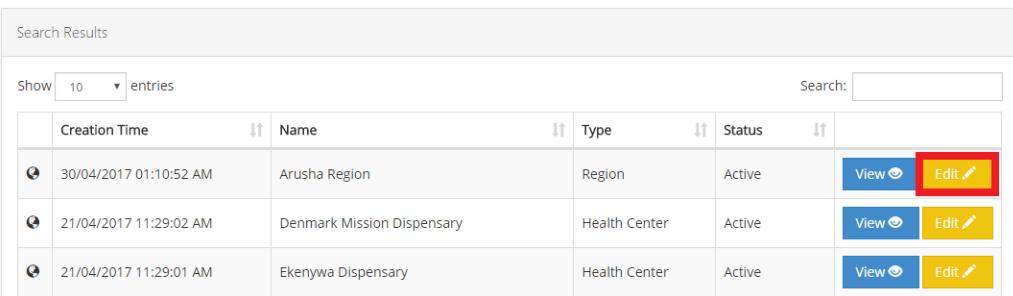
Figure 17.12 - Relationships area

17.5 Editing Places

Each place has several components that can be edited. You can change the initial details, add or change identifiers and add or change relationships.

To access the **Edit Place** page from the **Places** page:

Step 1: Find a place using the search bar and click the **Edit**  button (See the figure below)

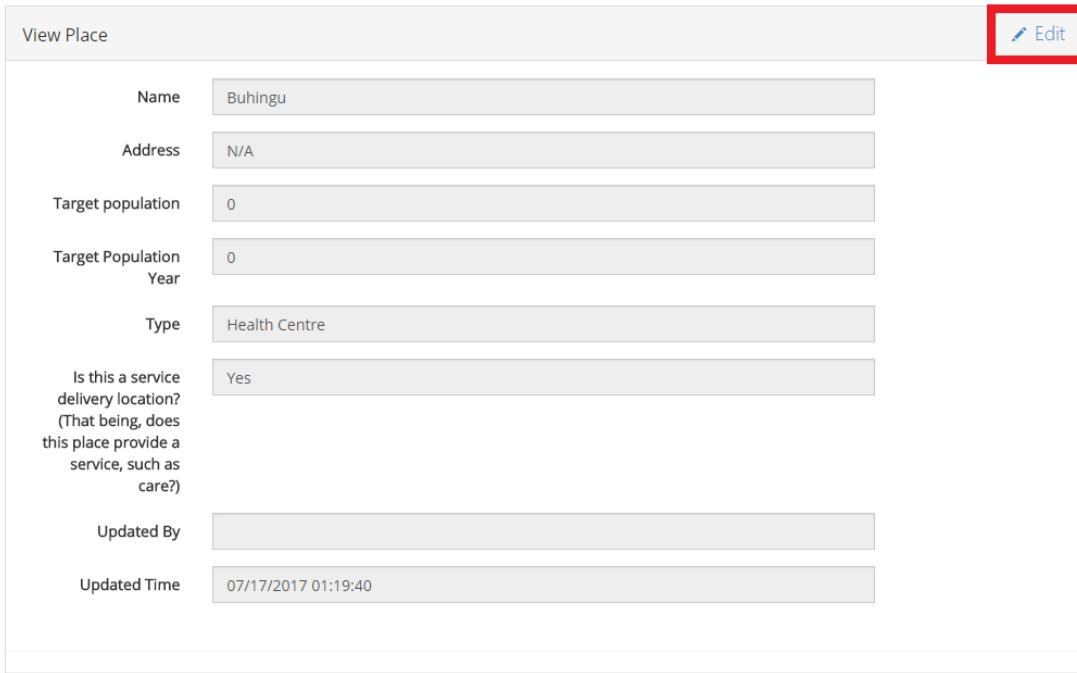


Search Results				
Show 10 entries Search:				
	Creation Time	Name	Type	Status
	30/04/2017 01:10:52 AM	Arusha Region	Region	Active
	21/04/2017 11:29:02 AM	Denmark Mission Dispensary	Health Center	Active
	21/04/2017 11:29:01 AM	Ekenywa Dispensary	Health Center	Active

Figure 17.13 - Place Edit button

To access the **Edit Place** page from the **View Place** page:

Step 1: Click the **Edit**  button (See the figure below)



The screenshot shows a 'View Place' page with the following fields and their values:

View Place	
Name	Buhingu
Address	N/A
Target population	0
Target Population Year	0
Type	Health Centre
Is this a service delivery location? (That being, does this place provide a service, such as care?)	Yes
Updated By	
Updated Time	07/17/2017 01:19:40

Figure 17.14 - View Place Edit button

You will be brought to **Edit Place** page for the place you selected to edit. From this page you can modify fields and add/edit/remove identifiers and relationships.

17.5.1 Edit Place Area

In this area you can change all the basic values set for the place you are viewing. *Required fields: Name.* (See the figure below)

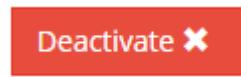
Figure 17.15 - Edit Place area

If the place being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Place Is Not Active*. To activate or deactivate a place, see the sections below.

Deactivating a Place ✕

In this area you can deactivate the place. Once deactivated the place cannot be modified or used anywhere in the system until reactivated. To deactivate a place:

Step 1: From the **Edit Place** page, click the red **Deactivate ✕** button in the **Edit Place** area (See the figure below)



You will see a message popup stating *Place successfully deactivated* and you will be returned to the **Search & View Places** page.

Activating a Place

If a place has been deactivated it can be reactivated in the **Edit Place** page. Once activated the place can again be modified or used in the system until deactivated. To activate a place:

Step 1: From the **Edit Place** page, click the green **Activate**  button in the **Edit Place** area (See the figure below)



You will see a message popup stating *Place successfully activated* and you will be returned to the **Search & View Places** page.

17.5.2 Identifiers Area

The **Identifiers** area displays a list of all identifiers for the place. You are also able to add new identifiers and edit or delete existing identifiers.

Creating a New Identifier

Step 1: From the **Edit Place** page, in the **Identifiers** area, click the **New**  button (See the figure below)

Identifiers				New 
Show 10 entries		Search:		
	Name	Type	Value	
	GIIS Item Identifiers	GIIS_ITEM	62	Edit  Delete 
Showing 1 to 1 of 1 entries				
		Previous	1	Next

Figure 17.16 - New Identifier button

You will be brought to the **Add Identifier** page. Here you can add an identifier by using the **Add Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

Add Identifier		
Type	<input type="text"/>	Value
	Cancel	Submit

Figure 17.17 - Add Identifier page

Step 2: In the **Add Identifier** area:

- Select a **Type (Required)**
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)

Cancel	Submit
------------------------	------------------------

Upon creation of a new identifier you will be returned to the **Edit Place** page.

Editing an Identifier

You can view and edit existing identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Place** page, in the **Identifiers** area, click the **Edit**  button next to the identifier you wish to edit (See the figure below)

Identifiers					New 
Show 10 entries		Search:			
	Name	Type	Value		
	GIIS Item Identifiers	GIIS_ITEM	62	 Edit 	 Delete 
Showing 1 to 1 of 1 entries					
				Previous  1 Next 	

Figure 17.18 - Edit Identifier button

You will be brought to the **Edit Identifier** page. Here you can edit the identifier by using the **Edit Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

Edit Identifier			
Type	<input type="text" value="GIIS Item I"/>	Value	<input type="text" value="62"/>
	 Cancel	 Submit	

Figure 17.19 - Edit Identifier page

Step 2: In the **Edit Identifier** area:

- Select a **Type** (**Required**)
- Enter a **Value** for the identifier

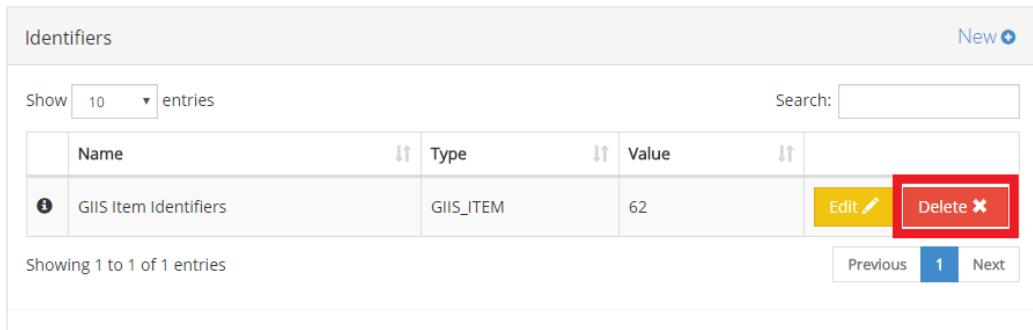
Step 3: Press the **Submit** button (See the figure below)



Deleting an Identifier

You can delete identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Place** page, in the **Identifiers** area, click the **Delete**  button next to the identifier you wish to delete (See the figure below)



	Name	Type	Value	Edit 	Delete 
1	GIIS Item Identifiers	GIIS_ITEM	62		

Figure 17.20 - Delete Identifier button

The identifier will be deleted and the **Edit Place** page will be refreshed.

17.5.3 Relationships Area

The **Relationships** area displays a list of all relationships for the place. You are also able to add new relationships and edit or delete existing relationships. Places can have relationships with other places.

Creating a New Relationship: Place

Step 1: From the **Edit Place** page, in the **Relationships** area, click the **New Place**  button (See the figure below)

Relationships						New Place
Show 10 entries				Search:		
	Name	Relationship type	Type	Quantity		
👤	Ngorongoro District Council	Parent	District	0	Edit	Delete
👤	BCG (Serum Institute of India)	owned entity	Bacillus Calmette-Guerin vaccine BCG	0	Edit	Delete
👤	BCG Diluent (Serum Institute of India)	owned entity	N/A	0	Edit	Delete

Figure 17.21 - New Place button

You will be brought to the **Create Place** page. Here you can add a new relationship by using the **Create Place** area (See the figure below) and also see the list of current relationships in the **Relationships** area of this page.

Create Place						
Relationships						
Related						
<input type="checkbox"/> Inverts the relationship. Use this option if you're attempting to assign a Dedicated Service Delivery location to a facility rather than a village						
Relationship type						
Cancel			Submit			

Figure 17.22 - Create Place area

Step 2: In the **Create Place** area, start typing the related places name into the **Related** field

Note: You must enter 4 or more characters to search for a related place

Step 3: Select a relationship type with the **Relationship type** dropdown

Note: Only check off the **Invert Relationship** checkbox if you want to assign a Dedicated Service Delivery location to a facility rather than a village.

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Place** page.

Deleting a Relationship ✖

You can delete relationships using the **Edit Place** page.

Step 1: From the **Edit Place** page, in the **Relationships** area, click the **Delete ✖** button next to the relationship you wish to delete (See the figure below)

A screenshot of the 'Edit Place' page showing the 'Relationships' section. The table has columns: Name, Relationship type, Type, and Quantity. Each row has 'Edit' and 'Delete' buttons. The 'Delete' button for the first row is highlighted with a red box.

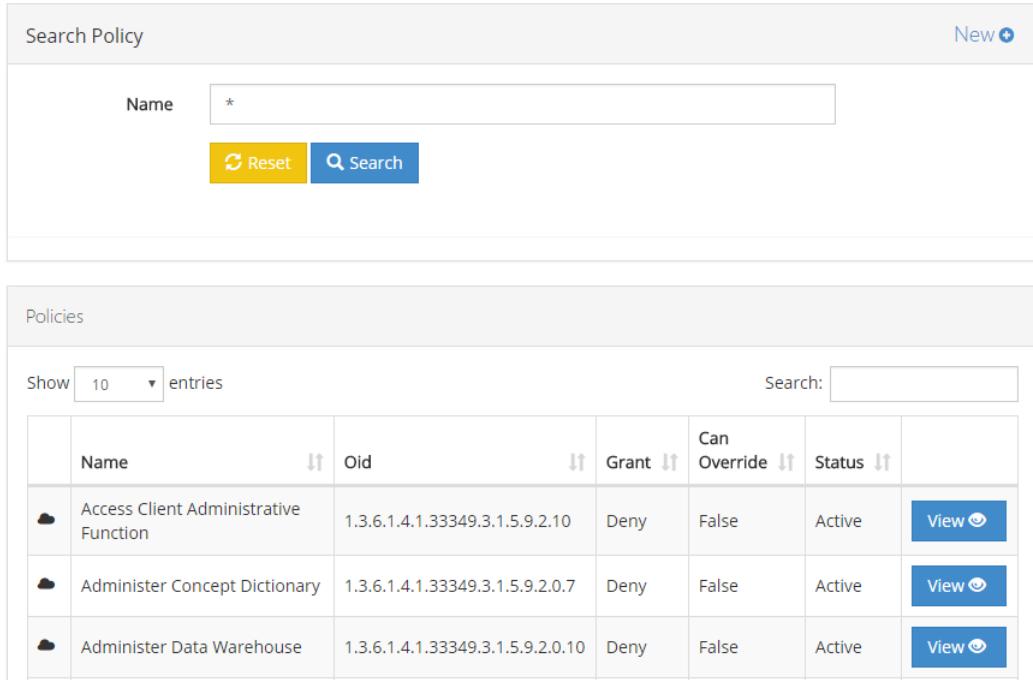
	Name	Relationship type	Type	Quantity	
1	Ngorongoro District Council	Parent	District	0	<button>Edit</button> Delete ✖
2	BCG (Serum Institute of India)	owned entity	Bacillus Calmette-Guerin vaccine BCG	0	<button>Edit</button> Delete ✖
3	BCG Diluent (Serum Institute of India)	owned entity	N/A	0	<button>Edit</button> Delete ✖

Figure 17.23 - Delete Relationship button

The relationship will be deleted and the **Edit Place** page will be refreshed.

Chapter 18: Policies

The **Policies** page allows you to search for policies, and view or manage them. (See the figure below)



The figure consists of two screenshots of a web-based application. The top screenshot shows a search interface with a 'Search Policy' header, a 'Name' input field containing an asterisk (*), a 'Reset' button, and a 'Search' button. The bottom screenshot shows a table titled 'Policies' with columns: Name, Oid, Grant, Can Override, and Status. It lists three policies: 'Access Client Administrative Function', 'Administer Concept Dictionary', and 'Administer Data Warehouse', each with a 'View' button.

	Name	Oid	Grant	Can Override	Status	
1	Access Client Administrative Function	1.3.6.1.4.1.33349.3.1.5.9.2.10	Deny	False	Active	View
2	Administer Concept Dictionary	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Deny	False	Active	View
3	Administer Data Warehouse	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Deny	False	Active	View

Figure 18.1 - Policies page

18.1 Search Policies

If you are looking for a specific policy that already exists in the system you can use the **Search Policy** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Policy** area, enter the name of a policy (See the figure below)

Search Policy

Name

Figure 18.2 - Searching for a Policy

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Policies** area below. See the following section on **Policies** for more information.

18.2 Policies

The **Policies** area of the **Policies** page displays a list of all the policies in the search results. By default the search results load with all policies available. (See the figure below)

Policies

Show 10 entries Search:

	Name	Oid	Grant	Can Override	Status	
	Access Client Administrative Function	1.3.6.1.4.1.33349.3.1.5.9.2.10	Deny	False	Active	<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0;" type="button" value="View"/>
	Administer Concept Dictionary	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Deny	False	Active	<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0;" type="button" value="View"/>
	Administer Data Warehouse	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Deny	False	Active	<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0;" type="button" value="View"/>

Figure 18.3 - Policies

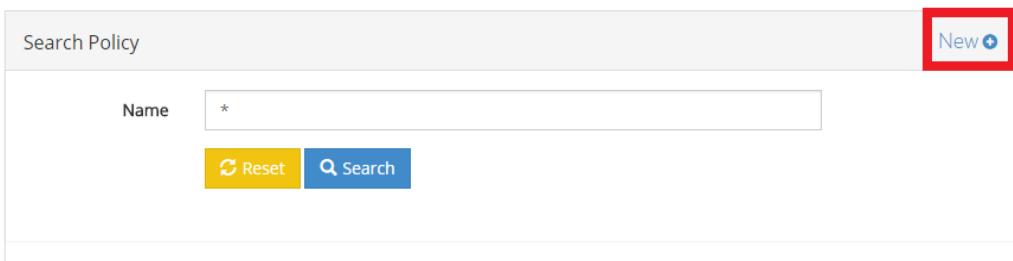
Policies displayed here list details such as the name, oid (object identifier), grant status, override status and active status. These policies can also be viewed from this page.

New policies can also be added from this page. To add a new policy, or view an existing policy, see sections below.

18.3 New Policy

When a new policy is required, you can create a new policy. To create a new policy:

Step 1: From the **Policies** page, click the **New**  button in the top right of the **Search Policy** area (See the figure below)



The screenshot shows a search interface for policies. At the top, there is a search bar labeled 'Search Policy'. In the top right corner of this bar, there is a blue button with a white plus sign and the word 'New'. Below the search bar, there is a form with the following fields: 'Name' (with an asterisk indicating it is required) and two buttons: 'Reset' (yellow) and 'Search' (blue).

Figure 18.4 - New policy button

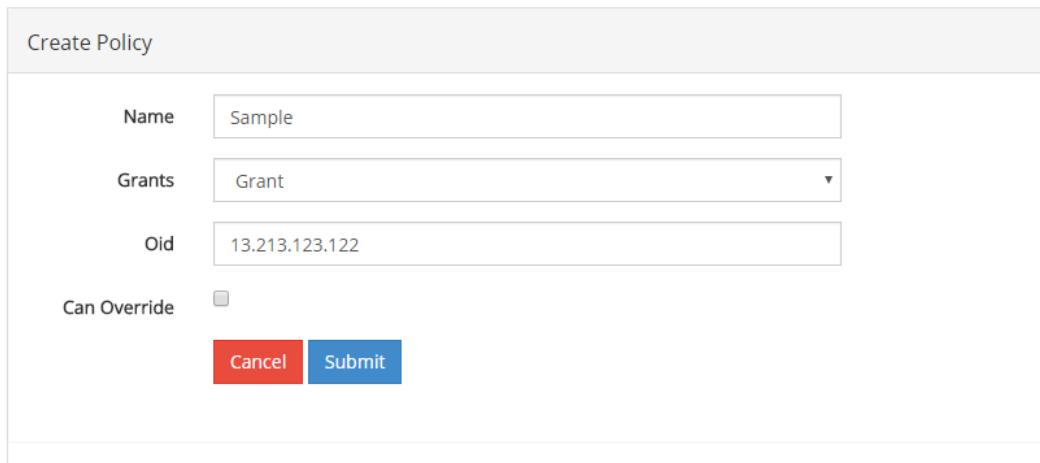
Step 2: Fill in the fields for the policy you are adding (See the figure below):

- Name (**Required**)
- Grants (**Required**)
- Oid (**Required**)

Note: This is the object identifier, this should be a unique value

- Can Override

Note: Select this if you want this policy to override other policies when attached to an entity



The screenshot shows the 'Create Policy' page. It has a header 'Create Policy'. Below it are four input fields: 'Name' with 'Sample', 'Grants' with 'Grant', 'Oid' with '13.213.123.122', and a 'Can Override' checkbox which is unchecked. At the bottom are two buttons: 'Cancel' (red) and 'Submit' (blue).

Figure 18.5 - Create Policy page

Step 3: Press the **Submit** button to create the policy (See the figure below)

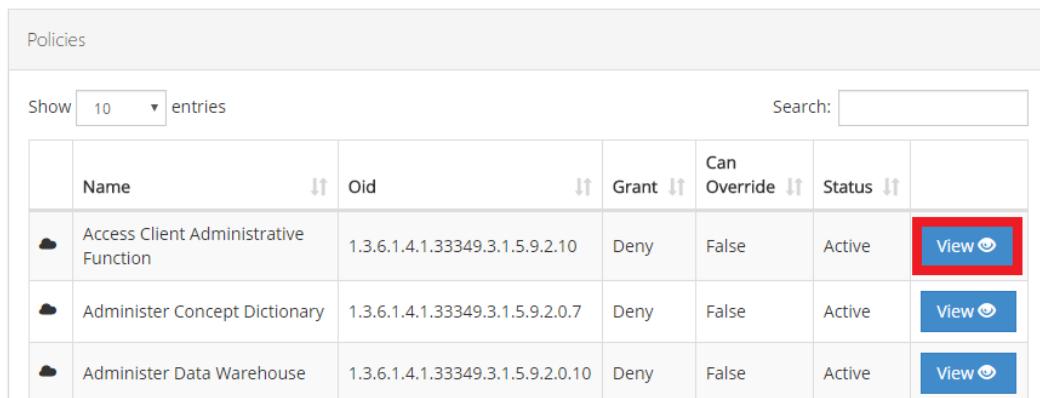


If created successfully you should see a popup display message saying the Policy created successfully. From here you will see the **View Policy** page. See below for more details on viewing and editing policies.

18.4 View Policies

After finding a policy in the search results, or creating a new policy you can view the policies details.

Step 1: From the **Policies** page, find a policy you would like to view and press the **View**  button (See the figure below)



The screenshot shows the 'Policies' page. It has a header 'Policies' and a search bar. Below is a table with columns: Name, Oid, Grant, Can Override, Status, and View. The 'View' column contains blue buttons with a magnifying glass icon. The first row is highlighted with a red box around the 'View' button.

	Name	Oid	Grant	Can Override	Status	
1	Access Client Administrative Function	1.3.6.1.4.1.33349.3.1.5.9.2.10	Deny	False	Active	
2	Administer Concept Dictionary	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Deny	False	Active	
3	Administer Data Warehouse	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Deny	False	Active	

Figure 18.6 - View Policy button

You will be brought to **View Policy** page for the policy you selected to view.

18.4.1 View Policy Area

The **View Policy** area displays the initial information for the policy that was created. Details such as the name, grant status, oid (object identifier) and override status for the policy are displayed in this area. (See the figure below)

View Policy	
Name	Access Client Administrative Function
Grant	Deny
Oid	1.3.6.1.4.1.33349.3.1.5.9.2.10
Can Override	False

Figure 18.7 - View Policy area

Chapter 19: Realm Management

The OpenIZ Administration portal allows you to manage the realm you are joined to. The Realm Management page will display the current realm you are linked to. (See the figure below)



Warning: Do not leave the current realm without knowing the correct credentials for the new realm (or for the current realm as backup).

Current Realm	
Address	<input type="text" value="http://timrdev.marc-hi.ca:8080"/>
Application Id	<input type="text" value="fiddler"/>
Creation Time	<input type="text" value="08/05/2017 05:50:59 PM"/>

Figure 19.1 - Realm Management - Current Realm

19.1 Leaving a Realm

Before you can join a new realm you first have to leave the current realm. It is important to know the required information for joining a new realm or rejoining the current realm if there is an issue with the new realm. To leave a realm:

Step 1: Click the **Leave Realm**  button in the **Current Realm** area (See the figure below)

Current Realm	
Address	http://timrdev.marc-hi.ca:8080
Application Id	fiddler
Creation Time	08/05/2017 05:50:59 PM
Leave Realm	

Figure 19.2 - Leave Realm button

A warning box will appear below the **Current Realm** area.



Warning: Do not leave the current realm without knowing the correct credentials for the new realm (or for the current realm as backup).

Step 2: If you are sure you want to leave the realm, press the **Leave Realm** button in the **Leave Realm** area (See the figure below)

Leave Realm	
Are you sure you would like to leave the current realm?	
Cancel	Leave Realm

Figure 19.3 - Are you sure? Leave Realm button

The Join Realm page will appear. You have successfully left the current realm. To join a new realm see the section below.

19.2 Joining a Realm

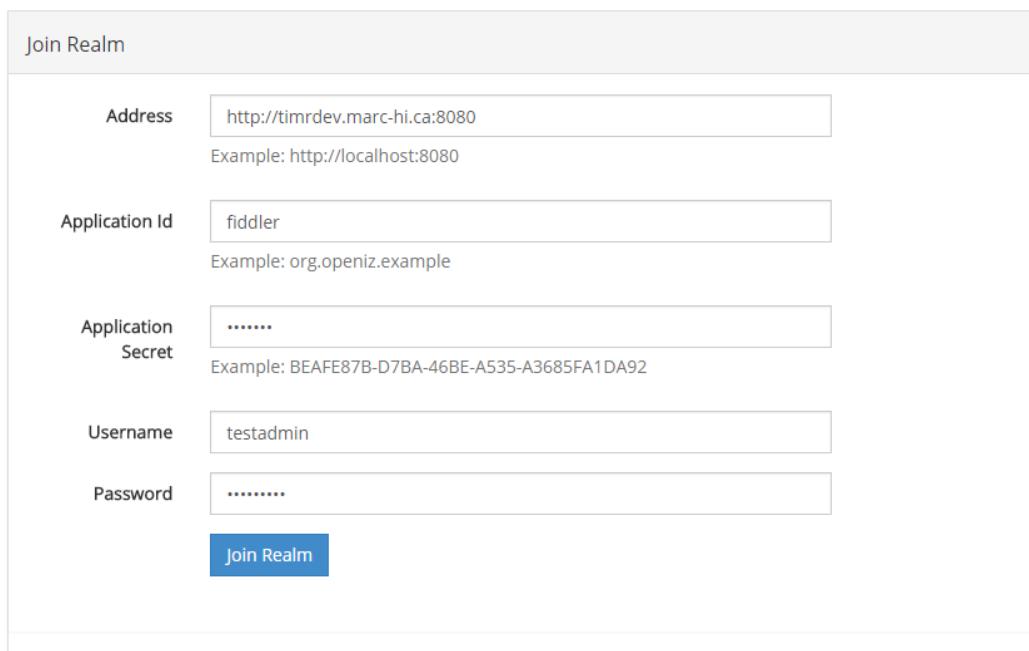
If you are not joined to a realm or just left a realm you will see the **Join Realm** page instead of the **Login** or **Dashboard** pages. You need to join a realm in order to have access to the functionality of the OpenIZ Administration portal.

Step 1: Enter in the details for the realm you are joining (See the figure below):

- Realm Address (**Required**)
- Application Id (**Required**)
- Application Secret (**Required**)
- Username (**Required**)

Note: The User credentials must have Administrator level access on the Realm being joined.

- Password (**Required**)



The screenshot shows a 'Join Realm' form with the following fields:

Join Realm	
Address	<input type="text" value="http://timrdev.marc-hi.ca:8080"/> Example: http://localhost:8080
Application Id	<input type="text" value="fiddler"/> Example: org.openiz.example
Application Secret	<input type="text" value="....."/> Example: BEAFE87B-D7BA-46BE-A535-A3685FA1DA92
Username	<input type="text" value="testadmin"/>
Password	<input type="text" value="....."/>
<input type="button" value="Join Realm"/>	

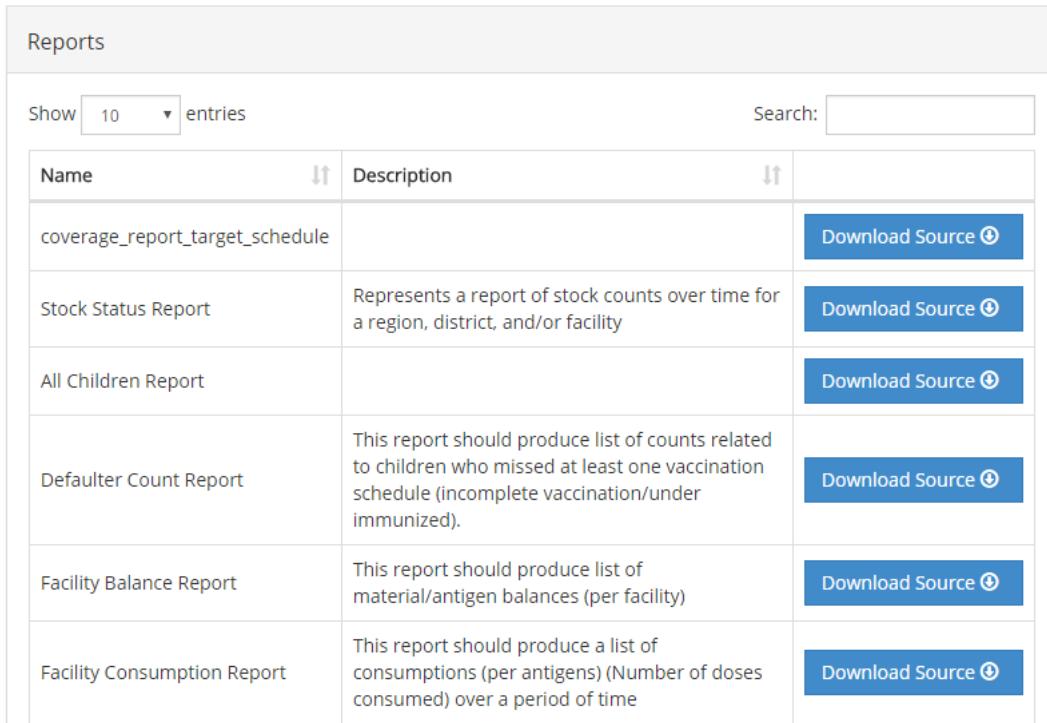
Figure 19.4 - Join Realm

Step 2: Click the **Join Realm** button

You will be brought to the **Login** page on the new realm.

Chapter 20: Reports

The **Reports** page displays a list of reports generated by the system. This page provides download links to download XML document reports. From this page you can also filter the list using the search box. (See the figure below)



Reports		
Show 10 entries		Search:
Name	Description	
coverage_report_target_schedule		Download Source 
Stock Status Report	Represents a report of stock counts over time for a region, district, and/or facility	Download Source 
All Children Report		Download Source 
Defaulter Count Report	This report should produce list of counts related to children who missed at least one vaccination schedule (incomplete vaccination/under immunized).	Download Source 
Facility Balance Report	This report should produce list of material/antigen balances (per facility)	Download Source 
Facility Consumption Report	This report should produce a list of consumptions (per antigens) (Number of doses consumed) over a period of time	Download Source 

Figure 20.1 - Reports page

20.1 Downloading Reports

You can download reports at any time. To download a specific report:

Step 1: In the **Reports** area, type in a name or a few letters to filter the search results of the reports.

Step 2: Click the **Download Source ** button (See the figure below)

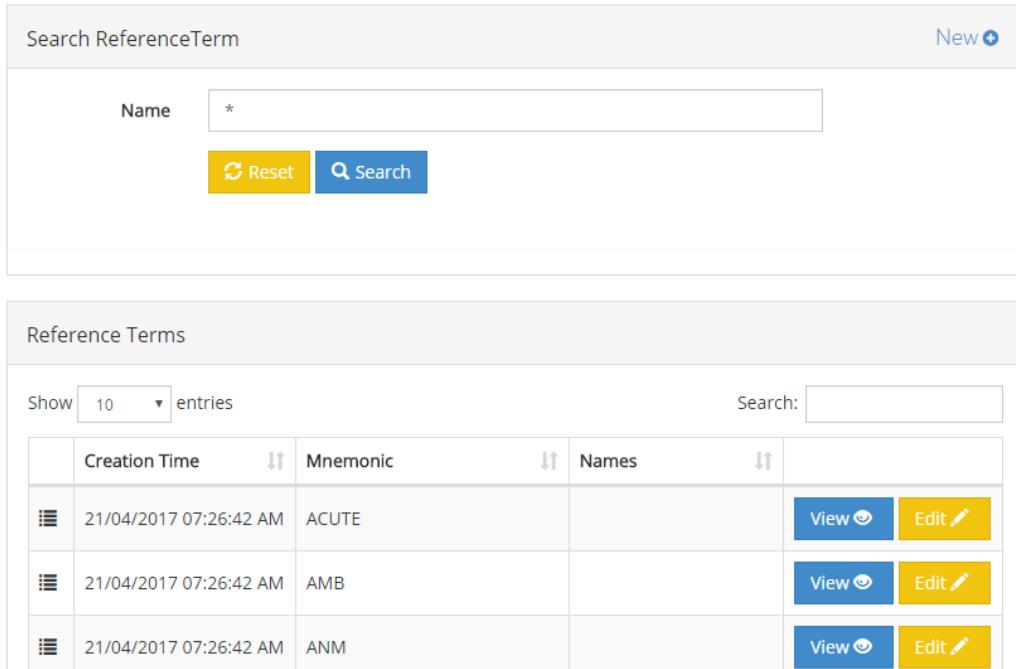
Reports		
Show 10 entries		Search: stock status
Name	Description	
Stock Status Report	Represents a report of stock counts over time for a region, district, and/or facility	Download Source ⓘ
Showing 1 to 1 of 1 entries (filtered from 24 total entries)		
Previous 1 Next		

Figure 20.2 - Download Source button

The XML Report will be downloaded to your local drive (usually the Downloads folder)

Chapter 21: Reference Terms

The **Reference Terms** page allows you to search for reference terms, or manually manage reference terms and reference terms. (See the figure below)



The screenshot shows two parts of a web application. The top part is a search interface titled 'Search ReferenceTerm' with a 'Name' input field containing an asterisk (*), a 'Reset' button, and a 'Search' button. The bottom part is a table titled 'Reference Terms' showing three rows of data: ACUTE, AMB, and ANM, each with a creation timestamp of 21/04/2017 07:26:42 AM. For each row, there are 'View' and 'Edit' buttons.

	Creation Time	Mnemonic	Names		
☰	21/04/2017 07:26:42 AM	ACUTE		View	Edit
☰	21/04/2017 07:26:42 AM	AMB		View	Edit
☰	21/04/2017 07:26:42 AM	ANM		View	Edit

Figure 21.1 - The Reference Terms page

21.1 Search Reference Terms

If you are looking for a specific reference term that already exists in the system you can use the **Search Reference Term** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Reference Term** area, enter the name of the reference term (See the figure below)

Search ReferenceTerm

Name

Figure 21.2 - Searching for a Reference Term

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Reference Term** area below. See the following section on **Reference Terms**  for more information.

21.2 Reference Terms

The **Reference Term** area of the **Reference Term** page displays a list of all the reference terms in the search results. By default the search results load with all reference terms available. (See the figure below)

Reference Terms

Show 10 entries Search:

	Creation Time	Mnemonic	Names	
	21/04/2017 07:26:42 AM	ACUTE		<input type="button" value="View"/> <input type="button" value="Edit"/>
	21/04/2017 07:26:42 AM	AMB		<input type="button" value="View"/> <input type="button" value="Edit"/>
	21/04/2017 07:26:42 AM	ANM		<input type="button" value="View"/> <input type="button" value="Edit"/>

Figure 21.3 - Reference Terms

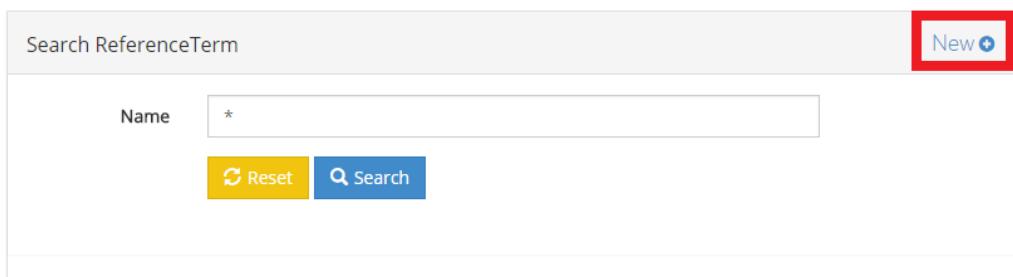
Reference Terms displayed here show the creation time, mnemonic, and name. Reference terms can be viewed and managed from this page.

New reference terms can also be added from this page. To add a new reference term, or view and manage an existing reference term, see sections below.

21.3 New Reference Term

When a new reference term is needed to be added to the system, you can create a new reference term. To create a new reference term:

Step 1: From the **Reference Term** page, click the **New**  button in the top right of the **Search Reference Term** area (See the figure below)



The screenshot shows a search interface for 'ReferenceTerm'. At the top right is a blue button labeled 'New' with a plus sign. Below it is a search bar with the placeholder 'Name *'. Underneath the search bar are two buttons: a yellow 'Reset' button and a blue 'Search' button.

Figure 21.4 - New Reference Term button

Step 2: You will be brought to the **Add Reference Term** page, Enter or select the details for the reference term you are adding (See the figure below):

- Mnemonic **(Required)**

Note: This is memorable value for your reference term

- Code System
- Name **(Required)**
- Language **(Required)**

Add Reference Term

Mnemonic	<input type="text" value="samp"/>
CodeSystem	<input type="text" value="1.3.6.1.4.1.33349.3.1.5.9.3.99"/>
Name	<input type="text" value="Sample Reference Term"/>
Language	<input type="text" value="English"/>

Cancel **Submit**

Figure 21.5 - Add Reference Term page

Step 3: Press the **Submit** button to add the reference term (See the figure below)



If created successfully you should see a popup display message saying the *Reference Term created successfully*. From here you will see the **View Reference Term** page. See below for more details on viewing and editing reference terms.

21.4 View Reference Terms

After finding a reference term in the search results, or after creating a new reference term you can view the reference term's details.

Step 1: From the **Reference Terms** page, find a reference term you would like to view and press the **View**  button (See the figure below)

Reference Terms				
Show 10 entries		Search: <input type="text"/>		
	Creation Time	Mnemonic	Names	
	21/04/2017 07:26:42 AM	ACUTE		View  Edit 
	21/04/2017 07:26:42 AM	AMB		View  Edit 
	21/04/2017 07:26:42 AM	ANM		View  Edit 

Figure 21.6 - View Reference Term button

You will be brought to **View Reference Term** page for the reference term you selected to view. The **View Reference Term** page displays the initial information for the reference term, as well as related reference term names and their languages. (See the figure below)

The screenshot shows a 'View Reference Term' page. At the top, there is a 'Mnemonic' field containing 'samp'. Below this is a table titled 'Reference Term Names' with the following data:

	Languages	Name
en	Sample Reference Term	

At the bottom of the page, there is a message 'Showing 1 to 1 of 1 entries' and a navigation bar with 'Previous', a blue '1', and 'Next'.

Figure 21.7 - View Reference Term page

21.4.1 View Reference Term Area

The **View Reference Term** area displays the initial mnemonic for the reference term that was created. (See the figure below)

The screenshot shows a 'View Reference Term' page. At the top, there is a 'Mnemonic' field containing 'samp'.

Figure 21.8 - View Reference Term area

21.4.2 Reference Term Names Area

The **Reference Term Names** area displays a list of all reference term names and their languages for the reference term being viewed. (See the figure below)

Reference Term Names	
Show	10 ▾ entries
Search:	<input type="text"/>
Languages	↑ Name
en	Sample Reference Term
Showing 1 to 1 of 1 entries	
Previous	1 Next

Figure 21.9 - Reference Term Names area

21.5 Edit Reference Term

Each reference term has several components that can be edited. You can change the initial details and add or change reference term names.

To access the **Edit Reference Term** page from the **Reference Terms** page:

Step 1: Find a reference term using the search bar and click the **Edit**  button
(See the figure below)

Reference Terms				
	Creation Time	Mnemonic	Names	
	21/04/2017 07:26:42 AM	ACUTE		View  Edit 
	21/04/2017 07:26:42 AM	AMB		View  Edit 
	21/04/2017 07:26:42 AM	ANM		View  Edit 

Figure 21.10 - Edit Reference Term from the Reference Terms page

To access the **Edit Reference Term** page from the **View Reference Term** page:

Step 1: Click the **Edit**  button (See the figure below)



The screenshot shows a 'View Reference Term' page. At the top right, there is a blue 'Edit' button with a pencil icon, which is highlighted with a red box. Below the button, there is a 'Mnemonic' field containing the value 'samp'. The page has a clean, modern design with a light gray background and white text.

Figure 21.11 - Edit Reference Term from the View Reference Term page

You will be brought to **Edit Reference Term** page for the reference term you selected to edit. From this page you can modify fields and add/edit/remove reference term names.

21.5.1 Edit Reference Term Area

In this area you can change the mnemonic set for the reference term you are viewing. *Required fields: Mnemonic.* (See the figure below)



The screenshot shows the 'Edit Reference Term' page. At the top, it says 'Edit Reference Term'. Below that is a 'Mnemonic' field containing 'samp'. At the bottom right, there is a red 'Delete' button with a white 'X' icon. The page includes standard UI elements like 'Cancel' and 'Submit' buttons.

Figure 21.12 - Edit Reference Term page

21.5.2 Reference Term Name Area

The **Reference Term Name** area displays a list of all reference term names for the reference term. You are also able to add new reference term names and edit or delete existing reference term names.

Creating a Reference Term Name

Step 1: From the **Edit Reference Term** page, in the **Reference Term Name** area, click the **New**  button (See the figure below)

Reference Term Name			New 
Show 10 entries		Search: <input type="text"/>	
	Languages	Name	
	en	Sample Reference Term	Edit  Delete 
	en	Test	Edit  Delete 
Showing 1 to 2 of 2 entries		Previous	1
			Next

Figure 21.13 - New Reference Term Name button

You will be brought to the **Add Reference Term Name** page. Here you can add a reference term name by using the **Add Reference Term Name** area (See the figure below) and also see the list of current reference term names in the **Reference Term Names** area of this page.

Add Reference Term Name

Mnemonic	<input type="text" value="samp"/>
Name	<input type="text"/>
Language	<input type="text" value="English"/>
Cancel Submit	

Figure 21.14 - Add Reference Term Name page

Step 2: In the **Add Reference Term Name** area:

- Enter a **Name** (Required)
- Select a **Language** (Required)

Step 3: Press the **Submit** button (See the figure below)

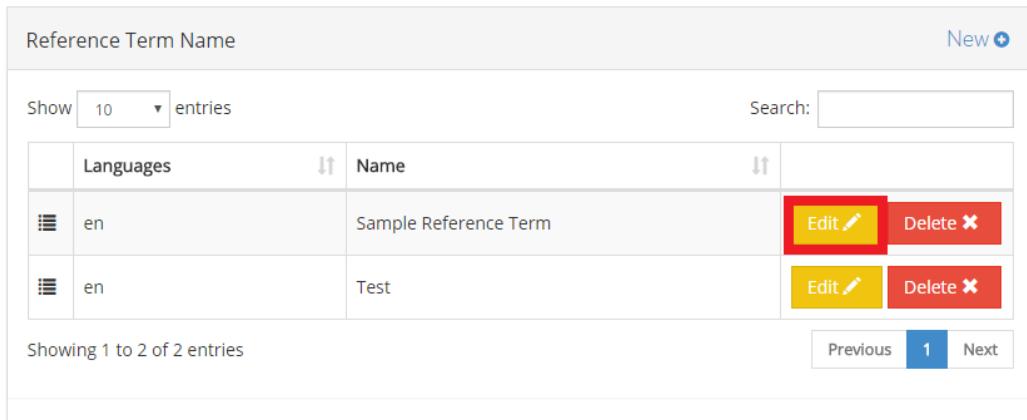


Upon creation of a new reference term name you will be returned to the **Edit Reference Term** page.

Editing a Reference Term Name

You can view and edit existing reference term names using the **Edit Reference Term** page.

Step 1: From the **Edit Reference Term** page, in the **Reference Term Name** area, click the **Edit**  button next to the reference term name you wish to edit (See the figure below)



	Languages	Name	
	en	Sample Reference Term	 
	en	Test	 

Figure 21.15 - Edit Reference Term Name button

You will be brought to the **Edit Reference Term Name** page. Here you can edit the reference term name by using the **Edit Reference Term Name** area (See the figure below) and also see the list of current reference term names and their languages in the **Reference Term Names** area of this page.

Edit Reference Term Name

Mnemonic	<input type="text" value="samp"/>
Name	<input type="text" value="Sample Reference Term"/>
Language	<input type="text" value="English"/>

Cancel **Submit**

Figure 21.16 - Edit Reference Term Name page

Step 2: In the **Edit Reference Term Name** area:

- Enter a **Name** (**Required**)
- Select a **Language** (**Required**)

Step 3: Press the **Submit** button (See the figure below)



You will be returned to the **Edit Reference Term** page.

Deleting a Reference Term Name

You can delete reference term names by using the **Edit Reference Term** page.

Step 1: From the **Edit Reference Term** page, in the **Reference Term Names** area, click the **Delete**  button next to the reference term name you wish to delete (See the figure below)

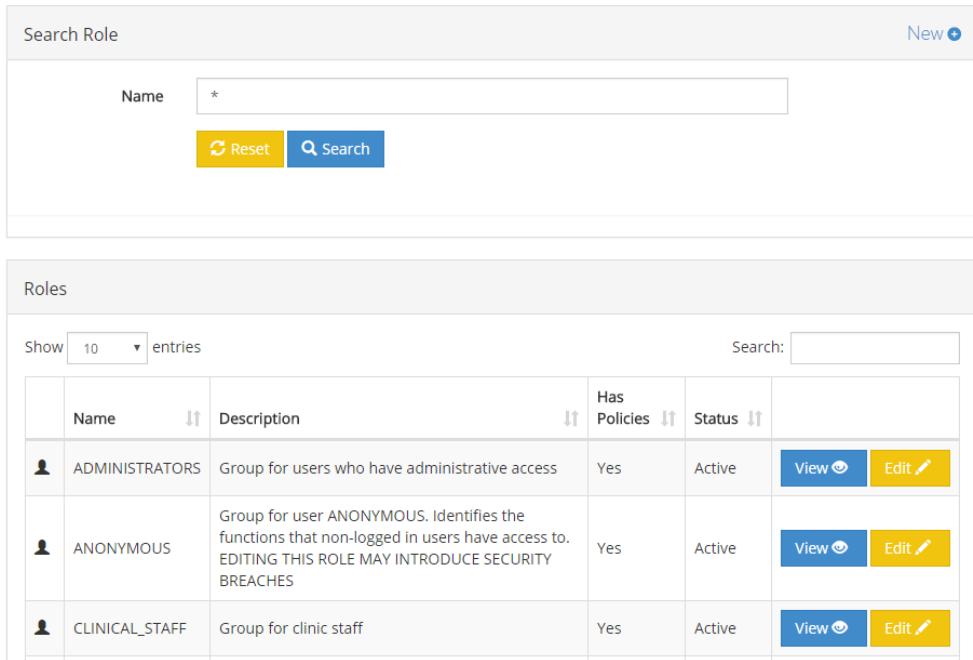
Reference Term Name		New 
Show 10 entries		Search: <input type="text"/>
Languages	Name	
en	Sample Reference Term	 
en	Test	 
Showing 1 to 2 of 2 entries		Previous  1 Next 

Figure 21.17 - Delete Reference Term Name button

The reference term name will be deleted and the **Edit Reference Term** page will be refreshed.

Chapter 22: Roles

The **Roles** page allows you to search for roles, or manually manage roles and their relationships (policies). (See the figure below)



The figure consists of two screenshots of a web application. The top screenshot shows a search interface with a 'Search Role' input field, a 'Name' field containing an asterisk (*), and 'Reset' and 'Search' buttons. The bottom screenshot shows a table of roles with columns for Name, Description, Has Policies, and Status. Each row includes 'View' and 'Edit' buttons. The roles listed are ADMINISTRATORS, ANONYMOUS, and CLINICAL_STAFF.

	Name	Description	Has Policies	Status	
	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	View  Edit 
	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View  Edit 
	CLINICAL_STAFF	Group for clinic staff	Yes	Active	View  Edit 

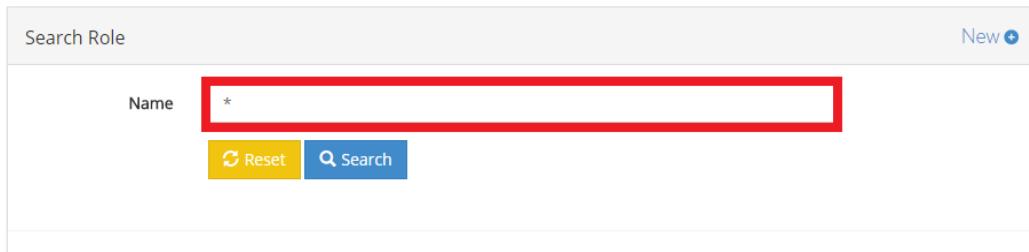
Figure 22.1 - Roles page

22.1 Search Roles

If you are looking for a specific role that already exists in the system you can use the **Search Role** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Role** area, enter the name of a role (See the figure below)



Search Role

New [+ New](#)

Name

[Reset](#) [Search](#)

Figure 22.2 - Searching for a Role

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **Roles** area below. See the following section on **Roles**  for more information.

22.2 Roles

The **Roles** area of the **Roles** page displays a list of all the roles in the search results. By default the search results load with all roles available. (See the figure below)

Roles						
Show 10 entries			Search: <input type="text"/>			
	Name	Description	Has Policies	Status		
👤	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	View 	Edit 
👤	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View 	Edit 
👤	CLINICAL_STAFF	Group for clinic staff	Yes	Active	View 	Edit 
👤	DEVICE	Represents a device in the system. Identifies the functions that are used for devices. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View 	Edit 
👤	IT Officer		No	Active	View 	Edit 
👤	Middle Level Officer		No	Active	View 	Edit 
👤	National Level Officer		No	Active	View 	Edit 
👤	SYNCHRONIZERS	Group for user SYNCHRONIZERS. Identifies the functions that are used for synchronization. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View 	Edit 
👤	SYSTEM	Group for user SYSTEM. Identifies the functions that internal system functions have access to. EDITING THIS ROLE MAY CAUSE SYSTEM FAILURE	Yes	Active	View 	Edit 
👤	USERS	Group for users who have login access	Yes	Active	View 	Edit 
Showing 1 to 10 of 10 entries			Previous 1 Next			

Figure 22.3 - Roles

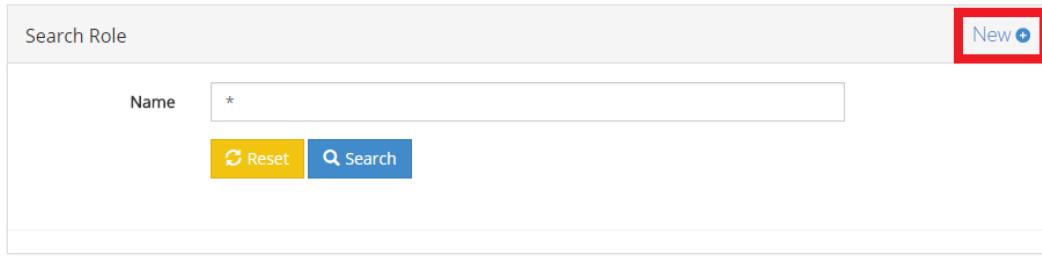
Roles displayed here show details such as the name, description, policy status and active status. Roles can be viewed and managed from this page.

New roles can also be added from this page. To add a new role, or view and manage an existing role, see sections below.

22.3 New Role

When a new role is required, you can create a new role with specific policies limiting the power they have within the system. To create a new role:

Step 1: From the **Roles** page, click the **New**  button in the top right of the **Search Role** area (See the figure below)

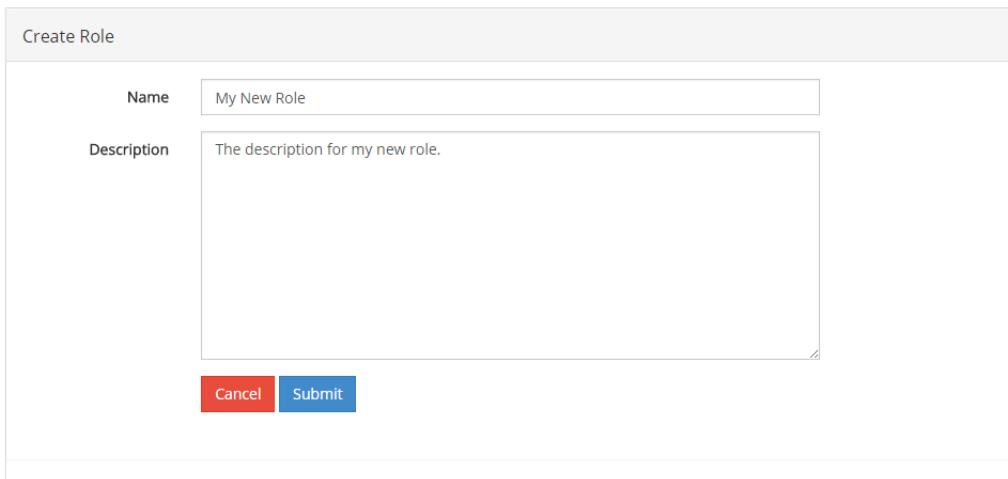


A screenshot of a web page titled 'Search Role'. At the top right is a blue 'New' button with a white plus sign, which is highlighted with a red box. Below it is a search form with a 'Name' field containing an asterisk (*) and two buttons: 'Reset' (yellow) and 'Search' (blue).

Figure 22.4 - New role button

Step 2: Fill in the fields for the role you are adding (See the figure below):

- Name (**Required**)
- Description



A screenshot of a web page titled 'Create Role'. It has two input fields: 'Name' with the value 'My New Role' and 'Description' with the value 'The description for my new role.'. At the bottom are two buttons: 'Cancel' (red) and 'Submit' (blue), with the 'Submit' button highlighted with a red box.

Figure 22.5 - Create Role page

Step 3: Press the **Submit** button to create the role (See the figure below)



If created successfully you should see a popup display message saying the role created successfully. From here you will see the **View Role** page. See below for more details on viewing and editing roles.

22.4 View Role

After finding a role in the search results, or creating a new role you can view the roles details.

Step 1: From the **Roles** page, find a role you would like to view and press the **View**  button (See the figure below)

Roles					
Show <input type="button" value="10"/> entries		Search: <input type="text"/>			
	Name 	Description 	Has Policies 	Status 	
	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	<input data-bbox="1140 612 1235 646" type="button" value="View"/> 
	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	<input data-bbox="1140 680 1235 713" type="button" value="View"/> 
	CLINICAL_STAFF	Group for clinic staff	Yes	Active	<input data-bbox="1140 747 1235 781" type="button" value="View"/> 

Figure 22.6 - View Role button

You will be brought to **View Role** page for the role you selected to view.

22.4.1 View Role Area

The **View Role** area displays the initial information for the role that was created. The name and description for the role are displayed in this area. (See the figure below)

View Role	
Name	<input type="text" value="CLINICAL_STAFF"/>
Description	<input type="text" value="Group for clinic staff"/>

Figure 22.7 - View Role area

22.4.2 Policies Area

The **Policies** area displays a list of **Policies**  related to the Role. Details such as the creation time, name, grant status, public status, oid (object

identifier) and active status are all visible for each policy listed. (See the figure below)

Policies						
Policies						
Show 10 entries		Search:				
	Creation Time	Name	Grant	Is Public	Oid	Status
	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
	12/05/2017 02:49:26 PM	Login	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.1	Active
	12/05/2017 02:49:26 PM	Override Disclosure	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.3	Active
	12/05/2017 02:49:26 PM	Unrestricted Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0	Active
	12/05/2017 02:49:26 PM	Unrestricted Clinical Data	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.2	Active
	12/05/2017 02:49:26 PM	Unrestricted Metadata	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.4	Active
Showing 1 to 6 of 6 entries			Previous	1	Next	

Figure 22.8 - Policies area

22.5 Edit Role

Each role has several components that can be edited. You can change the initial details, change policies and view current policies

To access the **Edit Role** page from the **Role** page:

Step 1: Find a role using the search bar and click the **Edit** button (See the figure below)

Roles					
Show 10 entries			Search: <input type="text"/>		
	Name	Description	Has Policies	Status	
	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	View Edit
	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View Edit
	CLINICAL_STAFF	Group for clinic staff	Yes	Active	View Edit

Figure 22.9 - Edit Role from the Roles page

To access the **Edit Role** page from the **View Role** page:

Step 1: Click the **Edit**  button (See the figure below)

View Role

[Edit](#)

Name	<input type="text" value="CLINICAL_STAFF"/>
Description	<input type="text" value="Group for clinic staff"/>

Figure 22.10 - Edit Role from the View Role page

You will be brought to **Edit Role** page for the role you selected to edit. From this page you can modify fields and add or remove policies.

22.5.1 Edit Role Area

In this area you can change all the basic values set for the role you are viewing. *Required fields: Name.* (See the figure below)

Figure 22.11 shows the 'Edit Role' page. The page has a header 'Edit Role'. It contains three main sections: 'Name' (input field: CLINICAL_STAFF), 'Description' (input field: Group for clinic staff), and 'Policies' (checkboxes: Login, Override Disclosure, Read Metadata, Unrestricted Administrative Function, Unrestricted Clinical Data). Below these are 'Cancel' and 'Submit' buttons. In the bottom right corner, there is a red button labeled 'Deactivate ✕'.

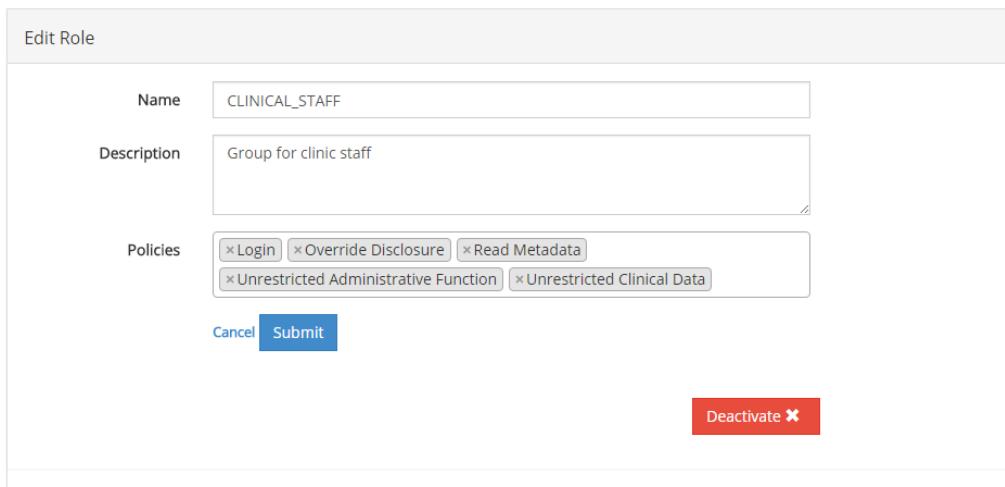


Figure 22.11 - Edit Role area

If the role being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Role Is Not Active*. To activate or deactivate a role, see the sections below.

Deactivating a Role ✕

In this area you can deactivate the role. Once deactivated, the role cannot be modified or used anywhere in the system until reactivated. To deactivate a role:

Step 1: From the **Edit Role** page, click the red **Deactivate ✕** button in the **Edit Role** area (See the figure below)



You will see a message popup stating *Role successfully deactivated* and you will be returned to the **Search & View Roles** page.

Activating a Role ⓘ

If a role has been deactivated it can be reactivated in the **Edit Role** page. Once activated, the role can again be modified or used in the system until deactivated. To activate a role:

Step 1: From the **Edit Role** page, click the green **Activate**  button in the **Edit Role** area (See the figure below)



You will see a message popup stating *Role successfully activated* and you will be returned to the **Search & View Roles** page.

Adding Policies

You are able to modify available policies in the **Edit Role** area of the **Edit Role** page. You can add multiple policies to a role to give that role more functionality throughout the system. To add a policy to a role:

Step 1: Click on an empty part of the **Policies** field (See the figure below)



Figure 22.12 - Adding policies

Step 2: A drop-down menu will appear with available policies, select a policy (See the figure below)

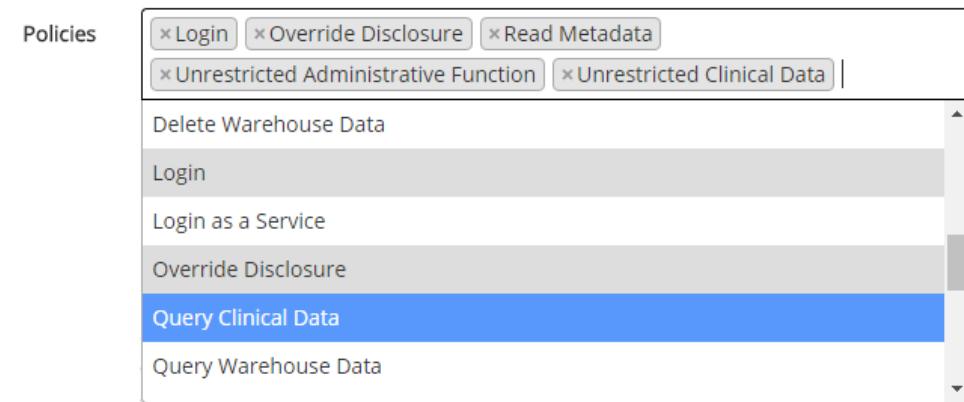


Figure 22.13 - Adding policies - Drop-down menu

Step 3: Repeat the previous steps to add more policies

Step 4: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Role** page. The **Policies** area will be updated with the changes in policies for that role.

Removing Policies

You are able to modify available policies in the **Edit Role** area of the **Edit Role** page. You can restrict access for specific roles by removing some policies that exist for that role. To remove a policy from a role:

Step 1: Click on the **×** next to the name of a policy in the **Policies** field that you want to remove (See the figure below)



Figure 22.14 - Remove policies

Step 2: Repeat the previous step to remove another policy

Step 3: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Role** page. The **Policies** area will be updated with the changes in policies for that role.

22.5.2 Policies Area

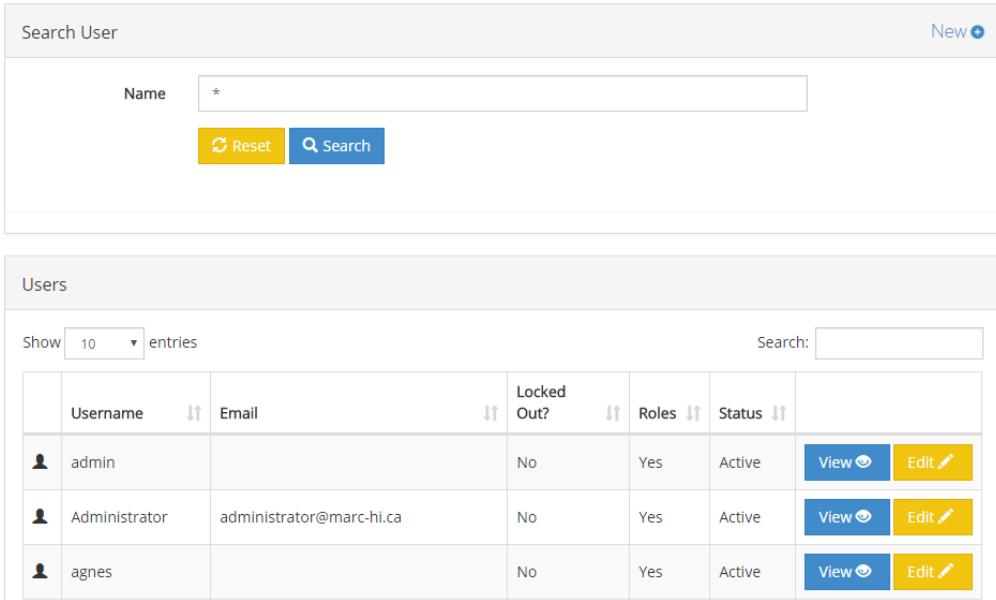
The **Policies** area displays a list of **Policies** related to the Role you are editing. The creation time, name, grant status, public status, oid (object identifier) and active status are all visible for each policy listed. If the policy list is very large there is a search bar that allows you to filter results. (See the figure below)

Policies						
Policies						
Show 10 entries		Search: <input type="text"/>				
	Creation Time	Name	Grant	Is Public	OID	Status
	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
	12/05/2017 02:49:26 PM	Login	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.1	Active
	12/05/2017 02:49:26 PM	Override Disclosure	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.3	Active
	12/05/2017 02:49:26 PM	Unrestricted Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0	Active
	12/05/2017 02:49:26 PM	Unrestricted Clinical Data	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.2	Active
	12/05/2017 02:49:26 PM	Unrestricted Metadata	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.4	Active
Showing 1 to 6 of 6 entries			Previous	1	Next	

Figure 22.15 – Policies area

Chapter 23: Users

The **Users** page allows you to search for users, or manually manage users and their roles. (See the figure below)



The screenshot shows two main sections of a user management interface. The top section is a search form titled 'Search User' with a 'Name' field containing an asterisk (*), a 'Reset' button, and a 'Search' button. The bottom section is a table titled 'Users' showing three rows of user data. The columns are: Username, Email, Locked Out?, Roles, Status, View (eye icon), and Edit (pencil icon). The users listed are admin, Administrator, and agnes, each with their respective details and edit options.

	Username	Email	Locked Out?	Roles	Status	View	Edit
1	admin		No	Yes	Active	 	 
2	Administrator	administrator@marc-hi.ca	No	Yes	Active	 	 
3	agnes		No	Yes	Active	 	 

Figure 23.1 - Users page

23.1 Search Users

If you are looking for a specific user that already exists in the system you can use the **Search User** area of the page.

An input of some kind is required in order to run a search. You can search for all users by using the * symbol. This will return all results.

Step 1: In the **Name** field of the **Search User** area, enter the name of a user (See the figure below)



The screenshot shows the 'Search User' form from the previous figure. The 'Name' input field is highlighted with a red border, indicating it is the active field for input. The other buttons and fields are visible but not highlighted.

Figure 23.2 - Searching for a User

Step 2: Click the **Search**  button (See the figure below)



Search results will appear in the **User** area below. See the following section on **Users**  for more information.

23.2 Users

The **Users** area of the **Users** page displays a list of all the users in the search results. By default the search should load with all users available. (See the figure below)

Users											
Show <input type="button" value="10"/> entries			Search: <input type="text"/>								
	Username	Email	Locked Out?	Roles	Status						
	admin		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	Administrator	administrator@marc-hi.ca	No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	agnes		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	aicc		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	aicc1		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	aicc2		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	Allison	allison@marc-hi.ca	No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	almc5		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	Amina		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
	amina2		No	Yes	Active	<input type="button" value="View"/> <input type="button" value="Edit"/>					
Showing 1 to 10 of 399 entries			Previous	<input type="button" value="1"/>	<input type="button" value="2"/>	<input type="button" value="3"/>	<input type="button" value="4"/>	<input type="button" value="5"/>	...	<input type="button" value="40"/>	Next

Figure 23.3 - Users area

Users displayed here show details such as the username, email, locked out status, roles, and active status. Users can be viewed and managed from this page.

New users can also be added from this page. To add a new user, or view and manage an existing user, see sections below.

23.3 New User

You can create a new user and assign them a role to give them specific accesses depending on what their job may be. To create a new user:

Step 1: From the **Users** page, click the **New ** button in the top right of the **Search User** area (See the figure below)



The screenshot shows a 'Search User' form. At the top right is a 'New ' button, which is highlighted with a red box. Below it is a 'Name' input field with an asterisk (*) indicating it is required. At the bottom are 'Reset' and 'Search' buttons.

Figure 23.4 - New User button

Step 2: Fill in the fields for the user you are adding (See the figure below):

- Username (**Required**)
- Password (**Required**)

Note: Password must contain one uppercase and one lowercase character and have a minimum of 8 characters.

- Given Name
- Surname
- Language
- Roles (**Required**)

Note: At least one role is required, multiple roles are allowed

Note: Roles set the access levels for the user account

Note: For more details about adding roles, see the **Edit User: Adding Roles** section below

- Facility

Note: You must enter 4 or more characters to search for a place

- Phone Type
- Phone (Required)
- Email (Required)

The screenshot shows the 'Create User' form. The fields are as follows:

- Username: sampleuser
- Password: (redacted)
- Confirm Password: (redacted)
- Given Name: Sample
- Surname: User
- Language: English
- Roles: ADMINISTRATORS
- Facility: Miti Mirefu
- Phone Type: Mobile Phone
- Phone: 092137723
- Email: sampleuser@sampleemail.com

At the bottom, there are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red border.

Figure 23.5 - Create User page

Step 3: Press the **Submit** button to create the user (See the figure below)



If created successfully you should see a popup display message saying the User created successfully. From here you will be transferred to the **Edit User** page to make any changes to the user information.

Press submit again to be brought the **View User** page for the user you just created.

23.4 View User

After finding a user in the search results, or creating a new user you can view the user details.

Step 1: From the **Users** page, find a user you wish to view and press the **View**  button (See the figure below)



Users						
Show 10 entries		Search: <input type="text"/>				
	Username	Email	Locked Out?	Roles	Status	
	admin		No	Yes	Active	View  Edit 
	Administrator	administrator@marc-hi.ca	No	Yes	Active	View  Edit 
	agnes		No	Yes	Active	View  Edit 

Figure 23.6 - View User button

You will be brought to **View User** page for the user you selected to view.

23.4.1 View User Area

The **View User** area displays key information about a user. You can select  **Edit** to edit user details (See the figure below)

View User

Edit

Username	sampleuser
Lockout Status	Unlocked
Name	Sample User
Language	English
Health Facility	Miti Mirefu
Phone Type	Mobile Phone
Phone	092137723
Email	
Last login time	

Figure 23.7 - View User area

See the **Edit User**  section below for more information about editing a user.

23.4.2 Roles Area

The **Roles** area displays a list of **Roles**  related to the user. Name and description for each role are listed. (See the figure below)

Roles	
Show	10 <input type="button" value="▼"/> entries
	Search: <input type="text"/>
Name	Description
 CLINICAL_STAFF	Group for clinic staff
Showing 1 to 1 of 1 entries	
Previous 1 Next	

Figure 23.8 - User Roles area

23.5 Edit User

Each user has several components that can be edited. You can change the user details, change facilities and roles.

To access the **Edit User** page from the **User** page:

Step 1: Find a user and click the **Edit**  button (See the figure below)

Users						
Show 10 entries		Search: <input type="text"/>				
	Username	Email	Locked Out?	Roles	Status	
	admin		No	Yes	Active	View  Edit 
	Administrator	administrator@marc-hi.ca	No	Yes	Active	View  Edit 
	agnes		No	Yes	Active	View  Edit 

Figure 23.9 - Edit User button on the Users page

To access the **Edit User** page from the **View User** page:

Step 1: Click the **Edit**  button in the **View User** area (See the figure below)

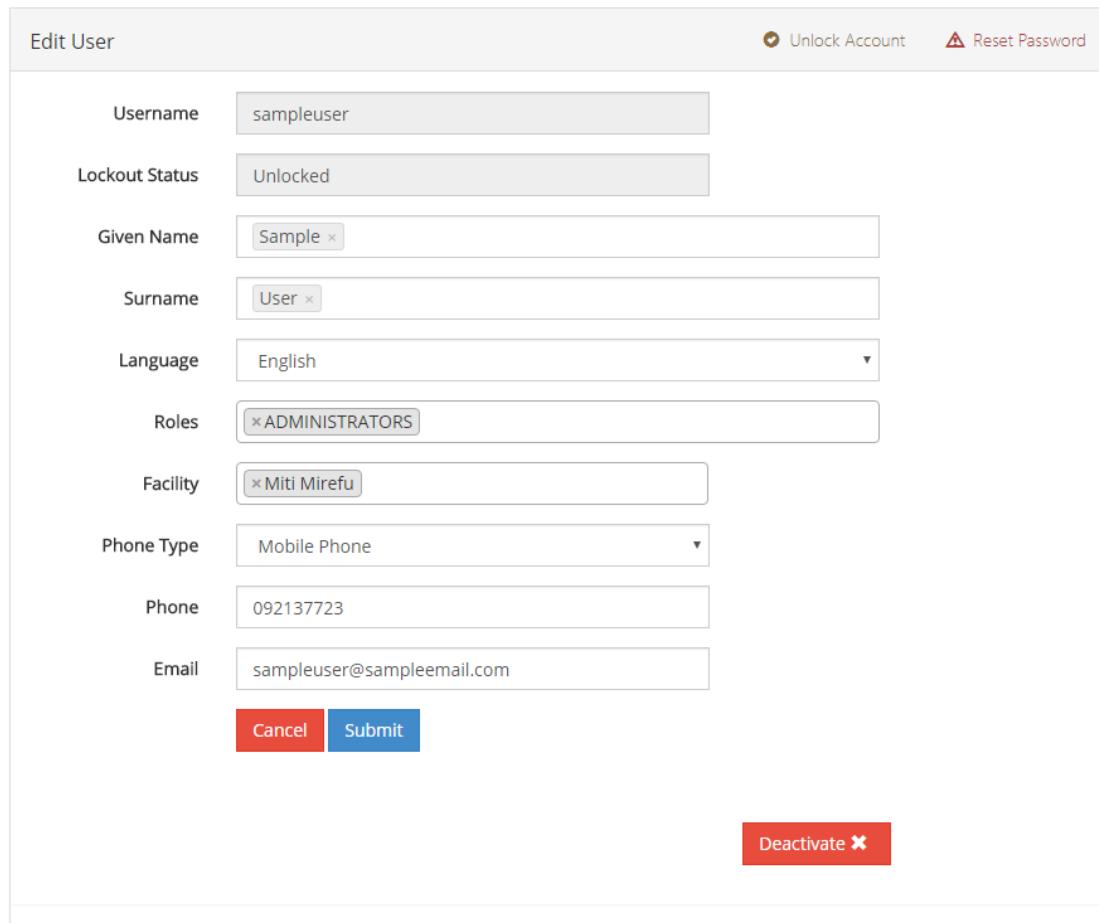
View User	
Username	<input type="text" value="sampleuser"/>
Lockout Status	<input type="text" value="Unlocked"/>
Name	<input type="text" value="Sample User"/>
Language	<input type="text" value="English"/>
Health Facility	<input type="text" value="Miti Mirefu"/>
Phone Type	<input type="text" value="Mobile Phone"/>
Phone	<input type="text" value="092137723"/>
Email	<input type="text"/>
Last login time	<input type="text"/>

Figure 23.10 - Edit User button on the View User page

You will be brought to **Edit User** page for the user you selected to edit. From this page you can modify fields, change facilities, or add or remove roles.

23.5.1 Edit User Area

In this area you can change all the basic values set for the user you are viewing. *Required fields: Name, Email, Role, Phone Number.*



The screenshot shows the 'Edit User' form with the following fields and controls:

- Username:** sampleuser
- Lockout Status:** Unlocked
- Given Name:** Sample
- Surname:** User
- Language:** English
- Roles:** ADMINISTRATORS
- Facility:** Miti Mirefu
- Phone Type:** Mobile Phone
- Phone:** 092137723
- Email:** sampleuser@sampleemail.com

At the bottom of the form are two buttons: **Cancel** (red) and **Submit** (blue).

Below the form, a red button labeled **Deactivate X** is visible.

Figure 23.11 - Edit User area

If the user being viewed has been deactivated there will be a red label at the top of the page stating: **Warning, This User Is Not Active**. To activate or deactivate a user, see the sections below.

Deactivating a User **X**

In this area you can deactivate the user. Once deactivated the user cannot be modified or used anywhere in the system until reactivated. To deactivate a user:

Step 1: From the **Edit User** page, click the red **Deactivate ✖** button in the **Edit User** area (See the figure below)



You will see a message popup stating *User successfully deactivated* and you will be returned to the **Search & View Users** page.

Activating a User ⓘ

If a user has been deactivated they can be reactivated in the **Edit User** page. Once activated the user can again be modified or used in the system until deactivated. To activate a user:

Step 1: From the **Edit User** page, click the green **Activate ⓘ** button in the **Edit User** area (See the figure below)

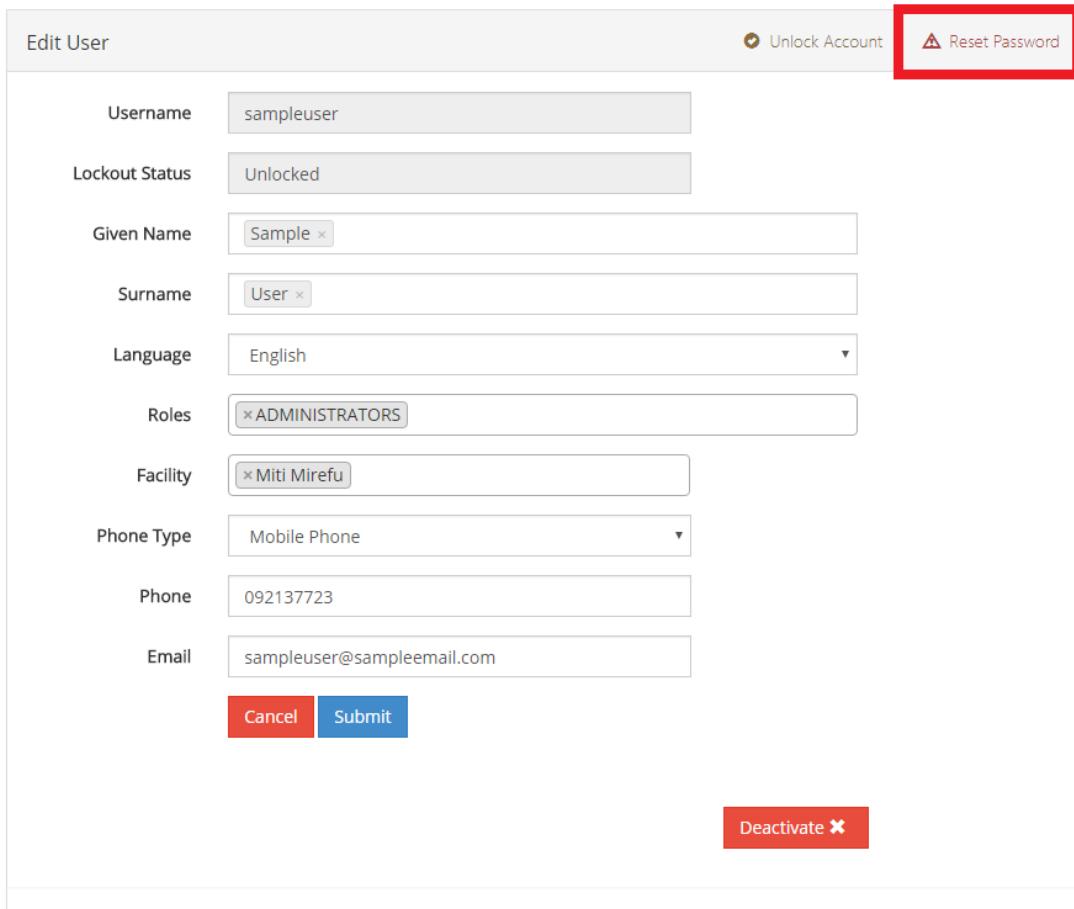


You will see a message popup stating *User successfully activated* and you will be returned to the **Search & View Users** page.

Reset Password ⓘ

You can reset the password for a user. To reset the password from **Edit User** page:

Step 1: In the top right corner of the **Edit User** area, click the **Reset Password**  button (See the figure below)

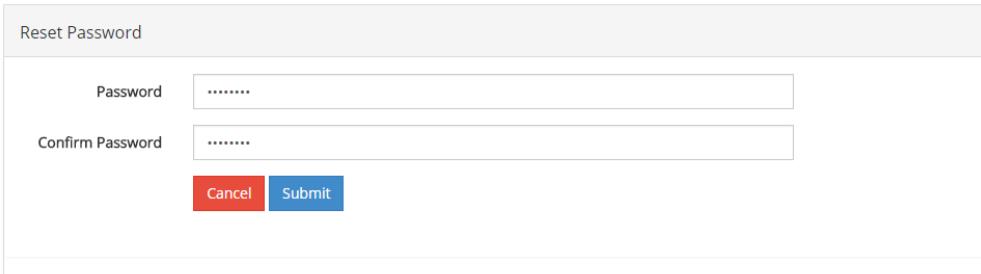


The screenshot shows the 'Edit User' page with various user profile fields. At the top right, there are two buttons: 'Unlock Account' and 'Reset Password'. The 'Reset Password' button is highlighted with a red box. Below these buttons are sections for 'Username' (sampleuser), 'Lockout Status' (Unlocked), 'Given Name' (Sample), 'Surname' (User), 'Language' (English), 'Roles' (ADMINISTRATORS), 'Facility' (Miti Mirefu), 'Phone Type' (Mobile Phone), 'Phone' (092137723), and 'Email' (sampleuser@sampleemail.com). At the bottom of the page are 'Cancel' and 'Submit' buttons, and a 'Deactivate' button with a red 'X' icon.

Figure 23.12 - Reset Password button

Step 2: You will be brought to the **Reset Password** page, in the **Reset Password** area (See the figure below):

- Enter the new password in the **Password** field
- Re-enter the new password in the **Confirm Password** field



The screenshot shows the 'Reset Password' page. It has two input fields: 'Password' and 'Confirm Password', both containing '.....'. Below the fields are 'Cancel' and 'Submit' buttons.

Figure 23.13 - Reset Password page

Step 3: Press the **Submit** button (See the figure below)

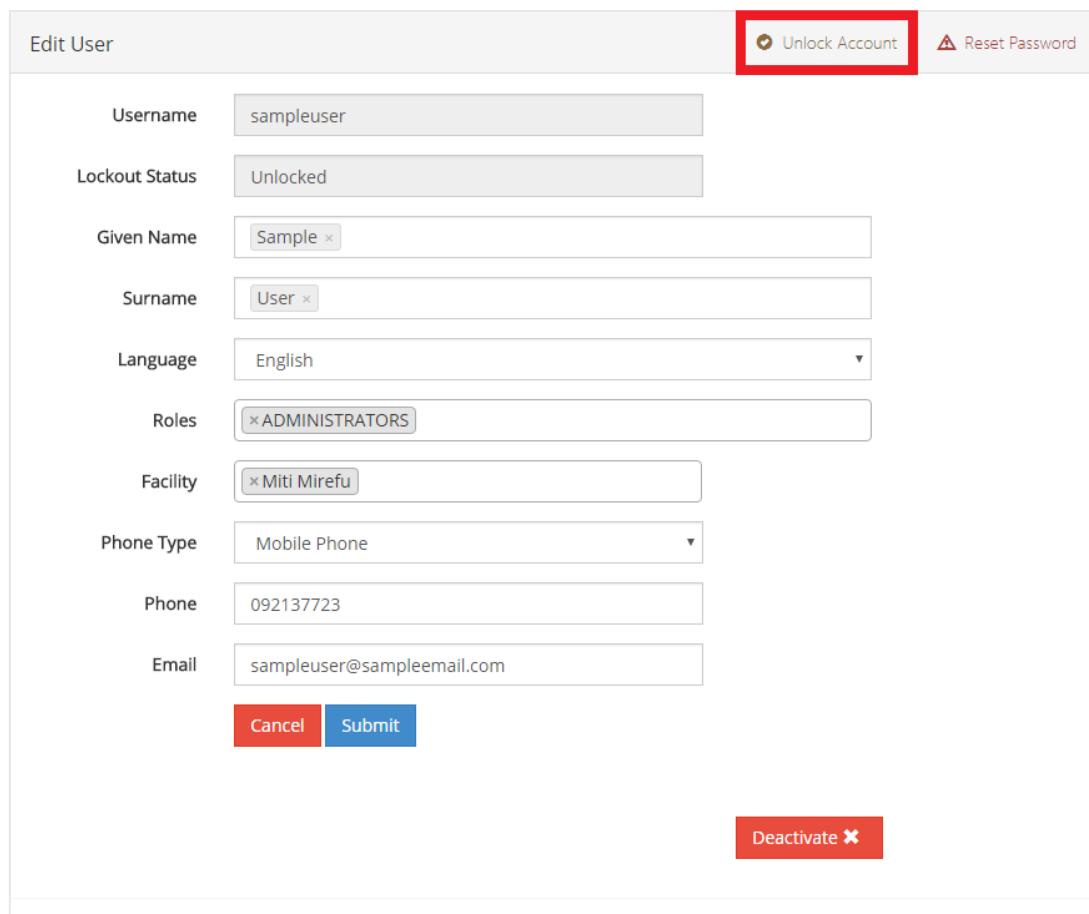


The password will be reset for the user.

Unlock Account

If an account has been locked, you can unlock the account from the **Edit User** page.

Step 1: Click the **Unlock Account**  button in the **Edit User** area (See the figure below)



The screenshot shows the 'Edit User' form with the following fields and buttons:

- Username:** sampleuser
- Lockout Status:** Unlocked
- Given Name:** Sample
- Surname:** User
- Language:** English
- Roles:** ADMINISTRATORS
- Facility:** Miti Mirefu
- Phone Type:** Mobile Phone
- Phone:** 092137723
- Email:** sampleuser@sampleemail.com

At the bottom of the form, there are two buttons: **Cancel** (red) and **Submit** (blue). A red box highlights the **Unlock Account** button in the top right corner. Another red box highlights the **Deactivate** button in the bottom right corner.

Figure 23.14 – Unlock Account button

You will be returned to the **View User** page and see a popup saying *User account unlocked successfully*.

Adding Roles

You are able to modify available roles in the **Edit User** area of the **Edit User** page. You can add multiple roles to a user to give that user more functionality throughout the system. To add a role to a user:

Step 1: Click on an empty part of the **Roles** field (See the figure below)



Figure 23.15 - Adding Roles for a User

Step 2: A drop-down menu will appear with available roles, select a role (See the figure below)

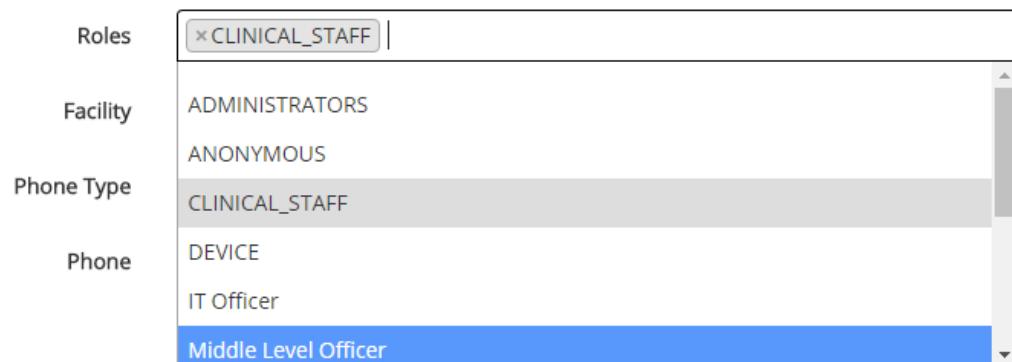


Figure 23.16 - Adding Roles - Drop-down menu

Step 3: Repeat the previous steps to add more roles

Step 4: Once you have modified the roles, press the **Submit** button (See the figure below)



You will be returned to the **View User** page. The **Roles** area will be updated with the changes in policies for that user.

Removing Roles

You are able to modify available roles in the **Edit User** area of the **Edit User** page. You can restrict access for specific users by removing some roles that exist for that user. To remove a role from a user:

Step 1: Click on the  next to the name of a role in the **Roles** field that you want to remove (See the figure below)

Roles

 CLINICAL_STAFF  Middle Level Officer

Figure 23.17 - Removing Roles from a User

Step 2: Repeat the previous step to remove another role

Note: At least one role is required

Step 3: Once you have modified the role, press the **Submit** button (See the figure below)

You will be returned to the **View User** page. The **Roles** area will be updated with the changes in role for that user.

23.5.2 Roles Area

The **Roles** area displays a list of **Roles**  related to the user. Name and description for each role are listed (See the figure below). If the roles list is very large there is a search bar that allows you to filter results.

Roles		
Show <input type="text" value="10"/> entries		Search: <input type="text"/>
	Name	Description
	CLINICAL_STAFF	Group for clinic staff
Showing 1 to 1 of 1 entries		
Previous <input type="button" value="1"/> Next		

Figure 23.18 - Roles area

Chapter 24: About

The **About** page is the hub of all versioning information for the system (See the figure below). The top of the page shows the Open Immunize version details and version number. Also in this section you can click to submit a bug report. For information on submitting bug reports see the section below.

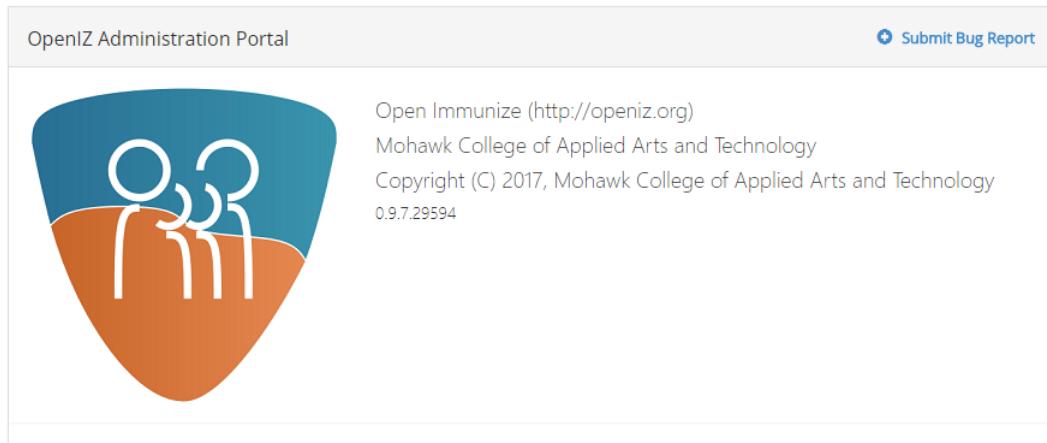


Figure 24.1 - About page

24.1 Version Information

The **Version Information** area of the **About** page displays a list of all the elements used in the system as well as descriptions and version numbers. (See the figure below)

Version Information		
Show <input type="button" value="10"/> entries	Search:	
Name	Description	Version
Antlr3.Runtime		3.5.0.2
ELMAH	Error Logging Modules and Handlers (ELMAH) for ASP.NET	1.2.14706.0955
Elmah.io		2.0.29
Elmah.io.Client	.NET client for communicating with the elmah.io V2 API	2.0.29
EntityFramework	EntityFramework.dll	6.1.40302.0
EntityFramework.SqlServer	EntityFramework.SqlServer.dll	6.1.40302.0
Json.NET	Json.NET is a popular high-performance JSON framework for .NET	10.0.2.20802
Microsoft.AspNet.Identity.Core		2.2.1.40403.0
Microsoft.AspNet.Identity.EntityFramework		2.2.1.40403.0
Microsoft.AspNet.Identity.Owin		2.2.1.40403.0
Showing 1 to 10 of 99 entries		Previous <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/> ... <input type="button" value="10"/> Next

Figure 24.2 - Version Information area

The search feature in this section allows you to quickly filter through all entries available. To filter the list start typing something in the search field.

24.2 Submitting a Bug Report

On the about page there is a section that allows you to submit bug reports. Bug reports will be submitted and reviewed to help make the system better and issue free. You can [Submit Bug Reports](#). To submit a bug report:

Step 1: From the **About** page, in the **OpenIZ Administration Portal** area, press the **Submit Bug Report** button (See the figure below)

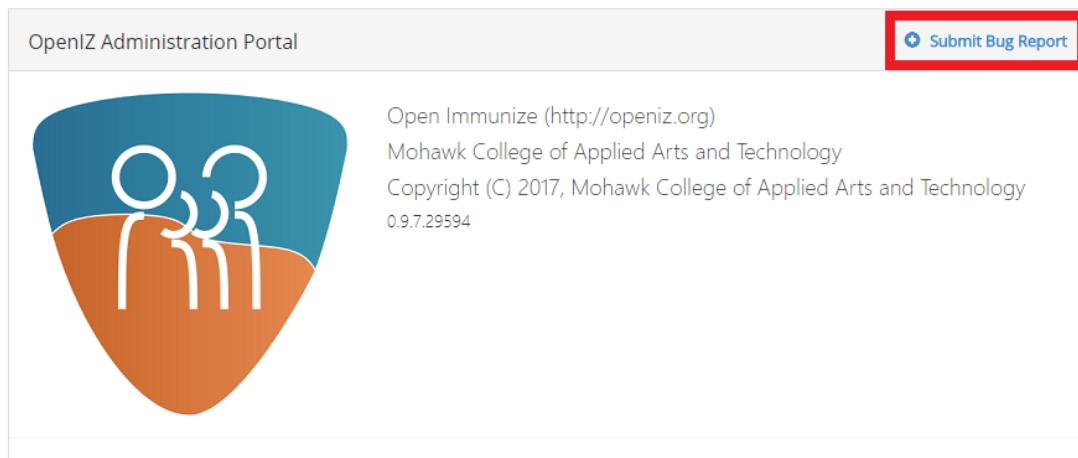


Figure 24.3 - Submit Bug Report button

You will be brought to the **Submit Bug Report** page. From here you can enter any details related to the bug you have encountered.

Step 2: Fill out the **Steps to Reproduce** field (See the figure below)

Note: This should contain clear and specific details on how the bug occurred. Try to point out what you were doing at the time, what you changed, who you were logged in as or any other details.

A screenshot of the "Submit Bug Report" page. The page has a header "Submit Bug Report". Below it, there are two input fields: "Reporter" (set to "Administrator") and "Steps to Reproduce". The "Steps to Reproduce" field contains the following text:

Example bug report

1. Logged in
2. Clicked on the About section
3. Clicked on Submit Bug Report

The bug report page did not load, a different page loaded instead.

At the bottom, there is a checkbox labeled "Attach application information (versions, log files, settings, etc.)" which is checked. Below the checkbox are two buttons: "Cancel" and "Submit".

Figure 24.4 - Submit Bug Report page - Sample bug report

Step 4: Check or uncheck to attach application information

Note: The more information that is available the easier it will be to isolate the issue.

Step 3: Click the **Submit** button (See the figure below)



You will be returned to the **About** page and your bug will be submitted.